

Oracle® Complex Maintenance, Repair, and Overhaul

User's Guide

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Oracle Complex Maintenance, Repair, and Overhaul User's Guide, Release 11i

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Contents

Volume 1

Send Us Your Comments	xvii
Preface.....	xix
How To Use This Guide	xx
Other Information Sources	xxiii
Installation and System Administration	xxv
Training and Support.....	xxviii
Do Not Use Database Tools to Modify Oracle Applications Data	xxix
About Oracle	xxix
Your Feedback.....	xxx
 1 Overview of Oracle Complex Maintenance, Repair, and Overhaul	
What is Oracle Complex Maintenance, Repair, and Overhaul?	1-1
Key Features.....	1-3
Fleet Maintenance Program	1-3
Route Management	1-4
Document Index	1-4
Master Configuration.....	1-5
Unit Configuration	1-5
Product Classification	1-6
Unit Maintenance Plan	1-6
Visit Work Package	1-7

Long Term Plan.....	1-7
Administration.....	1-8
Production Planning.....	1-8
Production	1-9
Outside Processing	1-9
Business Processes	1-9
Managing Maintenance Requirements.....	1-10
Working with Maintenance Routes	1-10
Managing Maintenance Documents	1-11
Managing Master Configuration Records.....	1-11
Managing Unit Configuration Records	1-12
Working with Product Classifications	1-12
Planning Unit Maintenance.....	1-13
Managing Maintenance Visits	1-14
Long Term Planning.....	1-14
Administration.....	1-15
Production Planning.....	1-15
Production	1-16
Outside Processing	1-16
Integration and Dependencies	1-17
Accessing Oracle Complex Maintenance, Repair, and Overhaul	1-18

2 Managing Maintenance Requirements

What is Fleet Maintenance Program?.....	2-2
Key Business Processes.....	2-3
Fields Associated with Maintenance Requirement Records.....	2-5
Fields on the Search Maintenance Requirements Page.....	2-5
Fields on the Create and Update Maintenance Requirement Pages	2-6
Fields on the Update Attached Documents Page	2-9
Fields on the Update Attached Routes Page.....	2-10
Fields on the Route Dependencies Page.....	2-11
Fields on the Update Attached Actions Page	2-11
Fields on the Update Effectivity Page.....	2-12
Fields on the Update Effectivity Details Page	2-13
Fields on the Update Interval Threshold Page.....	2-13

Fields on the Maintenance Requirement Relationships Page	2-15
Fields on the View Affected Items Page.....	2-16
Creating Maintenance Requirement Records	2-16
Retrieving Existing Maintenance Requirement Records.....	2-21
Attaching Documents to a Maintenance Requirement	2-26
Associating Routes to a Maintenance Requirement.....	2-32
Setting Maintenance Route Dependencies.....	2-39
Defining Maintenance Requirement Effectivity	2-43
Defining Effectivity Details	2-47
Defining Intervals and Thresholds.....	2-50
Defining Maintenance Requirement Relationships.....	2-53
Updating Maintenance Requirement Records.....	2-59
Viewing Items Affected by a Maintenance Requirement	2-63
Creating Maintenance Requirement Revisions.....	2-67
Viewing Maintenance Requirement Details.....	2-69
Associating Program Sub Types to Program Types	2-70

3 Managing Maintenance Routes

Overview	3-1
What is Route Management?.....	3-2
Key Business Processes	3-3
Fields Associated with Operation Records.....	3-4
Creating Operation Records	3-5
Fields Associated with Maintenance Route Records.....	3-12
Creating Maintenance Route Records	3-14
Finding Operation Records.....	3-18
Finding Maintenance Route Records.....	3-21
Defining Reference Documents.....	3-26
Fields on the Reference Document Page.....	3-27
Defining Reference Documents for an Operation	3-28
Defining Reference Documents for a Maintenance Route.....	3-31
Defining Resource Requirements	3-35
Fields on the Resource Requirement Page.....	3-36
Defining Resource Requirements for an Operation	3-36
Defining Resource Requirements for a Maintenance Route	3-41

Defining Costing Parameters	3-44
Fields on the Costing Parameters Page	3-45
Defining Costing Parameter for an Operation Resource Requirement	3-45
Defining Costing Parameter for a Route Resource Requirement	3-48
Defining Material Requirements	3-50
Fields on the Material Requirement Page	3-51
Defining Material Requirements for an Operation.....	3-52
Defining Material Requirements for a Maintenance Route.....	3-56
Associating Operations with a Maintenance Route.....	3-58
Editing Operation Records.....	3-63
Editing Maintenance Route Records.....	3-66
Defining Component Locations in Fleet Units	3-67
Fields on the Associate Zone to Product Type Pages	3-68
Associating Major Zones to Product Types	3-69
Associating Sub Zones to Product Types	3-71
Finding Oracle Complex Maintenance, Repair, and Overhaul Resources	3-74
Creating Oracle Complex Maintenance, Repair, and Overhaul Resources	3-76
Editing Oracle Complex Maintenance, Repair, and Overhaul Resources	3-81
Associating BOM Resources.....	3-83
Fields associated with Item Composition	3-87
Creating an Item Composition List.....	3-88
Editing Item Compositions	3-95
Viewing Item Compositions.....	3-100
Fields associated with Disposition Association	3-101
Creating Disposition Lists.....	3-102
Editing Disposition Lists.....	3-121
Approving Disposition Lists	3-122

4 Managing Maintenance Documents

What is Document Index?	4-2
Key Business Processes.....	4-2
Fields Associated with Document References	4-3
Creating Document References.....	4-4
Associating Document Sub Types to Document Types.....	4-6
Finding Document References	4-11

Editing Document References.....	4-13
Maintaining Document Subscription Information.....	4-15
Maintaining Document Supplier Information	4-19
Maintaining Document Distribution Information	4-22
Fields Associated with Document Revisions.....	4-26
Creating Document Revision Records.....	4-27
Editing Document Revision Records.....	4-31
Uploading Electronic Documents.....	4-33

5 Working With Master Configurations

What is Master Configuration?.....	5-2
Key Business Processes	5-3
Working with Master Configuration Records.....	5-4
Fields Associated with Master Configuration Records.....	5-4
Creating Master Configuration Records	5-6
Finding Master Configuration Records.....	5-10
Working with Positions	5-13
Fields on the Create Position Page	5-13
Creating Positions in a Master Configuration	5-14
Copying Existing Configurations to a Position	5-18
Associating Item Groups with a Position	5-22
Associating a Sub-Configuration/ Alternate Sub-Configuration with a Position.....	5-24
Fields Associated with Sub-Configuration Association	5-25
Creating Rules for a Configuration or Sub-configuration	5-30
Fields on the Create Rule page.....	5-31
Editing Position Ratios	5-38
Attaching Documents to a Position.....	5-39
Managing Alternate Items Information	5-42
Fields Associated with Alternate Items Information	5-43
Adding Alternate Items Information	5-45
Finding Alternate Items Information	5-49
Editing Alternate Items Information	5-50
Creating Item Group Revisions	5-56
Editing Master Configuration Records	5-57
Creating Master Configuration Revisions.....	5-60

Approving Master Configurations	5-61
Viewing Master Configuration Records.....	5-63
Viewing Position Details.....	5-65
Viewing Position Ratios Associated with a Position	5-66
Viewing Documents Attached to a Position	5-67
Viewing Alternate items Associated with a Position.....	5-68
Viewing Positions Associated with an Alternate item Group	5-69
Viewing Rules	5-70
Closing Master Configuration Records.....	5-70
Reopening Closed Records	5-72

6 Working With Unit Configurations

What is Unit Configuration?.....	6-2
Key Business Processes.....	6-2
Creating Unit Configuration Records.....	6-4
Finding Master Configuration Records.....	6-4
Creating Unit Configuration	6-7
Assigning Items to Unit Configuration Positions	6-11
Finding Unit Configuration Records	6-19
Validating Unit Configuration Records	6-21
Migrating Unit Configurations	6-22
Editing Unit Configuration Records	6-27
Approving Unit Configurations	6-31
Viewing Alternate Items Utilization.....	6-32
Assigning Alternate Items to Unit Configuration Positions.....	6-33
Creating and Updating Item Information.....	6-34

7 Managing Product Classification

What is Product Classification?.....	7-2
Key Business Processes.....	7-2
Fields Associated with Product Classification.....	7-4
Fields on the Search Product Classification Page	7-4
Fields on the Attach Documents Page	7-6
Fields on the View Maintenance Requirements Page	7-6
Fields on the View Utilization Forecast Page	7-6

Finding Product Classifications	7-6
Working With Product Classifications	7-8
Creating a Product Classification.....	7-9
Copying a Product Classification.....	7-12
Editing a Product Classification	7-14
Working With Nodes	7-16
Adding a Node	7-17
Editing a Node	7-20
Removing a Node.....	7-22
Viewing Nodes	7-24
Associating Documents to a Node	7-25
Attaching Units in Product Classification	7-28
Viewing Utilization Forecasts	7-31
Viewing Associated Maintenance Requirements	7-32
Checking Completeness	7-33
Launching the Approval Process	7-35

Volume 2

8 Working With Unit Maintenance Plans

What is Unit Maintenance Plan?	8-2
Key Business Processes	8-2
Fields Associated with Unit Maintenance Plans	8-3
Fields on the Search Unit Maintenance Plan Page	8-4
Fields on the Search Visits Page	8-5
Fields on the View MR Detail & History Page.....	8-5
Fields on the Unit Maintenance Plan - Group MR Page.....	8-5
Fields on the View Maintenance Requirement Pages.....	8-6
Fields on the View Threshold Page	8-6
Fields on the Search Part Page.....	8-7
Fields on the Update Item Utilization Forecast Page	8-7
Fields on the Search Product Classification Page	8-8
Fields on the Search Unit Page	8-8
Fields on the Utilization Forecast Page	8-8
Finding Unit Maintenance Plan Records	8-9

Associating a Maintenance Requirement to a Visit	8-12
Calculating Maintenance Requirement Due Dates	8-15
Viewing Unit Maintenance Requirement Detail and History	8-16
Viewing Group Maintenance Requirements	8-18
Initializing Maintenance Requirements	8-19
Viewing Unit Maintenance Requirement Details	8-21
Viewing Maintenance Requirement Thresholds	8-23
Finding Item Utilization Forecasts	8-24
Updating Item Utilization Forecasts	8-26
Finding and Updating a Product Classification Utilization Forecast	8-29
Finding and Updating a Unit Configuration Utilization Forecast	8-31
Entering Service Requests	8-33
Creating Non-Routine Service Requests	8-34
Associating Maintenance Requirements	8-36
Viewing Non-Routine Service Requests	8-38
Updating Service Requests	8-40

9 Working with Maintenance Visits

What is Visit Work Package?	9-2
Key Business Processes	9-3
Fields Associated with Visit Work Packages	9-5
Fields on the Create Maintenance Visit and Edit Maintenance Visit Pages	9-5
Fields on the Search Visit Page	9-6
Fields on the Search Visit Task Page	9-8
Fields on the Create Planned Task Page	9-8
Fields on the Create Unplanned Visit Task Page	9-9
Fields on the Associate Serial Number/Service Request to Task Page	9-10
Fields on the Create Unassociated Task Page	9-11
Fields on the Update Visit Task Header Page	9-12
Fields on the Update Visit Task Hierarchy Page	9-13
Fields on the Visit Cost Structure Page	9-14
Fields on the Visit Cost and Price Page	9-15
Creating Maintenance Visit Records	9-15
Creating Maintenance Visit Records	9-15
Preparing the Maintenance Visit for Production Planning	9-20

Retrieving Existing Maintenance Visit Records	9-24
Associating Tasks with Maintenance Visits	9-29
Retrieving Existing Visit Task Records	9-34
Updating Visit Records.....	9-37
Creating Imminent Visit Tasks	9-38
Creating Undated Visit Tasks.....	9-44
Associating Item Serial Numbers and Service Requests with Tasks	9-48
Creating Visit Tasks Unassociated with Routes	9-51
Updating Visit Task Headers.....	9-54
Defining Visit Task Hierarchy	9-56
Viewing Maintenance Requirements for a Visit	9-58
Creating an Associated Project.....	9-61
Defining Visit Cost Structure.....	9-62
Visit Costing and Pricing	9-63
Visit Costing	9-64
Visit Pricing	9-69

10 Managing Long Term Planning

What is Long Term Plan?.....	10-2
Key Business Processes	10-2
Fields Associated with Long Term Planning.....	10-3
Fields on the Search Visits Page	10-4
Fields on the Simulation Plan Page.....	10-5
Fields on the View Simulation Plan Page	10-5
Fields on the Schedule Visit Page.....	10-6
Fields on the Select Resource Leveling Criteria Page.....	10-8
Finding Scheduled and Unscheduled Visits	10-9
Assessing a Work Schedule	10-11
Scheduling a Visit.....	10-14
Unschedulering a Maintenance Visit.....	10-20
Viewing Scheduled Visit Details	10-20
Assigning Spaces to a Visit.....	10-21
Material Demand Planning and Scheduling.....	10-23
Material Demand Planning	10-24
Supply Chain Planning.....	10-29

Checking the Material Schedule.....	10-32
Checking Material Availability.....	10-35
Managing Simulation Plans	10-38
Viewing Simulation Plans	10-39
Creating a New Simulation Plan	10-41
Deleting a Simulation Plan.....	10-43
Adding Visits to a Simulation Plan.....	10-44
Deleting a Simulation Visit.....	10-47
Setting a Simulation Plan as Primary	10-48
Deleting a Simulation Plan.....	10-49
Copying a Visit to a New Simulation Plan	10-50
Running Resource Leveling Plans	10-51

11 Administration

Key Business Processes.....	11-1
Fields on the Create Department Shift Page.....	11-2
Fields on the Search Department Shift Page.....	11-2
Fields on the Search Spaces Page	11-2
Fields on the Edit Spaces Page.....	11-4
Fields on the Search Space Availability Restrictions Page	11-4
Fields on the Add Availability Restriction Page.....	11-5
Creating Department Shift Records	11-6
Retrieving Department Shift Records	11-9
Finding Maintenance Spaces.....	11-11
Creating a Maintenance Space	11-13
Editing Maintenance Spaces.....	11-16
Deleting Maintenance Spaces	11-17
Finding a Space's Unavailable Period	11-19
Setting a Space as Unavailable.....	11-20
Editing a Space's Unavailable Period	11-23
Deleting a Space's Unavailable Period.....	11-24

12 Production Planning

What is Production Planning?.....	12-2
Key Business Processes.....	12-2

Fields Associated with Production Planning	12-3
Fields on the Create Service Request Page	12-3
Fields on the Job Overview Page.....	12-5
Fields on the Update Service Request Page.....	12-6
Fields on the Configuration Part Changes or Item Part Changes Page.....	12-6
Fields on the Job Operations Page for the Job Details.....	12-7
Fields on the Job Operations Page for the Operations	12-8
Fields on the Operation Detail Page	12-8
Fields on the Update Material Requirements Page	12-9
Fields on the Material Requirement Detail Page	12-10
Fields on the Update Resource Requirements Page.....	12-10
Fields on the Resource Requirement Detail Page	12-11
Fields on the Resource Assignments Page.....	12-12
Fields on the Perform Resource Transactions Page.....	12-12
Fields on the Perform Material Transactions Page for WIP Component Issue	12-13
Fields on the Perform Material Transactions Page for WIP Component Return.....	12-14
Working With Jobs	12-15
Finding Jobs and Visits	12-15
Viewing Job and Operation Dependencies.....	12-17
Editing Job Operations.....	12-18
Releasing Jobs to Production	12-19
Editing Material Requirements	12-20
Working With Resource Requirements.....	12-21
Viewing Resource Requirements	12-22
Editing Resource Requirements	12-23
Working With Resource Assignments	12-24
Viewing Resource Assignments.....	12-24
Editing Resource Assignments.....	12-25

13 Working with Production

What is Production?	13-3
What is a Routine Task?.....	13-3
What is a Non-Routine Task?	13-3
Key Business Processes	13-3
Fields Associated with Production.....	13-5

Fields on the Create Service Request Page.....	13-5
Fields on the Job Overview Page.....	13-6
Fields on the Maintenance Requirement Deferral Details Page	13-7
Fields on the Update Service Request Page.....	13-8
Fields on the Configuration Part Changes or Item Part Changes Page.....	13-9
Fields on the Serial Number Change Page.....	13-9
Fields on the Job Operations Page for the Job Details.....	13-10
Fields on the Job Operations Page for the Operations	13-10
Fields on the Operation Detail Page	13-11
Fields on the Update Material Requirements Page	13-12
Fields on the Material Requirement Detail Page.....	13-13
Fields on the View Documents Page.....	13-13
Fields on the Update Resource Requirements Page	13-14
Fields on the Resource Requirement Detail Page	13-15
Fields on the Resource Assignments Page.....	13-16
Fields on the Perform Resource Transactions Page.....	13-16
Fields on the Perform Material Transactions Page for WIP Component Issue	13-17
Fields on the Perform Material Transactions Page for WIP Component Return	13-18
Creating a Job or Service Request	13-19
Push to Production from Visit Work Package.....	13-19
Initiate Service Requests from a Material Transaction.....	13-21
Initiate Service Requests from a Parts Change Transaction	13-23
Initiate Service Requests against Existing Jobs.....	13-26
Searching for a Job or Service Request	13-28
Maintaining a Job or Service Request	13-31
Releasing Jobs.....	13-32
Completing Jobs.....	13-33
Deferring Jobs.....	13-34
Entering QA Results for a Job	13-35
Signing Off Maintenance Requirements	13-37
Scheduling Jobs using the Scheduler Workbench	13-39
Viewing the Scheduling Hierarchy	13-44
Updating Existing Service Requests	13-45
Performing Part Removal/Install.....	13-46
Changing the Serial Number of Items Associated with Jobs	13-51

Viewing the Serial Number Change History	13-53
Deferring Maintenance Requirements (MR)	13-54
Updating Job Details	13-60
Creating Operations for non-route based Jobs.....	13-61
Updating Operations	13-63
Updating Operation Details.....	13-64
Completing Operations	13-65
Entering QA results for an Operation	13-66
Working with Maintenance Requirements	13-67
Viewing Material Requirements	13-70
Updating Material Requirements.....	13-74
Updating Material Requirement Details	13-76
Viewing Employee Assignments.....	13-77
Viewing Documents.....	13-80
Updating Resource Requirements.....	13-84
Updating Resource Requirement Details	13-86
Updating Resource Assignments.....	13-87
Charging Resources.....	13-89
Working with Material Transactions	13-90
Issuing and Returning Parts to a Job	13-91
Entering QA results for a Material Transaction.....	13-93
Quality Collection Plans Setup.....	13-96

14 Managing Outside Processing

What is an OSP Work Order?	14-2
What is a Loan or Borrow Order?	14-2
What is an Exchange Order?	14-3
Key Business Processes	14-3
Fields Associated with Outside Processing.....	14-6
Fields on the Edit OSP Work Order Page	14-6
Fields on the Create Order Page.....	14-7
Fields on the Search OSP Order Page.....	14-8
Fields on the Search Work Order Page.....	14-9
Fields on the Create Borrow Order Page	14-10
Fields on the Create OSP Order Page	14-11

Fields on the Ship Order Page	14-12
Fields on the Create Exchange Order Page.....	14-14
Working With Outside Processing Work Orders	14-15
Creating an OSP Order	14-16
Finding OSP Work Orders	14-21
Editing an OSP Work Order.....	14-24
Closing an OSP Work Order	14-29
Submitting an OSP Work Order.....	14-30
Working With Purchase Orders	14-31
Reviewing Purchase Orders.....	14-32
Synchronizing Outside Processing Work Orders with Purchase Orders	14-37
Updating and Approving Purchase Orders	14-38
Shipping and Receiving	14-43
Shipping Parts	14-44
Receiving Parts.....	14-50
Accepting Supplier Services.....	14-51
Working with Loan and Borrow Orders.....	14-52
Creating a Loan or Borrow Order	14-53
Finding a Loan or Borrow Order.....	14-55
Editing a Loan or Borrow Order.....	14-56
Submitting a Loan or Borrow Order.....	14-56
Closing a Loan or Borrow Order	14-57
Initiating Contracts.....	14-57
Working with Exchange Orders	14-57
Creating an Exchange Order	14-58
Editing Exchange Orders.....	14-65
Converting Service/Exchange OSP to Exchange/Service OSP	14-67

A Windows and Navigation Paths

Windows and Navigation Paths.....	A-1
Default Navigation Paths for Standard Application Windows.....	A-2

Index

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Oracle Complex Maintenance, Repair, and Overhaul User's Guide, Release 11*i*

Part No. A97640-03

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Preface

Welcome to the Oracle Complex Maintenance, Repair, and Overhaul User's Guide, Release 11*i*.

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

- The principles and customary practices of your business area.
- Oracle Complex Maintenance, Repair, and Overhaul.

If you have never used Oracle Complex Maintenance, Repair, and Overhaul, Oracle suggests you attend one or more of the Oracle Applications training classes available through Oracle University.

- Oracle Self-Service Web Applications.

To learn more about Oracle Self-Service Web Applications, read the *Oracle Self-Service Web Applications Implementation Manual*.

- 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

The Oracle Complex Maintenance, Repair, and Overhaul User's Guide contains the information you need to understand and use Oracle Complex Maintenance, Repair, and Overhaul. This guide contains four chapters:

- Chapter 1, "[Overview of Oracle Complex Maintenance, Repair, and Overhaul](#)" provides overviews of the application and its components, explanations of key concepts, features, and functions.
- Chapter 2, "[Managing Maintenance Requirements](#)" provides process-oriented, task based procedures for using the Fleet Maintenance Program module of Oracle Complex Maintenance, Repair, and Overhaul to manage maintenance requirements.
- Chapter 3, "[Managing Maintenance Routes](#)" provides process-oriented, task based procedures for using the Route Management module of Oracle Complex Maintenance, Repair, and Overhaul to manage maintenance routes.
- Chapter 4 "[Managing Maintenance Documents](#)" provides process-oriented, task based procedures for using the Document Index module of Oracle Complex Maintenance, Repair, and Overhaul to manage maintenance documents.
- Chapter 5, "[Working With Master Configurations](#)" provides process-oriented, task based procedures for using the Master Configuration module of Oracle Complex Maintenance, Repair, and Overhaul to manage master configurations of electromechanical system assemblies.
- Chapter 6, "[Working with Unit Configurations](#)" provides process-oriented, task based procedures for using the Unit Configuration module of Oracle Complex Maintenance, Repair, and Overhaul to manage the operational readiness of fleet units.
- Chapter 7, "[Managing Product Classification](#)" provides process-oriented, task based procedures for using the Product Classification module of Oracle Complex Maintenance, Repair, and Overhaul to manage product maintenance based on different maintenance classifications.
- Chapter 8, "[Working With Unit Maintenance Plans](#)" provides process-oriented, task based procedures for using the Unit Maintenance Plan module of Oracle Complex Maintenance, Repair, and Overhaul to manage unit maintenance plans.
- Chapter 9, "[Working With Maintenance Visits](#)" provides process-oriented, task based procedures for using the Visit Work Package module of Oracle Complex Maintenance, Repair, and Overhaul to manage maintenance visits.

- Chapter 10, "[Long Term Planning](#)" provides process-oriented, task based procedures for using the Long Term Plan module of Oracle Complex Maintenance, Repair, and Overhaul to manage the long term planning of maintenance activities.
- Chapter 11, "[Administration](#)" provides process-oriented, task based procedures for using the Administration module of Oracle Complex Maintenance, Repair, and Overhaul to create and edit spaces, determine the unavailability of a space, and also manage department shifts.
- Chapter 12, "[Production Planning](#)" provides process-oriented, task based procedures for using the Production Planning module of Oracle Complex Maintenance, Repair, and Overhaul to manage the planning of maintenance activities.
- Chapter 13, "[Production](#)" provides process-oriented, task based procedures for using the Production module of Oracle Complex Maintenance, Repair, and Overhaul to manage the production of maintenance activities.
- Chapter 14, "[Outside Processing](#)" provides process-oriented, task based procedures for using the Outside Processing module of Oracle Complex Maintenance, Repair, and Overhaul to manage third party maintenance activities.
- Appendix A provides the necessary navigation paths.

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

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **PDF Documentation**- See the Online Documentation CD for current PDF documentation for your product with each release. This Documentation CD is also available on *OracleMetaLink* and is updated frequently.
- **Online Help** - You can refer to Oracle Applications Help for current HTML online help for your product. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation. No system downtime is required to apply online help.
- **Release Content Document** - See the Release Content Document for descriptions of new features available by release. The Release Content Document is available on *OracleMetaLink*.
- **About document** - Refer to the About document for information about your release, including feature updates, installation information, and new documentation or documentation patches that you can download. The About document is available on *OracleMetaLink*.

Related Guides

Oracle Complex Maintenance, Repair, and Overhaul shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other guides when you set up and use Oracle Complex Maintenance, Repair, and Overhaul.

You can read the guides 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>.

Guides 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). 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.

Guides Related to This Product

Oracle Install Base Concepts and Procedures Guide

This guide provides an introduction to the concepts, and explains how to navigate the system, enter data, and query information in the Oracle Installed Base interface that forms part of Oracle Complex Maintenance, Repair, and Overhaul

Oracle Complex Maintenance, Repair, and Overhaul Implementation Guide

Use this guide to set up Oracle Complex Maintenance, Repair, and Overhaul.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Oracle Applications Implementation Wizard User Guide

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

“About” Document

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software updates, refer to the “About” document for your product. “About” documents are available on Oracle *MetaLink* for most products starting with Release 11.5.8.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Complex Maintenance, Repair, and Overhaul implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

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 *OracleMetalink*

Oracle Applications Message Manual

This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11*i*.

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Complex Maintenance, Repair, and Overhaul and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many education centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Complex Maintenance, Repair, and Overhaul 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 Oracle server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

*Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.*

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.

About Oracle

Oracle develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

Your Feedback

Thank you for using Oracle Complex Maintenance, Repair, and Overhaul and this user guide.

Oracle values your comments and feedback. In this guide is a reader's comment form that you can use to explain what you like or dislike about Oracle Complex Maintenance, Repair, and Overhaul or this user guide. Mail your comments to the following address or call us directly at (650) 506-7000.

Oracle Applications Documentation Manager
Oracle Corporation
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

Or, send electronic mail to mfgdoccomments_us@oracle.com.

Overview of Oracle Complex Maintenance, Repair, and Overhaul

This section provides an overview of Oracle Complex Maintenance, Repair, and Overhaul and its components. It explains the key concepts, features, and functions of Oracle Complex Maintenance, Repair, and Overhaul. This chapter covers the following topics:

- [What is Oracle Complex Maintenance, Repair, and Overhaul?](#)
- [Key Features of Oracle Complex Maintenance, Repair, and Overhaul](#)
- [Business Processes](#)
- [Integration and Dependencies](#)
- [Accessing Oracle Complex Maintenance, Repair, and Overhaul](#)

What is Oracle Complex Maintenance, Repair, and Overhaul?

Oracle Complex Maintenance, Repair, and Overhaul is an integrated, Web-enabled, software application suite designed to empower complex equipment maintenance organizations. Oracle Complex Maintenance, Repair, and Overhaul supports typical maintenance processes such as scheduled and unscheduled maintenance visits, component monitoring, job scheduling and routing, labor time collection, cost collection, inventory management, and maintenance document management.

Oracle Complex Maintenance, Repair, and Overhaul reveals maintenance practice improvement opportunities, and opportunities to improve fleet readiness. Oracle Complex Maintenance, Repair, and Overhaul provides models for electromechanical systems and defines rules for assembling units. It also records unit-specific information, allowing quick access to the maintenance history of a

product component. It provides maintenance organizations a means to reduce operational costs, and thereby to yield improved profitability.

Oracle Complex Maintenance, Repair, and Overhaul is organized as follows:

1. Engineering
 - Fleet Maintenance Program (maintenance requirements)
 - Route Management (work card authoring)
 - Document Index (technical document management)
2. Configuration Management
 - Master Configuration (allowable installations)
 - Unit Configuration (“as installed” maintenance tracking)
 - Product Classification (logical grouping)
3. Planning
 - Unit Maintenance Plan (active maintenance requirements)
 - Visit Work Package (work scope and resource)
 - Long Term Plan (hangar and visit plan)
4. Administration
 - Approvals
 - Workflow
 - Department Shift
 - Spaces
 - Space Unavailability
5. Execution
 - Production
 - Production Planning
 - Outside Processing

Key Features

Oracle Complex Maintenance, Repair, and Overhaul enables maintenance organizations to meet customer expectations, and draw maximum benefit by improving the operational readiness of equipment. Oracle Complex Maintenance, Repair, and Overhaul enables organizations to:

- Streamline maintenance operations
- Meet the demands for transport and service
- Improve profitability

The major features presented by each of the Oracle Complex Maintenance, Repair, and Overhaul modules are discussed in the following sections:

- [Fleet Maintenance Program](#)
- [Route Management](#)
- [Document Index](#)
- [Master Configuration](#)
- [Unit Configuration](#)
- [Product Classification](#)
- [Unit Maintenance Plan](#)
- [Visit Work Package](#)
- [Long Term Plan](#)
- [Administration](#)
- [Production Planning](#)
- [Production](#)
- [Outside Processing](#)

Fleet Maintenance Program

Key Fleet Maintenance Program features include:

- Maintenance requirements creation allowing maintenance personnel to create maintenance requirements with attributes uniquely defining the requirement
- Maintenance routes association by attaching appropriate routes created in the Route Management module to the maintenance requirement

- Maintenance documents association by attaching appropriate documents from Document Index to the maintenance requirement
- Effectivity definition allowing automatic notification to personnel of the maintenance requirements applicable to certain physical units within the database
- Interval and threshold definition enabling a schedule to be set that counts down until the maintenance requirement is due for a unit
- Maintenance requirements and dependent relationships management allowing use of group relationships for non-complicated parent child components where the parent maintenance requirement accomplishment includes the children
- Affected items listing providing a comprehensive view of the items that are covered by a maintenance requirement's effectivities

Route Management

Key Route Management features include:

- Work card or route authoring
- Maintenance planning information helps organizations plan maintenance activities based on system, zone, process, skill of technician, and significant task
- Resource requirements definition providing a set of resource requirements such as estimated labor, tools, and material, associated with each maintenance operation
- Sign-off requirements definition allowing the association of Quality Plans in order to define sign-off requirements and accomplishment recordings for each work card and/or operation
- Resource collection check point definition allowing capture of resource utilization details at different maintenance operation levels

Document Index

Key Document Index features include:

- Receipt and registration of documents
- Upload and revision of electronic documents
- Document subscription control through supplier information recording and subscription status tracking

- Document revision control ensuring current and accurate information
- Document status look-up allowing document version verifications from multiple levels during maintenance operations
- Document Distribution Control ensuring authorization of a person (who requests a document) to receive a document

Master Configuration

Key Master Configuration features include:

- Assembly tree structure representing the positions of tracked or required components that make up a complex assembly
- Assembly qualification by identifying the components required to meet a certain specification
- Tracked parts positioning
- Definition of parent child relationships between components in an assembly
- Configuration template for unit configuration modeling the general characteristics of a fleet unit
- Cost roll up structure allowing division of maintenance cost by the modules of an assembly
- Definition of alternate parts allowable for each component position in an assembly
- Definition of position ratios for usage counter updates between positions in a master configuration hierarchy
- Maintenance document association to master configuration positions

Unit Configuration

Key Unit Configuration features include:

- Unit composition providing information on the hierarchical positions of parts within a unit
- Physical location tracking of parts
- Recording of child unit installation and removal on or from parent assemblies
- Recording of utilization or age of parts in an assembly based on different parameters related to usage of parts and events that affect the parts

- Utilization population from parent to child units enabling determination of component aging as a result of attachment to other parts, or parent units, that gain utilization
- Unit maintenance history tracking through all previously accomplished maintenance requirement records
- Applicable warranty tracking of individual units enabling easy comparison of coverage period and unit utilization period
- Equipment ownership history tracking enabling analysis of impact on business procedures due to ownership change
- Temporary part identification allowing assignment of temporary serial numbers to parts in an acquired unit

Product Classification

Key Product Classification features include:

- Hierarchy based product classification creation and maintenance.
- Association of maintenance requirements and documents to any level in the product classification using a tree based hierarchy in order to reduce the administration necessary with adding a new product to a maintenance program.
- Logical grouping of products across multiple levels.
- Primary and supplementary classification support which allows part and unit grouping from multiple viewpoint.

Unit Maintenance Plan

Key Unit Maintenance Plan features include:

- Utilization forecast maintenance that provides the utilization forecast in terms of the applicable time based unit of measures for each unit in the fleet
- Serviceable time (UOM) of units viewing for the parent unit and all child units expressed in terms of appropriate UOM, such as hours, cycles, mileage, etc.
- Repetitive maintenance requirement modeling over a user defined period providing the UOM remaining for each occurrence of a maintenance requirement

- Due date calculation of maintenance requirements based on utilization forecasts and maintenance frequencies in the absence of a specified fixed due date
- Association of maintenance requirement groups to a visit

Visit Work Package

Key Visit Work Package features include:

- Equipment based maintenance visit definition enabling an equipment item to be connected with a block of tasks, a location, and a period of time
- Maintenance visit template definition enabling a maintenance planner to develop a shop visit plan without access to a unit maintenance plan for the equipment
- Visit creation from a template allowing a planner to add attribute values like visit location, visit start date, and description to a template definition, and copy the template to a visit object
- Visit and task structure conversion to a template allowing a visit object, or the visit header, and all attached tasks that comprise the work package, to be transformed into a visit template
- Merging of imminent maintenance requirements with visits allowing a maintenance planner to select imminent maintenance requirements for an equipment unit based on an effective date range
- Addition of ad hoc repair tasks to visits allowing association of ad hoc tasks, not associated with a route, to a visit
- Visit task work breakdown structure definition enabling calculation of the labor, parts, and material costs incurred during a maintenance visit
- Visit task sequence definition permitting precise definition of the order of completion of all tasks that comprise a maintenance facility visit
- Visit work package export to Oracle Projects enabling export of the entire visit object to Oracle Projects, on completion of the visit definition, as a project record with equivalent tasks

Long Term Plan

Key Long Term Plan features include:

- Assessment of a maintenance base's work load capacity. analysis of available labor by skill, available tooling/machinery, available materials and the

location's capabilities—such as the list of units and requirements the location can support—balanced against known workloads.

- Visit creation in order to group together events for long and short term capacity planning and to facilitate scheduling to a maintenance base.
- Definition of a visit's resource requirements based on the unit, man hour requirements by skill, required tooling, required materials, duration and required completion times of the visit's maintenance requirements and routes.
- Visit appointment creation based on maintenance base resource forecasting and visit requirements.
- Resource balancing capacity versus work load requirements for scheduling purposes and efficiency assurance.
- Resource leveling on different simulation plans allowing identification of the best plan with regards to resource capacity.

Administration

Key Administration features include:

- Departmental work shift schedule definition allowing maintenance planners to select shift schedules for the departmental workers who will accomplish the inspections and repairs
- Calculating spaces and space unavailability

Production Planning

Key Production Planning features include:

- Job creation from visit tasks for Scheduled, Unscheduled, and Convenience maintenance
- Service Request creation for tracking reported problems
- Creation of Operations to Non-Routine Jobs for work definition and tracking
- Job maintenance through status, completion, and start/end date adjustments of the schedule.
- Operation maintenance by addition, removal, material and resource requirement updates, cost capture, and resource assignment review.
- Quality maintenance using Route Management.

Production

Key Production features include:

- Job creation from visit tasks for Scheduled, Unscheduled, and Convenience maintenance
- Service Request creation for tracking reported problems
- Creation of Operations to Non-Routine Jobs for work definition and tracking
- Job maintenance through status, completion, and start/end date adjustments of the schedule.
- Operation maintenance by addition, removal, material and resource requirement updates, cost capture, and resource assignment review.
- Quality maintenance using Route Management.

Outside Processing

Key Outside Processing features include:

- Assign production jobs for third party service
- Add or remove production jobs to an existing OSP Work Order
- Determine how and when the parts will be shipped to the supplier
- Create and Approve Purchase Orders
- Borrow Parts from a third party organization
- Loan Parts to a third party organization
- Approve Loan or Borrow Orders

Business Processes

The following sections explain the business process associated with Oracle Complex Maintenance, Repair, and Overhaul:

- [Managing Maintenance Requirements](#)
- [Working with Maintenance Routes](#)
- [Managing Maintenance Documents](#)
- [Managing Master Configuration Records](#)

- [Managing Unit Configuration Records](#)
- [Working With Product Classifications](#)
- [Planning Unit Maintenance](#)
- [Managing Maintenance Visits](#)
- [Long Term Planning](#)
- [Administration](#)
- [Production Planning](#)
- [Production](#)
- [Outside Processing](#)

Managing Maintenance Requirements

The Fleet Maintenance Program module in Oracle Complex Maintenance, Repair, and Overhaul allows maintenance organizations to record, organize, and plan maintenance requirements. The maintenance planner can create maintenance requirement records and attach attributes to these records. The attributes attached to the record enables maintenance planning, and increased operational efficiency while accomplishing a requirement. Maintenance planners can:

- Search the database for a specific maintenance requirement for reference, or for editing purposes.
- Create a maintenance requirement record in the database.
- Attach documents, maintenance routes, actions, effectivities, and maintenance requirement relationships to the record.
- Create revisions for maintenance requirements that are complete.
- View items that are affected by a maintenance requirement.

The Oracle Complex Maintenance, Repair, and Overhaul Fleet Maintenance Program module serves as a repository for scheduled maintenance and associated information that organizes and streamlines planned maintenance tracking and execution.

Working with Maintenance Routes

The Route Management module in Oracle Complex Maintenance, Repair, and Overhaul provides a single interface for managing all maintenance tasks.

Maintenance personnel can prepare and maintain work instructions. Maintenance personnel can:

- Search the database for a specific operation for reference purposes, or for editing purposes.
- Create an operation or define instructions for carrying out a maintenance task.
- Search for maintenance routes, for reference, or for editing route information.
- Create a maintenance route.
- Associate major and sub zones in a system to a product type to facilitate tracking of maintenance operations on complex electromechanical systems.

The intuitive user interface of Oracle Complex Maintenance, Repair, and Overhaul is designed to enable maintenance personnel handle operational needs as effortlessly and quickly as possible.

Managing Maintenance Documents

The Document Index module in Oracle Complex Maintenance, Repair, and Overhaul is the central place for managing all maintenance documents. The maintenance personnel can access an online catalog of documents used in maintenance, repair, and overhaul operations. The Document Index allows personnel to receive, distribute, and control revisions in technical documentation.

Maintenance personnel can:

- Search the database to quickly refer to a document.
- Create new documents or document revisions.
- Associate subtypes to document types for easy identification.
- Upload electronic documents

Maintenance document management involves tracking documents and their revisions, validating document references from multiple levels of maintenance operations, and making them easily accessible to the maintenance personnel.

Managing Master Configuration Records

The Master Configuration module in Oracle Complex Maintenance, Repair, and Overhaul provides models of electromechanical system assemblies. A master configuration model will form the basis of a unit in combination with business rules

that specify the systems and subsystems that may be included in the assembled unit.

Maintenance personnel can:

- Search the database for master configurations of electromechanical system assemblies.
- Create system assembly master configurations.
- Search for alternate parts that may be used in place of specified components in an assembly.

Managing Unit Configuration Records

The Unit Configuration module in Oracle Complex Maintenance, Repair, and Overhaul allows organizations to describe the structure of an assembled electromechanical system. The as-constructed configuration of an assembly will determine the specific maintenance program required to ensure the operational readiness of that unit. Maintenance personnel can easily initiate proper maintenance activities to resolve issues. Maintenance personnel can:

- Create unit configurations from existing master configurations.
- Search for unit configuration records that exist in the database.
- Add new part information to the database.
- Search for, and update existing part information.

The Unit Configuration module in Oracle Complex Maintenance, Repair, and Overhaul is a key feature that enables maintenance organizations to determine services required. Even if two units have the same part number, or belong to the same product family, their configurations are normally different due to the operation and maintenance history of each unit. Unit Configuration provides models of individual tracked parts to support unit-specific information.

Working with Product Classifications

The Product Classification module in Oracle Complex Maintenance, Repair, and Overhaul provides a maintenance engineer with the ability to create and maintain product classifications. Product Classification provides a hierarchy within which parts and units can be grouped. Organizations are able to create, copy and maintain product classification and for the use of maintenance definition of the parts or units within a product classification, they can associate documents and view association of the associated maintenance requirements. Maintenance Personnel can:

- Search the database to quickly refer to a product classification.
- Create new product classifications or product classifications revisions.
- Edit and copy product classifications.
- Associate documents to a nodes product classifications.
- Attach parts or units to product classifications.
- View maintenance requirements associated to a product classification node.
- View Utilization forecast of a product classification.
- Check for completeness of primary product classifications.
- Launch the approval process for a draft product classification.

Product Classification allows organizations to provide a multilevel hierarchy that logically group products together. Product classifications are used mainly to define maintenance requirements and documents applicability as well as provide a basis for analysis and reporting purposes.

Planning Unit Maintenance

The Unit Maintenance Plan module in Oracle Complex Maintenance, Repair, and Overhaul ensures that all maintenance requirements are accomplished on or prior to their due date, and provides demand estimates over a planning time window by forecasting the due date of maintenance requirements associated to a unit. It searches and displays maintenance requirements that are due for an equipment unit and provides maintenance personnel instant access to maintenance requirements, due date estimation, accomplishment history, and planning information for a unit configuration. Maintenance personnel can:

- Maintain utilization forecasts.
- View the serviceable time remaining of a unit
- Model repetitive maintenance requirements over a specified time period
- Calculate the due dates of maintenance requirements.
- Associate maintenance requirements to a visit.

Unit Maintenance Plan serves as a repository of the maintenance requirements related to units and any related subassemblies or components. It also enables forecasting of usage to determine due dates for fleet maintenance activities.

Managing Maintenance Visits

The Visit Work Package module provides planning capabilities including creation, organization, and scheduling of maintenance visits based on maintenance requirements. It allows creation and management of visit templates based on equipment types enabling efficient visit package creation for equipment units of a type. Visit Work Package permits association of tasks with visits and visit templates, and definition of task hierarchy and cost structure. Maintenance planners can:

- Create maintenance visit records, new, or from a template
- Search for, retrieve, and update existing visit records
- Associate tasks with visits: planned tasks, tasks that are required but not scheduled, and ad hoc tasks that are not associated with maintenance routes
- Search for, retrieve, and update tasks associated with a visit
- Create visit templates, new, or from an existing visit record
- Search for, retrieve, and update existing visit templates
- Associate tasks with visit templates: tasks that are required but not scheduled, and ad hoc tasks that are not associated with maintenance routes
- Search for, retrieve, and update visit template tasks
- Create shift schedules for department workers based on planned visits
- Search for and retrieve existing department shifts

Visit Work Package permits a maintenance planner skilled in the maintenance of the firm's assets, and aware of cost and complexity, to organize a maintenance visit execution for an equipment unit.

Long Term Planning

The Long Term Planning module in Oracle Complex Maintenance, Repair, and Overhaul is used by a maintenance planner to schedule planned maintenance requirements for maintenance visits based on the optimal use of maintenance resources. The maintenance planner using Long Term Plan is able to make a complete assessment of the maintenance resources available at all maintenance locations. The planner can schedule maintenance visits, assess capacity and reserve required materials. Maintenance personnel can:

- Assess Maintenance Workload Capacity by analysis of available labor by skill, level and certification, available tools, materials, and location capabilities balanced against known workloads.

- Create a Visit in order to group events together for long and short term capacity planning, and to facilitate scheduling to a maintenance base.
- Define a Visit's Resource Requirements to allow accurate scheduling and capacity planning.
- Analyze capacity versus work load requirements
- Run simulations in order to evaluate different scheduling scenarios before implementing actual plan changes.

Long Term Plan maximizes maintenance scheduling by balancing maintenance requirements with available maintenance capacity. The maintenance planner is able to do this by balancing forecasted maintenance requirement information from Unit Maintenance Plan against projected maintenance capacity.

Administration

The Administration module in Oracle Complex Maintenance, Repair, and Overhaul is used by an administrator to set up approvals and workflow. Maintenance planners can also plan department shifts and spaces in this module. Maintenance personnel can:

- Create department shift records
- Create and edit maintenance spaces
- Set up a space as unavailable

Production Planning

The Production Planning module in Oracle Complex Maintenance, Repair, and Overhaul is designed for the execution of Routine Tasks and Maintenance Requirements associated with a Visit and creation and execution of Non-Routine Tasks for a Visit. The Production module supports the execution of the tasks against an Install Base Tracked Item. Maintenance personnel can:

- Search for Routine and Non-Routine Jobs using filtered search elements.
- Create Jobs from visit tasks for Scheduled, Unscheduled, and Convenience maintenance
- Create Service Requests to track reported problems when an item has a service difficulty.
- Create Operations to Non-Routine Jobs for work definition and tracking

- Maintain jobs by adjusting the schedule, the status, completing, deferring, and selecting the actual start and end for a job.
- Maintain operations by updating the operations, adding, removing, or updating the material and resource requirements.
- Maintain Quality using Route setup from Route Management for Job and Operation compliance.

Production Planning enables the maintenance scheduler to create jobs, initiate service for material and parts change transactions, and perform job operation maintenance.

Production

The Production module in Oracle Complex Maintenance, Repair, and Overhaul is designed for the execution of Routine Tasks and Maintenance Requirements associated with a Visit and creation and execution of Non-Routine Tasks for a Visit. The Production module supports the execution of the tasks against an Install Base Tracked Item. Maintenance personnel can:

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- Maintain Quality using Route setup from Route Management for Job and Operation compliance.

Production enables the maintenance scheduler to create jobs, initiate service for material and parts change transactions, and perform job operation maintenance.

Outside Processing

The Outside Processing module in Oracle Complex Maintenance, Repair, and Overhaul is used by a maintenance planner to schedule planned maintenance for

parts and services provided outside the organization. The maintenance planner using Outside Processing is able to determine when, where, and how a service or part can be used in the most cost effective manner. Maintenance personnel can:

- Assign production jobs for third party service
- Add or remove production jobs to an existing OSP Work Order
- Determine how and when the parts will be shipped to the supplier
- Create and Approve Purchase Orders
- Borrow Parts from a third party organization
- Loan Parts to a third party organization
- Approve Loan or Borrow Orders

Outside Processing maximizes scheduling third party service through the use of OSP Work Orders and Loan/Borrow Orders.

Integration and Dependencies

Oracle Complex Maintenance, Repair, and Overhaul uses modules from other Oracle applications.

Oracle Counters Organizations perform maintenance operations on an electromechanical system to maximize the service life of that asset. Maintenance operations require that the service life of a system, or the components comprising it, be measured. Timers and counters become important here. Car odometers, for example, are counters. Meters used to record the operating hours of power plants on aircraft and boats are timers. Maintenance is typically performed periodically, based on elapsed operating time. Oracle Complex Maintenance, Repair, and Overhaul meets these needs through its integration with Oracle Counters application.

Oracle Complex Maintenance, Repair, and Overhaul user will use an Oracle Counters instance to represent a timer when defining models for system configurations. The service life of a component is measured according to the nature of that component's role, and service life measurements are selected by failure mode analysis. Calendar time is of interest because of possible corrosive conditions resulting in damage over time. Counter instances are sufficiently flexible, and Oracle Complex Maintenance, Repair, and Overhaul users can define the counters using the appropriate unit of measurement associated with a component.

Oracle Install Base Maintenance organizations gain many advantages by modeling a template for electromechanical system assemblies and individual fleet units. After an Oracle Complex Maintenance, Repair, and Overhaul user completes the definition of a master configuration, a framework that describes the general characteristics of the system including the engineering rules for assembly, exists. The user can then create a unit configuration.

Oracle Complex Maintenance, Repair, and Overhaul will invoke the Install Base methods to populate the database with a transaction representing the as-operated or unit configuration of an electromechanical system.

Oracle Inventory Maintenance organizations can greatly improve operational efficiency by planning their material requirements. The Master Configuration module of Oracle Complex Maintenance, Repair, and Overhaul provides a template for the structure of an electromechanical system, and lists the components that are allowable in the different positions of a system configuration. The Unit Configuration module describes the as-installed configuration of a specific fleet unit. This helps organizations predict to an extent, the material requirement for maintaining operational readiness of fleet units.

Oracle Complex Maintenance, Repair, and Overhaul user will use instances of Oracle Inventory when defining the allowable parts in a master configuration for an electromechanical system, and when describing the components in a unit configuration.

Accessing Oracle Complex Maintenance, Repair, and Overhaul

You can access Oracle Complex Maintenance, Repair, and Overhaul with an up-to-date Web browser. Oracle recommends Netscape Communicator 4.78 or later, or Microsoft Internet Explorer 5.5 or later. Your systems administrator will provide you with a username and password to access Oracle Complex Maintenance, Repair, and Overhaul.

To access Oracle Complex Maintenance, Repair, and Overhaul, using the path provided by your System Administrator, navigate to the Welcome to Oracle eBusiness Suite page. If you have not already obtained a registered and approved login, click Register Here to register.

After you have an approved login, in the Welcome to Oracle eBusiness Suite page, enter your User ID and Password. Click **Go**. The Oracle Complex Maintenance, Repair, and Overhaul Home page appears. Access the modules using the global buttons at the top of the page. They are organized as follows:

1. Engineering

Engineering includes:

- Fleet Maintenance Program
- Route Management
- Document Index

2. Configuration Management

Configuration Management includes:

- Master Configuration
- Unit Configuration
- Product Classification

3. Planning

Planning includes:

- Unit Maintenance Plan
- Visit Work Package
- Long Term Planning

4. Administration

Administration includes:

- Approvals
- Workflow
- Department Shift
- Spaces
- Space Unavailability

5. Execution

Execution includes:

- Production Planning
- Production
- Outside Processing

To change your password, click the Profile link on the top right corner of the Home page to launch the Personal Profile page. Enter field values as required, and click Update to effect the change.

Managing Maintenance Requirements

Ensuring the safety and readiness of machines, and the increase in component life of complex, safety sensitive, and expensive assets is crucial in today's industry. The Oracle Complex Maintenance, Repair, and Overhaul Fleet Maintenance Program module enables organizations to manage a preventative maintenance program that accomplishes this need.

This chapter presents the key functions supported by this module, and provides process-oriented, task based procedures for using Oracle Complex Maintenance, Repair, and Overhaul to perform essential maintenance requirement management tasks.

See:

- [Creating Maintenance Requirement Records](#)
- [Retrieving Existing Maintenance Requirement Records](#)
- [Attaching Documents to a Maintenance Requirement](#)
- [Associating Maintenance Routes to a Maintenance Requirement](#)
- [Setting Maintenance Route Dependencies](#)
- Defining:
 - [Maintenance Requirement Effectivity](#)
 - [Effectivity Details](#)
 - [Intervals and Thresholds](#)
 - [Maintenance Requirement Relationships](#)
- [Updating Maintenance Requirement Records](#)
- [Viewing Items Affected by a Maintenance Requirement](#)

- [Creating Maintenance Requirement Revisions](#)
- [Viewing Maintenance Requirement Details](#)
- [Associating Program Sub Types to Program Types](#)

What is Fleet Maintenance Program?

Fleet Maintenance Program is an Oracle Complex Maintenance, Repair, and Overhaul subsystem that manages the creation, organization, and planning of preventative maintenance tasks for an asset or group of assets. It is a repository for scheduled maintenance and associated information that organizes and streamlines planned maintenance tracking and execution.

Planned maintenance actions are called maintenance requirements within Oracle Complex Maintenance, Repair, and Overhaul, and originate from required maintenance needs external to Oracle Complex Maintenance, Repair, and Overhaul. Subsystems face the challenge of defining all the maintenance requirements applicable to a product, and organizing them in a way universally usable by all parties involved. The Fleet Maintenance Program module addresses the four major parts of a preventative maintenance requirement:

- Origin (why a maintenance action is required)
- Effectivity (what the maintenance requirement applies to)
- Frequency (when the maintenance requirement is to be performed)
- Work Cards or Routes (how the maintenance requirement is to be performed).

Fleet Maintenance Program targets the operator (Commercial and Military), third party maintenance service provider, simple assembly component shop, and complex assembly component shop in the maintenance, repair, and overhaul industry. It allows the association of maintenance requirements to the three groups of product types:

- Top Units: units that contain all the component parts, such as an aircraft, a motor vehicle, or a ship
- Complex Assembly: a complex component of the top unit, such as an engine, or an aircraft landing gear
- Simple Component: a component of the top unit or complex assembly

Key Business Processes

Fleet Maintenance Program supports the following business processes:

Maintenance Requirements Creation Maintenance requirements refer to planned maintenance actions that originate from required maintenance needs external to Oracle Complex Maintenance, Repair, and Overhaul, such as airworthiness directives from the FAA (Federal Aviation Administration) in the aircraft industry. The maintenance requirement recording process allows maintenance personnel to create maintenance requirements with attributes uniquely defining the requirement. You can link maintenance requirements to maintenance routes that are authored using Oracle Complex Maintenance, Repair, and Overhaul, define an effectivity clause describing the requirement applicability, and schedule the maintenance performance.

Maintenance Routes Association Knowledge of maintenance routes associated with a maintenance requirement greatly enhances maintenance planning, organization, and execution. The Fleet Maintenance Program module allows maintenance personnel to search the Oracle Complex Maintenance, Repair, and Overhaul Route Management module for routes applicable to a maintenance requirement, and to attach the appropriate routes to the maintenance requirement. Routes can then be set up with technical dependencies to each other within the maintenance requirement. These dependencies are validated against the Oracle Complex Maintenance, Repair, and Overhaul Visit Work Package and Production Planning modules to assist in the scheduling order of the routes.

Documents Association Maintenance personnel frequently refer to technical manuals during a maintenance operation. Maintenance documents, such as technical manuals and regulatory directives, if attached to a maintenance requirement, can greatly improve operational efficiency. The Fleet Maintenance Program module allows maintenance personnel to search the Oracle Complex Maintenance, Repair, and Overhaul Document Index module for documents applicable to a maintenance requirement, to attach appropriate documents to a maintenance requirement, and mark attached documents as reference or source.

Effectivity Definition Effectivity refers to the applicability of a maintenance requirement. Fleet Maintenance Program allows maintenance organizations to attach attributes to maintenance requirements, which automatically notifies personnel of the maintenance requirements applicable to certain physical units within the database. A Master Configuration node, an alternate part combination, or an item from the database can be attached to a maintenance requirement.

Maintenance requirements can also be associated to unit details such as Serial Number, Serial Number Range, and Manufacturer.

You can set up multiple effectivities for one maintenance requirement allowing total flexibility and control. An effectivity owns a set of effectivity details, and a set of interval thresholds. Depending on these effectivity rows, details, and interval thresholds, the Oracle Complex Maintenance, Repair, and Overhaul Unit Maintenance Plan module will find the actual items affected in inventory, and then calculate estimated maintenance requirement due dates. You can also set up overlapping effectivities for the same maintenance requirement, in which case the Unit Maintenance Plan module will calculate more than one estimated due date, and then display only the earliest one. This is desirable because one effectivity can have its own set of applicable interval thresholds when an item is found according to specific criteria.

Interval and Threshold Definition Intervals and thresholds are used to set a schedule that counts down until the maintenance requirement is due for a unit. Maintenance organizations can define interval and threshold values for maintenance requirements using the Fleet Maintenance Program. The number of interval and threshold values defined for a maintenance requirement can be unlimited, and maintenance personnel can select whether the combined intervals will come due at “whichever occurs first” or “whichever occurs last”. The interval thresholds are directly related to one of the effectivities of a maintenance requirement, allowing a maintenance requirement to have several useful interval threshold sets depending on the effectivity.

Maintenance Requirements and Dependent Relationships Management

Maintenance organizations can use group relationships for non-complicated parent child components where the parent maintenance requirement accomplishment includes the children.

The Letter Check relationships in aviation maintenance is an example. An A check consists of X number of children components that are all tracked on the parent component’s interval for maintenance requirement. An A Check will belong to a B Check, and the B Check will include all the A Check's children in addition to some of its own. The B Check will belong to a C Check and the C Check to a D Check. Each Check will be displayed in the Unit Maintenance Plan as a group with the same estimated due date eliminating a cluttered report. However, when a child component has a recurring maintenance requirement frequency outside of its parent (more frequent), this will be displayed separately also.

A maintenance requirement is also sometimes linked up with the completion of another requirement. This creates a dependency between the two requirements.

Fleet Maintenance Program accommodates such dependency with a maintenance requirement attribute that states another maintenance requirement as its prerequisite.

Affected Items Listing The Fleet Maintenance Program module enables maintenance organizations to gain a comprehensive view of the items that are covered by a maintenance requirement's effectivities. Maintenance personnel can view all items in the database to which the maintenance requirement applies based on the current set of effectivities.

Fields Associated with Maintenance Requirement Records

The following sections provide descriptions of fields appearing on each Fleet Maintenance Program page.

Note: The Search icon beside fields implies the availability of a List of Values to choose from for those field values. To populate these fields, enter a partial search string using the generic substitution metacharacter%, and click the icon to retrieve and display matching results on a Select <field name> page. Click the relevant record on this page to return this value to the field on your maintenance requirement page.

Fields on the Search Maintenance Requirements Page

The following fields appear on the Search Maintenance Requirements page:

Title User defined maintenance requirement name. The combination of maintenance requirement Title and Version Number is unique. This can be a number, or other alpha numeric identifiers used to locate the record. For example, AD 99-01-01.

Revision Number User defined revision number of the maintenance requirement. This is an optional field used to record document revision. For example, Airworthiness Directives have FAA (Federal Aviation Authority) approved revision numbers. Such numbers may be recorded here.

Originating Document The document existing in the Document Index database which serves as the source for creating a maintenance requirement record. For example, an Airworthiness Directive issued by the Federal Aviation Authority.

Status The seeded revision status of the maintenance requirement. This is either Draft, Complete, Approval pending, Approval Rejected, or Terminated. Statuses are not user definable or editable, and only indicate whether the maintenance requirement details and associated information are editable. Any newly created maintenance requirement is given the Draft status. The status advances to Approval Pending when the user sends the maintenance requirement for approval, becomes Complete or Approval Rejected depending on Approval Process, and becomes Terminated when terminated or replaced by newer version.

Program Type The user defined maintenance requirement program type. Program Types are used to classify or group maintenance requirements, and can be used in conjunction with Program Subtypes. For example, Letter Check, Corrosion, Modification.

Parent Title The user defined title of the maintenance requirement that would act as parent for the maintenance requirement being retrieved.

Category The user defined category of the maintenance requirement. A common method of categorization would be based on the equipment type to which the maintenance requirement applies. For example, Airframe, Powerplant, Ground Service Equipment.

Description The maintenance requirement description. The description may be anything that identifies additional information.

Associated Item The item number to which the maintenance requirement applies. You can search for maintenance requirement records based on their associated Part Numbers using this field.

Route Number is the user-assigned identifier for a maintenance route.

Fields on the Create and Update Maintenance Requirement Pages

The following fields appear on the Create Maintenance Requirement and Update Maintenance Requirement pages:

Title The user defined maintenance requirement name. The combination of maintenance requirement Title and Version Number is unique. This can be a number, or other alpha numeric identifiers used to locate the record. For example, AD 99-01-01.

Status The seeded revision status of the maintenance requirement. This is either Draft, Complete, Approval pending, Approval Rejected, or Terminated. Statuses are not user definable or editable, and only indicate whether the maintenance requirement details and associated information are editable. Any newly created maintenance requirement is given the Draft status. The status advances to Approval Pending when the user sends the maintenance requirement for approval, becomes Complete or Approval Rejected depending on Approval Process, and becomes Terminated when terminated or replaced by newer version. Approval rules are defined when Oracle Complex Maintenance, Repair, and Overhaul is set up. Refer to *Oracle Complex Maintenance, Repair, and Overhaul Implementation Guide* for details.

Version The system defined version number of the maintenance requirement. This value is not user definable or editable, and indicates how many times this particular record has been changed in the system.

Revision Number The user defined revision number of the maintenance requirement. This is an optional field used to record document revision. For example, Airworthiness Directives have FAA (Federal Aviation Authority) approved revision numbers. Such numbers may be recorded here.

Category The user defined category of the maintenance requirement. A common method of categorization would be based on the equipment type to which the maintenance requirement applies. For example, Airframe, Powerplant, Ground Service Equipment.

Program Type The user defined maintenance requirement program type. Program Types are used to classify or group maintenance requirements, and can be used in conjunction with Program Subtypes. For example, Letter Check, Corrosion, Modification.

Program Subtype The user defined sub group of the Program Type, and is used in conjunction with Program Types. For example the Program Type Letter Check may have the Program Subtypes A Check, B Check, C Check, and D Check associated to it.

Service Type The seeded service type of the maintenance requirement. The value for Service Type is either On or Off. This field value is used to determine the service type needed to fulfill the maintenance requirement. For example, On wing can be accomplished at aircraft location, whereas Off wing requires being sent to the shop.

Implement Status The seeded implement status of the maintenance requirement. The field value is either Mandatory, Optional Implement, or Optional Do Not Implement. The user can select from these values while creating the maintenance requirement record. The field value depicts the maintenance requirement characteristic as defined by the document engineer. The Oracle Complex Maintenance, Repair, and Overhaul Unit Maintenance Plan module will pick up any Implement Status other than Optional Do Not Implement.

Repetitive The seeded repetitive flag for the maintenance requirement. The field values can be Yes or No. The field value indicates whether the maintenance requirement is one time or repetitive. This field adds appropriate logical validations to the maintenance requirement interval thresholds.

Show (Repetitive) The seeded flag used to show repeating maintenance requirements in the Oracle Complex Maintenance, Repair, and Overhaul Unit Maintenance Plan module. This field is only applicable to repetitive maintenance requirements. The field value can be either All or Next. This value is taken into consideration when Unit Maintenance Plan calculates the Estimated Due Dates list. Based on the Show field value, Unit Maintenance Plan will either show all repeating occurrences for the Unit Maintenance Plan rolling time window, or only the next occurrence. This is especially useful in the case of maintenance requirements that are to be carried out frequently, and would otherwise clutter up a year long report.

Whichever Comes A seeded flag used to determine whether to choose the first or the last due date calculated based on all the interval thresholds defined for the maintenance requirement. The values you can choose from are First and Last. First would indicate an OR condition, and Last would indicate an AND condition for the interval threshold records.

Effective From The effective start date of the maintenance requirement. Only one maintenance requirement revision can be effective at a time instance. The effective start date can be post dated to begin in the future. A revision to a maintenance requirement can be post dated to replace current version as of specified date.

Billing Item Billing items must be setup in Oracle Inventory. Billing items are defined as non-stockable and non-transactable items. Whenever a maintenance requirement with a billing item is added to a visit, the price of the billing item is taken into account when estimating the price of the visit.

Quality Inspection Type You can create the different Inspection Types for route and/or operation quality recording. The inspection types are maintained in a

seeded collection element called Inspection Type. A Collection Element is a data structure that you use to collect quality results.

Visit Category Visit Category for an MR is used to communicate a capability need to Visit Work Package. When a visit is created in Visit Work Package, the user can take into account the capability of a facility and only select MRs that are within that capability.

Follows After Accomplishment of The maintenance requirement after the accomplishment of which the maintenance requirement being created can be performed. This field is optional.

Description The maintenance requirement description. The description may be anything that identifies additional information.

Comments Text field where you can enter any user oriented comments.

Downtime Downtime is the total amount of time needed to complete the related MR.

Fields on the Update Attached Documents Page

The following fields appear on the Update Attached Documents Page:

Association Type indicates whether the document being attached is a source document or a reference document. The field value can be either Source or Reference. A Source association type indicates that the attached document is the originating document of the maintenance requirement, and a Reference association type indicates that the document is a supporting document.

Number Unique identifier, generated by the organization to identify a maintenance document. If you do not know the document number, enter% in the field, and click the search icon to launch the Select Number page that displays all the document references in the database. Click the relevant record to return this value to the Number field on the Update Attached Documents page.

Title The title of the maintenance document. This field value returns when you enter the document Number.

Type represents the major topic such as power plant, fleet unit, and ground support equipment that is described by the document in question. This field value is returned when you enter the document Number.

Revision Field that holds a user-assigned document revision identifier. This field is populated when the document Number value is returned.

Chapter The specific chapter in the document related to the maintenance requirement. This is a free text field where you can enter the chapter information.

Section The specific section in the document chapter that relates to the maintenance requirement record. This is a free text field where you can enter the section information.

Subject The subject within the document relating to the maintenance requirement. This is a free text field where you can enter the subject information.

Page The page in the document that deals with the section relating to the maintenance requirement. This is a free text field. Enter the page number here.

Figure Any figures in the document that are related to the maintenance requirement. This is a text field. Enter the figure detail here.

Note Text field where you can enter any additional information regarding the document attached to the maintenance requirement.

Fields on the Update Attached Routes Page

The following fields appear on the Update Attached Routes page:

Route Number User-assigned identifier for a maintenance route. You can retrieve this number from the List of Values by entering%, and clicking the search icon. This launches the Select Route Number page. Click the pertinent record to return this value to the Route Number field.

Route Description provides more information about the maintenance route. This field is populated when the Route Number field value is returned.

Product Type Classification by category, of the electromechanical system to which the maintenance route applies. This field is populated when the Route Number field value is returned.

Operator The organization operating the concerned equipment. This field is populated when the Route Number field value is returned.

Revision Number Field that holds a system driven maintenance route revision identifier. This field is populated when the Route Number field value is returned.

Fields on the Route Dependencies Page

The following fields appear on the Route Dependencies page:

Dependency Order in which maintenance routes associated to a maintenance requirement are to be carried out. The seeded field values include Execute Before and Execute After. You can choose between these values to set the order of this maintenance route accomplishment before or after another maintenance route associated to the same maintenance requirement.

Route Number User-assigned identifier for a maintenance route. You can retrieve this number from the List of Values by entering%, and clicking the search icon. This launches the Select Route Number page. In this case, the Route Number List of Values will show only routes associated to the maintenance requirement in context. Click the pertinent record to return this value to the Route Number field.

Route Description Information which provides more information about the maintenance route. This field is populated when the Route Number field value is returned.

Product Type Classification, by category, of the electromechanical system to which the maintenance route applies. This field is populated when the Route Number field value is returned.

Operator Organization operating the concerned equipment. This field is populated when the Route Number field value is returned.

Fields on the Update Attached Actions Page

The following fields appear on the Update Attached Actions page:

Action User defined action to be carried out at the time of maintenance requirement accomplishment. For example, at the accomplishment of this maintenance requirement, e-mail the equipment owner with data from findings. The Action could be called Owner Report.

Action Description is read only, and is carried forward from the Lookup values. Description further describes the action or Quality Control Plan for the maintenance requirement. With reference to the above example for action, the Action Description could be E-mail owner with data.

Quality Collection Plan represents the Quality Collection Plan identifier. This provides a link to Oracle Quality, where a workflow can be set up, for example, to automatically e-mail data when maintenance requirement is accomplished.

Fields on the Update Effectivity Page

The following fields appear on the Update Effectivity page:

Effectivity User defined name for the effectivity. The name is unique across all effectivities for a given maintenance requirement, and can relate to the actual application of the effectivity or maintenance requirement further describing its purpose. For example, Boeing 737, MD 80, Cold Weather.

Item Number The Inventory item identification number. This refers to the Part Number that the maintenance requirement is applicable to in the context of the effectivity.

Master Configuration Position The master configuration position to which the maintenance requirement applies to in the context of the effectivity. This indicates that the maintenance requirement would apply to a part installed in a specific position of the configuration. For detailed instructions, see [Retrieving Existing Master Configuration Records](#).

Master Configuration Item points to the alternate item which can be installed in the specified master configuration position. The maintenance requirement applies to the item in this position.

Product Classification Node The Product Classification node to which the maintenance requirement applies. Product Classification refers to the logical grouping of a product family. An Item or a Master Configuration Position must be defined for the maintenance requirement effectivity in addition to the product classification node. The maintenance requirement will then be applicable to the item when it is installed in the specified product classification only.

Fields on the Update Effectivity Details Page

The following fields appear on the Update Effectivity Details page:

Serial Number From allows you to enter any context item serial number to define the start of the serial number range to which the maintenance requirement applies. You can use a lookup from existing inventory serial numbers to populate this field, or enter any value here to allow accommodation of unknown new inventory, not yet owned, but would be affected by the maintenance requirement.

Serial Number To The serial number that ends the serial number range to which the maintenance requirement applies. You can use a lookup from existing inventory serial numbers to populate this field, or enter any value here to allow accommodation of unknown new inventory that is not yet owned, but would be affected by the maintenance requirement. The Serial Number To field value can be the same as the Serial Number From value if only one item serial number is affected by the maintenance requirement.

Manufacturer The item manufacturer identity. The current validation against this field is not in effect as manufacturer has a one to one relationship with Item Number.

Manufacture Date From denotes the starting item manufacturing date to which the maintenance requirement applies. This field value is used to define effectivity for items with manufacturing dates within a specified range.

Manufacture Date To represents the ending item manufacturing date to which the maintenance requirement applies. This field value is used to define effectivity for items with manufacturing dates within a specified range.

Country represents the country of origin. The current validation against this field is not in effect as country of origin is not stored against an instance of an item. Serial number range is often used for defining this item attribute.

Fields on the Update Interval Threshold Page

The following fields appear on the Update Interval Threshold page:

Calendar Due (Threshold Date) represents the calendar due date for the maintenance requirement effectivity. This attribute can be defined only for a one time (non-repetitive) maintenance requirement, and is used in conjunction with other one time intervals.

Counter The associated counter identifier. The associated counter is used for all the numerical values of the row including Interval, Tolerances, Start, and Stop.

Interval The interval value for repetitive maintenance requirements, and drop-dead counter values for one time maintenance requirements. When used with one time maintenance requirements, interval will be a count down of the associated counter. When used with repetitive maintenance requirements, interval will represent the frequency of occurrence according to the associated counter.

Start The start counter value of the range from which the interval specified is valid. Start value is mutually exclusive with the Stop value, and begins the range for the interval in relation to the associated counter. This field does not apply for one time maintenance requirements.

Stop The stop counter value of the range before which the interval specified is valid. This value is mutually exclusive with the Start value, and ends the range for the interval in relation to the associated counter. This field does not apply for one time maintenance requirements.

Start Date The start date of the range before which the interval specified is valid. This field value is mutually exclusive with the Stop Date, and begins the range for the interval in relation to the associated counter. This field does not apply for one time maintenance requirements.

Stop Date The stop date of the range before which the interval specified is valid. This date is mutually exclusive with Start Date, and ends the range for the interval in relation to the associated counter. This field is not applicable for one time maintenance requirements.

Tolerance Before The number of counter units of measure that is acceptable for maintenance requirement accomplishment before the specified interval. This aids in planning maintenance jobs.

Tolerance After The number of counter units of measure that is permissible for maintenance requirement accomplishment after the specified interval. This value aids in planning maintenance jobs.

UOM The Unit of Measure as per the associated counter. This field value is returned when the counter is selected. This value is not editable.

Fields on the Maintenance Requirement Relationships Page

The following fields appear on the Maintenance Requirement Relationships page:

Title User defined maintenance requirement name. Enter the generic substitution metacharacter% and click the Search icon to retrieve the list of maintenance requirement records that exist in the database. Click the pertinent record in the list of values to return the value to the Title field.

Revision The revision number of the maintenance requirement. This value if it exists, further identifies the maintenance requirement. This field is populated when the Title field value is returned.

Relationship Type indicates whether the attached maintenance requirement relates as a parent or a child to the context maintenance requirement. The field values can be either Parent or Child. Relationship Type Parent implies that the attached maintenance requirement would include the context maintenance requirement, and Relationship Type Child implies that a context maintenance requirement would include the attached maintenance requirement.

Description The maintenance requirement description. The description may be anything that identifies more information about the maintenance requirement. This field is populated when the Title field value is entered.

Program Type The user defined maintenance requirement program type. Program Types are used to classify or group maintenance requirements, and can be used in conjunction with Program Subtypes. For example, Letter Check, Corrosion, Modification. This field is populated when the material requirement Title is entered.

Status The seeded revision status of the maintenance requirement. This is either Draft, Complete, Approval Pending, Approval Rejected, or Terminated. Statuses are not user definable or editable, and only indicate whether the maintenance requirement details and associated information are editable. This field is populated when the maintenance requirement Title field value is returned.

Effective From The effective start date of the maintenance requirement. Only one maintenance requirement revision can be effective at a time instance. This field is populated when the Title field value is entered.

Effective To The effective maintenance requirement end date. Only one maintenance requirement revision can be effective at a time instance. This field is populated when the Title field value is entered.

Fields on the View Affected Items Page

The following fields appear on the View Affected Items page:

Item Number is the Inventory item identification number. This refers to the Part Number that the maintenance requirement is applicable to in the context of the effectivity.

Serial Number The part serial number to which the maintenance requirement applies. This is derived from the serial number ranges you set for maintenance requirement effectivity on the Update Effectivity Details page.

Location is an attribute of the item instance that is affected by the maintenance requirement, and is one of the standard item identifiers. The field value refers to the part location.

Status is an attribute of the item instance that is affected by the maintenance requirement, and is one of the standard item identifiers.

Owner refers to the item owner. This is an attribute of the item instance that is affected by the maintenance requirement, and is a standard item identifier. This attribute is defined when a part information is added or updated.

Condition is an attribute of the item instance that is affected by the maintenance requirement, and is one of the standard item identifiers.

Unit The top node of the unit configuration that this particular item instance is part of. When you click the Unit link, the unit configuration page for the item opens.

Creating Maintenance Requirement Records

The Fleet Maintenance Program module leads you through six steps to create a maintenance requirement record. The first step creates a record of the maintenance requirement in the database, while the steps that follow help you update the record, and define the attributes of the requirement including associated maintenance routes, source and reference documents, actions required, maintenance requirement effectivity, and relationships.

To update maintenance requirement records, see [Updating Maintenance Requirement Details](#).

To revise a maintenance requirement with the status “Complete”, see [Creating Maintenance Requirement Revisions](#).

The following process initiates the creation of a maintenance requirement. The Create Maintenance Requirement page permits you to save the record in the database, before proceeding to update the record, or define the attributes in the following pages.

Prerequisites:

You should know the Maintenance Requirement Category, Program Type, Program Sub Type, and the Service Type. These values must exist in the database. Moreover, the Program Type and Program Sub Type combination must be defined. See [Associating Program Sub Types to Program Types](#).

To create maintenance requirement records:

1. Click the Engineering link on the top right corner of the Oracle Complex Maintenance, Repair, and Overhaul Home page. Select the Fleet Maintenance Program tab. The Fleet Maintenance Program module opens with the Search Maintenance Requirements displayed under the Overview secondary tab.

Figure 2–1 Search Maintenance Requirements page

ORACLE

Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Document Index

Route Management

Fleet Maintenance Program

Overview | Program Type Associations

Search Maintenance Requirements

Title

Originating Document

Program Type

Category

Associated Item

Go

Clear

Revision

Status

Parent Title

Description

Route Number

Maintenance Requirements Results

Create

Select	Title	Description	Program Type	Status	Effective From	Effective To	Effectivity	Relationships
No records were found matching the given criteria..								

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- 2. Click Create on the Search Maintenance Requirements page to launch the Create Maintenance Requirement page that allows you to perform the first of eight successive steps in the process of creating a maintenance requirement.
- 3. Enter field values. Asterisks indicate mandatory fields. For field descriptions, see [Fields on the Create and Update Maintenance Requirement Pages](#).

Note:

The Status value defaults to Draft and the Version value defaults to 1 when you create the record.

Figure 2–2 Create Maintenance Requirement page

ORACLE[®] Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Overview | Program Type Associations

Create Maintenance Requirement

* Indicates required field

Cancel

Revert

Apply

Maintenance Requirement Information

* Title

Requirement1

Status

Draft

Version

1

Revision Number

* Category

Ground Service Equipment

* Program Type

Corrosion

Program Subtype

* Service Type

On

* Implement Status

Mandatory

* Repetitive

Yes

Show

All

* Whichever Comes

First

* Effective From

06-AUG-2004

Billing Item

Quality Inspection Type

- 4. Optionally, select a Quality Inspection Type using the LOV icon. Associating a Quality Inspection Type with the MR, will invoke a Quality Collection Plan based on the transaction and the organization when signing off the MR, and make it mandatory for the user to enter quality results. Do not associate a Quality Inspection Type if the Implementation status is 'Optional- Implement'.
- 5. Optionally, select a Billing Item using the Billing Item LOV icon. The Billing Item is used in estimating the price for a Visit.
- 6. Optionally, select a Visit Category from the Visit category LOV. When creating visits, planners can search for and add maintenance requirements to visits, based on the Visit Category.
- 7. Optionally, enter a Down Time value.

Note: Visit Category and Down Time provide additional search criteria and enable the planner to select specific maintenance requirements to associate with a visit.

- 8. Click Apply to save the maintenance requirement record in the database, and proceed to the Update Maintenance Requirements page to edit the maintenance requirement details, or navigate to define the maintenance requirement attributes.

Figure 2–3 Update Maintenance Requirement page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document IndexRoute ManagementFleet Maintenance Program

Overview | Program Type Associations

Details

Documents

Routes

Effectivities

Relationships

Affected Items

Update Maintenance Requirement

CancelApproveRevertAp

* Indicates required field

Maintenance Requirement Information

TitleRequirement1

StatusDraft

Version1

Revision Number

* CategoryGround Service Equipment

* Program TypeCorrosion

Program Subtype

* Service TypeOn

* Implement StatusMandatory

* RepetitiveYes

* Whichever ComesFirst

* Effective From06-AUG-2004

Billing Item

Quality Inspection Type

ShowAll

- 9. To define the maintenance requirement attributes, such as reference and source documents, associated maintenance routes, actions required, maintenance requirement effectivity, and relationships, use the side navigation menu.

See:

- [Attaching Documents to a Maintenance Requirement](#)

2-20 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

- [Associating Routes to a Maintenance Requirement](#)
- [Defining Maintenance Requirement Effectivity](#)
- [Defining Maintenance Requirement Relationships](#)

Retrieving Existing Maintenance Requirement Records

Maintenance organizations refer to existing maintenance requirement records while defining solutions for related equipment maintenance. Oracle Complex Maintenance, Repair, and Overhaul allows maintenance personnel to efficiently retrieve any maintenance requirement record that exists in the database to define maintenance requirement effectivity, to establish relationships between different maintenance requirements, to update the record, associate routes to the requirement, or to attach documents to the requirement.

While entering the search criteria, use the generic substitution metacharacter% to represent any string of zero or more characters. Use _ to represent any single character. For example, if the database contains a record with the value "ENGINE" in a field, typing "E%" will return all records where the field value begins with "E".

Prerequisites:

The maintenance requirement record you want to retrieve must exist in the database.

To retrieve existing maintenance route records:

1. Click the Engineering link on the upper right corner of the Oracle Complex Maintenance, Repair, and Overhaul Home page. Select the Fleet Maintenance Program tab. The Fleet Maintenance Program module opens with the Search Maintenance Requirements displayed under the Overview secondary tab.
2. Enter the information in the fields for which you know the value. For field descriptions, see [Fields on the Search Maintenance Requirements Page](#).

Figure 2–4 Enter Search Criteria - Search Maintenance Requirements page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Overview | Program Type Associations

Search Maintenance Requirements

Title

Originating Document

Program Type

Category

Associated Item

Go

Clear

Revision

Status

Parent Title

Description

Route Number

Maintenance Requirements Results

Create

SelectTitleDescriptionProgram TypeStatusEffective FromEffective ToEffectivityRelationships

No records were found matching the given criteria..

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- 3. Click Go. The lower half of the page displays the Maintenance Requirement List of all matching records in the database.

Figure 2–5 View Maintenance Requirement Search Results - Search Maintenance Requirements page

ORACLE Oracle Complex MRO

[Home](#)
[Engineering](#)
[Configuration](#)
[Planning](#)
[Administration](#)
[Execution](#)
[Profile](#)
[Sign Out](#)
[Help](#)

[Document Index](#)
[Route Management](#)
[Fleet Maintenance Program](#)

[Overview](#) | Program Type Associations

Search Maintenance Requirements

Title
 Originating Document
 Program Type
 Category
 Associated Item

Revision
 Status
 Parent Title
 Description
 Route Number

Maintenance Requirements Results

Select	Title	Description	Program Type	Status	Effective From	Effective To	Effectivity	Relationships
<input type="radio"/>	21-040-00	Replace the electrical and electronic compartment supply fan filter.	Letter Check	Complete	07-NOV-2002	13-NOV-2002		
<input type="radio"/>	21-040-00	Replace the electrical and electronic compartment supply fan filter.	Letter Check	Complete	13-NOV-2002			
<input type="radio"/>	21-040-00	Replace the electrical and electronic compartment supply fan filter.	Letter Check	Draft	07-JUL-2004			
<input type="radio"/>	21-150-00	Replace cabin temperature sensor.	Letter Check	Complete	07-NOV-2002	13-NOV-2002		

- To restart a search, click Clear. (If you have retrieved records being displayed in the lower half of the page, these records will remain).

After entering the new search criteria, click Go to begin searching the database for records that match.

- To view items affected by a maintenance requirement record, select the pertinent record using the Select radio button, and click View Affected Items.
- To revise a maintenance requirement, select the pertinent record using the Select radio button, and click Create Revision. The Update Maintenance Requirement page appears.

Figure 2–6 Create Revision - Update Maintenance Requirements page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Overview | Program Type Associations

Details

[Documents](#)

[Routes](#)

[Effectivities](#)

[Relationships](#)

[Affected Items](#)

Update Maintenance Requirement

[Cancel](#) [Approve](#) [Revert](#) [A](#)

* Indicates required field

Maintenance Requirement Information

Title27-036-00

StatusDraft

Version

Revision Number

* Category

Airframe

* Program Type

Letter Check

Program Subtype

C

* Service Type

On

* Implement Status

Mandatory

* Repetitive

Yes

* Whichever Comes

First

* Effective From

05-AUG-2004

Billing Item

Quality Inspection Type

ShowAll

Note: You can only create revisions for maintenance requirements that have the Status “Complete”.

- 7. To edit maintenance requirement details, attached routes, attached documents, actions, effectivities, and relationships, click the pertinent Title link. For example, you can click the Routes link and update the attached routes.

Figure 2–7 Update Attached Routes page

ORACLE

Oracle Complex MRO

[Home](#)
[Engineering](#)
[Configuration](#)
[Planning](#)
[Administration](#)
[Execution](#)
[Profile](#)
[Sign Out](#)
[Help](#)

[Document Index](#)
[Route Management](#)
[Fleet Maintenance Program](#)

[Overview](#)
[Program Type Associations](#)

[Details](#)
[Documents](#)
[Routes](#)
[Effectivities](#)
[Relationships](#)
[Affected Items](#)

Update Attached Routes

Title 27-036-00

Status **Draft**

Revision

Category **AIRFRAME**

Program Type **Letter Check**

Program Subtype C

Routes List

Previous 1-1 of 1 Next

Cancel

Attach Routes

Revert

Apply

Remove	Route Number	Route Description	Item Type	Operator	Revision Number	Dependency
<input type="checkbox"/>	27-036-00-00	Aft rudder quadrant	MRO Aircraft		1	

Add More Rows

Previous 1-1 of 1 Next

[Document Index](#)
[Route Management](#)
[Fleet Maintenance](#)

Program
[Home](#)
[Engineering](#)
[Configuration](#)
[Planning](#)
[Administration](#)
[Execution](#)
[Profile](#)
[Sign Out](#)
[Help](#)

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Note: You can update these attributes only for a maintenance requirement that is in the Draft or Approval Rejected state. If the selected maintenance requirement is in the Complete, Terminated, or Approval Pending states, the application generates the details and attribute pages as view-only.

You can also update (records in editable statuses) or view effectivity definitions and relationship associations by clicking the Effectivity and Relationships icons corresponding to the pertinent record.

- You can terminate a maintenance requirement that is in the status of 'Complete'. Select the record from the Maintenance Requirements Results table, and click Terminate. The approval workflow is initiated, and the status of the MR changes to Termination pending. On approval, the status will change to

Terminated and the MR instance will be removed from the applicable Unit Maintenance plan, else the status will revert to Complete.

Note: You cannot make any revisions from a terminated MR. A terminated MR cannot also be added to a visit.

9. You can delete an MR, which is in the Draft or Approval Rejected status. Select the record from the Maintenance Requirements Results table, and click Delete.

Attaching Documents to a Maintenance Requirement

Fleet Maintenance Program allows you to attach source and reference documents to a maintenance requirement.

Source or originating documents identify the origin of a maintenance requirement. The Oracle Complex Maintenance, Repair, and Overhaul Document Index module serves as the central location for these documents. Multiple originating documents can be applicable to one maintenance requirement. Reference documents refer to supporting documents. This enhances operational efficiency, providing maintenance personnel at all levels ready access to related documents during the maintenance process.

Note: You cannot edit the documents that are attached to a maintenance requirement flagged as Complete, Terminated, or Approval Pending. The system launches the View Attached Documents page (view-only mode) instead of the Update Attached Documents page when the maintenance requirement is in any of these states.

Prerequisites:

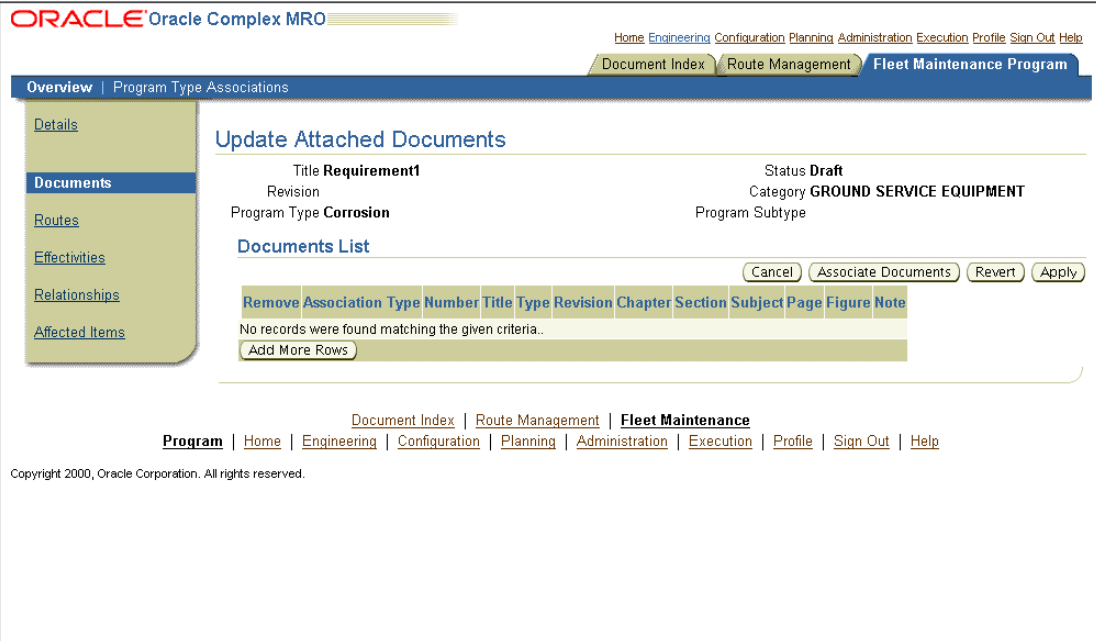
The document records and the maintenance requirement record to which you want to attach the documents must exist in the database. The maintenance requirement record must be in the Draft or Approval Rejected state.

To attach documents to a maintenance requirement:

1. Retrieve the maintenance requirement records that match your needs. See [Retrieving Existing Maintenance Requirement Records](#).

2. In the Search Results list, click the Title link of the pertinent record to launch the Update Maintenance Requirement page. The side navigation menu is accessible from this page.
3. On the side navigation menu, click Documents to launch the Update Attached Documents page.

Figure 2–8 Attach documents to MR - Update Attached Documents page



ORACLE Oracle Complex MRO

Home [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Overview | Program Type Associations

[Details](#)

Documents

[Routes](#)

[Effectivities](#)

[Relationships](#)

[Affected Items](#)

Update Attached Documents

Title **Requirement1** Status **Draft**
Revision
Program Type **Corrosion** Category **GROUND SERVICE EQUIPMENT**
Program Subtype

Documents List

[Cancel](#) [Associate Documents](#) [Revert](#) [Apply](#)

Remove	Association	Type	Number	Title	Type	Revision	Chapter	Section	Subject	Page	Figure	Note
No records were found matching the given criteria.												

[Add More Rows](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance](#)

Program | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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If documents have already been attached to the maintenance requirement, the Documents List shows the attached documents. These attachments can be updated by altering the values in the Documents List fields if the maintenance requirement record is in the Draft or Approval Rejected state.

For field descriptions, see [Fields on the Update Attached Documents Page](#).

4. To attach new documents to the maintenance requirement record, Add More Rows. Click the Number LOV icon to access the Select Number page. Query for a document number. The results will be displayed in the lower half of the page.

Figure 2–9 Select Number page

HomeEngineeringConfigurationPlanningAdministrationExecutionProfileSign Out

Document IndexRoute ManagementFleet Maintenance Program

Overview | Program Type Associations

Select Number

Enter Partial Value %

SearchCancel

Number	Title	Type	Revision	Status
MBAH019		Aircraft	1	Current
MBAH019		Aircraft	test	Current
000-BBHAT-000	Bhat's	Locomotive	#%@^	Current
000-BBHAT-000	Bhat's	Locomotive	\$#@	Current
000-BBHAT-000	Bhat's	Locomotive	11111111111111111111111111111111	Current
000-BBHAT-000	Bhat's	Locomotive	123-Q	Current
000-BBHAT-000	Bhat's	Locomotive	Rev1	Current
000-BBHAT-000	Bhat's	Locomotive	Rev2	Current
000-BBHAT-000	Bhat's	Locomotive	Rev3	Current
000-BBHAT-000	Bhat's	Locomotive	RevRad1	Current

First | Previous 1 - 10 of 106Next | Last

Cancel

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- 5. Select a Document Number. The Update Attached Documents page appears displaying the document association. Click Apply to save the record.

Figure 2–10 Update Attached Documents page

ORACLE Oracle Complex MRO

Home [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) **Fleet Maintenance Program**

Overview | Program Type Associations

[Details](#)
Documents
[Routes](#)
[Effectivities](#)
[Relationships](#)
[Affected Items](#)

Update Attached Documents

Title **27-036-00** Status **Draft**
Revision
Program Type **Letter Check** Category **AIRFRAME**
Program Subtype **C**

Documents List

[Cancel](#) [Associate Documents](#) [Revert](#) [Apply](#)

Previous 1-1 of 1 Next

Remove	Association Type	Number	Title	Type	Revision	Chapter	Section	Subject	Page	Figure	Note
<input type="checkbox"/>	Reference	MBAh019	Aircraft 1								

[Add More Rows](#)

Previous 1-1 of 1 Next

[Document Index](#) | [Route Management](#) | **[Fleet Maintenance](#)**

Program | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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- To select and associate multiple documents to an MR, click Associate Documents. The Search Document page is displayed.

Figure 2–11 Search Document page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Document IndexRoute ManagementFleet Maintenance Program

Overview | Program Type Associations

Search Document

Source

Title

Document Type

Operator

Media Type

Go

Clear

Document Number

Status

Sub Type

Item Type

Search Results

Cancel

SelectDocument NumTitleTypeSub TypeRevision NumRevision TypeStatus

No records were found matching the given criteria..

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- 7. Retrieve the document references that match your requirement. For detailed instructions, see [Finding Document References](#).

Figure 2–12 View Document Search Results - Search Document page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Overview | Program Type Associations

Search Document

Source Document Number

Title Status

Document Type Sub Type

Operator Item Type

Media Type

Search Results

Select object and...

Previous 1-10 of 357500 Next

Select	Document Num	Title	Type	Sub Type	Revision Num	Revision Type	Status
<input type="checkbox"/>	000-BBHAT-000	Bhat's Locomotive Component Overhaul Manual	11111111111111111111111111111111	Temporary Revision	Current		
<input type="checkbox"/>	000-BBHAT-000	Bhat's Locomotive Component Overhaul Manual	11111111111111111111111111111111	Temporary Revision	Current		
<input type="checkbox"/>	000-BBHAT-000	Bhat's Locomotive Component Overhaul Manual	11111111111111111111111111111111	Temporary Revision	Current		
<input type="checkbox"/>	000-BBHAT-000	Bhat's Locomotive Component Overhaul Manual	11111111111111111111111111111111	Temporary Revision	Current		

8. From the Search Results, select the document records using the Select checkbox, and click Associate to return this record to the Documents List in the Update Attached Documents page.
9. Click Apply on the Update Attached Documents page to save the changes.

Note: To attach new documents to the maintenance requirement, you can also click Add More Rows, enter the field values as described above, and click Apply. This, however, limits the search criteria you can use to find the required document.

10. To remove an attached document from the Documents List, select the Remove checkbox beside the record you want to remove, and click Apply.

Associating Routes to a Maintenance Requirement

Fleet Maintenance Program allows maintenance organizations to search for maintenance route records that are created and stored in the database using the Oracle Complex Maintenance, Repair, and Overhaul Route Management module, and to associate them to maintenance requirements. One maintenance requirement can be associated to multiple routes, and each route can be associated to multiple maintenance requirements. Fleet Maintenance Program module also allows you to set a dependency to the attached routes.

Note: You cannot edit the maintenance routes assigned to a maintenance requirement flagged as Complete, Terminated, or Approval Pending. The system launches the Update Attached Routes page in a view-only mode when the maintenance requirement is in any of these states.

Prerequisites:

The maintenance route records and the maintenance requirement record to which you want to associate the routes must exist in the database. The maintenance requirement record must be in the Draft or Approval Rejected state.

To associate maintenance routes to a maintenance requirement:

1. Retrieve the maintenance requirement records that match your needs. See [Retrieving Existing Maintenance Requirement Records](#).

Figure 2–13 Maintenance Requirement Search Results

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Overview | Program Type Associations

Search Maintenance Requirements

Title

Originating Document

Program Type

Category

Associated Item

Revision

Status

Parent Title

Description

Route Number

Go

Clear

Maintenance Requirements Results

Create

Select Maintenance Requirement and..

View Affected Items

Create Revision

Approve

Delete

Terminate

Previous

1-10 of 50

Next

Select	Title	Description	Program Type	Status	Effective From	Effective To	Effectivity	Relationships
<input type="radio"/>	27-036-00	Perform detail inspection of rudder components.	Letter Check	Draft	05-AUG-2004			
<input type="radio"/>	29B9999MR		Phase	Draft	31-MAR-2004			
<input type="radio"/>	CK-1		Corrosion	Draft	21-APR-2004			
<input type="radio"/>	CK-2	CK-MR Test	Corrosion	Draft	19-APR-2004			

2. In the Search Results list, click the Title link of the pertinent record to launch the Update Maintenance Requirement page.

Managing Maintenance Requirements 2-33

Figure 2–14 Maintenance Requirement Information - Update Maintenance Requirement page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Overview | Program Type Associations

Details

[Documents](#)

[Routes](#)

[Effectivities](#)

[Relationships](#)

[Affected Items](#)

Update Maintenance Requirement

Cancel

Approve

Revert

* Indicates required field

Maintenance Requirement Information

Title

27-036-00

Status

Draft

Version

Revision Number

* Category

Airframe

* Program Type

Letter Check

Program Subtype

C

* Service Type

On

* Implement Status

Mandatory

* Repetitive

Yes

* Whichever Comes

First

* Effective From

05-AUG-2004

Billing Item

Quality Inspection Type

Show

All

3. On the side navigation menu, click Routes to launch the Update Attached Routes page.

Figure 2–15 Attach Routes to MR - Update Attached Routes page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Overview | Program Type Associations

[Details](#)
[Documents](#)
Routes
[Effectivities](#)
[Relationships](#)
[Affected Items](#)

Update Attached Routes

Title **27-036-00**

Status **Draft**

Revision

Category **AIRFRAME**

Program Type **Letter Check**

Program Subtype **C**

Routes List

Previous

1-1 of 1



Next

Cancel

Attach Routes

Revert

Apply

Remove	Route Number	Route Description	Item Type	Operator	Revision Number	Dependency
<input type="checkbox"/>	27-036-00-00	 Aft rudder quadrant	MRO Aircraft		1	

Add More Rows

Previous

1-1 of 1

Next

[Document Index](#) | [Route Management](#) | [Fleet Maintenance](#)
Program | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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If routes have already been attached to the maintenance requirement, the Routes List shows the associated maintenance routes. These routes can be updated by altering the values in the Routes List fields if the maintenance requirement record is in the Draft or Approval Rejected state.

For field descriptions refer to [Fields on the Update Attached Routes Page](#).

- To associate new maintenance routes to the maintenance requirement record, click Attach Routes. This launches the Search Route page.

Managing Maintenance Requirements 2-35

Figure 2–16 Search Route page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Overview | Program Type Associations

Search Route

Route Number

Title

Route Type

Item Type

Major Zone

Organization

Status **Complete**

Process

Operator

Sub Zone

Item

Go

Clear

Route Results

Cancel

Select	Route Number	Title	Route Type	Item Type	Major Zone	Sub Zone	Process	Operator	Revision	Status	Start Date	End Date
No records were found matching the given criteria..												

- 5. Retrieve the desired maintenance route records. For detailed instructions, see [Retrieving Existing Maintenance Route Records](#).

Figure 2–17 Route Search Results

ORACLE[®] Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Overview | Program Type Associations

Search Route

Route Number

Title

Route Type

Item Type

Major Zone

Organization

Go

Clear

Status **Complete**

Process

Operator

Sub Zone

Item

Route Results

Select Route and...

Associate

Previous 1-10 of 242 Next

Select	Route Number	Title	Route Type	Item Type	Major Zone	Sub Zone	Process	Operator	Revision	Status	Start Date	End Date
<input type="checkbox"/>	00-RM-00	00-RM-00							1	Complete	22-APR-2004	07-JUN-2004
<input type="checkbox"/>	00-RM-00	00-RM-00							2	Complete	07-JUN-2004	07-JUN-2004
<input type="checkbox"/>	00-RM-00	00-RM-00							3	Complete	07-JUN-2004	23-JUN-2004
<input type="checkbox"/>	00-RM-00	00-RM-00							4	Complete	07-JUN-2004	23-JUN-2004

6. From the Search Results, select the pertinent record using the Select checkbox, and click Associate to return this record to the Routes List in the Update Attached Routes page.

Figure 2–18 Associate Routes - Update Attached Routes page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Overview | Program Type Associations

Details

Documents

Routes

Effectivities

Relationships

Affected Items




Update Attached Routes

Title 27-036-00
Revision
Program Type Letter Check
Status Draft
Category AIRFRAME
Program Subtype C

Routes List

Cancel Attach Routes Revert

Previous 1-1 of 1 Next

Remove	Route Number	Route Description	Item Type	Operator	Revision Number	Dep
<input type="checkbox"/>	27-036-00-00	 Aft rudder quadrant	MRO Aircraft		1	
	00-RM-00	 00-RM-00			1	

Add More Rows

Previous 1-1 of 1 Next

Document Index | Route Management | Fleet Maintenance

Program | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

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7. Click Apply on the Update Attached Routes to save the changes.

Note: To attach new routes to the maintenance requirement, you can also click Add More Rows, and query for the route using the Route Number LOV icon.

8. To set the route dependency, click on the Dependency icon for the route. This launches the Route Dependencies page. For detailed instructions, see [Setting Maintenance Route Dependencies](#).

9. To view the Route Details, click the Route Description link. The View Route page appears displaying the route details.

2-38 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 2–19 View Route page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Overview | Program Type Associations

Details

Reference Documents

Resource Requirements

Material Requirements

Associate Operations

Disposition Associations

View Route

Cancel

Route Information

Route Number 27-036-00-00	Status Complete
Revision 1	Revision Notes
Title Aft rudder quadrant	Time Span 2 Hours
Route Type Aircraft	Process
Item Type MRO Aircraft	Operator
Major Zone Empennage	Sub Zone Vertical Stabilizer
Service Item	Quality Inspection Type
Accounting Class	Task Template Group
System ..	

Start Date **07-NOV-2002**

Remarks **Perform detail visual inspection of the following aft rudder components**

Cancel

Document Index | Route Management | Fleet Maintenance

Program | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

- To remove an associated maintenance route from the Routes List, select the Remove checkbox corresponding to the record you want to remove, and click Apply.

Setting Maintenance Route Dependencies

Fleet Maintenance Program permits maintenance organizations to attach existing maintenance route records to maintenance requirements, and to set an order in which the maintenance routes are to be performed.

The Route Dependencies page is accessible from the Update Associated Routes page. The values for Dependency can be chosen as Execute Before, or Execute After. Only Route Numbers corresponding to routes associated to the maintenance requirement will be displayed in the context. If a maintenance route is associated to another route, then the system returns an error.

Note: You cannot edit the maintenance route dependencies assigned to a maintenance requirement flagged as Complete, Terminated, or Approval Pending. The system opens the View Route Dependencies page (view-only mode) instead of the Update Route Dependencies page when the maintenance requirement is in any of these states.

Prerequisites:

The maintenance requirement record must be in the Draft or Approval Rejected state.

To define maintenance route dependencies:

1. Associate the appropriate maintenance routes with the maintenance requirement record. See [Associating Maintenance Routes to a Maintenance Requirement](#).
2. Click the Dependency tree icon corresponding to the route that you want to set the dependency for. This launches the Route Dependencies page with the maintenance requirement and route context information.

Figure 2–20 Route Dependencies page

ORACLE Oracle Complex MRO

Home [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Overview | Program Type Associations

[Details](#)
[Documents](#)
Routes
[Effectivities](#)
[Relationships](#)
[Affected Items](#)

Route Dependencies

Title **27-036-00** Status **Draft**
Revision
Category **AIRFRAME**
Program Type **Letter Check** Program Subtype **C**
Route Number **27-036-00-00** Revision Number **1**
Operator Item Type **MRO Aircraft**

Dependency List

[Cancel](#) [Revert](#) [Apply](#)

Remove Dependency	Route Number	Route Description	Item Type	Operator	Revision Number
No records were found matching the given criteria.					
Add More Rows					

[Document Index](#) | [Route Management](#) | [Fleet Maintenance](#)

[Program](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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If other maintenance route dependencies have already been defined for the requirement record, the Route Dependencies List shows the existing dependencies. These dependencies can be updated by altering the values in the Route Dependencies List fields if the maintenance requirement record is in the Draft or Approval Rejected state.

For field descriptions, see [Fields on the Route Dependencies Page](#).

- To set new route dependencies for the maintenance requirement, click Add More Rows, and enter the required values.

Figure 2–21 Add Route Dependencies - Route Dependencies page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Document IndexRoute ManagementFleet Maintenance Program

Overview | Program Type Associations

Details

Documents

Routes

Effectivities

Relationships

Affected Items

Route Dependencies

Title **CMR003**

Revision

Program Type **Special**

Route Number **111220031307**

Operator

Status **Draft**

Category **GROUND SERVICE EQUIPMENT**











Program Subtype

Revision Number **1**

Item Type

Dependency List

CancelRevertApply

Remove	Dependency	Route Number	Route Description	Item Type	Operator	Revision Number
	Executed Before	28-020-01-00	 Operationally check	MRO Aircraft		2
	Executed Before					
	Executed Before					
	Executed Before					
	Executed Before					

Add More Rows

- 4. Click Apply to save the route dependencies.

2-42 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 2–22 Save Route Dependencies - Route Dependencies page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Overview](#) | [Program Type Associations](#)

[Details](#)
[Documents](#)
[Routes](#)
[Effectivities](#)
[Relationships](#)
[Affected Items](#)

Route Dependencies

Title **CMR003**
 Revision
 Program Type **Special**

Status **Draft**
 Category **GROUND SERVICE EQUIPMENT**
 Program Subtype

Route Number **111220031307**
 Operator

Revision Number **1**
 Item Type

Dependency List

Previous
 1-1 of 1
 Next

Remove	Dependency	Route Number	Route Description	Item Type	Operator	Revision Number
<input type="checkbox"/>	Executed Before	28-020-01-00	Operationally check left surge tank relief valves	MRO Aircraft	2	

Previous
 1-1 of 1
 Next

[Document Index](#) | [Route Management](#) | [Fleet Maintenance](#)
[Program](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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- To remove a route dependency, click the Remove checkbox beside the pertinent record, and click Apply.

Defining Maintenance Requirement Effectivity

Fleet Maintenance Program permits maintenance organizations to attach Oracle Complex Maintenance, Repair, and Overhaul attributes to maintenance requirements. This automatically notifies maintenance personnel about a maintenance requirement applicability on certain physical components existing in the database.

You can define maintenance requirement effectivity using the Fleet Maintenance Program for a Master Configuration position or alternate item, for an item in Inventory, or for a Product Classification node. You can also define effectivity based on Manufacturer, Serial Number or a range of Serial Numbers, Manufacturing Date, or Country of Origin.

Note: You cannot edit the effectivity definitions for a maintenance requirement flagged as Complete, Terminated, or Approval Pending. The system launches the View Effectivity page (view-only mode) instead of the Update Effectivity page when the maintenance requirement is in any of these states.

Use the following procedure to define maintenance requirement effectivity.

Prerequisites:

The maintenance requirement record for which you want to define effectivities must exist in the database. The maintenance requirement record must be in the Draft or Approval Rejected state.

To define maintenance requirement effectivity:

1. Retrieve the maintenance requirement records that match your needs. See [Retrieving Existing Maintenance Requirement Records](#).
2. In the Search Results list, click the Title link of the pertinent record to launch the Update Maintenance Requirement page. The side navigation menu is accessible from this page.
3. On the side navigation menu, click Effectivities to launch the Update Effectivity page.

Figure 2–23 Update Effectivity page

ORACLE® Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document IndexRoute ManagementFleet Maintenance Program

Overview | Program Type Associations

DetailsDocumentsRoutesEffectivitiesRelationshipsAffected Items

Update Effectivity

Title **27 036-00**Status **Draft**

RevisionProgram Type **Letter Check**Category **AIRFRAME**

Program Subtype **C**

Effectivities List

Previous1-1 of 1NextCancelRevert

Remove	Effectivity	Item	Master Configuration Position	Master Configuration Item	Product Classification Node	Effectivity Details	Interval Threshold	At
<input type="checkbox"/>	C1600	MRO-C1600						
Add More Rows								

Previous1-1 of 1Next

If effectivities have already been defined for the maintenance requirement, the Effectivities List shows the existing effectivity definitions. These definitions can be updated by altering the values in the Effectivities List fields if the maintenance requirement record is in the Draft or Approval Rejected state.

For field descriptions, see [Fields on the Update Effectivity Page](#).

- 4. To define new effectivities for the maintenance requirement, click Add More Rows. Rows with empty fields are displayed where you can enter required values.

Figure 2–24 Define New Effectivities - Update Effectivity page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Overview | Program Type Associations

[Details](#)
[Documents](#)
[Routes](#)
Effectivities
[Relationships](#)
[Affected Items](#)

Update Effectivity

Title 27-036-00
Revision
Program Type Letter Check

Status Draft
Category AIRFRAME
Program Subtype C

Effectivities List

Previous1-1 of 1Next

CancelRevert

Remove	Effectivity	Item	Master Configuration Position	Master Configuration Item	Product Classification Node	Effectivity Details	Interval Threshold	View Affected Items
<input type="checkbox"/>	C1600	MRO-C1600						
		11475M95P05						

Add More Rows

Previous1-1 of 1Next

- 5. Click Apply on the Update Effectivity page to record the changes.
- 6. To remove an effectivity definition from the Effectivities List, select the Remove checkbox beside the record you want to remove, and click Apply.
- 7. To update the details of an effectivity definition, click the Effectivity Details icon corresponding to the record you want to update. This launches the Update Effectivity Details page. For detailed instructions, see [Defining Effectivity Details](#).
- 8. To define intervals and thresholds for an effectivity, click the Interval Threshold icon corresponding to that record. For details, see [Defining Intervals and Thresholds](#).
- 9. To view the items affected by a maintenance requirement effectivity, click the View Affected Items icon corresponding to that effectivity definition. For details, see [Viewing Items Affected by a Maintenance Requirement](#).

Defining Effectivity Details

You can define effectivity details, such as Serial Number Range, Manufacturing Details, and Country of Origin, after defining a maintenance requirement effectivity. Specifying these item details further funnels down the maintenance requirement applicability to specific units.

Note: You cannot edit the effectivity definition details for a maintenance requirement flagged as Complete, Terminated, or Approval Pending. The system launches the View Effectivity Details page (view-only mode) instead of the Update Effectivity Details page when the maintenance requirement is in any of these states.

Prerequisites:

The maintenance requirement record for which you want to define effectivity details must be in the Draft or Approval Rejected state.

To define effectivity details:

1. Define effectivities for the maintenance requirement. See [Defining Maintenance Requirement Effectivity](#).
2. On the Update Effectivity page, click the Effectivity Details icon corresponding to the effectivity definition for which you want to specify details. This launches the Update Effectivity Details page with the maintenance requirement context information.

Figure 2–25 Effectivities List - Update Effectivity page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Document Index

Route Management

Fleet Maintenance Program

Overview | Program Type Associations

Details

Documents

Routes

Effectivities

Relationships

Affected Items

Update Effectivity Details

Title 27-036-00

Status Draft

Revision

Category AIRFRAME

Program Type Letter Check

Program Subtype C

Effectivity C1600

Item MRO-C1600

Master Configuration Position

Master Configuration Item

Product Classification Node

Effectivity Details List

Cancel

Revert

Apply

Remove	Exclude	Serial Number From	Serial Number To	Manufacturer	Manufacture Date From	Manufacture Date To	Country
No records were found matching the given criteria.							
<div>Add More Rows</div>							

Document Index

Route Management

Fleet Maintenance

Program

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

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If other effectivity details have already been defined for the requirement effectivity record, the Effectivity Details List displays the existing details. These details can be updated by altering the values in the Effectivity Details List fields if the maintenance requirement record is in the Draft or Approval Rejected state.

For field descriptions, see [Fields on the Update Effectivity Details Page](#).

- 3. To enter a new effectivity detail row, click Add More Rows.
- 4. Enter the field values as required.

Figure 2–26 Define Effectivity Details - Update Effectivity Details

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management **Fleet Maintenance Program**

Overview | Program Type Associations

[Details](#)
[Documents](#)
[Routes](#)
Effectivities
[Relationships](#)
[Affected Items](#)

Update Effectivity Details

Title **27-036-00** Status **Draft**
Revision
Program Type **Letter Check** Category **AIRFRAME**
Program Subtype **C**

Effectivity **C1600** Item **MRO-C1600**
Master Configuration Position
Product Classification Node Master Configuration Item

Effectivity Details List

Cancel Revert A

Remove	Exclude	Serial Number From	Serial Number To	Manufacturer	Manufacture Date From	Manufacture Date To	Country
	<input type="checkbox"/>	101	103				
	<input type="checkbox"/>						
	<input type="checkbox"/>						
	<input type="checkbox"/>						
	<input type="checkbox"/>						

Add More Rows

5. Click Apply to save the effectivity detail.
6. To exclude an effectivity detail row from the maintenance requirement effectivity, select the Exclude checkbox corresponding to that row, and click Apply. The Exclude flag indicates whether the maintenance requirement effectivity includes or excludes an effectivity detail row.

For example, if you want to exclude from the effectivity, a range of part serial numbers within a serial number range for which the maintenance requirement applies, perform the following tasks:

- a. Click Add More Rows to open a new row.
- b. Enter the Serial Number From and Serial Number To values in this row, defining the range that you want to exclude from the effectivity.
- c. Select the Exclude checkbox beside the range that you want to exclude from the effectivity, and click Apply. The Exclude checkbox being selected serves

as the flag to exclude the serial number range in that effectivity detail row from the maintenance requirement effectivity.

7. To remove an effectivity detail row from the Effectivity Details List, select the Remove checkbox beside the pertinent record, and click Apply.

Defining Intervals and Thresholds

Maintenance organizations use intervals and thresholds to set a schedule that will count down until a maintenance requirement is due for a unit. Fleet Maintenance Program allows organizations to set multiple intervals and thresholds for each effectivity. It links all intervals and thresholds directly to the affected unit's existing counters. You can choose the counter based on which to set an interval and threshold combination. You can choose between "Whichever Comes Last" and "Whichever Comes First" for each set of interval and threshold combination.

Note: You cannot edit the interval and threshold definitions for a maintenance requirement flagged as Complete, Terminated, or Approval Pending. The system launches the View Interval Threshold page (view-only mode) instead of the Update Interval Threshold page when the maintenance requirement is in any of these states.

Prerequisites:

The maintenance requirement record for which you want to define interval threshold must be in the Draft or Approval Rejected state.

To define intervals and thresholds:

1. Define effectivities for the maintenance requirement. See [Defining Maintenance Requirement Effectivity](#).
2. On the Update Effectivity page, click the Interval Threshold icon corresponding to the effectivity definition for which you want to define intervals and thresholds. This launches the Update Interval Threshold page with the maintenance requirement context information.

Figure 2–27 Update Interval Threshold page

ORACLE Oracle Complex MRO

Home [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Overview | Program Type Associations

[Details](#)
[Documents](#)
[Routes](#)
Effectivities
[Relationships](#)
[Affected Items](#)

Update Interval Threshold

Title **27-036-00** Status **Draft**
Revision
Program Type **Letter Check** Category **AIRFRAME**
Program Subtype **C**

Effectivity **C1600** Item **MRO-C1600**
Master Configuration Position
Product Classification Node Master Configuration Item

Interval Threshold List

Repetitive **Yes** [Cancel](#) [Revert](#) [Apply](#)
Whichever Comes **FIRST**

Remove	Start Date	Stop Date	Start Interval	Stop	Tolerance Before	Tolerance After	Reset Value	Counter Name	UOM
No records were found matching the given criteria.									
Add More Rows									

[Document Index](#) | [Route Management](#) | [Fleet Maintenance](#)
Program | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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If other intervals and thresholds have already been defined for the requirement effectivity record, the Interval Threshold List displays the existing records. These intervals and thresholds can be updated by altering the values in the Interval Threshold List fields if the maintenance requirement record is in the Draft or Approval Rejected state.

For field descriptions, see [Fields on the Update Interval Threshold Page](#).

3. To enter a new interval threshold, click [Add More Rows](#) to open new rows.
4. Enter the field values as required.

Figure 2–28 Define New Interval Threshold

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Document Index

Route Management

Fleet Maintenance Program

Overview | Program Type Associations

Details

Documents

Routes

Effectivities

Relationships

Affected Items

Update Interval Threshold

Title 27-036-00

Revision

Program Type Letter Check

Effectivity C1600

Master Configuration Position

Product Classification Node

Status Draft

Category AIRFRAME

Program Subtype C

Item MRO-C1600

Master Configuration Item

Interval Threshold List

Repetitive Yes

Whichever Comes FIRST

Remove	Start Date	Stop Date	Start	Interval	Stop	Tolerance Before	Tolerance After	Reset Value	Count
	09-AUG-2004	10-AUG-2004							

- Note:
- a. You can define a threshold only for one-time (non-repetitive) maintenance requirements. You cannot enter Start, Stop, Start Date, and Stop Date values for one-time maintenance requirements.
 - b. You can add only one interval per counter.
 - c. Start and Stop values cannot overlap.
5. Click Apply to save the interval threshold definition.

Figure 2–29 Save Interval Threshold Definition - Update interval Threshold page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management **Fleet Maintenance Program**

Overview | Program Type Associations

[Details](#)
[Documents](#)
[Routes](#)
Effectivities
[Relationships](#)
[Affected Items](#)

Update Interval Threshold

Title **27.036.00** Status **Draft**
Revision
Program Type **Letter Check** Category **AIRFRAME**
Program Subtype **C**

Effectivity **C1600** Item **MRO-C1600**
Master Configuration Position
Product Classification Node Master Configuration Item

Interval Threshold List

Repetitive **Yes**
Whichever Comes **FIRST**

[Cancel](#) [Rev](#)

Previous 1-1 of 1 Next

Remove	Start Date	Stop Date	Start	Interval	Stop	Tolerance Before	Tolerance After	Reset Value	Counter
<input type="checkbox"/>			0	20	100				CSI

[Add More Rows](#)

Previous 1-1 of 1 Next

- To remove an existing interval threshold definition from the Interval Threshold List for the maintenance requirement, select the Remove checkbox beside the definition you want to remove, and click Apply.

Defining Maintenance Requirement Relationships

Maintenance organizations use group relationships for non-complicated parent child components, where the maintenance requirement accomplishment on the parent component includes the child components. A maintenance requirement is also sometimes linked to the accomplishment of another requirement, creating a dependency between the two. For example, a maintenance requirement MR1 can have a dependency to another requirement MR2 that requires MR2 to be completed before MR1. Fleet Maintenance Program accommodates such dependencies using an attribute of the maintenance requirement that states another requirement as its prerequisite.

Note: You cannot edit the relationships defined for a maintenance requirement flagged as Complete, Terminated, or Approval Pending. The system launches the Relationships page in a view-only mode when the maintenance requirement is in any of these states.

Use the following procedure to create maintenance requirement groups, and define their relationships.

Prerequisites:

The maintenance requirement record for which you want to create groups and define relationships must exist in the database. The maintenance requirement record must be in the Draft or Approval Rejected state.

To define maintenance requirement relationships:

1. Retrieve the maintenance requirement records that match your need. See [Retrieving Existing Maintenance Requirement Records](#).
2. In the Search Results list, click the Title link of the pertinent record to launch the Update Maintenance Requirement page. The side navigation menu is accessible from this page.
3. On the side navigation menu, click Relationships to launch the Maintenance Requirement Relationships page.

Figure 2–30 Maintenance Requirement Relationships page

ORACLE Oracle Complex MRO

Home [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Overview | Program Type Associations

[Details](#)
[Documents](#)
[Routes](#)
[Effectivities](#)
Relationships
[Affected Items](#)

Maintenance Requirement Relationships

Title **27-036-00** Status **Draft**
Revision Program Type **Letter Check** Category **AIRFRAME**
Program Subtype **C**

[Maintenance Requirements List](#)

[Cancel](#) [Attach](#) [Revert](#) [Apply](#)

27-036-00

Previous 1-1 of 1 Next

Remove	Title	Revision	Relationship Type	Description	Program Type	Status	Effective From	Effective To	Relationships
<input type="checkbox"/>	C-Check		Parent	Maintenance group to be performed every 2000 operation hours.	Letter Check	Complete	11-NOV-2002		

[Add More Rows](#)

Previous 1-1 of 1 Next

[Document Index](#) | [Route Management](#) | [Fleet Maintenance](#)

[Program](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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If other maintenance requirement relationships have already been defined for the requirement record, the Maintenance Requirements List shows the existing relationships. These relationship definitions can be updated by altering the values in the Maintenance Requirement List fields if the maintenance requirement record is in the Draft or Approval Rejected state.

For field descriptions, see [Fields on the Maintenance Requirement Relationships Page](#).

- To relate new maintenance requirements to the maintenance requirement record, click **Attach**. This launches the Search Maintenance Requirement page.

Figure 2–31 Retrieve Maintenance Requirements - Search Maintenance Requirements page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Overview | Program Type Associations

Document IndexRoute ManagementFleet Maintenance Program

Search Maintenance Requirements

Title

Originating Document

Program Type

Category

Associated Item

GoClear

Revision

Status

Parent Title

Description

Route Number

Maintenance Requirements Results

Select	Title	Revision	Description	Program Type	Status	Effective From	Effective To
No records were found matching the given criteria..							

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- 5. Retrieve the maintenance requirement records that match your needs. See [Retrieving Existing Maintenance Requirement Records](#).
- 6. From the Search Results, select the record that you want to attach using the Select checkbox, and click Attach to return this record to the Maintenance Requirements List on the Maintenance Requirement Relationships page.

2-56 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 2–32 Attach Maintenance Requirements - Maintenance Requirement Relationships page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management **Fleet Maintenance Program**

Overview | Program Type Associations

[Details](#)
[Documents](#)
[Routes](#)
[Effectivities](#)
Relationships
[Affected Items](#)

Maintenance Requirement Relationships

Title **27-036-00** Status **Draft**
Revision Program Type **Letter Check** Category **AIRFRAME**
Program Subtype **C**

Maintenance Requirements List

[Cancel](#) [Attach](#) [Revert](#)

27-036-00

Previous 1-1 of 1 Next

Remove	Title	Revision	Relationship Type	Description	Program Type	Status	Effective From	Effective To	Rela
<input type="checkbox"/>	C-Check		Parent	Maintenance group to be performed every 2000 operation hours.	Letter Check	Complete	11-NOV-2002		
	06112003165		Parent		Corrosion	Complete	11-DEC-2003		

[Add More Rows](#)

Previous 1-1 of 1 Next

- Click Apply on the Maintenance Requirement Relationships page to save the relationship records.

Figure 2–33 View Associated Records - Maintenance Requirement Relationships page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Overview | Program Type Associations

Details

Documents

Routes

Effectivities

Relationships

Affected Items

Maintenance Requirement Relationships

Title 27-036-00

Revision

Program Type Letter Check

Status Draft

Category AIRFRAME

Program Subtype C

Maintenance Requirements List

Cancel Attach Revert Apply

27-036-00

Previous 1-2 of 2 Next

Remove	Title	Revision	Relationship Type	Description	Program Type	Status	Effective From	Effective To	Relationships
<input type="checkbox"/>	06112003165	061120031650	Parent		Letter Check	Complete	11-DEC-2003		
<input type="checkbox"/>	C-Check		Parent	Maintenance group to be performed every 2000 operation Check hours.	Letter Check	Complete	11-NOV-2002		

Add More Rows

Previous 1-2 of 2 Next

Document Index | Route Management | Fleet Maintenance

Program | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

Note: To include new maintenance requirement relationships, you can also click Add More Rows to open new rows, enter the field values as described above, and click Apply. This, however, limits the search criteria you can use to find the required maintenance requirement.

8.

To remove a related requirement from the Material Requirements List, select the Remove checkbox beside the record you want to remove, and click Apply.

9.

To view the child maintenance requirements associated with any Parent Relationship Type record in the Maintenance Requirements List, click the corresponding Relationships icon. This displays the list of material requirements to which the record is related, and their relationship types.

2-58 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 2–34 View Maintenance Requirements Hierarchy - Maintenance Requirement Relationships page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Document Index

Route Management

Fleet Maintenance Program

Overview | Program Type Associations

Details

Documents

Routes

Effectivities

Relationships

Affected Items

Maintenance Requirement Relationships

Title 27-036-00

Revision

Program Type Letter Check

Status Draft

Category AIRFRAME

Program Subtype C

Maintenance Requirements List

Cancel

061120031650 > 27-036-00

Previous

1-1 of 1

Next

Title	Revision	Relationship Type	Description	Program Type	Status	Effective From	Effective To	Relationships
27-036-00		CHILD	Perform detail inspection of rudder components.	Letter Check	Draft	05-AUG-2004		

Previous

1-1 of 1

Next

Document Index

Route Management

Fleet Maintenance

Program

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

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Updating Maintenance Requirement Records

Oracle Complex Maintenance, Repair, and Overhaul allows you to retrieve existing maintenance requirement records and edit the information associated with the requirement including maintenance routes, documents, effectivities, actions and relationships.

Note: You can update these attributes only for a maintenance requirement that is in the Draft or Approval Rejected state. If the selected maintenance requirement is in the Complete, Terminated, or Approval Pending states, the application generates the details and attribute pages in view-only mode.

To view the details of a Complete, Approval Pending, or Terminated maintenance requirement, see [Viewing Maintenance Requirement Details](#).

This first step in the process allows you to edit the basic maintenance requirement information.

Prerequisites:

The maintenance requirement record you want to edit must exist in the database. The record must be in the Draft or Approval Rejected state.

To update maintenance requirement records:

1. Retrieve the maintenance requirements that match your need. See [Retrieving Existing Maintenance Requirement Records](#).
2. In the Search Results list, click the Title Link of the record that you want to edit. This launches the Update Maintenance Requirement page if the maintenance requirement is in the Draft or Approval Rejected state.

Figure 2–35 Modify Maintenance Requirement Information - Update Maintenance Requirement page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Overview | Program Type Associations

Update Maintenance Requirement

* Indicates required field

Maintenance Requirement Information

Title **27-036-00** Status **Draft** Version **3**

Revision Number

* Category

* Program Type

Program Subtype

* Service Type

* Implement Status

* Repetitive

* Whichever Comes

* Effective From

Billing Item

Quality Inspection Type

Show

Cancel Approve Revert Ap

If the maintenance requirement record you selected has the status Complete, Terminated, or Approval Pending, the application launches the View Maintenance Requirement page. In this case, a Super-User can change the following attributes in the maintenance requirement details:

- Program Type
- Program Sub Type
- Service Type
- Repetitive
- Show Repetitive
- Description
- Comments

- Revision Number
3. Make the necessary changes to the field values. For field descriptions, see [Fields on the Create and Update Maintenance Requirement Pages](#).
 4. Click Apply to record the changes.
 5. To advance the maintenance requirement to Approval Pending Status, click Approve. This is possible only after maintenance routes have been associated to the requirement. The status changes are dependent on the approval rules during Oracle Complex Maintenance, Repair, and Overhaul setup.

A maintenance requirement record in the Approval Pending Status cannot be edited. When you click Approve, the View Maintenance Requirement page is launched displaying the maintenance requirement details in a view only mode.

Figure 2–36 View Maintenance Requirement page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document IndexRoute ManagementFleet Maintenance Program

Overview | Program Type Associations

Details

Documents

Routes

Effectivities

Relationships

Affected Items

View Maintenance Requirement

Cancel

Maintenance Requirement Information

Title	AHL%	Status	Approval Pending	Version 1
Revision Number				
Category	Ground Service Equipment			
Program Type	Letter Check			
Program Subtype				
Service Type	On			
Implement Status	Mandatory			
Repetitive	Yes	Show	All	
Whichever Comes	First			
Effective From	02 JAN 2004			
Follows After Accomplishment of				
Billing Item				
Quality Inspection Type				
Visit Category				
Description				
Comments				
Down Time			HOURS	

6. To view items to which the maintenance requirement applies, click [Affected Items](#) link on the side navigation menu. See [Viewing Items Affected by a Maintenance Requirement](#).
7. To update attached documents, associated maintenance routes, attached actions, effectivities, and relationships, use the side navigation menu.

See:

- [Attaching Documents to a Maintenance Requirement](#)
- [Associating Routes to a Maintenance Requirement](#)
- [Defining Maintenance Requirement Effectivities](#)
- [Defining Maintenance Requirement Relationships](#)

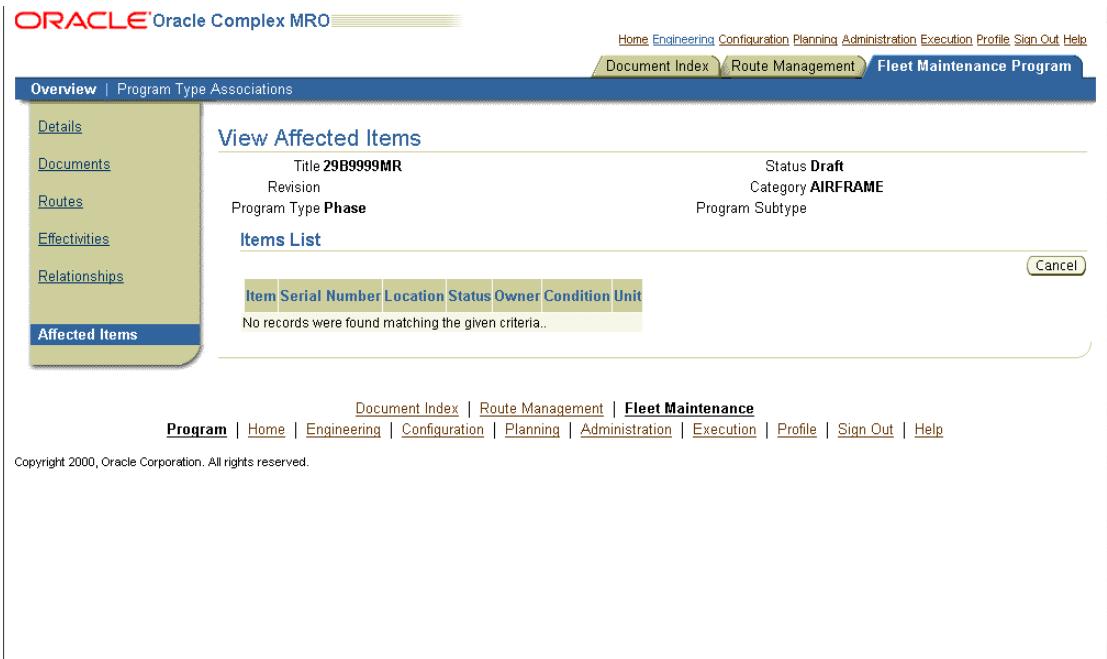
Viewing Items Affected by a Maintenance Requirement

The View Affected Items page displays the items that are affected by a maintenance requirement. Maintenance requirement effectivities are defined using the Update Effectivity page.

You can access the View Affected Items page using any of the following methods. For field descriptions, refer to [Fields on the View Affected Items Page](#).

1. From the Search Maintenance Requirement page:
 - a. Retrieve the maintenance requirement record for which you want to view the affected items. See [Retrieving Existing Maintenance Requirement Records](#).
 - b. Select the pertinent record using the Select radio button, and click View Affected Items to launch the View Affected Items page.

Figure 2–37 View Affected Items page



2. From the Update Maintenance Requirement page (when the maintenance requirement is in the Draft or Approval Rejected state):
 - a. Retrieve the maintenance requirement records that match your needs.
 - b. On the Search Results list, click the pertinent maintenance requirement Title link to launch the Update Maintenance Requirement page.
 - c. On the side navigation menu, click Affected Items to launch the View Affected Items page.
3. From the View Maintenance Requirement page (when the maintenance requirement is in the Approval Pending, Terminated, or Complete state):
 - a. Retrieve the maintenance requirement records that match your needs.
 - b. On the Search Results list, click the pertinent maintenance requirement Title link to launch the View Maintenance Requirement page.

- c. On the View Maintenance Requirement page side navigation menu, click Affected Items to launch the View Affected Items page.
4. From the Update Effectivity page (when the maintenance requirement is in the Draft or Approval Rejected state):
 - a. Retrieve the maintenance requirement records that match your needs.
 - b. On the Search Results list, click the pertinent maintenance requirement Title link to launch the Update Maintenance Requirement page.
 - c. On the side navigation menu, click Effectivities to launch the Update Effectivity page.

Figure 2–38 Update Effectivites page

Update Effectivity

Title 29B9999MR

Status **Draft**

Revision

Category **AIRFRAME**

Program Type **Phase**

Program Subtype

Effectivities List

Cancel

Revert

Apply

Previous

1-2 of 2

Next

Remove	Effectivity	Item	Master Configuration Position	Master Configuration Item	Product Classification Node	Effectivity Details	Interval Threshold	View Affected Items
<input type="checkbox"/>	PCEffectivity1	11475M95P05			Child			
<input type="checkbox"/>	PCEffectivity2	11475M95P05			MBT			

Add More Rows

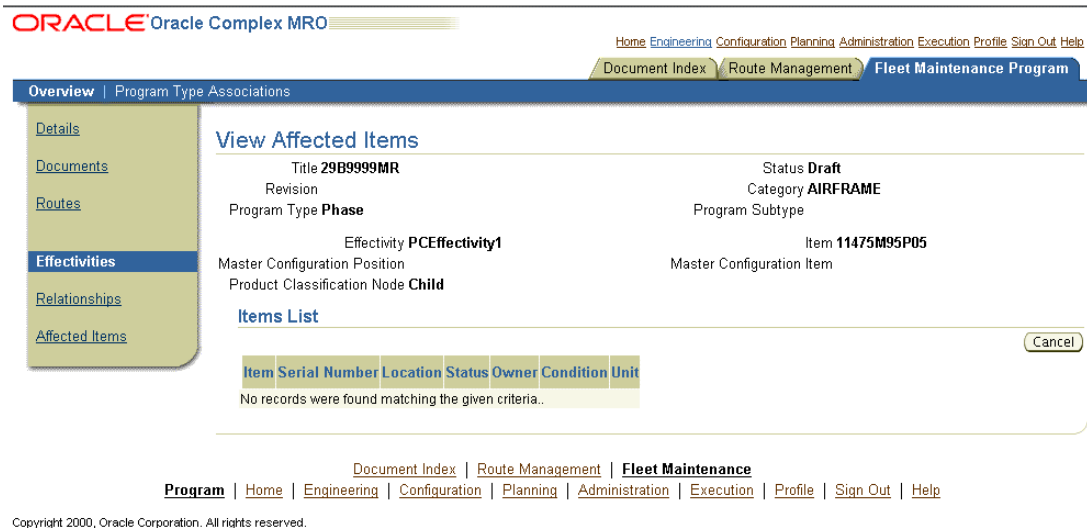
Previous

1-2 of 2

Next

- d. To view the items affected by any effectivity definition, click the corresponding View Affected Items icon. This launches the View Affected Items page listing all the part Serial Numbers for which the effectivity is defined.

Figure 2–39 View items Affected by an Effectivity Definition - View Affected Items page



5. From the View Effectivity page (when the maintenance requirement record is in the Approval Pending, Terminated, or Complete state):
 - a. Retrieve the maintenance requirement records that match your needs.
 - b. On the Search Results list, click the pertinent maintenance requirement Title link to launch the View Maintenance Requirement page.
 - c. On the side navigation menu, click Effectivities to launch the View Effectivity page.
 - d. To view the items affected by any effectivity definition, click the corresponding View Affected Items icon. This launches the View Affected Items page listing all the part Serial Numbers for which the effectivity is defined.

Creating Maintenance Requirement Revisions

A maintenance requirement revision is created when an existing maintenance requirement record with the status Complete has to be updated for necessary reasons.

You can create a revision from an existing maintenance requirement record. The Create Maintenance Requirement Revision page is a variation of the Create Maintenance Requirement page with the status set to Draft. The maintenance requirement Version defaults to the next sequentially generated number, and all the original maintenance requirement attributes including intervals and thresholds are copied into the revision. The maintenance requirement Revision Number is user definable and optional.

Note: Revisions are allowed only from the latest Complete maintenance requirement record.

Prerequisites:

The maintenance requirement record you want to revise must exist in the database in the Complete state.

To create maintenance requirement revisions:

1. Retrieve the maintenance requirement record for which you want to create a revision. See [Retrieving Existing Maintenance Requirement Records](#).
2. In the Search Results list, select the pertinent record using the Select radio button, and click Create Revision. This launches the Update Maintenance Requirement page.

Figure 2–40 Create Maintenance Requirement Revisions - Update Maintenance Requirement page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Overview | Program Type Associations

Details

[Documents](#)

[Routes](#)

[Effectivities](#)

[Relationships](#)

[Affected Items](#)

Update Maintenance Requirement

[Cancel](#) [Approve](#) [Revert](#)

* Indicates required field

Maintenance Requirement Information

Title00-MR-00

StatusDraft

Version

Revision Number

* CategoryGround Service Equipment

* Program TypeLetter Check

Program Subtype

* Service TypeOn

* Implement StatusMandatory

* RepetitiveYes

* Whichever ComesFirst

* Effective From08-AUG-2004

Billing Item

Quality Inspection Type

ShowAll

The fields that appear on the Update Maintenance Requirement page are the same as that on the Create Maintenance Requirement page with the exception of the Copy Last Accomplishment field, and the Version field defaulting to the next sequentially generated number. For field descriptions, see [Fields on the Create and Update Maintenance Requirement Pages](#).

Copy Last Accomplishment is a flag to indicate whether the last accomplishment of the maintenance requirement should be copied in Unit Maintenance Plan when a new maintenance requirement revision is created. The field value can be either Yes or No, and is used when creating a maintenance requirement revision. This flag is used only in the case of repetitive maintenance requirements. The Unit Maintenance Plan module calculates the next occurrence of the maintenance requirement based on the previous accomplishment of the same maintenance requirement. Also, when a maintenance requirement revision is created, you may want to retain the previous accomplishment information, or start with new information.

2-68 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

3. Click Apply to save the maintenance requirement revision record.
4. To advance the maintenance requirement revision to Approval Pending Status, click Approve. This is possible only after maintenance routes have been associated to the requirement.

A maintenance requirement record in the Approval Pending Status cannot be edited. When you click Approve, the View Maintenance Requirement page is launched displaying the maintenance requirement details in a view only mode.

5. To update the maintenance requirement attributes, such as attached documents, associated maintenance routes, actions, effectivities, and relationships, see:
 - [Attaching Documents to a Maintenance Requirement](#)
 - [Associating Routes to a Maintenance Requirement](#)
 - [Defining Maintenance Requirement Effectivities](#)
 - [Defining Maintenance Requirement Relationships](#)
6. To view items to which the maintenance requirement revision applies, click Affected Items link on the side navigation menu. See [Viewing Items Affected by a Maintenance Requirement](#).

Viewing Maintenance Requirement Details

Maintenance requirement records with the status Complete, Terminated, or Approval Pending, cannot be edited. With any of these maintenance requirement statuses, the application opens the Maintenance Requirement Details page in a view-only mode.

Prerequisites:

The maintenance requirement record that you want to view must exist in the database with the status Complete, Terminated, or Approval Pending.

To view maintenance requirement details:

1. Retrieve the maintenance requirement records that meet your needs. See [Retrieving Existing Maintenance Requirement Records](#).
2. Click the pertinent Title link to launch the View Maintenance Requirement page. This page provides the maintenance requirement header details. For field descriptions, see [Fields on the Create and Update Maintenance Requirement Pages](#).

To associate program sub types to program types:

1. Under the Fleet Maintenance Program tab, select Program Type Associations secondary tab to launch the Create Program Type/Sub Type page.

Figure 2–42 Create Program Type/Sub Type page


ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management **Fleet Maintenance Program**

Overview | **Program Type Associations**

Create Program Type/ Sub Type

Program Type  Description Revert Apply

Program Sub Type List

Remove	Program Subtype	Description
No records were found matching the given criteria..		
Add More Rows		

Revert Apply

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2. In the Program Type field enter the generic substitution metacharacter%, and click the Search icon to return a list of Program Type values on the Select Program Type page.

Figure 2–43 Select Program Type - Create Program Type/Sub Type page

HomeEngineeringConfigurationPlanningAdministrationExecutionProfileSign Out

Document IndexRoute ManagementFleet Maintenance Program

Overview | Program Type Associations

Select Program Type

Enter Partial Value %

SearchCancel

Program Type	Description
Corrosion	Corrosion
Letter Check	Letter Check
Modification	Modification
Non-Routine	Non-Routine
Phase	Phase
Special	Special

First | Previous 1 - 6 of 6 Next | Last

Cancel

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- 3. Click the relevant result to return this record to the Program Type field.
- 4. The Program Sub Types List displays all the Program Sub Types associated to the selected Program Type.
- 5. To associate a new sub type to the Program Type, click Add More Rows to reveal new rows.

Figure 2–44 Define Program Sub Types - Create Program Type/Sub Type page


ORACLE Oracle Complex MRO

Home [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)






Document Index Route Management **Fleet Maintenance Program**

Overview | **Program Type Associations**

Create Program Type/ Sub Type

Program Type  Description **Special** Revert Apply

Program Sub Type List

Remove	Program Subtype	Description
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

Add More Rows

Revert Apply

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6. Enter the required values in the fields. Fields in the Program Sub Types List include:
 - Program Subtype represents the user defined sub type of the Program Type. For example, for the Program Type Letter Check, Program Subtypes could be A Check, B Check, C Check, and D Check.
 - Description refers to the Program Subtype description. The description provides more description about the subtype to the user.
7. Click Apply to record the association.
8. To remove a Sub Type that is associated to the Program Type, select the Remove checkbox beside the Program Subtype you want to remove, and click Apply.

Note: You can remove a Program Sub Type association to a Program Type only if this combination is not associated to any existing maintenance requirement. For information on defining Program Types and Program Sub Types, refer to the *Oracle Complex Maintenance, Repair, and Overhaul Implementation Guide*.

Managing Maintenance Routes

Overview

A maintenance route describes a series of maintenance, repair, or overhaul tasks on a fleet unit, subassembly, or subsystem. Maintenance routes are effectively work cards, modeling the printed work cards typically provided by the manufacturer of the fleet unit. Work cards are often associated with a zone in a fleet unit, such as the powerplant of a commercial aircraft. Other attributes of maintenance routes include work location (for example, engine overhaul shop, machine shop, painting facility), supporting process types (for example, inspection, cleaning), skill types (for example, electronics technician, airframe technician, powerplant technician), and supporting significant maintenance tasks (for example, ship in dry-dock with all cargo and engines removed). Oracle Complex Maintenance, Repair, and Overhaul includes the Route Management module that manages work cards and resource requirements.

This chapter discusses the key functions supported by the Oracle Complex Maintenance, Repair, and Overhaul Route Management module. The chapter provides process-oriented, task based procedures for using Oracle Complex Maintenance, Repair, and Overhaul to perform essential route management tasks in maintenance organizations.

See:

- [Creating Operation Records](#)
- [Creating Maintenance Route Records](#)
- [Finding Operation Records](#)
- [Finding Maintenance Route Records](#)
- [Defining Reference Documents](#)

- Defining Resource Requirements
- Defining Material Requirements
- Associating Operations with a Maintenance Route
- Editing Operation Records
- Editing Maintenance Route Records
- Associating Major Zones to Product Types
- Associating Sub Zones to Product Types
- Finding Oracle Complex Maintenance, Repair, and Overhaul Resources
- Creating Oracle Complex Maintenance, Repair, and Overhaul Resources
- Editing Oracle Complex Maintenance, Repair, and Overhaul Resources
- Associating BOM Resources
- Creating an Item Composition List
- Editing Item Compositions
- Viewing Item Compositions
- Creating Disposition Lists
- Editing Disposition Lists
- Approving Disposition Lists

What is Route Management?

Route Management is a subsystem that manages the work definition of scheduled and unscheduled maintenance tasks. It allows maintenance organizations to create work cards specifying the zone, work location, supporting process types, skill types, and significant maintenance tasks associated with the work card.

The Route Management module also supports the management of resource requirements for a maintenance route including labor estimate, materials estimate, tooling required, and reference documents. For some fleets, especially aircraft, regulatory compliance requires that maintenance operations be inspected before completion is formally recorded. Route Management supports the definition of inspection signature attributes for work card records. Route Management also supports check point definitions for labor cost collection, and progress reporting.

The Route Management module uses data managed by the other modules comprising Oracle Complex Maintenance, Repair, and Overhaul. For example, airlines may create work cards in response to an Airworthiness Directive by the Federal Aviation Administration, but only for a subset of the aircraft in the operational fleet. Through Fleet Maintenance Program, Route Management routes (work cards) can be associated with those fleet units.

Key Business Processes

Route Management supports the following business processes:

Work Card or Route Authoring Work cards or routes are fundamental in accomplishing maintenance requirements. Work cards consist of step by step work instructions containing functional and operational data needed to perform specific job tasks. Oracle Complex Maintenance, Repair, and Overhaul supports the authoring of routes. Each work card is made up of one or several operations. The route authoring process allows maintenance personnel to select pre-defined operations, and associate them to a maintenance route.

Production Planning Information Operational data is essential to grouping work cards and planning maintenance requirements. The more the information in the work card, the easier it is for the production planner to schedule and group work cards. Oracle Complex Maintenance, Repair, and Overhaul allows organizations to define production planning information for an operation, including work zone, work center, operation category, operation type, process, and significant tasks.

Resource Requirements Information Functional data is essential to accomplish maintenance requirements, and to a lesser extent grouping of maintenance tasks. The more the information in the work card, the easier it is for the production planner to schedule and group work cards. This allows the material planner to schedule and forecast material needs. Oracle Complex Maintenance, Repair, and Overhaul allows organizations to define the resource requirements for an operation including estimated labor man hours, material required, tools required, and reference documents.

Sign-Off Requirements A work card changes to a work order when issued to Production. In the maintenance, repair, and overhaul industry, all work orders require to be signed off when completed, and also at certain step levels. Oracle Complex Maintenance, Repair, and Overhaul allows maintenance facilities to define sign-off requirements for each work card. You can set up all sign-off requirements at

the time the work card or route is created. The actual sign-off, however, occurs on the work order and not on the work card.

Resource Collection Check Points Maintenance organizations may require to collect actual labor expended, material usage, and other job cost data at the completion of different operations during a maintenance job. Oracle Complex Maintenance, Repair, and Overhaul allows you to collect this data by creating check points that group successive operations together.

Composition Lists Creation Composition lists serve as the base definition for a component or assembly. They enable the creation of disposition lists and forecast models, based on the type of service to be performed, and also allow for a more accurate prediction of material requirements. It is a complete listing of the non-tracked items and/or item groups contained in an item/assembly.

Disposition List Creation Disposition lists act as checklists for the Production user. Disposition listing is defined in Route Management, as the subset of a composition list, to compliment material requirements. Maintenance personnel may use the item composition or the composition of the master configuration, depending on their needs, to create the listing that is utilized when the item or master configuration is being planned in a maintenance requirement.

Fields Associated with Operation Records

The following fields appear on Route Management pages that relate to maintaining operation records:

Operation field contains the operation code, which describes the order of the operation within the route. If you do not know the value for a segment in the operation, enter the generic substitution metacharacter%, and click Go to launch the Select Operation page. This returns all operation records in the segment. You can then click on the pertinent record to return the value to the corresponding field. Repeat for each segment.

Operation Type refers to the kind of operation being performed. It is used to help organize operations. Operation type values are set up during the installation of Oracle Complex Maintenance, Repair, and Overhaul.

Process refers to the kind of maintenance process, such as cleaning or inspection. If you do not know the value, enter the generic substitution metacharacter%, and click Go to launch the Select Process page. This returns all process records in the

database. Click on the pertinent record to return the value to the corresponding field. Process values are set up during the installation of Oracle Complex Maintenance, Repair, and Overhaul.

Revision Status indicates whether the operation record is current, or in the draft stage. The status types are system defined and are approval supported.

Start Date refers to the date of the first day of effectivity of this operation. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.

End Date refers to the date before which the operation is to be completed. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.

Description refers to a text description of the maintenance operation.

Remarks is a field where you can enter any additional information that the maintenance personnel should know regarding the operation.

Revision is a field that holds a user-assigned document revision identifier.

Revision Note is a description of why the revision is made.

Quality Collection Plan is an association to a plan in Oracle Quality with quality elements for recording the necessary accomplishments and sign-off criteria of an operation. Quality collection plans are used at the time of maintenance completion and are set up as part of Oracle Quality allowing for precise control of job completion requirements and subsequent processes. For more information, see the Oracle Quality set up procedures.

Standard is a user selected yes or no value to catalog an operation record as a standard or non-standard job.

Approver Note This indicates the reason for approval rejection.

Creating Operation Records

The Route Management module leads you through the steps to create an operation record. The initial step creates a record of the operation in the database. Subsequent steps define operation attributes like document references, labor, machine and

tooling requirements, and material requirements. The following process initiates the creation of an operation. The Create Operation page permits saving the record in the database before proceeding to define the attributes in the following pages.

Prerequisites:

You should know the Product Type, the Major and Sub Zones of the system on which the operation is to be carried out, the Work Center, the Skill Type required to perform the operation, the Operation Type, and the Category type. These values must exist in the database.

To create operation records:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.
2. Click the Route Management tab. The Search Operation page appears.

Figure 3–1 Search Operation page

ORACLE® Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document IndexRoute ManagementFleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions

Search Operation

Operation

Operation Type

Standard

Description

Go

Clear

Process

Status

Operation Results

Create

Select	Operation	Standard	Description	Operation Type	Process	Revision	Status	Start Date	End Date
No records were found matching the given criteria..									

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3. Click Create to launch the Create Operation page and begin the process of creating an operation record.

Figure 3–2 Create Operation page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution Profile

Sign Out

Help

Document Index

Route Management

Fleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions

Create Operation

* Indicates required field

CancelRevertApply

Operation Information

* Operation

.....

Revision1

* Description

Please tab out of this text box

* Standard

No

StatusDraft

Operation Type

Process

* Start Date

Quality Inspection Type

Remarks

Revision Note

4. Enter the information in the fields provided. Information in fields marked with asterisk is mandatory. For field descriptions, see [Fields Associated with Operation Records](#).

Figure 3–3 Enter Operation Information - Create Operation page

ORACLE® Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution Profile

Sign Out

Help

Document Index

Route Management

Fleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions

Create Operation

* Indicates required field

CancelRevertApply

Operation Information

* Operation27.10.51.12.26.16.36

Please tab out of this text box

* DescriptionTest operation

* StandardNo

Operation TypeInspection

* Start Date09-AUG-2004

Quality Inspection Type

Remarks

Revision Note

Revision1

StatusDraft

Process

5. Click Apply to record the operation in the database. The Edit Operation page appears where you can update information and/or define reference documents, resource requirements, and material requirements for the operation.

Figure 3–4 Edit Operation page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Document Index

Route Management

Fleet Maintenance Program

Operations

Routes

Major Zones

Sub Zones

Resource

Item Compositions

Details

Reference Documents

Resource Requirements

Material Requirements

Edit Operation

Cancel

Delete

Approve

Revert

Apply

* Indicates required field

Operation Information

Revision

1

Operation

X

* Description

Test operation

* Standard

No

Status

Draft

Operation Type

Inspection

Process

* Start Date

09-AUG-2004

End Date

Quality Inspection Type

Remarks

Revision Note

Cancel

Delete

Approve

Revert

Apply

6. After it is completely defined, the operation must be approved. To do this, click Approve on the Edit Operation page. This will launch the approval workflow and, depending on the outcome of the approval, change the status of the operation.

Figure 3–5 View Operation Approval Status - Edit Operation page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions

Details

[Reference Documents](#)

[Resource Requirements](#)

[Material Requirements](#)

Edit Operation

Cancel

Create Revision

Terminate

Revert

Apply

* Indicates required field

Operation Information

Revision5

OperationX

DescriptionPaPaOil level generator checking at lower levelsPaOil level generator checking at lower PaOil level generator checking at lower PaOil level generator checking at lower levelsPaOil level genePaOil level gehjkkrlator checking at lower levels

StandardNo

StatusComplete

Operation Type

Process

Start Date15-JUL-2010

End Date

Quality Inspection Type

Remarks

Revision Note

Cancel

Create Revision

Terminate

Revert

Apply

Note: During the approval workflow the status is “Approval pending” for the creation of a operation or “Termination pending” for the deletion of an operation. The outcome status of the approval workflow can either be “Complete” or “Approval Rejected.” When an operation record in the ‘Approval Rejected’ status is modified, the status reverts to ‘Draft’ and the record can be re-submitted for approval after editing.

You can also approve a draft operation from the result list in the operation search screen. The approval workflow is defined by your organization at the time of setting up Oracle Complex Maintenance, Repair, and Overhaul. For more information about setting up approval workflow, see the *Oracle Complex Maintenance, Repair, and Overhaul Implementation Guide*

Managing Maintenance Routes 3-11

See:

- [Defining Reference Documents for an Operation](#)
- [Defining Resource Requirements for an Operation](#)
- [Defining Material Requirements for an Operation](#)

Fields Associated with Maintenance Route Records

The following fields appear on Route Management pages that relate to managing maintenance route records:

Route Number is the user-assigned identifier for a maintenance route.

Title refers to the text description of the maintenance route.

Operator refers to the organization operating the concerned fleet. If you do not know the value, enter the generic substitution metacharacter%, and click Go to launch the Select Operator page. This page displays all operator records in the database. Select the pertinent record to return the value to the field on the Create Route page.

Time Span defines the total duration of a route in hours. It will be used when calculating the visit structure in the Visit Work Package module.

Product Type refers to the classification by category, of the electromechanical system. If you do not know the value, enter the generic substitution metacharacter%, and click Go to launch the Select Product Type page. This page displays all product type records in the database. Select the pertinent record to return the value to the field.

Major Zone and Sub Zone refers to the user-defined zones used as a method for identifying locations in the electromechanical system being maintained. If you do not know the value, enter the generic substitution metacharacter%, and click Go to launch the Select Major Zone (or, if applicable, Sub Zone) page. This page displays all records in the database. Select the pertinent record to return the value to the field.

Route Type refers to the type of route, for example, whether the route applies to an entire aircraft or to a subsystem in the aircraft. The route types are defined while installing Oracle Complex Maintenance, Repair, and Overhaul.

Process refers to the type of the maintenance route such as cleaning or inspection.

System refers to the electromechanical system on which you perform the maintenance activity. This system field is a segmented flexfield. The segmentation is defined by your organization at set up time. When setting up the system field, your organization may define valid values for the segments

Quality Collection Plan is an association to a plan in Oracle Quality with quality elements for recording the necessary accomplishments and sign-off criteria of an operation. Quality collection plans are used at the time of maintenance completion and are set up as part of Oracle Quality allowing for precise control of job completion requirements and subsequent processes. For more information, see the Oracle Quality set up procedures.

Service Item refers to the service item of this route for outside processing. This service item is used in production planning when creating the outside processing work order and the purchase order. Service Items are defined by your organization when setting up the item master in Oracle's inventory module.

Accounting Class The accounting class is used when the route becomes a WIP job in Production. It supports the costing procedure in on the shop floor. Accounting Classes are defined by your organization when setting up Oracle's WIP module.

Task Template Group refers to a template group used by Oracle Service. Task Template Groups need only be defined when your Organization uses Oracle's Preventive Maintenance Module. Task Template Groups are defined by your organization when setting up Oracle's Service and/or Field Service module.

Start Date refers to the date of the first day of effectivity of this maintenance route. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.

End Date refers to the date that represents the last day before which the maintenance route is to be completed. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.

Revision is a field that holds a user-assigned document revision identifier.

Status indicates whether the route record is completed, or in the draft stage.

Approver Note This indicates the reason for approval rejection.

Creating Maintenance Route Records

The Route Management module takes you through eight steps to create a maintenance route record. The first step creates a record of the route in the database, while the steps that follow help you define the attributes of the route including sign off requirement, document references, labor requirement, material requirement, machine requirement, and tool requirement. The final step involves associating existing operations with a route.

The following process initiates the creation of a route. The Create Route page lets you save the record in the database, before proceeding to define the attributes in the following pages.

Prerequisites:

You should know the Route Type, Product Type, the System, the Process, the Major/ Sub Zone, the Quality Collection Plan, and the Accounting class of the system to which the maintenance route applies. These fields are all optional. If you define the route as a work card for a different operator on whose equipment you perform maintenance, you can specify that operator on the route. If the route is a work card for an outside processing job, you can define the Service Item that is applicable when the outside processing work order and the purchase order gets created. If Route Management is used in the Preventive Maintenance Module you can also define the JTF Task Template Group which should be used when integrating with Oracle's Field Service module through Preventive Maintenance.

These values must exist in the database.

To create a route record:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.
2. Select the Route Management tab and then the Route secondary tab. The Search Route page in Route Management appears. Click Create to launch the Create Route page.
3. Enter the information in the fields provided. Information in fields marked with asterisk is mandatory. For field descriptions, see [Fields Associated with Maintenance Route Records](#).

Figure 3–6 Create Route page

ORACLE Oracle Complex MRO

Home [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Operations | **Routes** | Major Zones | Sub Zones | Resource | Item Compositions

Create Route

* Indicates required field Cancel Revert Apply

Route Information

* Route Number <input type="text" value="100"/>	Status Draft
Revision 1	Revision Notes <input type="text"/>
* Title <input type="text" value="Route100-Test"/>	* Time Span <input type="text" value="10"/> Hours
Route Type <input type="text"/>	Process <input type="text"/>
Item Type <input type="text"/>	Operator <input type="text"/>
Major Zone <input type="text"/>	Sub Zone <input type="text"/>
Service Item <input type="text"/>	Quality Inspection Type <input type="text"/>
Accounting Class <input type="text"/>	Task Template Group <input type="text"/>
System * <input type="text" value=".."/>	
* Please tab out of this text box	
* Start Date <input type="text" value="09-AUG-2004"/>	
Remarks <input type="text"/>	

- Click Apply to record the operation in the database. The Update Route page appears where you can update information and/or define reference documents, resource requirements, and material requirements for the operation.

Figure 3–7 Update Route page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution Profile

Sign Out

Help

Document Index

Route Management

Fleet Maintenance Program

Operations

Routes

Major Zones

Sub Zones

Resource

Item Compositions

Details

Reference Documents

Resource Requirements

Material Requirements

Associate Operations

Disposition Associations

Update Route

* Indicates required field

Cancel

Delete

Approve

Revert

Apply

Route Information

* Route Number 100

Revision 1

* Title Route100-Test

Route Type

Item Type

Major Zone

Service Item

Accounting Class

System

* Start Date 09-AUG-2004

Remarks

Status Draft

Revision Notes

* Time Span 10 Hours

Process

Operator

Sub Zone

Quality Inspection Type

Task Template Group

5. After it is completely defined, the operation must be approved. To do this, click Approve on the Update Route page. This will launch the approval workflow and, depending on the outcome of the approval, change the status of the operation.

Figure 3–8 View Route Approval Status - View Route page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Operations](#) | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | [Resource](#) | [Item Compositions](#)

Details
[Reference Documents](#)
[Resource Requirements](#)
[Material Requirements](#)
[Associate Operations](#)
[Disposition Associations](#)

View Route

Cancel

Route Information

Route Number 100	Status Approval Pending
Revision 1	Revision Notes
Title Route100-Test	Time Span 10 Hours
Route Type	Process
Item Type	Operator
Major Zone	Sub Zone
Service Item	Quality Inspection Type
Accounting Class	Task Template Group
System X	
Start Date 09-AUG-2004	
Remarks	

Cancel

[Document Index](#) | [Route Management](#) | [Fleet Maintenance](#)
[Program](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

Note: The status to which the route gets updated to depends on the approval workflow setup. You may set up the workflow such that the route passes from Draft to the Approval Pending status. Optionally, the status may directly change to Complete when the route is approved. The outcome status of the approval workflow can either be “Complete” or “Approval Rejected.” When a route in the ‘Approval Rejected’ status is modified, the status reverts to ‘Draft’ and the record can be re-submitted for approval after editing.

You can also approve a draft operation from the result list in the operation search screen. The approval workflow is defined by your organization at the time of setting up Oracle Complex Maintenance, Repair, and Overhaul. For more information about setting up approval workflow, see the *Oracle Complex Maintenance, Repair, and Overhaul Implementation Guide*

6. To define the attributes of the route such as reference documents, labor requirement, resource (material, tool, machine etc.) requirement, and associated operations, see:
 - [Defining Reference Documents for a Route](#)
 - [Defining Resource Requirements for a Route](#)
 - [Defining Material Requirements for a Route](#)
 - [Associating Operations to a Maintenance Route](#)

Finding Operation Records

Maintenance organizations refer to existing operation records while defining solutions for similar maintenance requirements. Oracle Complex Maintenance, Repair, and Overhaul also allows organizations to associate existing operations to a maintenance route. This necessitates the efficient retrieval of operation records.

Oracle Complex Maintenance, Repair, and Overhaul permits use of metacharacters when you type a word, or part of a word, to use as a search argument. Use % to represent any string of zero or more characters. Use _ to represent any single character. For example, if the database contains a record with the value “ENGINE” in a field, typing “E%” will return all records where the field value begins with “E”.

Prerequisites:

The operation record you want to retrieve must exist in the database.

To find an operation record:

- 1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.
- 2. Select the Route Management tab. The Search Operation page appears.

Figure 3–9 Find Operation Record - Search Operation page

ORACLE[®] Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Operations](#) | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | [Resource](#) | [Item Compositions](#)

Search Operation

Operation

Operation Type

Standard

Description

Go

Clear

Process

Status

Operation Results

Create

Select	Operation	Standard	Description	Operation Type	Process	Revision	Status	Start Date	End Date
No records were found matching the given criteria..									

- 3. Enter the information in the fields for which you know the value. For field descriptions, see [Fields Associated with Operation Records](#).
- 4. Click Go. The lower half of the screen displays the Operation List of all matching records in the database.

Figure 3–10 Operation Search Results - Search Operation Page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution Profile

Sign Out

Help

Document Index

Route Management

Fleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions

Search Operation

Operation

Operation Type

Standard

Description

Go

Clear

Process

Status

Operation Results

Create

Select Operation and...

Approve

Delete

Create Revision

Terminate

Previous

1-10 of 89

Next

Select	Operation	Standard	Description	Operation Type	Process	Revision	Status	Start Date	End Date
<input type="radio"/>	<input checked="" type="checkbox"/>	Yes	Rudder Aft Quadrant Detail Visual Inspection	Inspection		1	Complete	06-NOV-2002	
<input type="radio"/>	<input checked="" type="checkbox"/>	Yes	Cabin Temp Assy Filter Installation	Assembly		1	Complete	07-NOV-2002	
<input type="radio"/>	<input checked="" type="checkbox"/>	Yes	Cabin Temp Sensor Assembly Filter Removal	Disassembly		1	Complete	07-NOV-2002	
<input type="radio"/>	<input checked="" type="checkbox"/>	Yes	Cabin Temp Sensor Assy Filter Cleaning	Cleaning		1	Complete	07-NOV-2002	
<input type="radio"/>	<input checked="" type="checkbox"/>	Yes	Check Brake Accumulator Precharge	Operation Check		1	Complete	07-NOV-2002	
<input type="radio"/>	<input checked="" type="checkbox"/>	Yes	Check generator oil level	Inspection		1	Complete	07-NOV-2002	04-MAY-2004
<input type="radio"/>	<input checked="" type="checkbox"/>	Yes	EMDP Case Drain Filter Element Installation	Replacement		1	Complete	07-NOV-2002	

- 5. To restart a search for records, click Clear. All the search fields on the page will clear. (If you have retrieved records being displayed in the lower half of the screen, these records will remain).

After entering the new search criteria, click Go to begin searching the database for records that match.

- 6. To edit a maintenance operation record, select an operation record, and click the Operation link. The Edit Operation page appears. Make the necessary changes and click Apply.

Figure 3–11 Edit Operation Information - Edit Operation page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions

Edit Operation

Cancel Delete Approve Revert Apply

* Indicates required field

Operation Information

Revision 1
Operation X

* Description Test operation

* Standard No Status Draft

Operation Type Inspection Process

* Start Date 15-AUG-2003 End Date

Quality Inspection Type

Remarks

Revision Note

Cancel Delete Approve Revert Apply

7. To approve a draft operation, select the pertinent record and click Approve.
8. To delete a draft operation, select the pertinent record and click Delete.
9. To terminate an active operation, select the pertinent record and click Terminate.
10. To create a revision for an active operation, select the pertinent record and click Create Revision.

Note: The Approve, Delete, Terminate, and Create Revision functions can also be performed from the Edit Operations page.

Finding Maintenance Route Records

Use this process to retrieve maintenance route records from your database.

Oracle Complex Maintenance, Repair, and Overhaul permits use of metacharacters when you type a word, or part of a word, to use as a search argument. Use % to represent any string of zero or more characters. Use _ to represent any single character. For example, if the database contains a record with the value "ENGINE" in a field, typing "E%" will return all records where the field value begins with "E".

Prerequisites:

The maintenance route that you want to retrieve must exist in the database.

To find maintenance route records:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.
2. Select the Route Management tab, then select the Route secondary tab. The Search Route page appears in Route Management.

Figure 3–12 Find Route Results - Search Route page

ORACLE Oracle Complex MRO

Home [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)


[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)


Operations | **Routes** | Major Zones | Sub Zones | Resource | Item Compositions


Search Route


Route Number Status


Title


Route Type 


Item Type 


Major Zone 

Organization 

Process 

Operator 

Sub Zone 

Item 

Route Results

Select	Route Number	Title	Route Type	Item Type	Major Zone	Sub Zone	Process	Operator	Revision	Status	Start Date	End Date
No records were found matching the given criteria..												

- Enter the information in the fields for which you know the value. For field descriptions, see [Fields Associated with Maintenance Route Records](#).
- Click Go. The lower half of the screen displays the Route List of all matching records in the database.

Figure 3–13 Route Search Results - Search Route page

ORACLEOracle Complex MRO

HomeEngineeringConfigurationPlanningAdministrationExecution ProfileSign Out Help

Document IndexRoute ManagementFleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions

Search Route

Route Number

Title

Route Type

Item Type

Major Zone

Organization

StatusDraft

Process

Operator

Sub Zone

Item

Go

Clear

Route Results

Select Route and...

Approve

Create

Previous1-10 of 72Next

Select	Route Number	Title	Route Type	Item Type	Major Zone	Sub Zone	Process	Operator	Revision	Status	Start Date	End Date
<input type="radio"/>	1	Test							1	Draft	27-JUL-2004	
<input type="radio"/>	1222222	test							1	Draft	30-APR-2004	
<input type="radio"/>	24-030-01-00	Left IDG Oil Level	Engine	MRO Aircraft Engine		#1 Engine			2	Draft	06-JAN-2004	

5. To restart a search for records, click Clear. All the search fields on the page will clear. (If you have retrieved records being displayed in the lower half of the screen, these records will remain).

After entering the new search criteria, click Search to begin searching the database for records that match.

6. To edit a maintenance route record, select a route, and click the Route link. The Update Route page appears. Make the necessary changes and click Apply.

3-24 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 3–14 Edit Route Record - Update Route page

ORACLE Oracle Complex MRO

Home [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Operations | **Routes** | Major Zones | Sub Zones | Resource | Item Compositions

Details

[Reference Documents](#)

[Resource Requirements](#)

[Material Requirements](#)

[Associate Operations](#)

[Disposition Associations](#)

Update Route

* Indicates required field

Route Information

* Route Number **1** Status **Draft**

Revision **1**

* Title

Route Type

Item Type

Major Zone

Service Item

Accounting Class

System

* Please tab out of this text box

* Start Date

Revision Notes

* Time Span **Hours**

Process

Operator

Sub Zone

Quality Inspection Type

Task Template Group

Remarks

7. To approve a draft route, select the pertinent record and choose Approve from the drop-down menu.
8. To delete a draft route, select the pertinent record and choose Delete from the drop-down menu.
9. To terminate an active route, select the pertinent record and choose Terminate from the drop-down menu. You can terminate only those routes, which are not associated with any maintenance requirements (MR), or if associated the MR's effective_to' date is a past date.
10. To create a revision for an active route, select the pertinent record and choose Create Revision from the drop-down menu.

Note: The Approve, Terminate, Delete, and Create Revision functions can also be performed from the Update Route page.

- 11. To associate operations with a maintenance route record, select the pertinent route, and choose Associate Operations from the drop-down menu.
- 12. Select View Maintenance Requirements from the drop-down menu to view maintenance requirements that have been associated with the route in Fleet Maintenance program. The Search Maintenance Requirements page is displayed. Query for records using the search criteria to view the maintenance requirements. You can view maintenance requirements only for routes with status 'Complete' or 'Termination Pending'.

Figure 3–15 Search Maintenance Requirements page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Operations](#) | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | [Resource](#) | [Item Compositions](#)

Search Maintenance Requirements

Title

Originating Document

Program Type

Category

Associated Item

Go

Clear

Revision

Status

Parent Title

Description

Route Number

00-RM-00

Maintenance Requirements Results

Previous

1-1 of 1

Next

Cancel

Title	Description	Program Type	Status	Effective From	Effective To	Effectivity	Relationships
00-MR-00	Letter Check		Complete	22-APR-2004			

Previous

1-1 of 1

Next

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Defining Reference Documents

Oracle Complex Maintenance, Repair, and Overhaul allows you to define the reference documents related to a maintenance activity while creating the work card. This provides a ready reference that will improve the operational efficiency of personnel involved in the maintenance job.

See:

- [Defining Reference Documents for an Operation](#)
- [Defining Reference Documents for a Maintenance Route](#)

Fields on the Reference Document Page

The following fields appear on the Reference Document page:

Document Number contains a unique identifier, generated by the organization to identify a maintenance document. If you do not know the document number, enter the generic substitution metacharacter% in the field, and click Go to launch the Select Doc Number page that displays all the document references in the database.

Type represents the major topic such as powerplant, fleet unit, and ground support equipment that is described by the document in question. This field value is returned when you enter the Document Number.

Title refers to the title of the maintenance document. This field value returns when you enter the Document Number.

Revision is a field that holds a user-assigned document revision identifier.

Chapter refers to a specific chapter in the associated document. The value is defined by the user when the association is created.

Section refers to a specific section in the associated document. The value is defined by the user when the association is created.

Subject refers to a specific subject in the associated document. The value is defined by the user when the association is created.

Page refers to a specific page in the associated document. The value is defined by the user when the association is created.

Figure refers to a specific figure in the associated document. The value is defined by the user when the association is created.

Note refers to a specific note in the associated document. The value is defined by the user when the association is created.

Defining Reference Documents for an Operation

Prerequisites:

The document references and the operation record to which you want to associate them must exist in the database.

To define reference documents for an operation:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.
2. Select the Route Management tab. The Search Operation page appears. Click the Create button to launch the Create Operation page, or search for an existing operation from the search operation page.
3. If you are creating a new operation, enter the information in the fields provided. Information in fields marked with asterisk is mandatory (see [Fields Associated with Operation Records](#)).
4. Click Apply, and the operation is added to the database. The Edit Operation page appears.
5. If you are associating documents to an existing operation, find that operation with the search, and click the corresponding link in the search result list to navigate to the edit operation page.

Figure 3–16 View Operation Information - Edit Operation page

ORACLE[®] Oracle Complex MRO

HomeEngineeringConfigurationPlanningAdministrationExecutionProfileSign OutHelp

Document IndexRoute ManagementFleet Maintenance Program

OperationsRoutesMajor ZonesSub ZonesResourceItem Compositions

Details

Reference Documents

Resource Requirements

Material Requirements

Edit Operation

CancelCreate RevisionTerminateRevertApply

* Indicates required field

Operation Information

Revision1

OperationX

DescriptionRudder Aft Quadrant Detail Visual Inspection

StandardYesStatusComplete

Operation TypeInspectionProcess

Start Date06-NOV-2002End Date

Quality Inspection Type

Remarks

Revision Note

CancelCreate RevisionTerminateRevertApply

6. Click Reference Documents on the side navigation menu to launch the Attach Reference Document page. Enter the information in the fields provided. For field descriptions, see [Fields on the Reference Document Page](#).

Managing Maintenance Routes 3-29

Figure 3–17 Attach Reference Documents page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document IndexRoute ManagementFleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions

Details

Reference Documents

Resource Requirements

Material Requirements
















Attach Reference Documents

Operation **X**
Revision **1**
Title **Ada testing**

Status **Draft**
Revision Notes
Standard **No**

Reference Documents List

CancelRev

Remove	Doc Number	Type	Title	Revision	Chapter	Section	Subject	Page	Figure	Not
	MBAh019	 Aircraft		1						
	000-BBHAT	 Locomotive	Bhat's	\$#@!						
										
										
										

Add More Rows

Document IndexRoute ManagementFleet Maintenance

Program | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

- 7. Click Apply to add the reference document information to the operation record.

Figure 3–18 Add Document Reference to Operation Record - Attach Reference Documents page

ORACLEOracle Complex MRO

HomeEngineeringConfigurationPlanningAdministrationExecution ProfileSign OutHelp

Document IndexRoute ManagementFleet Maintenance Program

OperationsRoutesMajor ZonesSub ZonesResourceItem Compositions

Details

Reference Documents

Resource Requirements

Material Requirements

Attach Reference Documents

Operation XRevision 1Title Ada testingStatus DraftRevision NotesStandard No

Reference Documents List

CancelRevertApply

Previous1-2 of 2Next

Remove	Doc Number	Type	Title	Revision	Chapter	Section	Subject	Page	Figure	Note	Use Latest
<input type="checkbox"/>	MBAh019	Aircraft		1							No
<input type="checkbox"/>	000-BBHAT	Locomotive Bhat's	\$#@!								No

Add More Rows

Previous1-2 of 2Next

Document IndexRoute ManagementFleet Maintenance Program

HomeEngineeringConfigurationPlanningAdministrationExecutionProfileSign OutHelp

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8. To remove a reference document associated to the operation, click on the delete icon in the associate document list of document definition that you want to remove, then click Apply.

Defining Reference Documents for a Maintenance Route

Prerequisites:

The document references, and the maintenance route record to which you want to associate them, must exist in the database.

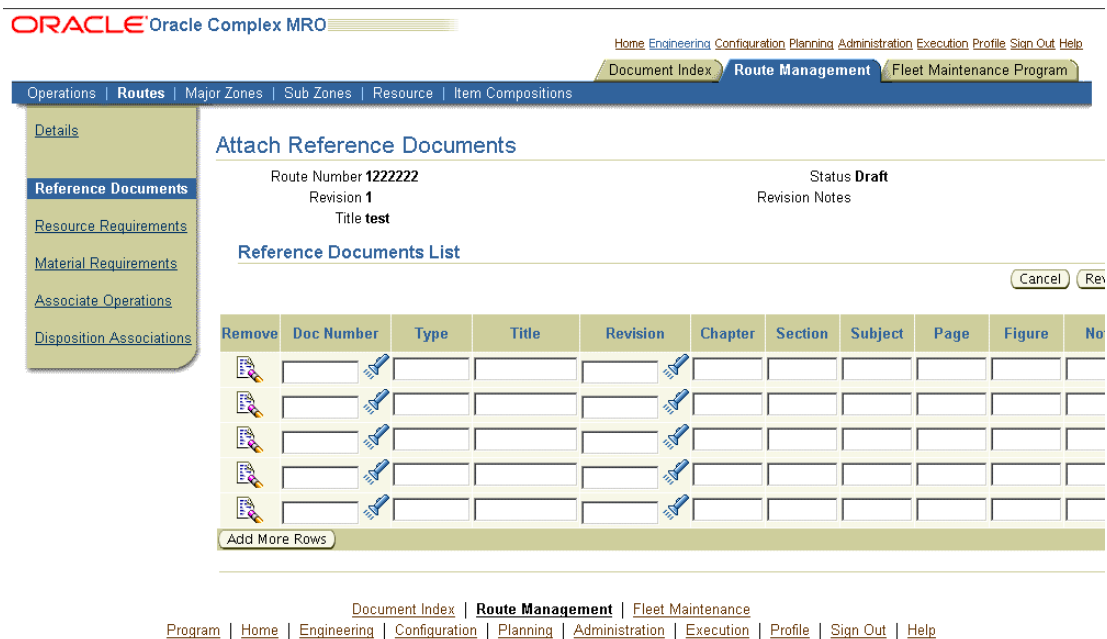
To define reference documents for a maintenance route:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.

Managing Maintenance Routes 3-31

- 2. Select the Route Management tab and then select the Route secondary tab. The Search Route page appears. Click the Create button to launch the Create Route page, or search for an existing route from the search route page.
- 3. If you are creating a new route, enter the information in the fields provided. Information in fields marked with asterisk is mandatory (see [Fields Associated with Maintenance Route Records](#)).
- 4. Click Apply, and the route is added to the database. The Update Route page appears.
- 5. If associating documents to an existing route, search for the route, and click the Route link to navigate to the Update Route page. Click Reference Document on the side navigation menu to launch the Attach Reference Document page.

Figure 3–19 Define Reference Documents for a Route - Attach Reference Documents page



- 6. Enter the information in the fields provided. For field descriptions, see [Fields on the Reference Document Page](#).

Figure 3–20 Enter Document References - Attach Reference Documents page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out

Document Index Route Management Fleet Maintenance Prog

Operations Routes Major Zones Sub Zones Resource Item Compositions

Details

Reference Documents

Resource Requirements

Material Requirements

Associate Operations

Disposition Associations

Attach Reference Documents

Route Number 1222222

Revision 1
















Title test

Status Draft

Revision Notes

Reference Documents List

Can

Remove	Doc Number	Type	Title	Revision	Chapter	Section	Subject	Page	Figure
	MBAh1019	 Aircraft		test					
	000-BBHAT	 Locomotive	Bhat's	Rev2					
									
									
									

Add More Rows

- 7. Click Apply to add the reference document information to the maintenance route record.

Figure 3–21 View Attached Documents - Attach Reference Documents page

ORACLE

Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Operations](#) | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | [Resource](#) | [Item Compositions](#)

[Details](#)
[Reference Documents](#)
[Resource Requirements](#)
[Material Requirements](#)
[Associate Operations](#)
[Disposition Associations](#)

Attach Reference Documents

Route Number 1222222
Revision 1
Title test

Status Draft
Revision Notes

Reference Documents List

Cancel

Revert

Apply

Previous

1-2 of 2

Next

Remove	Doc Number	Type	Title	Revision	Chapter	Section	Subject	Page	Figure	Note	Use Latest
<input type="checkbox"/>	MBAhIQ19	Aircraft		test							No
<input type="checkbox"/>	000-BBHAT	Locomotive Bhat's		Rev2							No

Add More Rows

Previous

1-2 of 2

Next

[Document Index](#) | [Route Management](#) | [Fleet Maintenance](#)

[Program](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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8. To remove a reference document associated to the route, select the check box beside the document definition that you want to remove, and then click Apply.

Defining Resource Requirements

Oracle Complex Maintenance, Repair, and Overhaul allows you to compile labor requirements related to a maintenance task. This information is necessary for pre-planning activities. Resource requirements can be defined as Labor, Tooling or Machinery.

See:

- Defining Resource Requirements for an Operation
- Defining Resource Requirements for a Maintenance Route

3-34 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Fields on the Resource Requirement Page

The following fields appear on the Labor Requirement page:

Resource Type refers to the type of resource requirement. If you do not know the value, enter a partial search string using the generic substitution metacharacter%, and click on the search icon to launch the resource type list of values. The resource types are system seeded, defined at installation of Oracle Bill of Materials.

Primary Resource refers to the resource required to perform the route or operation. If you do not know the value, enter a partial search string using the generic substitution metacharacter%, and click on the search icon to launch the resource list of values. The resources are set up by your organization at implementation time.

Quantity refers to the number of resources required to perform the route or operation.

Duration refers to number of hours required of each resource to perform the route or operation.

Skill Type refers to the type of skill the individual performing the maintenance operation should possess. The skill type is retrieved from the selected resource. Skill Type is populated only for the resource type "Person."

Skill Level refers to the skill level an individual performing the maintenance task should possess. The skill type is retrieved from the selected resources. Skill level is populated only for the resource type "Person."

Certification refers to certification an individual performing the maintenance task should possess. Certification is populated only for the resource type "Person."

Defining Resource Requirements for an Operation

Prerequisites:

The operation record for which you want to define labor requirements should exist in the database. The resources required to carry out the operation must be set up in the database. Refer to *Oracle Complex Maintenance, Repair, and Overhaul Implementation Guide*.

To define resource requirements for an operation:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.
2. Select the Route Management tab to bring up the Search Operation page. Click the Create button to launch the Create Operation page, or search for an existing operation from the search operation page.
3. If you are creating a new operation, enter the information in the fields provided. Information in fields marked with asterisk is mandatory (see [Fields Associated with Operation Records](#)). Click Apply to add the operation to the database. The Edit Operation page appears.
4. If defining resources for an existing operation, search for the operation, and click the corresponding link in the search result list to navigate to the Edit Operation page.
5. Click the Resource Requirements link in the side navigation menu. The Define Resource Requirements page appears. Click Add More Rows.

Figure 3–22 Define Resource Requirements page

ORACLE Oracle Complex MRO

Home [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) **[Route Management](#)** [Fleet Maintenance Program](#)

Operations | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | [Resource](#) | [Item Compositions](#)


















[Details](#)
[Reference Documents](#)
[Resource Requirements](#)
[Material Requirements](#)

Define Resource Requirements

Operation **X** Status **Draft**
Revision **1** Revision Notes
Title **30.10.52.12.26.16.RTY** Standard **No**

Resources List

[Cancel](#) [Revert](#) [Apply](#)

Remove	Resource Type	Resource	Description	Quantity	Duration	Costing Parameters	Define Alternate Resources
							
							
							
							
							

[Add More Rows](#)

[Document Index](#) | **[Route Management](#)** | [Fleet Maintenance](#)

[Program](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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- Enter the information in the fields provided. For field descriptions, see [Fields on the Resource Requirement Page](#).

Figure 3–23 Enter Resource Information - Define Resource Requirements page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Document Index

Route Management

Fleet Maintenance Program

Operations

Routes

Major Zones

Sub Zones

Resource

Item Compositions

Details

Reference Documents

Resource Requirements

Material Requirements

Define Resource Requirements

Operation X
Revision 1
Title 30.10.52.12.26.16.RTY






Status Draft
Revision Notes
Standard No

Resources List

Cancel

Revert

Apply

Remove	Resource Type	Resource	Description	Quantity	Duration	Costing Parameters	Define Alternate Resources
	Machine	Drills	SMA_Drills	10	1		
							
							
							
							

Add More Rows

Document Index

Route Management

Fleet Maintenance

Program

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

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- 7. Click Apply to add the resource requirement information to the operation record.

Figure 3–24 View Resources List - Define Resource Requirements page

ORACLE Oracle Complex MRO

Home [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Operations | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | [Resource](#) | [Item Compositions](#)

[Details](#)
[Reference Documents](#)
[Resource Requirements](#)
[Material Requirements](#)



Define Resource Requirements

Operation **X** Status **Draft**
Revision **1** Revision Notes
Title **30.10.52.12.26.16.RTY** Standard **No**

Resources List

[Cancel](#) [Revert](#) [Apply](#)

Previous 1-1 of 1 Next

Remove	Resource Type	Resource	Description	Quantity	Duration	Costing Parameters	Define Alternate Resources
<input type="checkbox"/>	Machine	Drills	SMA_Drills	10	1		

[Add More Rows](#)

Previous 1-1 of 1 Next

[Document Index](#) | [Route Management](#) | [Fleet Maintenance](#)
[Program](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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8. Click on the Costing Parameter Icon to specify Costing Parameters for this resource requirement. The Update Costing Parameters page appears. See [Defining Costing Parameters](#).

Figure 3–25 Update Costing Parameters page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Operations](#) | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | [Resource](#) | [Item Compositions](#)

[Details](#)
[Reference Documents](#)
[Resource Requirements](#)
[Material Requirements](#)

Update Costing Parameters

Operation X	Status Draft
Revision 1	Revision Notes
Title 30.10.52.12.26.16.RTY	Standard No
Resource Type Machine	Quantity 10
Resource Drills	Duration 1

Costing Parameters

Cost Basis <input type="text" value="Item"/>	Scheduled <input type="text"/>
Autocharge Type <input type="text"/>	Standard Rate <input type="text" value="Yes"/>

[Document Index](#) | [Route Management](#) | [Fleet Maintenance Program](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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- 9. Click Apply to add the information to the operation record.
- 10. To remove a labor requirement associated to the operation, click the remove icon on the pertinent record in the resource list and then click Apply.

Defining Resource Requirements for a Maintenance Route

Prerequisites:

The maintenance route record for which you want to define labor requirements must exist in the database. The Resources required to carry out the route must be set up in the database. Refer to the *Oracle Complex Maintenance, Repair, and Overhaul Implementation Guide*.

To define resource requirements for a maintenance route:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.
2. Select the Route Management tab then click the Route secondary tab to bring up the Search Route page. Click the Create button to launch the Create Route page, or search for an existing route from the search route page.
3. If you are creating a new route, enter the information in the fields provided. Information in fields marked with asterisk is mandatory (see [Fields Associated with Maintenance Route Records](#)). Click Apply to add the operation to the database. The Update Route page appears.
4. If you are defining resources for an existing route, search for the route, and click on the corresponding Route link in the search result list to navigate to the Update Route page.

Figure 3–26 Route Information - Update Route page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Document Index

Route Management

Fleet Maintenance Program

Operations

Routes

Major Zones

Sub Zones

Resource

Item Compositions

Details

Reference Documents

Resource Requirements

Material Requirements

Associate Operations

Disposition Associations

Update Route

* Indicates required field

CancelDeleteApproveRevertApply

Route Information

* Route Number 1222222

Status Draft

Revision 1

Revision Notes

* Title test

* Time Span 20 Hours

Route Type

Process

Item Type

Operator

Major Zone

Sub Zone

Service Item

Quality Inspection Type

Accounting Class

Task Template Group

System Communication Gyroscope GP

Please tab out of this text box

* Start Date 30-APR-2004

Remarks

- 5. Click the Resource Requirements link in the side navigation menu. The Define Resource Requirement page appears.
- 6. Click Add More Rows to enter resource requirements. Enter the information in the fields provided. For field descriptions, see [Fields on the Resource Requirement Page](#). Click Apply to add the resource requirement information to the operation record.

3-42 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 3–27 Define Resource Requirements for a Route - Define Resource Requirements page

ORACLE Oracle Complex MRO

Home [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) **[Route Management](#)** [Fleet Maintenance Program](#)

[Operations](#) | **[Routes](#)** | [Major Zones](#) | [Sub Zones](#) | [Resource](#) | [Item Compositions](#)

[Details](#)
[Reference Documents](#)
[Resource Requirements](#)
[Material Requirements](#)
[Associate Operations](#)
[Disposition Associations](#)

Define Resource Requirements

Route Number **1222222** Status **Draft**
Revision **1** Revision Notes
Title **test**

Resources List

[Cancel](#) [Revert](#) [Apply](#)

Previous 1-1 of 1 Next

Remove	Resource Type	Resource	Description	Quantity	Duration	Costing Parameters	Define Alternate Resources
<input type="checkbox"/>	Machine	MROM1	Machine Resource Type 1	5	10		

[Add More Rows](#)

Previous 1-1 of 1 Next

[Document Index](#) | **[Route Management](#)** | [Fleet Maintenance](#)

[Program](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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7. Click Apply to add the resource requirement information to the operation record.
8. Click on the Costing Parameter Icon to specify Costing Parameters for this resource requirement. See [Defining Costing Parameters](#).
9. To remove a labor requirement associated to the operation, click the remove icon on the pertinent record in the resource list and then click Apply.

Defining Costing Parameters

Oracle Complex Maintenance, Repair, and Overhaul allows you to define the costing parameters for resource requirements. These parameters are used for calculating job costs during execution of the route or operation on the shop floor. The costing parameter values are defined when implementing Oracle's Work in

Process (WIP) and Costing module. Definition of the costing parameters at the route or operation level is optional. Should you choose not to define any parameter values at that level when you create a job in WIP for this Route/Operation, the system selects a default from the Bill of Materials resources connected to the Oracle Complex Maintenance, Repair, and Overhaul Resource.

See:

- [Defining Costing Parameters for an Operation Resource Requirement](#)
- [Defining Costing Parameters for a Route Resource Requirement](#)

Fields on the Costing Parameters Page

The following fields appear on the Material Requirement page:

Cost Basis refers to the Cost Basis ID. The value is picked from a pull down list. The valid cost basis id's are defined upon implementation of the Bill of Materials Resources

Scheduled refers to the Schedule Type ID. The value is picked from a pull down list. The valid schedule types are defined upon implementation of the Bill of Materials.

Activity refers to the Activity ID. The value is picked from a pull down list. The valid activity id's are defined upon implementation of the Bill of Materials.

Autocharge Type refers to the Autocharge Type. The value is picked from a pull down list. The valid autocharge types are defined upon implementation of the Bill of Materials Resources

Standard Rate refers to the application of a Standard Rate. The value is picked from a pull down list and can be either Yes or No.

Defining Costing Parameter for an Operation Resource Requirement

Prerequisites:

The operation record and the material requirements for which you want to define costing parameters must exist in the database. The costing parameters must exist in the database.

To define the costing parameters for a requirement on an operation:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.
2. Select the Route Management tab to bring up the Search Operation page. Click the Create button to launch the Create Operation page, or search for an existing operation from the search operation page.
3. If you are creating a new operation, enter the information in the fields provided. Information in fields marked with asterisk is mandatory (see [Fields Associated with Operation Records](#)).
4. Click Apply to add the operation to the database. The Edit Operation page appears.
5. If you are defining parameters for an existing operation, search for the operation, and click the corresponding link in the search result list to navigate to the Edit Operation page.
6. Click on Resource Requirements in the side navigation menu to navigate to the Resource Requirements page.
7. Enter the information in the fields provided. For field descriptions, see [Fields on the Resource Requirement Page](#).
8. Click Apply to add the resource requirement information to the operation record.
9. Click on the Costing Parameters icon in the resource requirements list to navigate to the Update Costing Parameters page.

Figure 3–28 Define Costing Parameters - Update Costing Parameters page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Operations](#) | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | [Resource](#) | [Item Compositions](#)

[Details](#)

[Reference Documents](#)

[Resource Requirements](#)

[Material Requirements](#)

Update Costing Parameters

Operation **X**

Revision **1**

Title **30.10.52.12.26.16.RTY**

Status **Draft**

Revision Notes

Standard **No**

Resource Type **Machine**

Resource **Drills**

Quantity **10**

Duration **1**

Costing Parameters

Cost Basis

Autocharge Type

Scheduled

Standard Rate

Cancel

Revert

Apply

Cancel

Revert

Apply

[Document Index](#) | [Route Management](#) | [Fleet Maintenance Program](#)

[Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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10. Enter the information in the fields provided. For field descriptions, see [Fields on the Costing Parameter Page](#).

11. Click Apply to save your costing parameter definition.

3-46 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 3–29 Enter Costing Parameters - Update Costing Parameters page

ORACLE Oracle Complex MRO

Home [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Operations](#) | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | [Resource](#) | [Item Compositions](#)

[Details](#)
[Reference Documents](#)
[Resource Requirements](#)
[Material Requirements](#)

Update Costing Parameters

Operation X	Status Draft
Revision 1	Revision Notes
Title 30.10.52.12.26.16.RTY	Standard No
Resource Type Machine	Quantity 10
Resource Drills	Duration 1

Costing Parameters

Cost Basis Item	Scheduled 	Cancel Revert Apply
Autocharge Type Manual	Standard Rate Yes	Cancel Revert Apply

[Document Index](#) | [Route Management](#) | [Fleet Maintenance Program](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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- To remove Costing Parameters, select the null value from the pull down list of each field you want to remove and then click Apply.

Defining Costing Parameter for a Route Resource Requirement

Prerequisites:

The Route record and the material requirements for which you want to define costing parameters must exist in the database. The Costing Parameters must exist in the database.

To define costing parameters for a resource requirements on a route:

- From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.

2. Select the Route Management tab then click the Route secondary tab to bring up the Search Route page. Click the Create button to launch the Create Route page, or search for an existing route from the search route page.
3. If you are creating a new route, enter the information in the fields provided. Information in fields marked with asterisk is mandatory (see [Fields Associated with Maintenance Route Records](#)). Click Apply to add the route to the database. The Update Route page appears.
4. If you are defining parameters for an existing route, search for the route, and click on the Route Number link in the search result list to navigate to the Update Route page.
5. Click on Resource Requirements in the side navigation menu to navigate to the Resource Requirements page.
6. Enter the information in the fields provided. For field descriptions, see [Fields on the Resource Requirement Page](#).
7. Click Apply to add the resource requirement information to the Route record
8. Click on the Costing Parameters icon in the resource requirements list to navigate to the Update Costing parameters page.

Figure 3–30 Define Costing Parameters for a Route Resource Requirement - Update Costing Parameters page

ORACLE Oracle Complex MRO

Home [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) **[Route Management](#)** [Fleet Maintenance Program](#)

Operations | **Routes** | Major Zones | Sub Zones | Resource | Item Compositions

[Details](#)
[Reference Documents](#)
Resource Requirements
[Material Requirements](#)
[Associate Operations](#)
[Disposition Associations](#)

Update Costing Parameters

Route Number **24-030-01-00** Status **Draft**
Revision **2** Revision Notes
Title **Left IDG Oil Level**

Resource Type **Machine** Quantity **1**
Resource **MROM1** Duration **1**

Costing Parameters

Cost Basis Scheduled
Autocharge Type Standard Rate

[Document Index](#) | **[Route Management](#)** | [Fleet Maintenance Program](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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9. Enter the information in the fields provided. For field descriptions, see [Fields on the Costing Parameter Page](#).
10. Click Apply to save your costing parameter definition.
11. To remove Costing Parameters, select the null value from the pull down list of each field you want to remove and then click Apply.

Defining Material Requirements

Oracle Complex Maintenance, Repair, and Overhaul allows you to compile material requirements related to a maintenance task. This information is necessary for pre-planning activities.

See:

- [Defining Material Requirements for an Operation](#)

- [Defining Material Requirements for a Maintenance Route](#)

Fields on the Material Requirement Page

The following fields appear on the Resource Requirement page:

Item Group refers to the Alternate Item Group defined in Master Configuration. If your material requirement for this task is not a specific item type but a group of alternate items, you can define the complete alternate item group as a material requirement. This allows the system to plan for all the possible alternate items to perform the task. This definition specifically applies for a replacement material requirement. You can only define an item group or a part number for one and only one material requirement. If you do not know the value, enter a partial search string using the generic substitution metacharacter%, and click on the search icon to launch the alternate Item Group list of values. The alternate item groups are defined by your organization when implementing Master Configuration.

Part Number refers to an item number that is required to perform the task. This definition supports the set up of consumable requirements to perform the task. You can only define an item group or a part number for one material requirement but not both. If you do not know the value, enter a partial search string using the generic substitution metacharacter%, and click on the search icon to launch the part number list of values. Parts are defined by your organization when setting up the item master. Only the eAM enabled inventory items are displayed in the list of values.

Organization refers to the Inventory Organization an Item belongs to. The organization will be automatically populated when a part number is defined. When creating a material requirement for an item group the Organization remains empty, since Alternate Item Groups are not Organization related in Master Configuration. Organizations are defined by your organization when setting up the item master.

Description refers to the description of the item group or the part number. The description is automatically populated when selecting an item group or part number.

Quantity refers to the number of parts required to perform the task.

UOM refers to the Unit of Measure of the quantity required to perform the task.

Defining Material Requirements for an Operation

Prerequisites:

The operation record for which you want to define resource requirements should exist in the database. The Material required to carry out the operation must exist in the database.

To define machine requirements for an operation:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.
2. Select the Route Management tab to bring up the Search Operation page. Click the Create button to launch the Create Operation page, or search for an existing operation from the search operation page.
3. If you are creating a new operation, enter the information in the fields provided. Information in fields marked with asterisk is mandatory (see [Fields Associated with Operation Records](#)). Click Apply to add the operation to the database. The Edit Operation page appears.
4. If defining material requirements for an existing operation, search for the operation and click on the hyper linked record in the search result list to navigate to the Edit Operation page.

Figure 3–31 View Operation Details - Edit Operation page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Document Index

Route Management

Fleet Maintenance Program

Operations

Routes

Major Zones

Sub Zones

Resource

Item Compositions

Details

Reference Documents

Resource Requirements

Material Requirements

Edit Operation

Cancel

Delete

Approve

Revert

Apply

* Indicates required field

Operation Information

Revision

1

Operation

X

* Description

30.10.52.12.26.16.RTY

* Standard

No

Status

Draft

Operation Type

System Check

Process

* Start Date

04-FEB-2004

End Date

Quality Inspection Type

Remarks

Revision Note

Cancel

Delete

Approve

Revert

Apply

5. Click the Material Requirements link in the side navigation menu. The Define Material Requirement page appears.

Figure 3–32 Define Material Requirements page

ORACLE Oracle Complex MRO

Home [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Operations | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | [Resource](#) | [Item Compositions](#)

[Details](#)
[Reference Documents](#)
[Resource Requirements](#)
Material Requirements

Define Material Requirements

Operation **X** Status **Draft**
Revision **1** Revision Notes
Title **30.10.52.12.26.16.RTY** Standard **No**

Materials List [Cancel](#) [Revert](#) [Apply](#)

Remove	Item Group	Item	Organization	Description	Quantity	UOM
No records were found matching the given criteria..						
Add More Rows						

[Document Index](#) | [Route Management](#) | [Fleet Maintenance](#)

[Program](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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- Click [Add More Rows](#) to enter material requirements. Enter information in the fields provided. For field descriptions, see [Fields on the Resource Requirement Page](#).

Figure 3–33 Enter Material Requirements - Define Material Requirements page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Document Index

Route Management

Fleet Maintenance Program

Operations

Routes

Major Zones

Sub Zones

Resource

Item Compositions

Details

Reference Documents

Resource Requirements

Material Requirements

Define Material Requirements

Operation X

Revision 1

Title 30.10.52.12.26.16.RTY

Status Draft

Revision Notes





















Standard No

Materials List

Cancel

Revert

Apply

Remove	Item Group	Item	Organization	Description	Quantity	UOM	
		03 18 2004 V 10		Vision Operatio	03 18 2004 V 100	10 Dozen	
							
							
							
							

Add More Rows

Document Index

Route Management

Fleet Maintenance

Program

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

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- 7. Click Apply to add the material requirement information to the operation record.

Figure 3–34 View Material List - Define Material Requirements page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Operations Routes Major Zones Sub Zones Resource Item Compositions

Details
Reference Documents
Resource Requirements
Material Requirements

Define Material Requirements

Operation **X** Status **Draft**
Revision **1** Revision Notes
Title **30.10.52.12.26.16.RTY** Standard **No**

Materials List

Cancel Revert Apply

Previous 1-1 of 1 Next

Remove	Item Group	Item	Organization	Description	Quantity	UOM
<input type="checkbox"/>		03 18 2004 V 1	Vision Operations	03 18 2004 V 100	10	Dozen

Add More Rows

Previous 1-1 of 1 Next

Document Index Route Management Fleet Maintenance
Program Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

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8. To remove a material requirement associated to the operation, click the remove icon on the pertinent record in the resource list and then click Apply.

Defining Material Requirements for a Maintenance Route

Prerequisites:

The maintenance route record for which you want to define machine requirements must exist in the database. The Item Type and Part Number values should exist in the database.

To define machine requirements for a maintenance route:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.

2. Select the Route Management tab then click the Route secondary tab to bring up the Search Route page. Click the Create button to launch the Create Route page, or search for an existing route from the search route page.
3. If you are creating a new route, enter the information in the fields provided. Information in fields marked with asterisk is mandatory (see [Fields Associated with Maintenance Route Records](#)). Click Apply to add the operation to the database. The Update Route page appears.
4. If you are defining material requirements for an existing route, search for the route, and click the Route Number link in the search result list, to navigate to the Update Route page.
5. Click the Material Requirements link in the side navigation menu. The Define Material Requirement page appears. Click Add More Rows. Enter the information in the fields provided. For field descriptions, see [Fields on the Resource Requirement Page](#).
6. Click Apply to add the material requirement information to the maintenance route record.

Figure 3–35 Add Material Requirements to a Maintenance Route - Define Material Requirements page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Operations | **Routes** | Major Zones | Sub Zones | Resource | Item Compositions

Define Material Requirements

Route Number **AHLRM001** Status **Draft**
Revision **6** Revision Notes
Title **AHLRM001**

Materials List

Cancel Revert Apply

Previous 1-8 of 8 Next

Remove	Item Group	Item	Organization	Description	Quantity	UOM
<input type="checkbox"/>	16_Bearing_Gu				3	Each
<input type="checkbox"/>	AP0129				1	Each
<input type="checkbox"/>	KMPG002				2	Each
<input type="checkbox"/>		8932B13	Vision Project Mfg	Filter, Hydraulic Pump	1	Each
<input type="checkbox"/>		AHLITEM002	Vision Project Mfg	This is a item for AHL	3	Box of 5
<input type="checkbox"/>		AHLITEMCOPY	Vision Operations AHL	Item for Neg test - Copy	1	Each
<input type="checkbox"/>		AHLITEMRM00	Vision Operations AHL	Item for Neg test	1	Each
<input type="checkbox"/>		R-ITEM1-Track	Vision Project Mfg	R-ITEM1-Trackable	2	Each

Add More Rows

- To remove a material requirement associated to the operation, click the remove icon on the pertinent record in the resource list and then click Apply.

Associating Operations with a Maintenance Route

The Associate Operation to a Route page allows you to associate operations to a selected maintenance route. The application simplifies the creation of maintenance routes by allowing you to use related operation records existing in the database. You can search for a required operation, and copy the operation record to associate it with the route.

Prerequisites:

Operation records that apply to the route must exist in the database.

To associate operations with maintenance routes:

- 1. Retrieve the route record for which you want to associate operations (see [Finding Maintenance Route Records](#)).
- 2. Select the pertinent route record from the Route List on the Search Route page.
- 3. Click Associate Operations on the side navigation menu to launch the Associate Operations page.

Figure 3–36 Associate Operations page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Operations](#) | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | [Resource](#) | [Item Compositions](#)

[Details](#)
[Reference Documents](#)
[Resource Requirements](#)
[Material Requirements](#)
[Associate Operations](#)
[Disposition Associations](#)

Associate Operations

Route Number **AHLRM001** Status **Draft**
Revision **6** Revision Notes
Title **AHLRM001**



Operations List

Cancel

Revert

Attach

Apply

Remove	Step	Standard	Operation	Description	Start Date	Check Point
	<input type="text"/>	No		<input type="text"/>	<input type="text"/>	No
	<input type="text"/>	No		<input type="text"/>	<input type="text"/>	No
	<input type="text"/>	No		<input type="text"/>	<input type="text"/>	No
	<input type="text"/>	No		<input type="text"/>	<input type="text"/>	No
	<input type="text"/>	No		<input type="text"/>	<input type="text"/>	No

Add More Rows

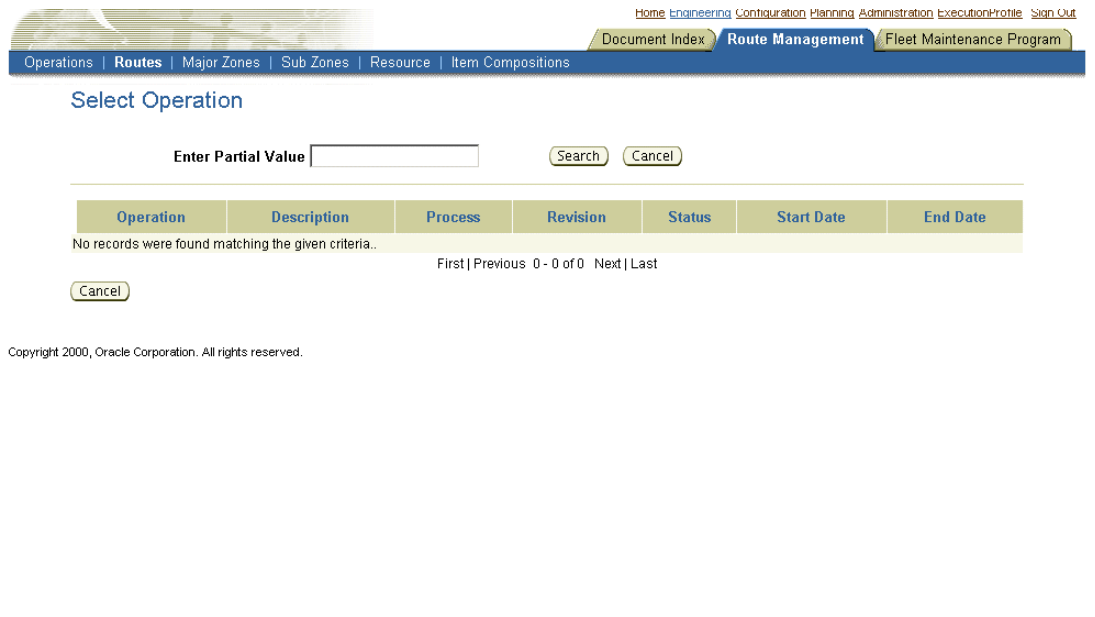
[Document Index](#) | [Route Management](#) | [Fleet Maintenance](#)

[Program](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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- 4. Enter the information in the fields provided.
 - Step refers to the serial order of the operation in the maintenance route. This field value is user assigned.
 - Operation field contains the pre-defined operation that you want to associate with the maintenance route.
- 5. Click the Operation search icon to launch the Select Operation page.

Figure 3–37 Select Operation page



Home [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [ExecutionProfile](#) [Sign Out](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Operations](#) | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | [Resource](#) | [Item Compositions](#)

Select Operation

Enter Partial Value

Operation	Description	Process	Revision	Status	Start Date	End Date
No records were found matching the given criteria..						

First | Previous 0 - 0 of 0 Next | Last

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- Query for operation records. Click the link to select the operation. The fields in the Associate Operations page will get populated with these values.

Figure 3–38 View Operation List - Associate Operations page

ORACLE® Oracle Complex MRO

HomeEngineeringConfigurationPlanningAdministrationExecution ProfileSign Out Help

Document IndexRoute ManagementFleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions






DetailsReference DocumentsResource RequirementsMaterial RequirementsAssociate OperationsDisposition Associations

Associate Operations

Route Number **AHLRM001**Revision **6**Title **AHLRM001**Status **Draft**Revision Notes

Operations List

CancelRevertAttachApply

Remove	Step	Standard	Operation	Description	Start Date	Check Point
	<input type="text"/>	No	X	the description is a lo	08-JAN-2004	No
	<input type="text"/>	No				No
	<input type="text"/>	No				No
	<input type="text"/>	No				No
	<input type="text"/>	No				No

Add More Rows

Document Index | Route Management | Fleet Maintenance

Program | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

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7. Click Apply to save the records.

Figure 3–39 View Associated Operations - Associate Operations page

ORACLE Oracle Complex MRO

Home [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Operations | **Routes** | Major Zones | Sub Zones | Resource | Item Compositions

[Details](#)
[Reference Documents](#)
[Resource Requirements](#)
[Material Requirements](#)
[Associate Operations](#)
[Disposition Associations](#)

Associate Operations

Route Number **AHLRM001** Status **Draft**
Revision **6** Revision Notes
Title **AHLRM001**

Operations List

[Cancel](#) [Revert](#) [Attach](#) [Apply](#)

Previous 1-1 of 1 Next

Remove	Step	Standard	Operation	Description	Start Date	Check Point
<input type="checkbox"/>	10	No	X	27.10.51.12.26.16.35	15-MAR-2004	No

[Add More Rows](#)

Previous 1-1 of 1 Next

[Document Index](#) | [Route Management](#) | [Fleet Maintenance Program](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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8. Alternatively, click Attach to search and associate multiple operations. In the Search Operation page, enter information in the fields for which you know the value, and click Go. All operations matching your search criteria are displayed in the Operations Results table.

Figure 3–40 Search Operation Record - Search Operation page

ORACLE

Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Document Index

Route Management

Fleet Maintenance Program

Operations | **Routes** | Major Zones | Sub Zones | Resource | Item Compositions

Search Operation

Operation

Operation Type

Standard

Description

Go Clear

Process

Status

Operation Results

Select Operation and...

Associate

Previous

1-10 of 75

Next

Select	Standard	Operation	Description	Operation Type	Process	Revision	Status	Start Date	End Date
<input type="checkbox"/>	Yes	X	Rudder Aft Quadrant Detail Visual Inspection	Inspection		1	Complete	06-NOV-2002	
<input type="checkbox"/>	Yes	X	Cabin Temp Assy Filter Installation	Assembly		1	Complete	07-NOV-2002	
<input type="checkbox"/>	Yes	X	Cabin Temp Sensor Assembly Filter Removal	Disassembly		1	Complete	07-NOV-2002	
<input type="checkbox"/>	Yes	X	Cabin Temp Sensor Assy Filter Cleaning	Cleaning		1	Complete	07-NOV-2002	
<input type="checkbox"/>	Yes	X	Check Brake Accumulator Precharge	Operation Check		1	Complete	07-NOV-2002	
<input type="checkbox"/>	Yes	X	EMDP Case Drain Filter Element Installation	Replacement		1	Complete	07-NOV-2002	
<input type="checkbox"/>	Yes	X	EMDP Case Drain Filter Element Removal	Replacement		1	Complete	07-NOV-2002	
<input type="checkbox"/>	Yes	X	Elevator Control Test	Operation Check		1	Complete	07-NOV-2002	

9. Select multiple operation records and click Associate. You will see that the values in the Operation fields are not in the same line as that of the step for which you entered the operation, but on the next empty line. Enter the values in the Step fields later, along with the rest of the fields.
10. Click Apply to associate the operations to the maintenance route record.

Editing Operation Records

Oracle Complex Maintenance, Repair, and Overhaul allows you to retrieve existing operation records and edit the information associated with the operation including sign off, material, machine, and tool requirements. You can also edit document reference and phase code definitions associated with the operation.

This first step in the process allows you to edit the basic operation record information.

Prerequisites:

The operation must exist in the database and must have a status of Draft or Approval Rejected. To edit an approved operation, you must first create a revision of that operation.

To edit operation records:

- 1. Retrieve the operation records that match your requirement (see [Finding Operation Records](#)).
- 2. Select an Operation record, and click the Operation link to bring it up on the Edit Operation page.

Figure 3–41 Edit Operation Information - Edit Operation page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Operations](#) | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | [Resource](#) | [Item Compositions](#)

Details

[Reference Documents](#)

[Resource Requirements](#)

[Material Requirements](#)

Edit Operation

Cancel Delete Approve Revert Apply

* Indicates required field

Operation Information

Revision1

OperationX

Description30.10.52.12.26.16.RTY

StandardNo

StatusDraft

Operation TypeSystem Check

Process

Start Date04-FEB-2004

End Date

Quality Inspection Type

Remarks

Revision Note

Cancel Delete Approve Revert Apply

- 3. Make the necessary changes to the information in the fields provided. For field descriptions, see [Fields associated with Operation Records](#).

Managing Maintenance Routes 3-63

Figure 3–42 Modify Operation Information - Edit Operation page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Operations](#) | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | [Resource](#) | [Item Compositions](#)

Details

[Reference Documents](#)

[Resource Requirements](#)

[Material Requirements](#)

Edit Operation

CancelDeleteApproveRevertApply

* Indicates required field

Operation Information

Revision1

OperationX

* Description30.10.52.12.26.16.RTY

* StandardNo

StatusDraft

Operation TypeOperation Check

Process

* Start Date04-FEB-2004

End Date

Quality Inspection Type

Remarks

Revision Note

CancelDeleteApproveRevertApply

4. To save the edited operation, click Approve.

3-64 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 3–43 Approve Operation Record Changes - Edit Operation page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Operations Routes Major Zones Sub Zones Resource Item Compositions

Edit Operation

* Indicates required field

Operation Information

Revision **1**
 Operation **X**
 Description **30.10.52.12.26.16.RTY**
 Standard **No** Status **Complete**
 Operation Type **Operation Check** Process
 Start Date **15-JUL-2010** End Date
 Quality Inspection Type
 Remarks
 Revision Note

Cancel Create Revision Terminate Revert Apply

Document Index Route Management Fleet Maintenance Program

Program Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

- To edit reference document resources, material requirements, or associated operations, click the pertinent link in the side navigation menu.

See:

- Defining Reference Documents for an Operation
- Defining Resource Requirements for an Operation
- Defining Material Requirements for an Operation

Editing Maintenance Route Records

Oracle Complex Maintenance, Repair, and Overhaul allows you to retrieve existing maintenance route records and edit the information associated with the route, including sign off, material, machine, and tool requirements. You can also edit document reference and phase code definitions associated with the operation.

This first step in the process allows you to edit the basic maintenance route record information.

Prerequisites:

The maintenance route record must exist in the database and must have a status of Draft or Approval Rejected. To edit an approved route, you must first create a revision of that route.

To edit maintenance route records:

1. Retrieve the maintenance route records that match your requirement (see [Finding Maintenance Route Records](#)).
2. Click the Route Number link to bring it up on the Update Route page.
3. Make the necessary changes to the information in the fields provided. For field descriptions, see [Fields Associated with Maintenance Route Records](#).
4. To save the edited route, click Approve.
5. To edit reference document resources, material requirements, or associated operations, click the pertinent link in the side navigation menu.

See:

- [Defining Reference Documents for a Route](#)
- [Defining Resource Requirements for a Route](#)
- [Defining Material Requirements for a Route](#)
- [Associating Operations to a Maintenance Route](#)

Defining Component Locations in Fleet Units

Maintenance organizations define zones to identify component locations in an electromechanical system. Oracle Complex Maintenance, Repair, and Overhaul allows you to associate major zones and sub zones in electromechanical systems to product types. Product Type refers to the classification by category of electromechanical systems such as Ground Support and Engine for aircraft. This enables you to closely monitor maintenance activities and component location on any fleet unit belonging to a product type.

See:

- [Associating Major Zones to Product Types](#)

- [Associating Sub Zones to Product Types](#)

Fields on the Associate Zone to Product Type Pages

The following fields appear on the Associate Major Zone to Product Type and Associate Sub Zone to Product Type pages:

Product Type refers to the classification by category of the electromechanical system. Enter the value of the product type to which you want to associate zones. If you do not know the value, enter a partial search string with the generic substitution metacharacter%, and click Go. This launches the Select Product Type page with all the matching records in the database. Click the pertinent record to return this value to the field.

Major Zone refers to the user-defined zones used as a method for identifying locations in the electromechanical system being maintained. If you do not know the value, enter a partial search string with the generic substitution metacharacter%, and click Go. This launches the Select Major Zone page with all the matching records in the database. Click the pertinent record to return this value to the field.

Description (Major Zone) is the zone description automatically placed in this field when the Major Zone is selected from the database.

Sub Zone refers to the user-defined zones within a major zone used as a method for identifying locations in the electromechanical system being maintained. If you do not know the value, enter a partial search string with the generic substitution metacharacter%, and click Go. This launches the Select Sub Zone page with all the matching records in the database. Click the pertinent record to return this value to the field.

Description (Sub Zone) is the sub zone description automatically placed in this field when the Sub Zone is selected from the database.

Start Date refers to the date from which this definition for component location is valid. You cannot enter a date directly in this field. Click on the calendar selector icon beside the date field and select the correct date, which will be copied into the field.

End Date refers to the date up to which this component location definition for the product type would remain valid. Click on the calendar selector icon beside the date field and select the correct date, which will be copied into the field.

Associating Major Zones to Product Types

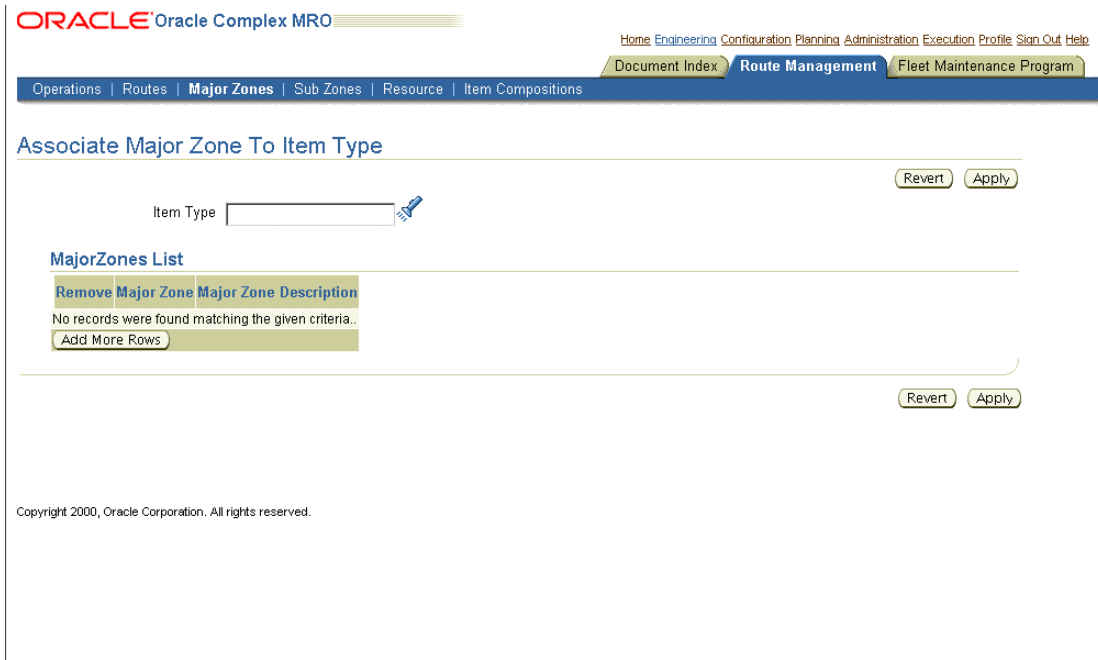
Prerequisites:

Product Type, and Major Zone values must exist in the database. You should decide on the major zone that you want to associate with the selected Product Type.

To associate major zones to a product type:

- 1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.
- 2. Select the Route Management tab, and then select the Major Zone secondary tab. The Associate Major Zone to Item Type page appears.

Figure 3–44 Associate Major Zone to Item Type page



3. Enter the information in the fields provided. For field descriptions, see [Fields on the Associate Zone to Product Type Pages](#).

Figure 3–45 Select Major Zones - Associate Major Zone To Item Type page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Operations](#) | [Routes](#) | **Major Zones** | [Sub Zones](#) | [Resource](#) | [Item Compositions](#)

Associate Major Zone To Item Type

Item Type

Revert

Apply

MajorZones List		
Remove	Major Zone	Major Zone Description
	Engine	Engine

Add More Rows

Revert

Apply

4. Click Apply to record the major zones associated to the item type.

Figure 3–46 Save Association - Associate Major Zone To Item Type page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Operations](#) | [Routes](#) | **Major Zones** | [Sub Zones](#) | [Resource](#) | [Item Compositions](#)

Associate Major Zone To Item Type

Item Type

Revert

Apply

MajorZones List

Previous

1-1 of 1

Next

Remove	Major Zone	Major Zone Description
<input type="checkbox"/>	<input type="text" value="Engine"/>	Engine
<div>Add More Rows</div>		

Previous

1-1 of 1

Next

Revert

Apply

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Associating Sub Zones to Product Types

Prerequisites:

Product Type, Major Zone, and Sub Zone values must exist in the database. You should decide on the major zone and sub zone that you want to associate with the selected Product Type.

To associate sub zones to product types:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.
2. Select the Route Management tab, and then select the Sub Zone secondary tab. The Associate Sub Zone to Item Type page appears.

Figure 3–47 Associate Sub Zone to Item Type page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Operations | Routes | Major Zones | **Sub Zones** | Resource | Item Compositions

Associate Sub Zone To Item Type

Item Type

Revert

Apply

SubZones List

Remove	Major Zone	Major Zone Description	Sub Zone	Sub Zone Description
No records were found matching the given criteria.				
<div>Add More Rows</div>				

Revert

Apply

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3. Enter the information in the fields provided. For field descriptions, see [Fields on the Associate Zones to Product Type Pages](#).

Figure 3–48 Select SubZones - Associate Sub Zone To Item Type page

ORACLEOracle Complex MRO

HomeEngineeringConfigurationPlanningAdministrationExecution ProfileSign Out Help

Document IndexRoute ManagementFleet Maintenance Program

















Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions

Associate Sub Zone To Item Type

Item TypeATO Option Class

RevertApply

SubZones List

Remove	Major Zone	Major Zone Description	Sub Zone	Sub Zone Description
	Empennage	 Empennage	 Cockpit	 Cockpit
				
				
				
				

Add More Rows

RevertApply

4. Click Apply to record the sub zones associated to the product type.

Figure 3–49 Save Sub Zone Association - Associate Sub Zone To Item Type page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions

Associate Sub Zone To Item Type

Item TypeATO Option Class

RevertApply

SubZones List

Previous1-1 of 1Next

Remove	Major Zone	Major Zone Description	Sub Zone	Sub Zone Description
<input type="checkbox"/>	Empennage	Empennage	Cockpit	Cockpit

Add More Rows

Previous1-1 of 1Next

RevertApply

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Finding Oracle Complex Maintenance, Repair, and Overhaul Resources

Use this process to retrieve Oracle Complex Maintenance, Repair, and Overhaul resource records from your database.

Oracle Complex Maintenance, Repair, and Overhaul permits use of metacharacters when you type a word, or part of a word, to use as a search argument. Use % to represent any string of zero or more characters. Use _ to represent any single character. For example, if the database contains a record with the value "ENGINE" in a field, typing "E%" will return all records where the field value begins with "E".

Prerequisites:

The resource that you want to retrieve must exist in the database.

To find Oracle Complex Maintenance, Repair, and Overhaul resources:

- 1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.
- 2. Select the Route Management tab, then select the Resource secondary tab. The Search Resources page appears in Route Management.

Figure 3–50 Search Resources page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Operations](#) | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | **Resource** | [Item Compositions](#)

Search Resources

Resource

Description

Resource Type

Go

Clear

Resource List

Create

Resource	Description	Resource Type	Remove
No records were found matching the given criteria..			

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- 3. Enter the information in the fields for which you know the value. Click Go. The lower half of the screen displays the Oracle Complex Maintenance, Repair, and Overhaul Resources List of all matching records in the database.

Figure 3–51 Resources Search Results - Search Resources page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Document Index

Route Management

Fleet Maintenance Program

Operations

Routes

Major Zones

Sub Zones

Resource

Item Compositions

Search Resources

Resource

Description

Resource Type

Machine

Go

Clear

Resource List

Create

Previous

1-8 of 8

Next

Resource	Description	Resource Type	Remove
AHLPAR004	Resource in PM mode	Machine	
AHLRE02	Resource round 2	Machine	
Drills	SMA_Drills	Machine	
Jack	SMA Jack	Machine	
MROM1	Machine Resource Type 1	Machine	
MROM2	Machine Resource Type 2	Machine	
Resource1	Resource 1	Machine	
ahlpRo01	AHL Resource	Machine	

4. To restart a search for records, click Clear. All the search fields on the page will clear. (If you have retrieved records being displayed in the lower half of the screen, these records will remain).
- After entering the new search criteria, click Search to begin searching the database for records that match.

Creating Oracle Complex Maintenance, Repair, and Overhaul Resources

The following process initiates the creation of a resource. The Create Oracle Complex Maintenance, Repair, and Overhaul Resource page lets you save the record in the database before defining the attributes.

Prerequisites:

You should know the resource type of the resource you want to create.

To create an Oracle Complex Maintenance, Repair, and Overhaul resource:

- 1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.
- 2. Select the Route Management tab, then select the Resource secondary tab. The Search Resources page appears in Route Management.
- 3. Click the Create button. The Create Resources page appears.

Figure 3–52 Create Resources page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Operations](#) | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | **Resource** | [Item Compositions](#)

Create Resources

* Indicates required field

* Name

* Description

* Resource

Cancel

Revert

Apply

Associated BOM Resources List

Remove

Name

Description

Organization

Disable Date

Resource Type

No records were found matching the given criteria..

Add More Rows

Attach

Cancel

Revert

Apply

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- 4. Enter the information in the fields provided. Information in fields marked with asterisk is mandatory.

3-76 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 3–53 Enter Resource Information - Create Resources page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Operations](#) | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | **Resource** | [Item Compositions](#)

Create Resources

* Indicates required field

* Name

* Description

* Resource

- You must associate at least one BOM Resource with the Oracle Complex Maintenance, Repair, and Overhaul resource you are creating. Use the Associated BOM Resources List on the lower half of the page to associate BOM resources to the Oracle Complex Maintenance, Repair, and Overhaul resource. Click Add More Rows and enter the information in the fields provided.

Figure 3–54 Associate BOM Resources - Create Resources page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Operations](#) | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | **Resource** | [Item Compositions](#)

Create Resources

* Indicates required field

NameResource

DescriptionResource1

ResourceMachine






Cancel

Revert

Apply

Associated BOM Resources List

Attach

Remove	Name	Description	Organization	Disable Date	Resource Type
	10NWCR	10 Ton NW Crane	San Diego Manufact		Machine
					
					
					
					

Add More Rows

Cancel

Revert

Apply

6. Alternatively, click Attach to search for, and associate a specific BOM resource.

Figure 3–55 Search BOM Resource page

ORACLE® Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Operations](#) | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | **Resource** | [Item Compositions](#)

Search BOM Resource

Name

Description

Organization

Go

Clear

BOM Resources Results

Select BOM Resource and...Associate

Previous1-10 of 2738Next

Select	Name	Description	Organization	Disable Date	Resource Type
<input checked="" type="checkbox"/>	Material	Material Sub-Element	Vision Healthcare Systems		
<input type="checkbox"/>	Sub1	Sub1	Vision Communications (USA)		
<input checked="" type="checkbox"/>	Material	Material	Vision Communications (USA)		
<input type="checkbox"/>	Material	Material Cost	W1 - Kansas City Distribution		
<input type="checkbox"/>	DS-Mat	Material	W1 - Kansas City Distribution		
<input type="checkbox"/>	DS-MOH2	Material Overhead for Drop Ship	W1 - Kansas City Distribution		
<input type="checkbox"/>	MOH1	MATERIAL OH 1	W1 - Kansas City Distribution		
<input type="checkbox"/>	MOH2	MATERIAL OH 2	W1 - Kansas City Distribution		
<input type="checkbox"/>	MOH3	MATERIAL OH 3	W1 - Kansas City Distribution		

7. Click Apply to create the resource in the database. The Update Resources page will appear displaying the current resource in context.

Figure 3–56 Update Resources page

ORACLE Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution Profile

Sign Out

Help

Document Index

Route Management

Fleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions

Update Resources

Indicates required field

Name

Resource

Description

Resource1

Resource

Machine

Cancel

Revert

Apply






Associated BOM Resources List

Previous

1-1 of 1

Next

Attach

Remove	Name	Description	Organization	Disable Date	Resource Type
<input checked="" type="checkbox"/>	10NWCR	10 Ton NW Crane	San Diego Manufacturing		Machine
					
					
					
					
	Material	Material	Vision Communicatic		

8. Click Cancel to stop the process and return to the previous page.
9. Click Remove next to any BOM resource you want to remove.

Editing Oracle Complex Maintenance, Repair, and Overhaul Resources

Oracle Complex Maintenance, Repair, and Overhaul allows you to retrieve existing Resources and edit the information associated with it.

Prerequisites:

The Oracle Complex Maintenance, Repair, and Overhaul Resource must exist in the database.

To edit resource records:

1. Retrieve the Oracle Complex Maintenance, Repair, and Overhaul resource records that match your requirement (see [Finding Oracle Complex Maintenance, Repair, and Overhaul Resources](#)).
2. Select a resource, and click the corresponding Resource link to bring it up on the Update Resources page.

Figure 3–57 Edit Resource Record - Update Resources page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | **Resource** | Item Compositions

Update Resources

* Indicates required field

* Name

* Description

Resource **Person**

Cancel Revert Apply

Associated BOM Resources List

Previous 1-1 of 1 Next

Remove	Name	Description	Organization	Disable Date	Resource Type
<input type="checkbox"/>	<input type="text" value="0611031301"/>	061120031301 Vision Project Mfg	05-NOV-2013	Person	

Add More Rows

Previous 1-1 of 1 Next

Cancel Revert Apply

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3. Make the necessary changes to the information in the fields provided. For more information on attaching BOM Resources to an Oracle Complex Maintenance, Repair, and Overhaul Resource see [Creating Oracle Complex Maintenance, Repair, and Overhaul Resources](#).
4. Click Apply to save the changes to the database.

Associating BOM Resources

Use this process to retrieve BOM resource records from your database.

Oracle Complex Maintenance, Repair, and Overhaul permits use of metacharacters when you type a word, or part of a word, to use as a search argument. Use % to represent any string of zero or more characters. Use _ to represent any single character. For example, if the database contains a record with the value "ENGINE" in a field, typing "E%" will return all records where the field value begins with "E".

Prerequisites:

The resource that you want to retrieve must exist in the database.

To associate BOM resources:

1. Retrieve the Oracle Complex Maintenance, Repair, and Overhaul resource records that match your requirement (see [Finding Oracle Complex Maintenance, Repair, and Overhaul Resources](#)).
2. Select a resource, and click the corresponding Resource link to bring it up on the Update Oracle Complex Maintenance, Repair, and Overhaul Resources page.
3. Click Attach under the Associated BOM Resources List results. The Search BOM Resource page appears.

Figure 3–58 Find BOM Resource - Search BOM Resource page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Operations](#) | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | **[Resource](#)** | [Item Compositions](#)

Search BOM Resource

Name
 Description
 Organization

BOM Resources Results

Select	Name	Description	Organization	Disable Date	Resource Type
No records were found matching the given criteria.					

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- Enter the information in the fields provided and click Go. The lower half of the page displays the BOM Resources results for that Oracle Complex Maintenance, Repair, and Overhaul resource.

Figure 3–59 BOM Resource Search Results - Search BOM Resource page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Operations | Routes | Major Zones | Sub Zones | **Resource** | Item Compositions

Search BOM Resource

Name

Description

Organization

Go

Clear

BOM Resources Results

Select BOM Resource and...

Associate

Previous

1-10 of 1189

Next

Select	Name	Description	Organization	Disable Date	Resource Type
<input type="checkbox"/>	RES1		MD1		Person
<input type="checkbox"/>	LBR-Assy Labour Assembly		P6-FIFO org		Person
<input type="checkbox"/>	LBR-Insp Inspection Labor		P6-FIFO org		Person
<input type="checkbox"/>	LBR-Oper Machine Operation		P6-FIFO org		Person
<input type="checkbox"/>	Test-Prs2		Project		Person
<input type="checkbox"/>	Crimper Crimper		Project		Person
<input type="checkbox"/>	NU-CP		Project		Person
<input type="checkbox"/>	NU-CPA		Project		Person
<input type="checkbox"/>	LBR-Assy Assembly Labor		Project		Person

- 5. Click the Select button next to the pertinent resource, then click Associate. The Update Resources page displays with the revised information.

Figure 3–60 Associate BOM Resource - Update Resources page

ORACLE Oracle Complex MRO

Home [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Operations | Routes | Major Zones | Sub Zones | **Resource** | Item Compositions

Update Resources

* Indicates required field

* Name

* Description

Resource **Person**

[Cancel](#) [Revert](#) [Apply](#)

Associated BOM Resources List

[Attach](#)

Previous 1-1 of 1 Next

Remove	Name	Description	Organization	Disable Date	Resource Type
<input type="checkbox"/>	<input type="text" value="0611031301"/>	<input type="text" value="061120031301"/>	<input type="text" value="Vision Project Mfg"/>	<input type="text" value="05-NOV-2013"/>	<input type="text" value="Person"/>
	<input type="text" value="LBR-Assy"/>	<input type="text" value="Labour Assembly"/>	<input type="text" value="P6-FIFO org"/>	<input type="text"/>	<input type="text" value="Person"/>
	<input type="text" value="RES1"/>	<input type="text"/>	<input type="text" value="MD1"/>	<input type="text"/>	<input type="text" value="Person"/>

[Add More Rows](#)

Previous 1-1 of 1 Next

[Cancel](#) [Revert](#) [Apply](#)

6. Click Apply to save the changes to the database.

Figure 3–61 View Associated BOM Resources - Update Resources page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Document Index

Route Management

Fleet Maintenance Program

Operations

Routes

Major Zones

Sub Zones

Resource

Item Compositions

Update Resources

* Indicates required field

Name

061120031300

Description

061120031300

Resource

Person

Cancel

Revert

Apply

Associated BOM Resources List

Previous

1-3 of 3

Next

Attach

Remove	Name	Description	Organization	Disable Date	Resource Type
<input type="checkbox"/>	0611031301	061120031301	Vision Project Mfg	05-NOV-2013	Person
<input type="checkbox"/>	LBR-Assy	Labour Assembly	P6-FIFO org		Person
<input type="checkbox"/>	RES1		MD1		Person

Add More Rows

Previous

1-3 of 3

Next

Cancel

Revert

Apply

7.

Click Revert to restore the fields to the last saved position in the database.
8.

Click Cancel to return to the Oracle Complex Maintenance, Repair, and Overhaul Resource page.

Fields associated with Item Composition

Organization refers to the Master Organization an Item belongs to. The organization will be automatically populated when a part number is defined. When creating a material requirement for an item group the Organization remains empty, since Alternate Item Groups are not Organization related in Master Configuration. Organizations are defined by your organization when setting up the item master.

Name The name given to the Composition List.

Item Install Base Tracked item for the header item and a non-Install Base Tracked item in the details.

Status Indicates the status of the route.

Route It is the identifier of the maintenance route to which the tasks you want to work with is connected.

Description Refers to the description of the item group or the part number. The description is automatically populated when selecting an item group or part number.

Revision is a field that holds a user-assigned document revision identifier.

Item Group Refers to the Alternate Item Group defined in Master Configuration. If your material requirement for this task is not a specific item type but a group of alternate items, you can define the complete alternate item group as a material requirement. This allows the system to plan for all the possible alternate items to perform the task. This definition specifically applies for a replacement material requirement. You can only define an item group or a part number for one and only one material requirement. If you do not know the value, enter a partial search string using the generic substitution metacharacter%, and click on the search icon to launch the alternate Item Group list of values. The alternate item groups are defined by your organization when implementing Master Configuration.

Quantity It describes the quantity necessary for the item or item group and is not required for the item group association.

UOM This describes the unit of measure for the item or item group and is not required for the item group association.

Creating an Item Composition List

A Composition List is a flat listing of the non tracked parts, items or item groups, that are contained in, and can be used in maintaining an install base tracked item. Composition lists are revision controlled, allowing for changes to be tracked and approved through an approval workflow, automatically replacing the older revision when approved. Composition Lists are used to create Disposition Lists. Disposition Lists provide a listing of items, item groups, and positions which may be impacted during the performance of a route.

After defining the composition list, you can create the details of the Disposition List by:

- Associating the tracked item with a route
- Associating a master configuration with a route. Compositions are inherited in Master Configuration through the tracked item's association with the item groups for each position and sub-configuration position.

Composition lists reduce the amount of time required to research, create, and maintain routes. When a composition is revised the changes automatically reflect in the routes disposition, thus keeping the route up-to-date.

See also:

[Editing an Item Composition](#)

[Viewing Composition Lists](#)

Prerequisites:

Tracked items, non-tracked items and item groups must have been defined. The Approval workflow must be set up.

To create a composition list for a tracked item:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Documents page appears.
2. Click the Route Management tab. The Search Operation page appears. Click the Item Compositions sub-tab. The Search Item Composition page appears.

Figure 3–62 Search Item Composition page

ORACLE[®] Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Document Index

Route Management

Fleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions

Search Item Composition

Organization

Item

Status

All

Route

Description

Revision

Go

Clear

Item Composition List

Create

Select

Organization

Item

Description

Status

Edit

Remove

No records were found matching the given criteria..

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Note: You can create Composition Lists from the Master Configuration module also. Navigate to the Master Configuration module, and select the Composition List sub-tab. The Search Item Composition page will appear.

3. Select Create. The Create Composition List page appears.

Figure 3–63 Create Composition List

ORACLEOracle Complex MRO

HomeEngineeringConfigurationPlanningAdministrationExecution ProfileSign OutHelp

Document IndexRoute ManagementFleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions

Create Composition List

CancelApply

* Organization

* Item

StatusDraft

Name

Description

Item List

Remove	Item Group	Item	Description	Quantity	UOM
No records were found matching the given criteria..					
Add More Rows					

CancelApply

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4. Select an Organization from the Organization LOV. Select an Item from the Item LOV. See [Fields Associated with Item Composition](#).

Figure 3–64 Enter Header Information - Create Composition List

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | **Item Compositions**

Create Composition List

Cancel Apply

* Organization

* Item

Status **Draft**

Name **Vision Operations**

Description **BODY FOR PKCTO CELL**

Item List

Remove	Item Group	Item	Description	Quantity	UOM
No records were found matching the given criteria.					
<input type="button" value="Add More Rows"/>					

Cancel Apply

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5. Click Add More Rows. You can add the following to the Composition List:
 - Non-Tracked Item Groups
 - Non-Tracked Items associated with at least one Inventory organization

Figure 3–65 Add Items/Item Groups - Create Composition List

ORACLEOracle Complex MRO

HomeEngineeringConfigurationPlanningAdministrationExecutionProfileSign OutHelp

Document IndexRoute ManagementFleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions

Create Composition List

CancelApply

OrganizationV1






Item00PKBODY

StatusDraft

NameVision Operations

DescriptionBODY FOR PKCTO CELL

Item List

Remove	Item Group	Item	Description	Quantity	UOM
	KMPG002		Non Tracke		
		00PKBAT	PK CTO BA		
					
					
					

Add More Rows

CancelApply

Note: You can copy composition details from one item composition into another Composition List when you have records existing in the database. In the Update Composition List page, select Copy Compositions. In the Search Item Composition page that appears, select the item composition, that you want to copy the details from.

6. Specify the quantity and unit of measure for the non-tracked items. Click Apply. The Update Composition page appears, displaying the item composition details.

Figure 3–66 Update Composition List page

ORACLE® Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Document Index

Route Management

Fleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions

Confirmation

Item Composition for item (00PKBODY) is created. 2 Item(s) Created.

Update Composition List

Cancel

Create New Revision

Copy Composition

Submit for Approval

Apply

Organization

V1

Name

Vision Operations

Item

00PKBODY

Description

BODY FOR PKCTO CELL

Status

Draft

Item List

Previous

1-2 of 2

Next

Remove	Item Group	Item	Description	Quantity	UOM
<input type="checkbox"/>		00PKBAT	PK CTO BAT OPTION CLASS	10	Ea
<input type="checkbox"/>	KMPG002		Non Tracked Items		

Add More Rows

Previous

1-2 of 2

Next

Cancel

Create New Revision

Copy Composition

Submit for Approval

Apply

7. Select Submit for Approval, to submit the item composition for approval.

Managing Maintenance Routes 3-93

Figure 3–67 View Composition List page



Editing Item Compositions

Prerequisites:

The Item Composition that you want to edit, must exist in the database, and must be in draft status.

To edit item compositions:

1. Navigate to the Search Item Compositions page. For information, see [Creating an Item Composition List](#).
2. Search for the Item Composition that you want to edit. The results appear in the Item Composition List table.

Figure 3–68 View Item Composition List - Search Item Composition page


ORACLE Oracle Complex MRO


Home Engineering Configuration Planning Administration Execution Profile Sign Out Help


Document Index Route Management Fleet Maintenance Program


Operations | Routes | Major Zones | Sub Zones | Resource | **Item Compositions**

Search Item Composition


Organization 

Item 

Status 

Route 











Description

Revision 

Item Composition List

Select Item Composition and ...

Previous 1-10 of 45 Next

Select	Organization	Item	Description	Status	Edit	Remove
<input type="radio"/>	V1	00PKBODY	BODY FOR PKCTO CELL	Complete		
<input type="radio"/>	PM	11475M95P05	HPT BLADE	Complete		
<input type="radio"/>	PM	1319M11P04	FRONT ROTATING AIR SEAL	Complete		
<input type="radio"/>	PM	1319M11P04	FRONT ROTATING AIR SEAL	Draft		
<input type="radio"/>	PM	1319M11P06	FRONT ROTATING AIR SEAL	Complete		

3. Select the Item Composition, and click the corresponding Edit icon. The Update Composition List page appears.

Figure 3–69 Edit Information - Update Composition List page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Operations | Routes | Major Zones | Sub Zones | Resource | **Item Compositions**

Update Composition List

Cancel

Create New Revision

Copy Composition

Submit for Approval

Apply

OrganizationPM

Item1319M11P04

StatusDraft

NameVision Project Mfg

DescriptionFRONT ROTATING AIR SEAL

Item List

Previous1-1 of 1Next

Remove	Item Group	Item	Description	Quantity	UOM
<input type="checkbox"/>	KMPG002		Non Tracked Items		

Add More Rows

Previous1-1 of 1Next

Cancel

Create New Revision

Copy Composition

Submit for Approval

Apply

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- 4. To remove an item and/or item group from the composition list, select the Remove check box, and click Apply.
- 5. To add records, click Add More Rows. Enter information in the fields provided. Click Apply to save the changes.

Figure 3–70 Add Item Group to Existing Composition - Update Composition List page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | **Item Compositions**

Confirmation • 1 Item(s) Created.

Update Composition List

Organization **PM** Name **Vision Project Mfg**
 Item **1319M11P04** Description **FRONT ROTATING AIR SEAL**
 Status **Draft**

Item List

1-2 of 2

Remove	Item Group	Item	Description	Quantity	UOM
<input type="checkbox"/>	MBPG004		Non Tracked Part Group		
<input type="checkbox"/>	KMPG002		Non Tracked Items		

1-2 of 2

- To copy the item composition from an existing Composition List, select Copy Compositions. The Search Item Composition page appears. Search for, and select the Item Composition that you want to copy the composition list from. The View Composition list appears, displaying the item list for the selected composition.

Figure 3–71 Copy Composition List - View Composition List page

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Document Index

Route Management

Fleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions

View Composition List

Cancel

Copy Composition

Organization V1

Item A10

Status Complete

Name Vision Operations

Description A10

Item List

Previous

1-4 of 4

Next

Select	Item Group	Item	Description	Quantity	UOM
<input type="checkbox"/>		15000 Mile Maint	15000 Mile Truck Maintenance	1	BG
<input type="checkbox"/>		777Test Item 1	Test Item 1	1	Ea
<input type="checkbox"/>		ACT_EAV1	Activity #1	1	Ea
<input type="checkbox"/>		10-40W Oil	10-40W Car / Truck Motor Oil	1	GAL

Previous

1-4 of 4

Next

Cancel

Copy Composition

- 7. Select the items that you want to include, and click Copy Compositions. The items are added to the item list of the Composition that you were editing.
- 8. Select Submit for Approval to initiate the approval workflow. The item composition is submitted for approval, and the View Composition List page is displayed.
- 9. Select Create New Revision to make changes to the item composition that you have defined. The Update Composition List page appears. Make the necessary changes, and click Apply. A new revision, once approved, replaces the existing revision as the active revision.

Figure 3–72 Create Revision - Update Composition List page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | **Item Compositions**

Confirmation • New revision of the item composition successfully created.

Update Composition List

Cancel Create New Revision Copy Composition Submit for Approval Apply

Organization **PM** Name **Vision Project Mfg**
 Item **1319M11P04** Description **FRONT ROTATING AIR SEAL**
 Status **Draft**

Item List

Previous 1-2 of 2 Next

Remove	Item Group	Item	Description	Quantity	UOM
<input type="checkbox"/>	MBPG004		Non Tracked Part Group		
<input type="checkbox"/>	KMPG002		Non Tracked Items		

Add More Rows

Previous 1-2 of 2 Next

Cancel Create New Revision Copy Composition Submit for Approval Apply

Note: You can create revisions for all Item compositions in Complete status. The Create Revision button is also available in the results table in the Search Item composition list page. Disposition Lists, which have been created utilizing the Item Compositions, automatically inherit all revisions made to the item composition they are based on.

Viewing Item Compositions

Prerequisites:

The item composition record must exist in the database.

To view item compositions:

- 1. Navigate to the Search Item Compositions page. For information, see [Creating an Item Composition List](#).
- 2. Search for the Composition list that you want to view the details of. The results appear in the Item Composition List table.
- 3. Select an Item and click the link in the corresponding Item column. The View Composition List page appears, displaying the list of non-tracked items and item groups.

Figure 3–73 View Composition List Details - View Composition List page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Operations](#) | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | [Resource](#) | [Item Compositions](#)

View Composition List

OrganizationPM

Item11475M95P05

StatusComplete

NameVision Project Mfg

DescriptionHPT BLADE

Cancel

Item List

Previous1-3 of 3Next

Item Group	Item	Description	Quantity	UOM
	13445272	Pump Warman 12/10EAH 1		BG
MBPG004		Non Tracked Part Group		
KMPG002		Non Tracked Items		

Previous1-3 of 3Next

Cancel

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Fields associated with Disposition Association

Route Number is the user-assigned identifier for a maintenance route.

Master Configuration Name of the master configuration that you want to associate with the route.

Revision Field contains a part revision identifier.

Organization Code Refers to the code for the inventory organization.

Item Install base Tracked Item.

Position Reference Refers to the position in the assembly that acts as the topmost node in the master configuration hierarchy.

%Replace Percent of replacement.

%Rework Percent of rework.

Creating Disposition Lists

A Disposition List is a list of items, item groups, and positions, that may be impacted when a route is performed. A Route can be set up to contain multiple Disposition Lists. You can associate a Disposition List with a Master Configuration and/or an Item.

Route - Item association: For a route and item association, you can choose the disposition items from the composition list of the associated item. Additionally you can pick items from the item master not related to the composition list. The item must be set up as a Tracked Item. For every item defined in the disposition list, you can assign a percentage value that indicates the likelihood of a replacement or tracked percentage of rework when this maintenance route is executed. The percentage figure helps the material planner to make an accurate planning decision.

Route - Master Configuration association: For a route and master configuration association, you can select from any of the configuration's position paths, alternate parts list, and the alternate part's composition list. The association is at position level instead of the item level, indicating that every alternate item is dispositioned the same way. You can also pick items from the item master not related to the composition list. You can then assign to each position, a percentage of rework and/or replacement. The Master Configuration can be revision specific or independent.

A Disposition List is approved when the Route is approved.

Disposition lists:

- Aid in material planning by providing the percentage of replacement and repair
- Provide the ability to create material requirements that are item or master configuration specific. This provides planning with increased visibility into possible material requirements

Disposition lists are created and utilized differently based on the maintenance needs. Following are some examples:

- Component overhaul - For component overhaul, the disposition list is defined based on a route-item association.
- Assembly breakdown - For assembly breakdowns, such as module disassembly in an engine shop, the items to disposition are typically the sub-assembly modules. Thus, when defining the disposition list for an assembly breakdown, the route is associated with a master configuration. The highest assembly is associated with the route, and the sub-assembly positions are selected into the disposition list.
- Assembly piece part breakdown - Disposition lists for assembly piece part breakdown are based on route-master configuration association. When a master configuration has been associated, you can also define a disposition list, which not only uses the master configuration hierarchy but also the item composition. You can select positions, and also compositions of the items assigned to the various positions. You can include the position's path if the disposition only applies to the specific position.

Prerequisites:

The following must have been defined:

- Tracked and Non-tracked items and item groups
- Composition lists for all tracked items
- Master Configurations and their position associations

To create disposition lists:

1. Select the route, for which you want to create the Disposition list for. Navigate to the Update Route page for the selected route.

Figure 3–74 Route Details - Update Route page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions

Details

[Reference Documents](#)

[Resource Requirements](#)

[Material Requirements](#)

[Associate Operations](#)

[Disposition Associations](#)

Update Route

* Indicates required field

Cancel Delete Approve Revert Apply

Route Information

* Route Number **24 030 01 00** Status **Draft**

Revision **2** Revision Notes

* Title Left IDG Oil Level * Time Span 1 **Hours**

Route Type Engine Process

Item Type MRO Aircraft Operator

Major Zone Engine Sub Zone #1 Engine

Service Item Quality Inspection Type

Accounting Class Task Template Group

System * Please tab out of this text box

* Start Date 06-JAN-2004

Remarks Check left IDG oil level and service if necessary.

2. Select Disposition Associations from the side navigation menu. The Define Disposition Associations page appears.

Figure 3–75 Define Disposition Associations page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Operations](#) | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | [Resource](#) | [Item Compositions](#)

[Details](#)
[Reference Documents](#)
[Resource Requirements](#)
[Material Requirements](#)
[Associate Operations](#)
[Disposition Associations](#)

Define Disposition Associations

Route Number **24-030-01-00**

Status **Draft**

Revision **2**

Revision Notes

Title **Left IDG Oil Level**

Remove

Master Configuration

Revision

Organization code

Item

Description

Disposition Details

No records were found matching the given criteria..

Add More Rows

Cancel

Apply

[Document Index](#) | [Route Management](#) | [Fleet Maintenance](#)

[Program](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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- 3. Click Add More Rows to enter data. See [Fields Associated with Disposition Association](#).

3-104 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 3–76 Enter Details - Define Disposition Associations page

ORACLE Oracle Complex MRO

Home [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)































Operations | **Routes** | Major Zones | Sub Zones | Resource | Item Compositions

[Details](#)
[Reference Documents](#)
[Resource Requirements](#)
[Material Requirements](#)
[Associate Operations](#)
Disposition Associations

Define Disposition Associations

Route Number **24-030-01-00** Status **Draft**
Revision **2** Revision Notes
Title **Left IDG Oil Level**

[Cancel](#) [Apply](#)

Remove	Master Configuration	Revision	Organization code	Item	Description	Disposition Details
						
						
						
						
						

[Add More Rows](#)

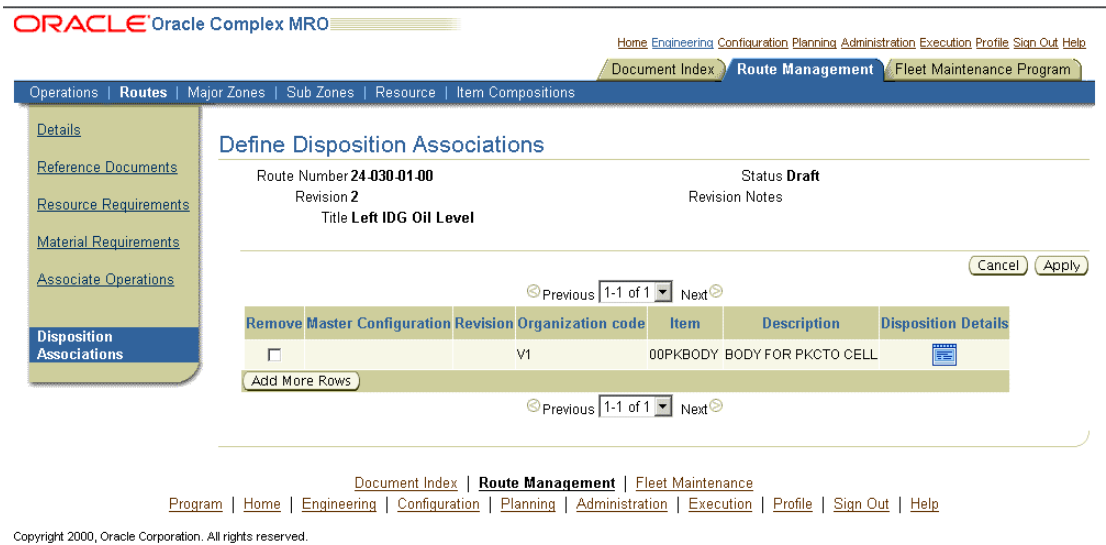
[Document Index](#) | [Route Management](#) | [Fleet Maintenance](#)
[Program](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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To create a Route - Item association

4. Select an organization from the organization list of values, using the search icon.
5. Select an item using the Item search icon. Click Apply.

Figure 3–77 Create Route - Item Association - Define Disposition Associations page



- 6. To view the disposition details, click the Disposition details icon. The Disposition List Details page appears.

Figure 3–78 Disposition List Details page

ORACLE Oracle Complex MRO

Home [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Operations | [Routes](#) | Major Zones | Sub Zones | Resource | Item Compositions

[Details](#)
[Reference Documents](#)
[Resource Requirements](#)
[Material Requirements](#)
[Associate Operations](#)
[Disposition Associations](#)

Disposition List Details

Route Number **24-030-01-00** Status **Draft**
Revision **2** Revision Notes
Title **Left IDG Oil Level**

Organization code **V1** Description **BODY FOR PKCTO CELL**
Item **00PKBODY**

[Cancel](#) [Apply](#) [Select from Composition](#)

Material List from Composition

Remove	Item Group	Organization code	Item	Description	Quantity	UOM	%Replace	%Rework	Exclude
No records were found matching the given criteria..									
Add More Rows									

Additional Materials

Remove	Item Group	Organization code	Item	Description	Quantity	UOM	%Replace	%Rework	Exclude
No records were found matching the given criteria..									
Add More Rows									

[Document Index](#) | [Route Management](#) | [Fleet Maintenance](#)
[Program](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

- To add the non-tracked items and/or item groups in the item composition, click [Select from Composition](#). The Composition Selection page appears, displaying the composition list.

Figure 3–79 Composition Selection page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Operations](#) | [Routes](#) | [Major Zones](#) | [Sub Zones](#) | [Resource](#) | [Item Compositions](#)

[Details](#)
[Reference Documents](#)
[Resource Requirements](#)
[Material Requirements](#)
[Associate Operations](#)
[Disposition Associations](#)

Composition Selection

Route Number24.030.01.00

Revision2

TitleLeft IDG Oil Level

Organization codeV1

Item00PKBODY

StatusDraft

Revision Notes

DescriptionBODY FOR PKCTO CELL

Item Composition List

Previous1-2 of 2Next

Select	Item Group	Item	Description	Quantity	UOM
<input type="checkbox"/>		00PKBAT	PK CTO BAT OPTION CLASS 10		Ea
<input type="checkbox"/>	KMPG002		Non Tracked Items		

Previous1-2 of 2Next

Cancel

Select

[Document Index](#) | [Route Management](#) | [Fleet Maintenance](#)

[Program](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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8. Select the items to include. The items are added to the Disposition list.

Figure 3–80 View Items Added to Disposition List - Disposition List Details page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions

Disposition List Details

Route Number **24-030-01-00** Status **Draft**
Revision **2** Revision Notes
Title **Left IDG Oil Level**
Organization code **V1** Description **BODY FOR PKCTO CELL**
Item **00PKBODY**

Cancel Apply Select from

Material List from Composition

Remove	Item Group	Organization code	Item	Description	Quantity	UOM	%Replace	%Re
	KMPG002			Non Tracked It				
		V1	00PKBAT	PK CTO BAT O	10	Each		

Add More Rows

Additional Materials

Remove	Item Group	Organization code	Item	Description	Quantity	UOM	%Replace	%Rework	Exclude
No records were found matching the given criteria..									

Add More Rows

9. Optionally, you can add one item or item group at a time. In the Disposition List Details page, choose the item/item-group using the corresponding list of values in the Material List from Composition table.
10. To remove an item or item group from the Disposition list, select the Remove check box, and click Apply. The item is not removed from the Item composition. You can include it again, by clicking Select from Composition, and then choosing the item from the Composition list.
11. Enter a Replace and/or Rework percentage.

Figure 3–81 Replace/Rework Percentage - Disposition List Details page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution Profile

Sign Out

Help

Document Index

Route Management

Fleet Maintenance Program

Operations

Routes

Major Zones

Sub Zones

Resource

Item Compositions

Details

Reference Documents

Resource Requirements

Material Requirements

Associate Operations

Disposition Associations

Disposition List Details

Route Number 24-030-01-00

Revision 2

Title Left IDG Oil Level

Organization code V1

Item 00PKBODY

Status Draft

Revision Notes

Description BODY FOR PKCTO CELL

Cancel

Apply

Select from

Material List from Composition

Remove	Item Group	Organization code	Item	Description	Quantity	UOM	%Replace	%Re
	KMPG002			Non Tracked It	20	Each		20
			V1	00PKBAT	10	Each		30

Add More Rows

Additional Materials

Remove	Item Group	Organization code	Item	Description	Quantity	UOM	%Replace	%Rework	Exclude
No records were found matching the given criteria.									

Add More Rows

12. Optionally, you can add additional items that may be required for, and will be impacted during the route execution. Click Add More Rows in the Additional Materials table. Choose the item group and/or item that you want to add.
13. Click Apply to save the record.

Figure 3–82 Save Record - Disposition List Details page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions

Disposition List Details

Route Number **24-030-01-00** Status **Draft**
Revision 2 Revision Notes
Title **Left IDG Oil Level**
Organization code **V1** Description **BODY FOR PKCTO CELL**
Item **00PKBODY**

[Cancel](#) [Apply](#) [Select from Com](#)

Material List from Composition

Previous 1-2 of 2 Next

Remove	Item Group	Organization code	Item	Description	Quantity	UOM	%Replace	%Rework
<input type="checkbox"/>		V1	00PKBAT	PK CTO BAT OPTION CLASS	10	Each	30	
<input type="checkbox"/>	KMPG002			Non Tracked Items	20	Each	20	

[Add More Rows](#)

Previous 1-2 of 2 Next

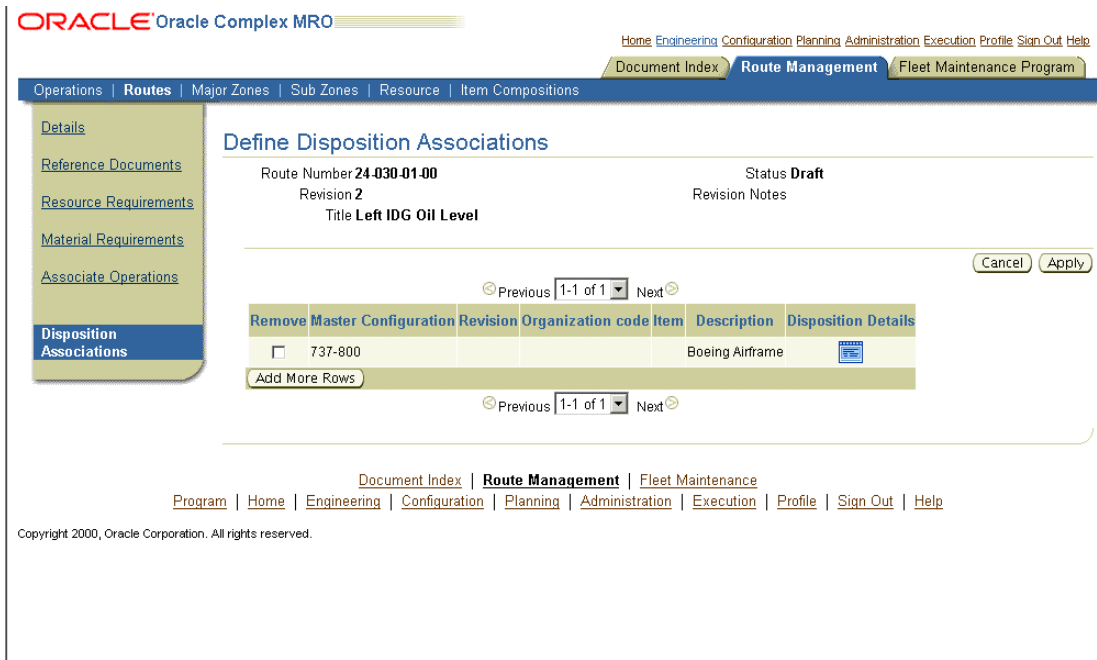
Additional Materials

Remove	Item Group	Organization code	Item	Description	Quantity	UOM	%Replace	%Rework	Exclude
--------	------------	-------------------	------	-------------	----------	-----	----------	---------	---------

To create a Route - Master configuration association

14. In the Disposition Association page, select the master configuration that you want to associate with the route. Optionally, you can choose a specific revision of this master configuration. Click Apply.

Figure 3–83 Route - Master Configuration Association - Define Disposition Associations page



15. To view the disposition details, click the Disposition details icon. You can now add position references to the Disposition list.

Figure 3–84 View Disposition List Details - Disposition List Details page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions

Details
Reference Documents
Resource Requirements
Material Requirements
Associate Operations
Disposition Associations

Disposition List Details

Route Number **24-030-01-00** Status **Draft**
Revision **2** Revision Notes
Title **Left IDG Oil Level**

Master Configuration **737-800** Revision
Description **Boeing Airframe**

Cancel Apply Select from Composition

Material List from Composition

Remove	Position Reference	Item Group	Organization code	Item Description	Source Composition	Quantity	UOM	% Replace	% Rework	Exclude
No records were found matching the given criteria.										
Add More Rows										

Additional Materials

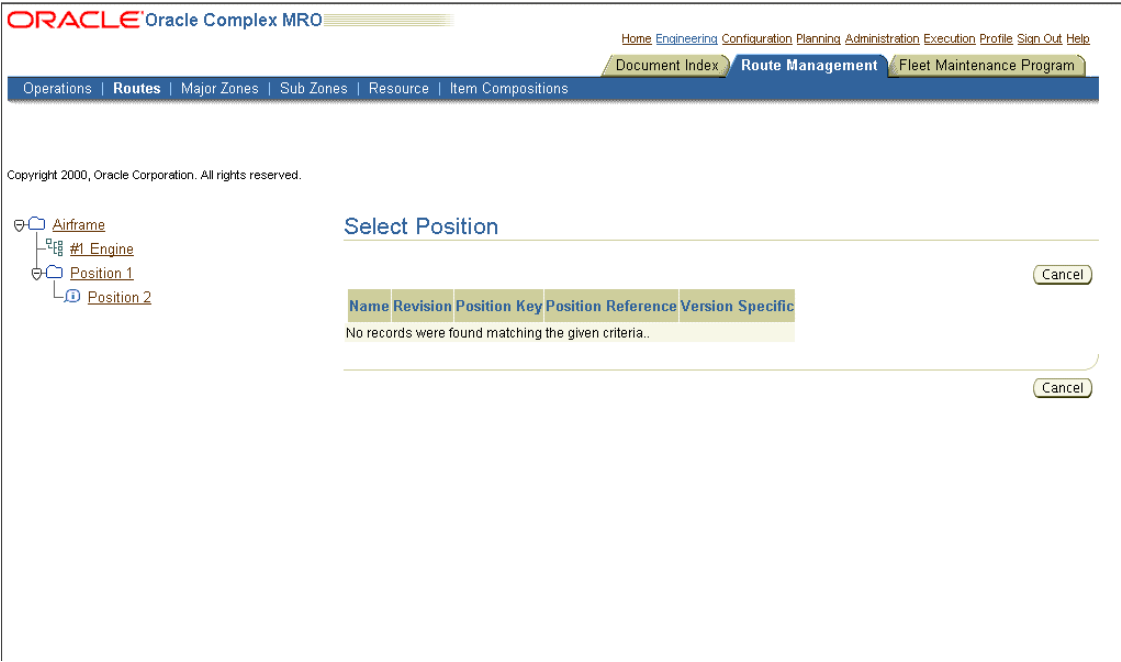
Remove	Item Group	Organization code	Item Description	Quantity	UOM	% Replace	% Rework	Exclude
No records were found matching the given criteria.								
Add More Rows								

Document Index | **Route Management** | Fleet Maintenance

Program | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

16. Click the Position Reference search icon to select the position references defined for the master configuration, which you associated with the route. The Search Master Configuration Revision page appears displaying all versions of the master configuration record. Optionally, you can enter a version number in the Revision field to select the position from a specific version of the master configuration.
17. To select a position reference, click the Tree icon corresponding to the master configuration version. The Select Position Page appears, displaying the configuration tree.

Figure 3–85 Select Position page



- 18. Select a position in the configuration tree. The position reference details are displayed. You can select the position reference by clicking the applicable node in the configuration tree.
- 19. To make the position path revision specific, select Yes from the Version Specific drop-down menu. The position reference that is taken into account is thus based on the selected master configuration version.

Figure 3–86 Select Position Reference - Select Position page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Operations Routes Major Zones Sub Zones Resource Item Compositions

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Airframe
 #1 Engine
 Position 1
 Position 2

Select Position

Previous 1-1 of 1 Next

Name	Revision	Position Key	Position Reference	Version Specific
737-800 1	12124	Position 1		Yes

Previous 1-1 of 1 Next

Cancel Apply

Cancel Apply

20. Click Apply. The Position reference is added to the Disposition list.

Figure 3–87 View Material List - Disposition List Details page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Document IndexRoute ManagementFleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions

Details

Reference Documents

Resource Requirements

Material Requirements

Associate Operations











Disposition Associations

Disposition List Details

Route Number24.030-01.00
Revision2
TitleLeft IDG Oil Level
Master Configuration737-800
DescriptionBoeing Airframe

StatusDraft
Revision Notes
Revision

Material List from Composition

Remove	Position Reference	Item Group	Organization code	Item	Description	Source Composition	Quantity	U
	Position 1							
								
								
								
								

Add More Rows

Additional Materials

21. Enter a Replace and Rework percentage. Enter the Quantity and UOM. Click Apply.

Figure 3–88 Add Position Reference - Disposition List Details page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Operations | **Routes** | Major Zones | Sub Zones | Resource | Item Compositions

Details
Reference Documents
Resource Requirements
Material Requirements
Associate Operations
Disposition Associations

Disposition List Details

Route Number **24-030-01-00** Status **Draft**
Revision **2** Revision Notes
Title **Left IDG Oil Level**
Master Configuration **737-800** Revision
Description **Boeing Airframe**

Cancel Apply Select from Cc

Material List from Composition

Previous 1-1 of 1 Next

Remove	Position Reference	Item Group	Organization code	Item Description	Source Composition	Quantity	UOM	%Replace	%Rework
<input type="checkbox"/>	49-26-93 APU					5	Each	35	20

Add More Rows

Previous 1-1 of 1 Next

Additional Materials

Remove	Item Group	Organization code	Item Description	Quantity	UOM	%Replace	%Rework	Exclude
No records were found matching the given criteria.								

Add More Rows

Disposition lists, created for part piece assembly breakdown, are based on a route - master configuration association. These lists also require non-tracked parts listing, which is derived from the composition of the item assigned to a position reference.

Note: If a composition or master configuration is revised removing positions, items, or item groups, and a disposition list has been created which utilizes them, the disposition list will automatically reflect the changes.

To create disposition lists, with both configuration and composition selection:

1. Select a route, and associate a configuration with it.
2. Select the position references to add to the disposition list.
3. To choose items from item compositions, click Select from Compositions. The Composition Selection page appears.

Figure 3–89 Select item Composition Selection page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Document Index

Route Management

Fleet Maintenance Program

Operations

Routes

Major Zones

Sub Zones

Resource

Item Compositions

Details

Reference Documents

Resource Requirements

Material Requirements

Associate Operations

Disposition Associations

Composition Selection

Route Number **KM-UMP-RM001**

Revision **3**

Title **KM-UMP-RM001**

Master Configuration **AHLUMPCD1**

Description **MC for Axle**

Status **Draft**

Revision Notes

Revision

Select Position Path and Item

* Position

* Item

Description

Organization

Go

Clear

Item Composition List

☐ Include Position Path in Disposition

Cancel

Select

Select

Item Group

Item

Description

Quantity

UOM

No records were found matching the given criteria..

Document Index

Route Management

Fleet Maintenance

4. Select the Position and Item from the list of values. Click Go. The list of non-tracked items and item groups belonging to the selected item’s composition are displayed.

Figure 3–90 Select Position Path and Item - Composition Selection page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Operations | Routes | Major Zones | Sub Zones | Resource | Item Compositions

Details
[Reference Documents](#)
[Resource Requirements](#)
[Material Requirements](#)
[Associate Operations](#)
Disposition Associations

Composition Selection

Route Number **KM-UMP-RM001** Status **Draft**
Revision **3** Revision Notes
Title **KM-UMP-RM001**
Master Configuration **AHLUMPCD1** Revision
Description **MC for Axle**

Select Position Path and Item

* Position
* Item
Organization **PM** Description **This is a item for AHL in PM**

Item Composition List

☐ Include Position Path in Disposition

Previous 1-4 of 4 Next

Select	Item Group	Item	Description	Quantity	UOM
<input type="checkbox"/>	Radhika NT Alternate Group		Radhika NT Alternate Group		
<input type="checkbox"/>	KMPG002		Non Tracked Items		

5. Select the items to include in the Disposition list.
6. Optionally, select the Include Position Path in Disposition check box to add the position, in addition to the selected composition details, to the disposition list.
7. Click Apply. The Disposition List Details page appears, displaying the item and position details.

Figure 3–91 View Disposition List - Disposition List Details page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Document Index

Route Management

Fleet Maintenance Program

Operations

Routes

Major Zones

Sub Zones

Resource

Item Compositions

Details

Reference Documents

Resource Requirements

Material Requirements

Associate Operations

Disposition Associations

Disposition List Details

Route Number **KM-UMP-RM001**

Revision **3**

Title **KM-UMP-RM001**

Master Configuration **AHLUMPMC01**

Description **MC for Axle**

Status **Draft**

Revision Notes

Revision

Material List from Composition

Remove	Position Reference	Item Group	Organization code	Item	Description	Source Composition	Quantity	U
	#2 Engine							
			KMPG002		Non Tracked It	#2 Engine:(AHL		
			Radhika NT Alt		Radhika NT Alt	#2 Engine:(AHL		

Add More Rows

Additional Materials

Remove	Item Group	Organization code	Item	Description	Quantity	UOM	%Replace	%Rework	Exclude
No records were found matching the given criteria..									

Add More Rows

Note: If a item or item group is removed from a composition, it will be automatically removed from the disposition list.

See

Editing Disposition Lists

Approving Disposition Lists

Editing Disposition Lists

Prerequisites:

The Disposition List record that you want to edit, must exist in the database.

To edit disposition lists:

1. Navigate to the Update Route page, for the Route whose associated Disposition list you want to edit. For information, see [Editing Maintenance Route Records](#).
2. Select Disposition Associations from the side navigation menu. The Define Disposition Association page appears.
3. You can add or remove items from the Disposition List. For information, see [Creating Disposition Lists](#). Make the required changes and click Apply.

Approving Disposition Lists

A Disposition list is approved when the route it is associated with, is approved. For information on route approval, see [Creating Maintenance Route Records](#). When the route is approved, you can view the Disposition association. From the Update Route page, select Disposition Associations. The View Disposition Associations page appears displaying the disposition list details.

Note: Disposition lists, that apply to the master configuration and item being planned, are provided to planning, when the route for a maintenance requirement is being planned. Planners use the replace and rework percentiles to determine which materials to plan. The percentile of replacement combined with the actual item instance helps in planning the expected material use. The percentile of rework combined with the items average duration is used to forecast the need for a replacement part.

Managing Maintenance Documents

The maintenance, repair, and overhaul of high-valued electromechanical systems is supported by large volumes of documentation, supplied by original equipment manufacturers (OEMs), equipment operators, governmental agencies, and third-party maintenance specialists. These numerous documents evolve during the life of the asset, and must be monitored, often for regulatory compliance. From the perspective of the organization, the complete set of maintenance documents includes self-authored documents, as well as those produced by external organizations. Oracle Complex Maintenance, Repair, and Overhaul includes the Document Index module that permits a maintenance organization to create a repository of meta-documentation.

This chapter discusses the key functions supported by the Oracle Complex Maintenance, Repair, and Overhaul Document Index module. The chapter provides process-oriented, task based procedures for using the application to perform essential document management tasks in maintenance organizations.

See:

- [Creating Document References](#)
- [Associating Document Sub Types to Document Types](#)
- [Finding Document References](#)
- [Editing Document References](#)
- [Maintaining Document Subscription Information](#)
- [Maintaining Document Supplier Information](#)
- [Maintaining Document Distribution Information](#)
- [Creating Document Revision Records](#)
- [Editing Document Revision Records](#)

- [Uploading Electronic Documents](#)

What is Document Index?

Document Index is a subsystem that provides an online catalog of documents used in maintenance, repair, and overhaul operations. Document Index is the Oracle Complex Maintenance, Repair, and Overhaul module that you will use to manage your maintenance, repair, and overhaul documents, regardless of their source, and regardless of their form, paper or electronic.

For each document that you would like to monitor with Document Index, you will add a reference to the document that includes the document identifier, its title, and whether or not the document can be subscribed to. Documents can be of certain types, and subtypes, and this information is also managed with Document Index. You can edit the document references that you create, as well as define and edit revisions. You cannot delete document descriptions using Document Index. When documents are no longer required, for example, after having disposed of a unit in your fleet, you can mark the document as obsolete.

Key Business Processes

The Document Index supports the following business processes:

Document Registration Internal documents that evolve during the life of an equipment, and external documents provided by suppliers on a subscription basis, may consist of various formats that should be tracked. Oracle Complex Maintenance, Repair, and Overhaul allows you to consolidate all the document information by registering the document titles and reference information in a single area. The various business areas can refer to the documents for the latest information on a particular maintenance requirement. Maintaining accuracy in available documents begins with the process of registering the documents. Document registration defines only a document title; the document definition is created with the first revision.

Document Revision Control Maintaining the latest documentation and related updates is a necessity for maintenance organizations. This includes tracking revisions of a document to ensure information is up to date and accurate. Inaccurate information may not be in adherence to required rules and regulations. Oracle Complex Maintenance, Repair, and Overhaul allows organizations to mark current information as reference, and obsolete information as not considered for use, while retaining the obsolete documents for document history.

Electronic Document Uploading Any document that is available in electronic form can be uploaded to the database and associated with the relevant document revision. All file types are supported.

Document Subscription Control Organizations maintain supplier information for documents to ensure that the right supplier provides the documentation requested or subscribed to. Oracle Complex Maintenance, Repair, and Overhaul allows organizations to maintain supplier information, and to track the status of a subscription for a document from an associated supplier.

Document Distribution To maintain information on document distribution, it is necessary to map out who or what group is the recipient of a particular document. Missing or incorrectly identifying a recipient can cause substantial business impact. Approvals may be necessary by a specific individual before the release of a document. Oracle Complex Maintenance, Repair, and Overhaul allows organizations to maintain the distribution of documents by defining the recipient of a document. This enables organizations to map the documents and release them to the right individuals or groups.

Fields Associated with Document References

The following fields appear on Document Index pages that relate to maintaining document references:

Document Number contains a unique identifier, generated by the organization to identify a maintenance document.

Type refers to the maintenance document type, and typically refers to the fleet unit, or major section division of the fleet unit. The set of values of this field is created when Oracle Complex Maintenance, Repair, and Overhaul is installed, and you cannot enter a new value here. Select the correct value for the type of document that you are creating from the drop-down list.

Sub Type is the maintenance document category that describes the nature of the information contained in the document that you are defining in this field. Select the appropriate value from the drop-down list. Also see [Associating Document Sub Types to Document Types](#).

Operator is the name of the company that owns or uses the document that you are recording. To find all operator codes, use the generic substitution meta character%, and click Go. This launches the Select Operator Page. All the records in the database

appear on the page in groups of ten. Click on the operator you want, to enter this value in the Operator field in the Create Document page.

Product Type contains a user-defined document product identifier. To find all product types, use the generic substitution meta character%, and click Go. This launches the Select Product Type page. All the records in the database appear on the page in groups of ten. Click on the product type you want, to enter this value in the Product Type field on the Create Document page. Product Type is based on the lookup 'ITEM_TYPE'.

Source refers to the internal or external supplier of the maintenance document. To find all source codes, use the generic substitution meta character%, and click Go. This launches the Select Source page. All the records in the database appear on the page in groups of ten. Click on the source you want, to enter this value in the Source field on the Create Document page.

Title refers to the title of the maintenance document.

Subscription Available is a true or false flag that indicates whether or not this maintenance document is available by subscription. Select Yes or No from the drop-down list.

Subscribed To is a true or false flag that indicates whether or not your organization has subscribed to this maintenance document. The status of this field is derived from the status of the subscription available flag and whether or not a subscription is in place.

Status indicates whether a document is obsolete or current. Select the value from the drop-down list. The values for this field is defined when Oracle Complex Maintenance, Repair, and Overhaul is installed.

Creating Document References

This is the primary process by which you can create references to all of the maintenance documents you would like to manage. You can record any revision information, if necessary, using this process.

Prerequisites:

To create a document reference, you should know the document type, the document source, the document number, whether the document is available through subscription, and whether the document is subscribed to by the organization.

Document types should be set up by your organization while installing Oracle Complex Maintenance, Repair, and Overhaul.

To create a document reference:

- 1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button.
- 2. Select the Document Index tab. The Search Document page appears.

Figure 4–1 Search Document page

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[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Document Index

Route Management

Fleet Maintenance Program

Search

Associate Type

Search Document

Source

Title

Document Type

Operator

Media Type

Go

Clear

Document Number

Status

Sub Type

Item Type

Search Results

Create

Select	Document Num	Title	Type	Sub Type	Revision Num	Revision Type	Status	Media Type	Electronic File
No records were found matching the given criteria..									

- 3. Click the Create button to display the Create Document page.

Figure 4–2 Create Document page

ORACLE

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[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Document Index

Route Management

Fleet Maintenance Program

Search | Associate Type

Create Document

* Indicates required field

Cancel

Apply

Document Info

* Document Number

* Type

Sub Type

Operator

Item Type

* Source

* Name

Title

* Subscription Available

No

Cancel

Apply

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- 4. Enter the document information in the fields provided. Information in fields marked with asterisk is mandatory. For field descriptions, see [Fields Associated with Document References](#).
- 5. Click Apply.

When you click Apply, Oracle Complex Maintenance, Repair, and Overhaul checks to ensure that all required fields have been completed with valid entries. The application rejects invalid records with error messages.

Associating Document Sub Types to Document Types

Manufacturers of transportation equipment produce many different types of documents including maintenance manuals, service bulletins, parts catalogs, and others. Organizations may wish to use sub types to identify maintenance documents that are sections of others, or related otherwise. For example, a document type might be “Propellant”. A powerplant will probably be supplied

with an “Illustrated Tool and Equipment Manual”, so you might create a document sub type called “ITEM”.

Prerequisites:

You should decide how to relate maintenance document types to sub types. Your organization should have set up document types while installing Oracle Complex Maintenance, Repair, and Overhaul.

To associate document sub types to a document type:

- 1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button.
- 2. Select the Document Index tab. Select the Associate Type secondary tab to display the Associate Document Sub Type to Document Type page.

Figure 4–3 Associate Document Sub Type To Document Type page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Document Index

Route Management

Fleet Maintenance Program

Search | Associate Type

Associate Document Sub Type To Document Type

Cancel

Apply

Document Type

Remove

Sub Type Name

Sub Type Description

No records were found matching the given criteria..

Add More Rows

Cancel

Apply

- 3. Select the document type for which you wish to create a document sub type using the Document Type drop-down menu. Document Type represents the major topic such as powerplant, fleet unit, and ground support equipment that is described by the document in question. This field is populated when Oracle Complex Maintenance, Repair, and Overhaul is installed. Sub Type records existing in the database, and associated with this document type, are displayed in the lower half of the page.

Figure 4–4 Select Document Type - Associate Document Sub Type To Document Type page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Document Index

Route Management

Fleet Maintenance Program

Search | Associate Type

Associate Document Sub Type To Document Type

Document TypeAircraft

CancelApply

Previous1-10 of 12Next

Remove	Sub Type Name	Sub Type Description
<input type="checkbox"/>	Advisory Circular	Advisory Circular
<input type="checkbox"/>	Airworthiness Directives	Airworthiness Directives
<input type="checkbox"/>	Component Overhaul Man	Component Overhaul Manual
<input type="checkbox"/>	Engineering Order	Engineering Order
<input type="checkbox"/>	Illustrated Parts Catalog	Illustrated Parts Catalog
<input type="checkbox"/>	Illustrated Parts List	Illustrated Parts List
<input type="checkbox"/>	Maintenance Manual	Maintenance Manual
<input type="checkbox"/>	Maintenance Planning Dat	Maintenance Planning Data
<input type="checkbox"/>	OEM Task Card	OEM Task Card
<input type="checkbox"/>	Service Bulletin	Service Bulletin

Add More Rows

- 4. Click Add More Rows to add Sub Type information.

Figure 4–5 Add Sub Types - Associate Document Sub Type To Document Type page

Associate Document Sub Type To Document Type

Document Type Aircraft

Cancel Apply

Previous 1-10 of 12 Next

Remove	Sub Type Name	Sub Type Description
<input type="checkbox"/>	Advisory Circular	Advisory Circular
<input type="checkbox"/>	Airworthiness Directives	Airworthiness Directives
<input type="checkbox"/>	Component Overhaul Man	Component Overhaul Manual
<input type="checkbox"/>	Engineering Order	Engineering Order
<input type="checkbox"/>	Illustrated Parts Catalog	Illustrated Parts Catalog
<input type="checkbox"/>	Illustrated Parts List	Illustrated Parts List
<input type="checkbox"/>	Maintenance Manual	Maintenance Manual
<input type="checkbox"/>	Maintenance Planning Dat	Maintenance Planning Data
<input type="checkbox"/>	OEM Task Card	OEM Task Card
<input type="checkbox"/>	Service Bulletin	Service Bulletin

- Enter the new document Sub Type Name and Sub Type Description.
Sub Type Name represents the content of the document type. For example, a document type might be “Powerplant”, and the document sub type might be “Illustrated Parts Catalog”. Sub Type Description contains the text description of the document Sub Type Name.
- Click Apply.

To remove a document sub type from a document type:

- From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button.
- Select the Document Index tab.
- Select the Associate Type secondary tab to display the Associate Document Sub Type to Document Type page where you can define sub types.

- 4. Select a document type using the Document Type drop-down list. The field below shows all document sub types in the database.
- 5. Select the Remove check box for the sub type record that you want to delete.

Figure 4–6 Remove Sub Type - Associate Document Sub Type To Document Type page

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[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Document Index

Route Management

Fleet Maintenance Program

Search | Associate Type

Associate Document Sub Type To Document Type

Document Type

Aircraft

Cancel

Apply

Previous

1-10 of 12

Next

Remove	Sub Type Name	Sub Type Description
<input checked="" type="checkbox"/>	Advisory Circular	Advisory Circular
<input type="checkbox"/>	Airworthiness Directives	Airworthiness Directives
<input type="checkbox"/>	Component Overhaul Man	Component Overhaul Manual
<input type="checkbox"/>	Engineering Order	Engineering Order
<input type="checkbox"/>	Illustrated Parts Catalog	Illustrated Parts Catalog
<input type="checkbox"/>	Illustrated Parts List	Illustrated Parts List
<input type="checkbox"/>	Maintenance Manual	Maintenance Manual
<input type="checkbox"/>	Maintenance Planning Dat	Maintenance Planning Data
<input type="checkbox"/>	OEM Task Card	OEM Task Card
<input type="checkbox"/>	Service Bulletin	Service Bulletin

- 6. Click Apply. You can remove only a single document sub type at a time.

Note: .A document sub type can only be removed from its document type if the combination is not associated to an existing document.

Finding Document References

Maintenance documents undergo frequent revisions. You can retrieve document references from the Document Index database and edit these references as necessary.

Oracle Complex Maintenance, Repair, and Overhaul permits use of meta characters when you type a word, or part of a word, to use as a search argument. Use % to represent any string of zero or more characters. Use _ to represent any single character. For example, if the database contains a record with the value "ENGINE" in a field, typing "E%" will return all records where the field value begins with "E".

Oracle Complex Maintenance, Repair, and Overhaul allows you to specify one or more search criteria to retrieve maintenance document references from the database. You can enter search strings in any of the fields for which you know the value. By using a combination of parameters in more than one field, you can restrict the search to retrieve only those document references that you want. After you retrieve the required document reference, click the buttons on the page to activate required functions.

Prerequisites:

The document reference must exist in the database.

To find a document reference:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button.
2. Select the Document Index tab.
3. Select Search secondary tab to display the Search Document page where you can enter the search criteria.
4. Enter the document information in the fields for which you know the value. For field descriptions, see [Fields Associated with Document References](#).

Figure 4–7 Find Document Record - Search Document page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Document IndexRoute ManagementFleet Maintenance Program

Search | Associate Type

Search Document

Source

Title

Document Type

Aircraft

Operator

Media Type

Document Number

Status

Sub Type

Advisory Circular

Item Type

Go

Clear

Search Results

Create

Select	Document Num	Title	Type	Sub Type	Revision Num	Revision Type	Status	Media Type	Electronic File
No records were found matching the given criteria..									

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- 5. Click Search. Search results appear in the Document List field in the lower half of the screen.

Figure 4–8 Document Search Results - Search Document Page

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[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Search | Associate Type

Document IndexRoute ManagementFleet Maintenance Program

Search Document

Source

Title

Document Type

Aircraft

Operator

Media Type

Document Number

Status

Sub Type

Advisory Circular

Item Type

Go

Clear

Search Results

Create

Select object and...

Edit RevisionCreate New RevisionUploadDelete Uploaded File

Previous1-10 of 21Next

Select	Document Num	Title	Type	Sub Type	Revision Num	Revision Type	Status	Media Type	Electronic File
<input type="radio"/>	AHLRRDI06	Test document for airplanes	Aircraft	Advisory Circular	Revision1	Temporary Revision	Obsolete	Paper	
<input type="radio"/>	AHLRRDI08		Aircraft	Advisory Circular	Revision1	Temporary Revision	Obsolete		
<input type="radio"/>	AHLRRDI100	Test pseudo doc creation	Aircraft	Advisory Circular	Rev14	Temporary Revision	Obsolete	Electronic File	
<input type="radio"/>	AHLRRDI100	Test pseudo doc creation	Aircraft	Advisory Circular	Rev1	Temporary Revision	Obsolete	Electronic File	
<input type="radio"/>	AHLRRDI25	Verifv editing doc	Aircraft	Advisory Circular	Revision10	Temporary Revision	Obsolete	Electronic File	sudha moorthw.doc

6. To restart a search for records, click Clear. All the search fields on the page clear. (If you have retrieved records being displayed in the lower half of the screen, these records will remain).

After entering the new search criteria, click Search to begin searching the database for records that match.

Editing Document References

After you create a document reference, you can edit it, or add more information about document subscriptions, document suppliers, and in-house document distribution.

To edit document references:

1. Retrieve the document reference that you want to edit (see Finding Document References).

Managing Maintenance Documents 4-13

- Click the document number link from the search results to launch the Edit Document page for that document.

Figure 4–9 Edit Document Page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document IndexRoute ManagementFleet Maintenance Program

SearchAssociate Type

Details

Subscription

Supplier

Distribution

CancelCreate New RevisionApply

Document Info

* Indicates required field

* Document NumberAHLRRD106

* TypeAircraft

Sub TypeAdvisory Circular

Operator

Item TypeCapital Item

* Source10002

* NameBNAF

TitleTest document for airplanes

* Subscription AvailableYes

* Subscribed ToYes

CancelCreate New RevisionApply

Document IndexRoute ManagementFleet Maintenance

ProgramHomeEngineeringConfigurationPlanningAdministrationExecutionProfileSign OutHelp

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- Make necessary changes to the document information in the fields provided. The fields in the Edit Document page are the same as in the Create Document page with the exception of the Document Number, which you cannot change. For field descriptions, see [Fields Related to Document References](#).
- Click Save to store your changes in the database.

You can edit subscription information, supplier information, and distribution information from the Edit Document page using the links on the left hand menu. You can also create new revisions for the document from the Edit Document page using the Create New Revision button.

See:

- [Maintaining Subscription Information](#)

- [Maintaining Supplier Information](#)
- [Maintaining Document Distribution Information](#)

Maintaining Document Subscription Information

When maintenance organizations purchase a new subscription, or want to update subscription information, tracking this information for reference is necessary. The supplier of a document may change over time, or the frequency of the subscription may change. Oracle Complex Maintenance, Repair, and Overhaul tracks such information ensuring that the document is subscribed from the right supplier, and that the information regarding the subscription is correct.

Prerequisites:

Your organization should have set up the Subscription Type and Media Type values while installing Oracle Complex Maintenance, Repair, and Overhaul.

To add subscription information:

1. Retrieve the document reference for which you want to add subscription information (see [Finding Document References](#)).
2. Click the document number link from the search results to launch the Edit Document page for that document.
3. Click Subscription on the left hand menu of the Edit Document page to launch the Create New Subscription page.

Figure 4–10 Edit Subscription Information page

ORACLE®Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Search | Associate Type

[Details](#)
[Subscription](#)
[Supplier](#)
[Distribution](#)

Edit Subscription Information

Cancel

Apply

Title

Leading Space

Document Number

MBH010

Source

Fedex

Type

Ground Support Equipment

Sub Type

Operator

*****5832 CWk Three

Item Type

ATO Option Class

Subscription Available

Yes

Subscribed To

No

Remove	Subscription Type	Frequency	Requested By	Subscribe From	From Date	To Date	Status	Quantity	Purchase Order	Media Type
No records were found matching the given criteria.										
<div>Add More Rows</div>										

Cancel

Apply

Document Index | Route Management | Fleet Maintenance

[Program](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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4. Click Add More Rows to add rows for subscription definition. Enter the subscription information in the fields provided. You must enter information into any field marked with an asterisk.
- Subscription Type indicates whether the subscription is free, or paid for. The field contains a drop-down list box from which you can select a value. These values are set up when your configuration of Oracle Complex Maintenance, Repair, and Overhaul is installed. You cannot type a string in this field.
 - Frequency specifies the reoccurrence of the subscription; i.e., monthly, semi-annually, annually. The field contains a drop-down list box from which you can select a value. Values are set up when your configuration of Oracle Complex Maintenance, Repair, and Overhaul is installed; you cannot type a string in this field.
 - Requested By contains the name of the individual in your organization who has requested a subscription to this publication. This is a quick lookup field.

You can enter a value if you know the value. Otherwise, enter a partial search string with the generic substitution meta character% (example John%), and click Go to launch the Select Requested By page. The system returns all records in the database that match the search argument. Click on a search result to return that record to the field on the Edit Subscription Information page. The requestors are internal person set up in the Oracle TCA (Trading Community Architecture) module.

- Subscribe From is a quick lookup field that contains the name of the organization that supplies the maintenance document. Enter a partial search string with the generic substitution meta character%, click Go and the system returns all matching supplier records in the database. Click on the pertinent record to return this value to the field on the Create New Subscription page. This field is mandatory.
- From Date contains the date on which the document subscription started. Click on the calendar selector icon beside the date field and select the correct date, which will be copied into the field.
- To Date is date on which the subscription ends. This date must be later than the From Date. Click on the calendar selector icon beside the date field and select the correct date, which will be copied into the field.
- Status contains a drop-down list box from which you can select a value from a set of values created when your configuration of Oracle Complex Maintenance, Repair, and Overhaul was installed. You cannot type a string in this field.
- Quantity contains the number of subscriptions to this document that your organization will receive. The value must be at least 1.
- Purchase Order contains a purchase order identifier supplied by your accounts payable department. If Oracle Purchasing is installed, you can select a PO Number from the list of values, using the search icon. Alternatively, if Oracle Purchasing is not installed, you can enter the PO Number in the PO Number text input. The PO Number is validated against PO Numbers in Oracle Purchasing if Oracle Purchasing is installed.
- Media Type indicates whether the subscription is a paper or an electronic document. The field contains a drop-down list box from which you can select a value. These values are set up when your configuration of Oracle Complex Maintenance, Repair, and Overhaul is installed. You cannot type a string in this field.

5. Click Apply to store the subscription information in the database.

Figure 4–11 Add Subscription Information - Edit Subscription Information page

Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

te Type

Edit Subscription Information

TitleElevator feel actuator - removal/Installation

Document Number11N-2012-31

TypeAircraft

Operator

Subscription AvailableYes

SourceAngela Gentile

Sub TypeTechnical Order

Item Type

Subscribed ToYes

Previous1-3 of 3Next

Remove	Subscription Type	Frequency	Requested By	Subscribe From	From Date	To Date	Status	Quantity	Purchase Order
<input type="checkbox"/>	Paid	On request	707SECDI	Consolidat	12-NOV-2003		Active	2	17502
<input type="checkbox"/>	Paid	Quarterly	707SECM	American	12-NOV-2003		Available, but not used	7	17502
<input type="checkbox"/>	Free	On request	Perry, Rys	Consolidat	05-NOV-2002		Active	1	17502

Add More Rows

Previous1-3 of 3Next

[Document Index](#) | [Route Management](#) | [Fleet Maintenance](#)

To update document subscription information:

1. Retrieve the document reference for which you want to update document subscription information (see [Finding Document References](#)).
2. Click Subscription on the left hand menu of the Edit Document page to navigate to the Subscription Information page. The lower half of the screen displays the subscription information about the document.
3. Update the field values.
4. Click Add More Rows to add rows for recipients definitions.

Figure 4–12 Update information - Edit Subscription page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Search | Associate Type

Details

Subscription

Supplier

Distribution

Title

Elevator feel actuator - removal/Installation

Document Number

11N-2012-31

Type

Aircraft

Operator

Subscription Available

Yes

Source

Angela Gentile

Sub Type

Technical Order

Item Type

Subscribed To

Yes

Previous 1-3 of 3 Next

Remove	Subscription Type	Frequency	Requested By	Subscribe From	From Date	To Date	Status	Q
<input type="checkbox"/>	Paid	On request	707SECDI	Consolidat	12-NOV-2003		Active	2
<input type="checkbox"/>	Paid	Quarterly	707SECM	American	12-NOV-2003		Available, but not used	7
<input type="checkbox"/>	Free	On request	Perry, Rys	Consolidat	05-NOV-2002		Active	1
							Active	
							Active	
							Active	
							Active	

5. Click Apply to store your changes in the database.

Maintaining Document Supplier Information

Maintaining supplier information for documents is necessary to ensure that the correct supplier provides the documentation requested or subscribed to. You may need to contact the supplier to verify information about a document, and for this reason maintenance of supplier contact information is crucial. Oracle Complex Maintenance, Repair, and Overhaul helps you record and update document supplier information.

Prerequisites:

The values for Preference Code should be set up by your organization while installing Oracle Complex Maintenance, Repair, and Overhaul.

Managing Maintenance Documents 4-19

To add supplier information:

- 1. Retrieve the document reference for which you want to add supplier information (see Finding Document References).
- 2. Click the document number link to launch the Edit Document page.
- 3. Click Supplier on the left hand menu of the Edit Document page to launch the Supplier Information page. Click Add More Rows to add rows for Supplier definitions.

Figure 4–13 Supplier Information Page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Document Index | Route Management | Fleet Maintenance Program

Search | Associate Type

Details

Subscription

Supplier

Distribution

Supplier Information

Cancel Apply

TitleLeading Space

Document NumberMBH010

TypeAircraft

Operator*****5832 CWk Three

Subscription AvailableYes

SourceFedex

Sub Type

Item TypeATO Option Class

Subscribed ToNo

Remove	Supplier Number	Supplier Name	Preference Code
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>

Add More Rows

Cancel Apply

Document Index | Route Management | Fleet Maintenance

- 4. Enter supplier information in the fields provided. Information in fields marked with asterisk is mandatory.
 - Supplier Name refers to the name of the organization that supplies this maintenance document. This is a quick lookup field. Enter a partial search string with the generic substitution meta character%, and click Go to launch the Select Supplier page. The system returns all matching records in the

supplier database. Click on the supplier name you want. This record returns to the Supplier Name field on the Supplier Information page.

- Supplier Description value is returned along with the Supplier Name to the Supplier Information page.
- Preference Code contains a drop-down list box from which you can select a value from a set of values created when your configuration of Oracle Complex Maintenance, Repair, and Overhaul was installed. You cannot type a string in this field.

Figure 4–14 Enter Supplier Information page

ORACLE[®] Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Document IndexRoute ManagementFleet Maintenance Program

Search | Associate Type

Details

Subscription

Supplier

Distribution

Supplier Information

CancelApply

TitleLeading Space

Document NumberMBH010SourceFedex

TypeAircraftSub Type

Operator***** 5832 CWk ThreeItem TypeATO Option Class

Subscription AvailableYesSubscribed ToNo

Remove	Supplier Number	Supplier Name	Preference Code
	1000	GE Plastics	Prime
	1004	Star Gate Ltd	Secondary

Add More Rows

CancelApply

Document Index | Route Management | Fleet Maintenance

5. Click Apply to store the document supplier information in the database.

Figure 4–15 View Supplier Information - Supplier Information page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Search](#) | [Associate Type](#)

[Details](#)
[Subscription](#)
[Supplier](#)
[Distribution](#)

Supplier Information

[Cancel](#) [Apply](#)

Title**Leading Space**

Document Number**MBH010**

Type**Aircraft**

Operator*******5832 CWk Three**

Subscription Available**Yes**

Source**Fedex**

Sub Type

Item Type**ATO Option Class**

Subscribed To**No**

[Previous](#) 1-2 of 2 [Next](#)

Remove	Supplier Number	Supplier Name	Preference Code
<input type="checkbox"/>	1000	GE Plastics	Prime
<input type="checkbox"/>	1004	Star Gate Ltd	Secondary

[Add More Rows](#)

[Previous](#) 1-2 of 2 [Next](#)

[Cancel](#) [Apply](#)

[Document Index](#) | [Route Management](#) | [Fleet Maintenance](#)

[Program](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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To update supplier information:

- 1. Retrieve the document reference for which you want to update document supplier information (see Finding Document References).
- 2. Click Supplier on the left hand menu of the Edit Document page to navigate to the Supplier Information page. The lower half of the screen displays the supplier information about the document.
- 3. Update the field values.
- 4. Click Add More Rows to add rows for recipients definitions.
- 5. Click Apply to store your changes in the database.

Maintaining Document Distribution Information

It is necessary for maintenance organizations to control the distribution of documents and software for various reasons including licensing, cost of

4-22 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

distribution, regulatory authorities, and others. This creates the necessity to ensure that the requester has authorization to receive a document prior to distributing it. Oracle Complex Maintenance, Repair, and Overhaul allows you to manage information about recipients in the organization to whom documents will be distributed.

To record document distribution information:

1. Retrieve the document reference for which you want to record distribution information (see [Finding Document References](#)).
2. Click the document number link to launch the Edit Document page.
3. Click Distribution on left hand menu of the Edit Document page to launch the Distribution Information page.

Figure 4–16 Distribution Information page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Search | Associate Type

Details
Subscription
Supplier
Distribution

Distribution Information

Cancel Apply

Title	Leading Space		Source	Fedex
Document Number	MBH010		Sub Type	
Type	Aircraft		Item Type	ATO Option Class
Operator	5832 CWk Three		Subscribed To	No
Subscription Available	Yes			

Remove	Recipient Name	Recipient Description
No records were found matching the given criteria..		
Add More Rows		

Cancel Apply

Document Index | Route Management | Fleet Maintenance

Program | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

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4. Click Add More Rows to add rows for recipients definitions. Enter the recipient information in the fields provided.

- Recipient Name is the name of the individual or department that will receive a copy of the document. This is a quick lookup field. You can enter a value if you know the value, otherwise, enter a partial search string with the generic substitution meta character% (example, John%), and click Go to launch the Select Recipient page. The system returns all matching records in the database. Click on the recipient name you want to enter. This record returns to the Recipient Name field on the Distribution Information page. Recipients are set up as Organizations in the Oracle Trading Community Architecture module.
- The system also returns the corresponding Recipient Description to the field on the Distribution Information Page.

Figure 4–17 Enter Recipient Information - Distribution Information page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

[Search](#) | [Associate Type](#)

[Details](#)
[Subscription](#)
[Supplier](#)
[Distribution](#)

Distribution Information

Cancel

Apply

Title

Leading Space

Document Number

MBH010

Source

Fedex

Type

Aircraft

Sub Type

Operator

*****5832 CWk Three

Item Type






ATO Option Class

Subscription Available

Yes

Subscribed To

No

Remove	Recipient Name	Recipient Description
	<input type="text" value="10000"/>	<input type="text" value="Abbitual"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

Add More Rows

Cancel

Apply

[Document Index](#) | [Route Management](#) | [Fleet Maintenance](#)

5. Click Apply to store the document recipient information in the database.

Figure 4–18 View Recipient Details - Distribution Information page

ORACLE® Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Search | Associate Type

Details
Subscription
Supplier
Distribution

Distribution Information

Cancel Apply

Title	Leading Space		Source	Fedex
Document Number	MBH010		Sub Type	
Type	Aircraft		Item Type	ATO Option Class
Operator	*****5832 CWk Three		Subscribed To	No
Subscription Available	Yes			

Previous 1-1 of 1 Next

Remove	Recipient Name	Recipient Description
<input type="checkbox"/>	10000	Abbitual

Add More Rows

Previous 1-1 of 1 Next

Cancel Apply

Document Index | Route Management | Fleet Maintenance
Program | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

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To update document distribution information:

1. Retrieve the document reference for which you want to update document distribution information (see [Finding Document References](#)).
2. Click Distribution on the left hand menu of the Edit Document page to navigate to the Distribution Information page. The lower half of the screen displays the distribution information about the document.
3. To remove a recipient from the list, select the name that you would like to remove, and click Apply. The application saves this change automatically.
4. Click Add More Rows to add rows for recipients definitions.
5. Click Apply to store your changes in the database.

Fields Associated with Document Revisions

The following fields appear on Document Index pages that relate to managing document revisions:

Revision No is a field that holds a user-assigned document revision identifier.

Revision Date is usually provided by the source company of the document. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field. This date should be greater than or equal to the system date.

Volume contains a string that identifies the volume of this revision.

Issue Number contains a number that identifies the issue of this revision. You cannot enter alphabetic characters here.

Date Received is the date on which the document revision was received by the user organization. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field. Received date must be less than revision date.

Effective Date is the date on which the document is technically effective. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field. Effective date should be greater than the revision date and the approved date.

Approved By contains the name of the individual who is authorized to approve this document revision. If you know the exact name, enter it. Otherwise, enter a text search argument (example, John%), and click Go to retrieve and display all records from the database that match the search argument. Click the correct value from the records displayed to have the text value returned to the field. Names of approvers are maintained as type persons in the Oracle Trading Community Architecture module.

Electronic Link is a Uniform Resource Identifier string that locates a document or similar file somewhere in the World Wide Web.

Remarks refer to any notes that are pertinent to this maintenance document revision. This long text field behaves much like a simple word processor.

Revision Type values are defined while installing Oracle Complex Maintenance, Repair, and Overhaul. Select the correct value for this field from the drop-down list.

Status indicates whether a document revision is a draft, current, or obsolete. Select the correct value for this field from the drop-down list box.

Issue contains a description of the document issue.

Issue Date refers to the date on which the maintenance document was made available, or the date of issue of the document, coming from the supplier. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.

Media Type indicates whether the document is in paper or electronic format. Select the correct value for this field from the drop-down list box.

Obsolete Date is the date on which the document is no longer valid. If the Status of this revision is Current, this field should remain blank. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field. The Obsolete date should be greater than all other dates in this UI.

Approved Date is the date on which the document revision was approved by the individual named in the Approved By field. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field. The Approved date should be greater than or equal to the Revision date.

Creating Document Revision Records

Equipment manufacturers frequently revise maintenance documents. For tractability, it is necessary to record document revision information including issue dates, dates of obsolescence, dates of effectivity, and publication part number changes. Oracle Complex Maintenance, Repair, and Overhaul allows you to create new revisions once you retrieve the pertinent document reference from the database.

Prerequisites:

The document reference for which you want to create a new revision must exist in the database.

To create new revision records:

- 1. Retrieve the document reference for which you want to create new revisions (see [Finding Document References](#)).

Figure 4–19 Find Document Records - Search Document page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Document IndexRoute ManagementFleet Maintenance Program

SearchAssociate Type

Search Document

SourceDocument Number

TitleStatus

Document TypeAircraftSub Type

OperatorItem Type

Media Type

GoClear

Search Results

Create

Select object and...Edit RevisionCreate New RevisionUploadDelete Uploaded File

Previous1-10 of 82Next

Select	Document Num	Title	Type	Sub Type	Revision Num	Revision Type	Status	Media Type	Electronic File
<input checked="" type="radio"/>	MBAH010		Aircraft						
<input type="radio"/>	MBH010	Leading Space	Aircraft						
<input type="radio"/>	11N-2012-31	Elevator feel actuator - removal/Installation	Aircraft Technical Order		Rev1	Temporary Revision	Current	Electronic File	read.txt
<input type="radio"/>	11N-2012-31	Elevator feel actuator - removal/Installation	Aircraft Technical Order		1	Full Revision	Current	Electronic File	

- 2. In the Search Document page, select the document, and click Create New Revision. The Create New Revision page appears. The Create New Revision button is also available in the Edit Documents page.

Figure 4–20 Create New Revision page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Search | Associate Type

Create New Revision

* Indicates required field

Cancel Apply

Title		Source	Imaging Innovations, Inc.
Document Number	MBAh019	Sub Type	
Type	Aircraft	Item Type	
Operator		Subscribed To	No
Subscription Available	No		

* Revision No	<input type="text"/>	* Revision Type	<input type="text" value="Temporary Revision"/>
Revision Date	<input type="text"/>	* Status	<input type="text" value="Current"/>
Volume	<input type="text"/>	Issue	<input type="text"/>
Issue Number	<input type="text"/>	Issue Date	<input type="text"/>
Date Received	<input type="text"/>	Media Type	<input type="text"/>
Effective Date	<input type="text"/>	Obsolete Date	<input type="text"/>
Approved By	<input type="text"/>		
Approved Date	<input type="text"/>		

- Enter revision information in the fields provided. Information in fields marked with asterisk is mandatory. For field descriptions, see [Fields Associated with Document Revisions](#).

Figure 4–21 Enter Revision Information - Create New Revision page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Document IndexRoute ManagementFleet Maintenance Program

Search | Associate Type

Create New Revision

* Indicates required field

CancelApply

Title

Document NumberMBAhI019

TypeAircraft

Operator

Subscription AvailableNo

SourceImaging Innovations, Inc.

Sub Type

Item Type

Subscribed ToNo

* Revision No1

Revision Date31-MAY-2004

Volume

Issue Number

Date Received

Effective Date

Approved By

Approved Date

* Revision TypeTemporary Revision

* StatusCurrent

Issue

Issue Date

Media Type

Obsolete Date

4. Click Apply to add the document revision to the database.

Figure 4–22 Save Document Revision - Edit Revision page

ORACLE Oracle Complex MRO

Home [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Document Index [Route Management](#) [Fleet Maintenance Program](#)

Search | Associate Type

Edit Revision

* Indicates required field

[Cancel](#) [Edit Document](#) [Apply](#)

Title		Revision Num	1
Document Number	MBAh019	Source	Imaging Innovations, Inc.
File		Sub Type	
Type	Aircraft	Item Type	
Operator		Subscribed To	No
Subscription Available	No		

Revision No	1	* Revision Type	Temporary Revision
Revision Date	31-MAY-2004	* Status	Current
Volume		Issue	
Issue Number		Issue Date	
Date Received		Media Type	
Effective Date		Obsolete Date	
Approved By			
Approved Date			

You can revise the maintenance document reference by clicking Edit Document, but your revision could be lost if you do not click Apply first.

Editing Document Revision Records

Documents related to an equipment often continue to evolve during the life cycle of the equipment. Maintenance organizations require to track and update such document revisions. Oracle Complex Maintenance, Repair, and Overhaul allows you to record and edit document revision information.

Prerequisites:

The document revision you want to edit must exist in the database.

To edit document revision records:

- 1. Retrieve the document revision record for which you want to edit information (see [Finding Document References](#)).
- 2. Select the document revision that you want to edit from the Document List at the bottom of the page.
- 3. Click Edit Revision to navigate to the Edit Revisions page. If you selected a document record that has no revisions defined, clicking the Edit Revision button will launch the Create New Revision page.

Figure 4-23 Edit Document Revision - Edit Revision page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Document Index](#) [Route Management](#) [Fleet Maintenance Program](#)

Search | Associate Type

Edit Revision

* Indicates required field

Title1213 Test VLe

Document Number12-45 - 234

File

TypeAircraft

Operator

Subscription AvailableYes

Revision Num1213-REV01

SourceAbbitual

Sub Type

Item Type

Subscribed ToNo

Revision No1213-REV01

Revision Date16-JAN-2004

Volume

Issue Number

Date Received

Effective Date

Approved By

Annmrent Date

* Revision TypeFull Revision

* StatusCurrent

Issue

Issue Date

Media Type

Obsolete Date

- 4. Enter the document revision information in the fields provided. The fields on the Edit Revision page are the same as on the Create New Revision page with the exception of the Revision Number field, which you cannot change. For field descriptions, see [Fields Associated with Document Revisions](#).

If the Revision Number is incorrect, create a new revision, noting in the Remarks field, the reason for the new revision (for example, “Typo in the

original revision entry.”). This feature preserves the tractability of document revisions to maintenance procedures, should questions about the effectiveness of maintenance procedures be raised in the future.

5. Click Apply when you have finished entering revised document information.

You can switch to the document reference editing page by clicking the Edit Document button.

Uploading Electronic Documents

Documents available in an electronic format can be uploaded to the database and associated with relevant records in Document Index. Associated electronic documents can be accessed via links in Document Index on the search results pages and edit revision pages.

Prerequisites:

A document revision must exist with media type of 'E-File'. The user needs access to the file system where the electronic document is stored.

To upload electronic documents:

1. Retrieve the document revision record, that you want to upload electronic documents for, using the document search functionality.

Figure 4-24 Find Document Record - Search Document page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution Profile

Sign Out

Help

Search

Associate Type

Document Index

Route Management

Fleet Maintenance Program

Search Document

Source

Title

Document Type

Aircraft

Operator

Media Type

Document Number

Status

Current

Sub Type

Item Type

Go

Clear

Search Results

Create

Select object and...

Edit Revision

Create New Revision

Upload

Delete Uploaded File

Previous

1-10 of 37

Next

Select	Document Num	Title	Type	Sub Type	Revision Num	Revision Type	Status	Media Type	Electronic File
<input type="radio"/>	MBAH1019		Aircraft		1	Temporary Revision	Current		
<input checked="" type="radio"/>	11N-2012-31	Elevator feel actuator - removal/Installation	Aircraft Technical Order		1	Full Revision	Current	Electronic File	
<input type="radio"/>	11N-2012-31	Elevator feel actuator - removal/Installation	Aircraft Technical Order		Rev1	Temporary Revision	Current	Electronic File	read.txt

2. Click Upload to bring up the upload page. The Upload button can also be accessed from the Edit Revision page.

Figure 4–25 Electronic File Upload page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Search | Associate Type

Electronic File Upload

Title	Elevator feel actuator - removal/Installation	
Document Number	11N-2012-31	Revision Num 1
File		Source Angela Gentile
Type	Aircraft	Sub Type Technical Order
Operator		Item Type
Subscription Available	Yes	Subscribed To Yes

File To Upload

File	Description
<input type="text"/> Browse...	<input type="text"/>

Cancel Upload

- Click Browse to open your file browser.
- Select your document and click on open. The file location path and the filename copy into the File field.

Note: .There is a predefined folder set up in Oracle Content Manager for storing electronic documents. Refer to the Implementation Guide for more information on setting up Oracle Content Manager for Document Index.

- Enter an optional description of the electronic document.
- Click on Upload. The document is now accessible through the document search result page or the edit document revision page.

Note: The system verifies if the file exists or not, and a warning message will be displayed if the user enters an incorrect file name or selects an empty file to upload.

7. To delete an uploaded file, select the document revision from the Search results table, and click Delete Uploaded File.

Note: .A revision can only have one file associated with it.

Working With Master Configurations

Modeling a complex assembly or system involves defining the hierarchy or structure, including the parts or sub-configurations allowed at each position or location, rules to control the configuration, documents which apply to the configuration, and ratios applicable between positions by which counter updates to will flow down, if other than one to one. The assembly configuration for an aircraft type, locomotive, ship, or any other complex system or assembly, is described by the Oracle Complex Maintenance Repair and Overhaul module called Master Configuration.

This chapter discusses the key functions supported by the Oracle Complex Maintenance Repair and Overhaul Master Configuration module. The chapter provides process oriented, task based procedures for using the application to perform essential tasks for managing configuration models.

See:

- [Creating Master Configuration Records](#)
- [Finding Master Configuration Records](#)
- [Working with Positions](#)
- [Creating Positions in a Master Configuration](#)
- [Copying Existing Configurations to a Position](#)
- [Associating Item Groups with a Position](#)
- [Associating a Sub-Configuration/Alternate Sub-Configuration with a Position](#)
- [Creating Rules for a Configuration or Sub-Configuration](#)
- [Editing Position Ratios](#)
- [Attaching Documents to a Position](#)

- [Adding Alternate Items Information](#)
- [Finding Alternate Items Information](#)
- [Editing Alternate Items Information](#)
- [Creating Item Group Revisions](#)
- [Editing Master Configuration Records](#)
- [Creating Master Configuration Revisions](#)
- [Approving Master Configurations](#)
- [Viewing Master Configuration Records](#)
- [Viewing Position Details](#)
- [Viewing Position Ratios Associated with a Position](#)
- [Viewing Documents Attached to a Position](#)
- [Viewing Alternate items Associated with a Position](#)
- [Viewing Positions Associated with an Alternate item Group](#)
- [Viewing Rules](#)
- [Closing \(Removing\) Master Configuration Records](#)
- [Reopening Closed Records](#)

What is Master Configuration?

Master Configuration is the template or control structure for an assembly, system, sub-assembly, or subsystem that provides a model of the structure of an electrical, hydraulic, pneumatic, or mechanical system or assembly, with rules for component location and component selection, and applicable maintenance operations. For example, a Boeing 757-300 can be configured with either a pair of Pratt & Whitney PW2043 engines, or a pair of slightly more powerful Rolls-Royce RB211-535E4B engines. Master Configuration is used to create and maintain instances or units derived from the configuration hierarchy, parts, sub-assemblies, and rules defined. The presence of a master configuration simplifies route development (see [Managing Maintenance Routes](#) for more information about maintenance routes), by serving as the basis for material requirements and their dispositioning in a disposition list. Master Configuration also simplifies maintenance requirement development (see [Managing Maintenance Requirements](#) for more information about maintenance

requirements), by serving as an association point for which maintenance requirements will apply.

Key Business Processes

The Master Configuration module supports the following business processes:

Definition of Allowable Configuration A master configuration is a template that represents the hierarchy of component positions in an assembly. The relative component positions define the parent-child relationship among the items within a master configuration. Master Configuration identifies the tracked parts that make up a unit, and allows you to construct a logical tree structure to illustrate the component positions in an assembly. You can define multiple master configurations for a product to suit different operation modes. You can also define the allowable part alternates for each component position.

Provide Configuration Template for Unit Configuration A fleet operator may have multiple units of the same configuration. The Master Configuration module provides a template to create a unit configuration, which reflects the current “as-installed” configuration of a product. A unit configuration replicates the position structure of a master configuration.

Attach Applicable Maintenance Requirement When defining a unit’s applicable maintenance requirement, organizations can use several grouping mechanisms to streamline the process. Oracle Complex Maintenance, Repair, and Overhaul allows you to apply a maintenance requirement, directly to a unit configuration, to a node in a product classification that a unit configuration inherits, or to a position in a master configuration that a unit configuration inherits. If you associate a maintenance requirement to a node in a master configuration for example, any unit configuration that you create based on the master will receive those maintenance requirements.

Provide Checklist for User The physical breakdown of a complex assembly decides shop floor processes and information requirement. You can associate such information with a node or position in a master configuration. During the overhaul of an assembly, maintenance personnel, remove, re-install, and replace serialized parts. The service provider has to provide an on-off log for such operations. The off log indicates the item number and serial number of a item installed at a certain position before the maintenance event. The on log indicates the item number and serial number of the item installed at a certain position during maintenance. Oracle Complex Maintenance, Repair, and Overhaul allows you to provide an on-off log

template indicating all the positions and item alternates for the nodes (positions) where users can install or remove items.

Working with Master Configuration Records

After you create a master configuration record using Oracle Complex Maintenance, Repair, and Overhaul, you can retrieve the record to edit the information, to create new master configurations, or to create unit configurations based on existing master configuration records.

See:

- [Creating Master Configuration Records](#)
- [Finding Master Configuration Records](#)

Fields Associated with Master Configuration Records

The following fields appear on Master Configuration pages that relate to creating and editing master configuration records:

Name refers to an appropriate name for the configuration template hierarchy.

Description is the field where you can enter phrases or sentences that describe this configuration hierarchy.

Status indicates whether a master configuration record is in Complete, Draft, Approval Pending, Approval Rejected, Closed or Expired status. The Status field contains a drop-down list box from which you can select a value. These values are set up when your Oracle Complex Maintenance, Repair, and Overhaul configuration is installed.

Position refers to the position in the assembly that acts as the topmost node of the master configuration hierarchy. Use the LOV icon to launch the Select Position page. Enter a partial search string with the generic substitution meta character% (example, Engine%), and click Search to display all matching records in the database. Click the appropriate record to return this value to the Position field in the Search Master Configuration page.

Position Description is the field containing phrases or sentences that describe this position in the configuration hierarchy.

Position Key Is used to uniquely identify a position within a MC structure. The positions should be non-revision specific so that rules, FMP, and so on are not defined each time a new revision of the MC is created. The configuration position is thus created as a link list of the Master Configuration (revision-specific or non-revision specific) + positions. To achieve non-revision specificity, position keys are used. This linked list of MC/position>MC/position>MC/position.... can always uniquely identify a position within a MC structure. This position path can then be used to compare against any units.

Quantity refers to the number of items in the item selection option set for this position in the configuration hierarchy. Enter a number greater than zero.

UOM field identifies the unit of measure of the items in the current hierarchy position. You cannot enter text directly in this field because the text value must exist in the database. Enter a search argument with the generic substitution meta character%, and click Go to retrieve and display all records from the database that match the search argument. Click the correct value from the records displayed on the Select UOM page, to have the text value returned to the field.

Start Date refers to the date of the first day of effectivity of this position in the configuration hierarchy. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.

End Date refers to the last day on which the position in the configuration is valid. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.

Item Group Name is the name for the set of item option selections at this node. You cannot enter text directly in this field because the text value must exist in the database. Use the LOV icon to navigate to the Select Group Name page. Enter a text search argument (example, MACHINE%), and click Search to retrieve and display all records from the database that match the search argument. Click the correct value from the records displayed, to have the text value returned to the field.

Item Group Description refers to a description of the item options set, and is displayed automatically when you retrieve the item Group Name.

Display Order refers to an ordinal that determines the order in which the configuration positions are displayed.

Item The tracked item for which the master configuration is defined.

Revision The revision number to indicate that the master configuration is under revision control. Revision control enables multiple configuration revisions to be active at one time. This is necessary because all of the units cannot be migrated to the new master configuration at the same time. During that transition phase the user will maintain units based on two different revisions of the same master configuration. This also aids in implementing configuration modifications throughout the master configuration life cycle. The Revision will be defaulted and auto generated, if not entered by the user.

Creating Master Configuration Records

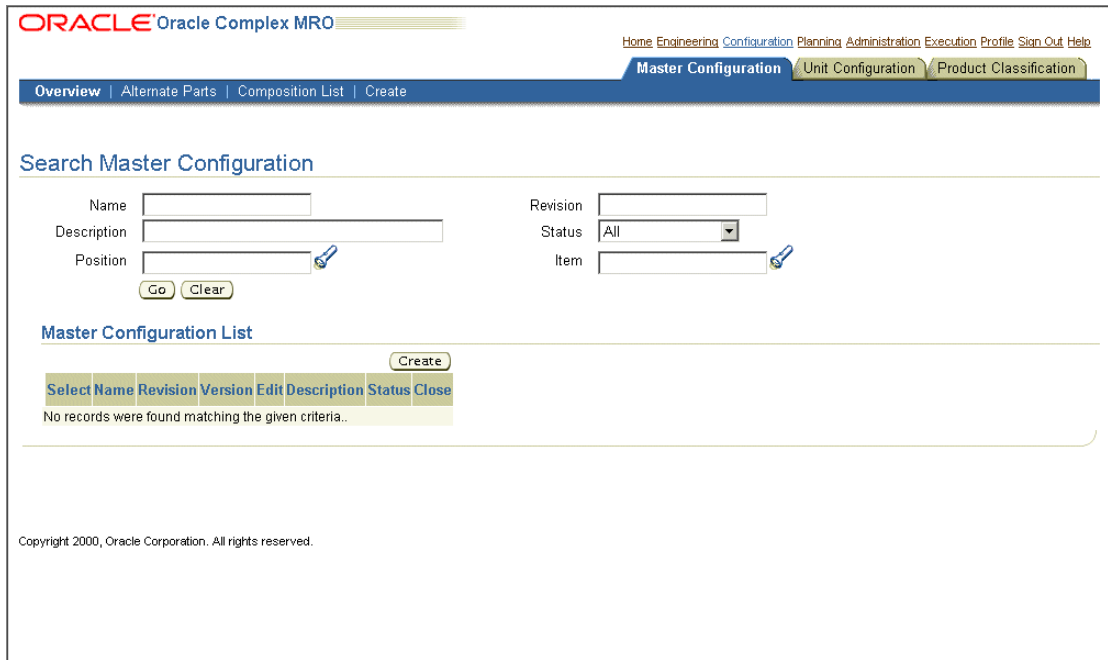
A master configuration represents the structure of a complete electromechanical assembly, consisting of as many nodes as necessary to fully represent the assembly. There is no limit to the number of nodes that an assembly representing a fleet unit can comprise. This process allows the user to add the master configuration of a fleet unit to the database.

Prerequisites:

You must know the information required to create a master configuration record.

To create a master configuration record:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click the Configuration link. The Search Master Configuration page appears.

Figure 5–1 Search Master Configuration page

ORACLE[®] Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help


Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Search Master Configuration


Name


Description

Position 

Go Clear

Revision

Status All 

Item 

Master Configuration List

Create

Select	Name	Revision	Version	Edit	Description	Status	Close
No records were found matching the given criteria..							

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2. Select the Create button to open the Create Master Configuration page.

Figure 5–2 Create Master Configuration page

ORACLE

Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview

Alternate Parts

Composition List

Create

Master Configuration

Unit Configuration

Product Classification

Create Master Configuration

Cancel

Apply

* Name

Description

Status

Draft

Revision

Version

1

* Indicates required field

Create Position

* Position

Quantity

1

Start Date

31-MAY-2004

Item Group

Display Order

1

Position Description

UOM

Ea

End Date

Description

Necessity

Mandatory

Cancel

Apply

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- 3. Enter the master configuration information in the fields provided. Information in fields marked with asterisk is mandatory. For field descriptions, see [Fields Associated with Master Configuration Records](#).
- 4. To create the top node of the hierarchy, search for, and select a position from the position list of values.

Figure 5–3 Create Configuration Record - Create Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Create Master Configuration

Cancel Apply

* Name MC 200 Revision
Description Version 1
Status **Draft**

* Indicates required field
Create Position

* Position #1 Engine Position Description #1 Engine
Quantity 1 UOM Ea
Start Date 31-MAY-2004 End Date
Item Group Description
Display Order 1 Necessity **Mandatory**

Cancel Apply

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5. Optionally, associate an item group with this node.
6. Click Apply to save this master configuration record in the database. The Edit Master Configuration page appears displaying the configuration tree. The top nodes' details are displayed next to the configuration tree.

Figure 5–4 Edit Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

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Actions Add Go

#1 Engine

Cancel Alternate Items GO Apply

* Name MC 200 Revision 1

Description Version 1

Status Draft

* Indicates required field

Edit Position

* Position #1 Engine Position Description #1 Engine

Position Key 12301

Quantity 1 UOM Ea

Start Date 31-MAY-2004 End Date

Item Group Description

Display Order 1 Necessity Mandatory

Cancel Alternate Items GO Apply

7. From the Edit Configuration page, you can do the following:

- Add, delete, and copy positions
- Edit Alternate items information
- Attach documents to a position
- Edit Position Ratios
- Submit the configuration for approval
- Create Rules
- Add or remove sub-configurations

Finding Master Configuration Records

Fleet operators can use a master configuration as a template to create unit configurations, as well as to create multiple master configurations (for a single

5-10 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

product) to suite different operation modes. Master configurations also provide checklists for users on the shop floor to ensure the validity of assembly models. This necessitates the efficient retrieval of master configuration records in maintenance organizations.

Oracle Complex Maintenance, Repair, and Overhaul permits use of meta characters when you type a word, or part of a word, to use as a search argument. Use % to represent any string of zero or more characters. Use _ to represent any single character. For example, if the database contains a record with the value "ENGINE" in a field, typing "E%" will return all records where the field value begins with "E".

To find a master configuration record:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Configuration Management Global button. The Search Master Configuration page appears.
2. Enter the master configuration information in the fields for which you know the value. For field descriptions, see [Fields Associated with Master Configuration Records](#).
3. Click Search. The lower half of the screen displays the Master Configuration List of all matching records in the database.

Figure 5–5 Master Configuration Search Results - Search Master Configuration page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Master ConfigurationUnit ConfigurationProduct Classification

Overview | Alternate Parts | Composition List | Create

Search Master Configuration

Name

Description

Position

Go

Clear

Revision

Status

Draft

Item

Master Configuration List

Select Master Configuration and ...

Copy

Go

Previous

1-10 of 63

Next

Select	Name	Revision	Version	Edit	Description	Status	Close
<input type="radio"/>	00-MC-00	2	2		00-MC-00	Draft	
<input type="radio"/>	000-MC-000	1	1			Draft	
<input type="radio"/>	1000	1	1			Draft	
<input type="radio"/>	AHL-MC271103-1	2	2		Master Configuration -- New Part grp	Draft	
<input type="radio"/>	AHLUMPMC01	3	3		MC for Axle	Draft	
<input type="radio"/>	ALEX	1	1			Draft	

4. The following options are available in the drop-down menu:
- Re-open - this re-opens a a master configuration in Closed or Expired status.
 - Submit for approval - this checks a master configuration for completeness and initiates the approval workflow.
 - Copy - this copies a master configuration.
 - Create Revision - this creates a copy of the master configuration with a new version number
 - Edit rules - this will list all the rules for the given master configuration.
- See:
- [Editing Master Configuration Records](#)
 - [Creating Master Configuration Revisions](#)

- [Closing Master Configuration Records](#)
- [Reopening Closed Records](#)
- [Viewing Master Configuration Details](#)

Working with Positions

After you define the general master configuration attributes, you can create each position in the hierarchy. For each position in the hierarchy, you can define a set of valid items, with maintenance requirements for each item. Oracle Complex Maintenance, Repair, and Overhaul stores this information in the database. Also, you can retrieve master configuration records to add other master configurations, item locations, and valid items to a position in the selected configuration.

See:

- [Creating Positions in a Master Configuration](#)
- [Copying Existing Configurations to a Position](#)
- [Associating Item Groups with a Position](#)
- [Associating a Sub-Configuration/ Alternate Sub-Configuration with a Position](#)
- [Creating Rules for a Configuration or Sub-configuration](#)
- [Editing Position Ratios](#)
- [Attaching Documents to a Position](#)
- [Managing Alternate items/Items Information](#)

Fields on the Create Position Page

The following fields appear on Master Configuration pages that relate to creating and editing position details in a master configuration:

Position refers to the position in the assembly that acts as the topmost node in the master configuration hierarchy. Enter a partial search string with the generic substitution meta character% (example, Engine%), and click Go to launch the Select Position page that displays all matching records in the database. Click the appropriate record to return this value to the Position field in the Search Master Configuration page.

Position Description is the field containing phrases or sentences that describe this configuration hierarchy.

Quantity refers to the number of items in the item selection option set for this position in the configuration hierarchy. Enter a number greater than zero.

UOM field identifies the unit of measure of the items in the current hierarchy position. You cannot enter text directly in this field because the text value must exist in the database. Enter a text search argument with the generic substitution meta character%, and click Go to retrieve and display all records from the database that match the search argument. Click the correct value from the records displayed on the Select UOM page to have the text value returned to the field.

Start Date refers to the date of the first day of effectivity of this position in the configuration hierarchy. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.

End Date refers to the date that represents the last day on which the position in the configuration is valid. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.

Item Group Name is the name for the set of item option selections at this node. You cannot enter text directly in this field because the text value must exist in the database. Enter a text search argument (example, MACHINE%), and click Go to retrieve and display all records from the database that match the search argument. Click the correct value from the records displayed, to have the text value returned to the field.

Item Group Description refers to a description of the item options set, and is displayed automatically when you retrieve the item group Name.

Display Order refers to an ordinal that determines the order in which the configuration positions are displayed.

Necessity sets a node as mandatory or optional. This field defines whether the item represented by the node is a required installation, or is only an option.

Creating Positions in a Master Configuration

Use the Edit Master configuration page to create a position in your master configuration. The top node in the hierarchy is created when defining the master

configuration template, in the Create Master Configuration page. All additional nodes are defined later. The position you create in the Edit Configuration page will form an additional node in the selected master configuration hierarchy.

Prerequisites:

The master configuration for which you want to define a position must exist in the database.

To create a position:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Configuration Management Global button. The Search Master Configuration page appears.
2. Click the Create button to launch the Create Master Configuration page.
3. Enter the master configuration information in the fields provided. For field descriptions, see [Fields Associated with Master Configuration Records](#).
4. Create the top node of the configuration hierarchy.
5. Click Apply to save the master configuration record in the database. The Edit Master Configuration page appears displaying the Master Configuration Tree structure in the left side of the page. The position details of the top node are also displayed.
6. Select the node where you want to add a position, and then choose Add from the drop-down menu. Click Go. The Create Position section is displayed under the master configuration details.

Figure 5–6 Select Node - Edit Master Configuration page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Overview | Alternate Parts | Composition List | Create

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Actions

Add

Go

#1 Engine

Name

MC 200

Description

Draft

Status

Draft

Revision

1

Version

1

* Indicates required field

Create Position

* Position

Position Key

* Quantity

1

Start Date

31-MAY-2004

Item Group

* Display Order

1

Position Description

* UOM

Ea

End Date

Description

Necessity

Mandatory

Cancel

Apply

Cancel

Apply

7. Enter the values in the fields provided in the Create Position region. Information in the fields marked with asterisk is mandatory. For field descriptions, see [Fields on the Create Position Page](#).

5-16 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 5–7 Create Position - Edit Master Configuration page

ORACLE® Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Copyright 2000, Oracle Corporation. All rights reserved.

Actions: Add Go

☒ #1 Engine

Edit Master Configuration

Cancel Apply

Name **MC 200** Revision **1**
Description Version **1**
Status **Draft**

* Indicates required field

Create Position

* Position	72-50 TURBINE SECTION	Position Description	TURBINE SECTION
Position Key			
* Quantity	1	* UOM	Ea
Start Date	31-MAY-2004	End Date	
Item Group		Description	
* Display Order	1	Necessity	Mandatory

Cancel Apply

8. Click Apply to add the position to the master configuration record.

Figure 5–8 Add Position - Edit Master Configuration page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Overview | Alternate Parts | Composition List | Create

Master Configuration | Unit Configuration | Product Classification

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Actions

Add

Go

#1 Engine

72-50 TURBINE SECTION

Confirmation

Master Configuration successfully updated.

Edit Master Configuration

Cancel

Alternate Items

Go

Apply

Name

MC 200

Description

Status

Draft

* Indicates required field

Edit Position

* Position

72-50 TURBINE SECTION

Position Key

12302

* Quantity

1

Start Date

31-MAY-2004

Item Group

* Display Order

1

Position Description

TURBINE SECTION

* UOM

Ea

End Date

Description

Necessity

Mandatory

This will launch the Edit Master Configuration, Edit Position page where you can edit the position details if necessary. Click Apply to save the changes. You can attach position ratios, documents, or alternate items to the node position by using the appropriate buttons on this page. For more information, refer to the appropriate sections in this chapter.

Copying Existing Configurations to a Position

The Edit Master Configuration page allows you to access the Search Master Configuration page, where you can retrieve an existing master configuration record that you want to add to a selected master configuration position. This process allows you to build configuration template hierarchies using existing master configuration records.

5-18 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Prerequisites:

Master configuration records that you want to add to the position must exist in the database.

To copy configurations to a position:

- 1. Navigate to the node to which you want to add a configuration. See [Creating Positions in a Master Configuration](#).
- 2. To copy an existing configuration to a node, click the check box next to the node then select Copy from the drop-down menu. Click Go. The Search Master Configuration page appears.

Figure 5–9 Search Existing Configuration - Search Master Configuration page

ORACLE[®] Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Master Configuration

Unit Configuration

Product Classification

[Overview](#) | [Alternate Parts](#) | [Composition List](#) | [Create](#)

Search Master Configuration

Name

Description

Position

Revision

Status

Item

Go

Clear

Master Configuration List

Select

Name

Revision

Version

Description

Status

Tree

No records were found matching the given criteria..

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- 3. Search for the master configuration that you want to add. See [Finding Master Configuration Records](#). The results appear in the lower half of the page.

Figure 5–10 View Configuration List - Search Master Configuration page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview | Alternate Parts | Composition List | Create

Master Configuration | Unit Configuration | Product Classification

Search Master Configuration

Name

Description

Position

Go

Clear

Revision

Status

All

Item

Master Configuration List

Previous

1-10 of 149

Next

Select	Name	Revision	Version	Description	Status	Tree
<input checked="" type="radio"/>	00-MC-00	1	1	00-MC-00	Complete	
<input type="radio"/>	00-MC-00	2	2	00-MC-00	Draft	
<input type="radio"/>	000-MC-000	1	1		Draft	
<input type="radio"/>	1000	1	1		Draft	
<input type="radio"/>	737-800	1	1	Boeing Airframe	Complete	
<input type="radio"/>	737-800	2	2	Boeing Airframe	Complete	
<input type="radio"/>	737-800	3	3	Boeing Airframe	Complete	

- 4. Select the pertinent record from the Master Configuration List, generated when you execute the search.
- 5. This will launch the View Master Configuration page.

Figure 5–11 View Configuration Details - View Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Overview | Alternate Parts | Composition List | Create

Master Configuration Unit Configuration Product Classification

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View Master Configuration

Cancel Alternate Items GO Copy

* Name **00-MC-00** Revision **1**
 Description **00-MC-00** Version **1**
 Status **Complete**

* Indicates required field
[View Position](#)

* Position **Airframe** Position Description **Airframe**
 Position Key **11740**
 Quantity **1** UOM **Ea**
 Start Date **22-APR-2004** End Date
 Item Group **00-CMRO-00** Description **CMRO Test PG Grp**
 Display Order **1** Necessity **Mandatory**

Cancel Alternate Items GO Copy

For more information, refer to the following sections:

- [Viewing Position Details](#)
 - [Viewing Position Ratios Associated with a Position](#)
 - [Viewing Documents Attached to a Position](#)
 - [Viewing Alternate items Associated with a Position](#)
 - [Viewing Rules](#)
6. To add this master configuration to the selected position, click Copy. The Edit Configuration page appears. The Master Configuration will now appear in the configuration tree.

Figure 5–12 View Configuration Tree - Edit Master Configuration page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Overview | Alternate Parts | Composition List | Create

Master Configuration | Unit Configuration | Product Classification

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Actions

Add

Go

#1 Engine

72-50 TURBINE SECTION

Airframe

Edit Master Configuration

Cancel

Alternate Items

GO

Apply

Name MC 200

Description

Status Draft

Revision 1

Version 1

* Indicates required field

Edit Position

Position #1 Engine

Position Key 12301

Quantity 1

Start Date 31-MAY-2004

Item Group

Display Order 1

Position Description #1 Engine

UOM Ea

End Date

Description

Necessity Mandatory

Cancel

Alternate Items

GO

Apply

Associating Item Groups with a Position

A Tracked Item Groups comprises items that can be assigned to a particular position in a master configuration. You can associate an Item Group with a position. You can then select the item instances to be added to the position. Non-tracked item groups are created for use in item compositions. Item groups can be revised independently from the master configuration. The master configuration gets updated with the changes upon the item group approval.

See [Managing Alternate Items Information](#) for information on creating Item Groups.

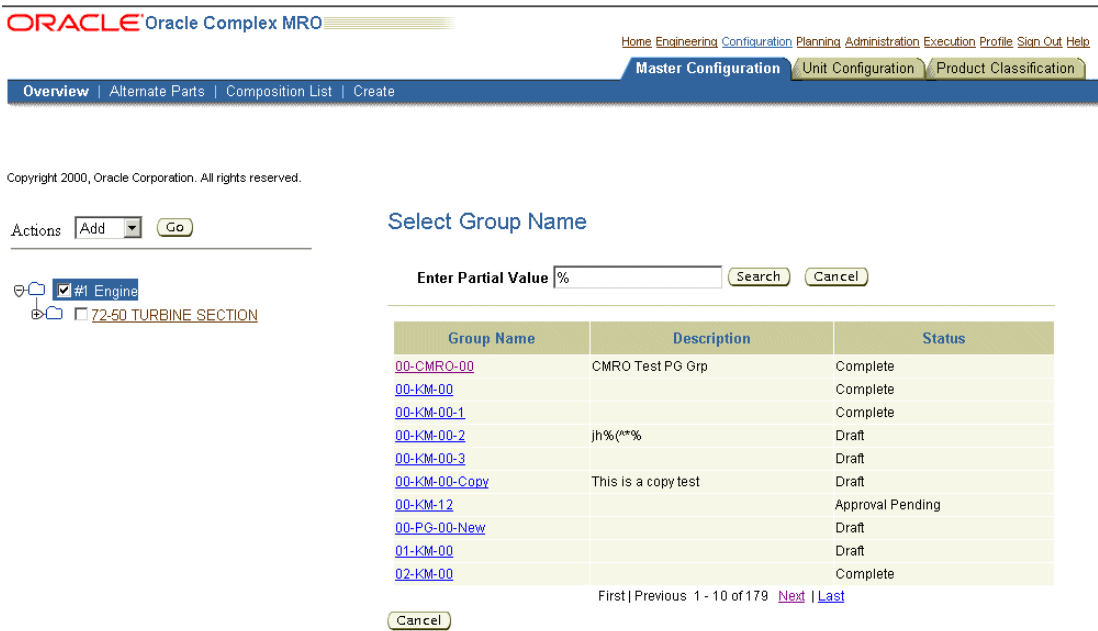
Prerequisites:

The item group must exist in the database. The configurations and positions must have been defined.

To associate item groups with a position:

- 1. Create a position and click Apply. See [Working with Positions](#).
- 2. Search for an Item Group, using the search icon. The Select Group Name page appears. Click Go to view a list of item groups.

Figure 5–13 Select Group Name page



- 3. Select the item, which you want to associate with the position. The Edit Master configuration page appears displaying the association.

Figure 5–14 View Item Association - Edit Master Configuration page

Oracle Complex MRO

[Home](#)
[Engineering Configuration](#)
[Planning](#)
[Administration](#)
[Execution Profile](#)
[Sign Out Help](#)

Overview
| [Alternate Parts](#)
| [Composition List](#)
| [Create](#)

Master Configuration
| [Unit Configuration](#)
| [Product Classification](#)

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Actions

☒ **#1 Engine**

☐ 72-50 TURBINE SECTION

Edit Master Configuration

* Name **MC 200**

Revision

Description

Version **1**

Status **Draft**

* Indicates required field

Edit Position

* Position

Position Description **#1 Engine**

Position Key **12301**

Quantity **1**

UOM **Ea**

Start Date

End Date

Item Group

Description **CMRO Test PG Grp**

Display Order **1**

Necessity **Mandatory**

Note: If any item in the Item Group has Quantity more than 1, it cannot be associated to a position which has child nodes.

4. Optionally, you can choose Alternate Items from the drop-down menu to add alternate item instances. See [Managing Alternate Items Information](#).

Associating a Sub-Configuration/ Alternate Sub-Configuration with a Position

A Master Configuration can be created as a hierarchy of positions and assembly of other master configurations. A master configuration can be defined for a sub component of a higher assembly. This sub-configuration can exist by itself, and also be added to the configuration hierarchy of another master configuration. For example, the master configuration of the engine can be included in the master

configuration of the aircraft. You can add Sub-Configurations to the Master Configuration positions, thus allowing the association of configurations within a configuration.

Fields Associated with Sub-Configuration Association

Name name of the child Master Configuration or sub-configuration.

Revision field contains a item revision identifier. The revision number indicates that the master configuration is under revision control. Revision control enables multiple configuration revisions to be active at one time.

Focus The user can click this icon to change the page context to the sub master configuration (sub MC).

Description Description of the sub MC.

Status Status of the sub MC. The sub MC should not be in Closed or Expired status.

Priority The priority field is used to specify the highest priority assembly to be used by planning when planning for a replacement.

Start Date Start date of the sub MC mapping.

End date End date of the sub MC mapping.

Remove Is used to remove the sub MC mapping.

Prerequisites:

The Master Configuration and the Sub-Configuration records must exist in the database. The Sub-Configuration must be in complete

To attach a sub-configuration to a position:

1. Create a position, and click Apply. See [Creating Positions in a Master Configuration](#).
2. The Edit Position page appears. To add sub-configurations to the position that you defined, select Add More Rows in the Alternate Subconfigurations table.

Figure 5–15 Associate Sub-Configuration - Edit Master Configuration page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Overview | Alternate Parts | Composition List | Create

Master Configuration | Unit Configuration | Product Classification

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Actions

Add

Go

#1 Engine

- 72-50 TURBINE SECTION
 - Airframe
 - Left

Edit Position

* Position

Left

Position Key

11741

* Quantity

1

Start Date

22-APR-2004

Item Group

* Display Order

1

Position Description

Left

* UOM

Ea

End Date

Description

Necessity

Mandatory

Alternate Subconfigurations

Select Focus	Name	Revision	Description	Status	Priority	Start Date	End Da

3. Select a sub-configuration using the Name search icon. Enter value in the Priority field. For field descriptions see [Fields Associated with Sub-Configuration Association](#).

5-26 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 5–16 Select Sub-Configuration - Edit Master Configuration page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview | Alternate Parts | Composition List | Create

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Actions

Add

Go

#1 Engine

- 72-50 TURBINE SECTION
 - Airframe
 - ☒ Left

Edit Position

* Position

Left

Position Key

11741

* Quantity

1

Start Date

22-APR-2004

Item Group

* Display Order

1

Position Description

Left

* UOM

Ea

End Date

Description

Necessity

Mandatory

Alternate Subconfigurations

Select	Focus	Name	Revision	Description	Status	Priority	Start Date	End Date
		737-800	5	Boeing Airframe	Complete	1		

4. Select Apply. The sub-configuration is associated with the position.

Working With Master Configurations 5-27

Figure 5–17 Add Sub-Configuration - Edit Master Configuration page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Overview | Alternate Parts | Composition List | Create

Master Configuration | Unit Configuration | Product Classification

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Actions

Add

Go

#1 Engine

72-50 TURBINE SECTION

Airframe

Left

Edit Position

Position

Left

Position Key

11741

Quantity

1

Start Date

22-APR-2004

Item Group

Display Order

1

Position Description

Left

UOM

Ea

End Date

Description

Necessity

Mandatory

Alternate Subconfigurations

Previous

1-1 of 1

Next

Select Focus	Name	Revision	Description	Status	Priority	Start Date	End Date	Remove
<div><div></div><div></div></div>	737-800	1	Boeing Airframe	Complete	1			<div><div></div><div></div><div></div></div>

Add More Rows

Previous

1-1 of 1

Next

Cancel

Alternate Items

Go

Apply

- 5. In the Alternate Subconfigurations table, select the sub-configuration and click Apply. The sub-configuration is added to the configuration tree.

5-28 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 5–18 View Configuration Hierarchy - Edit Master Configuration page

ORACLE[®] Oracle Complex MRO

[Home](#) [Engineering Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

[Overview](#) | [Alternate Parts](#) | [Composition List](#) | [Create](#)

[Master Configuration](#) | [Unit Configuration](#) | [Product Classification](#)

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Actions Add Go

#1 Engine

72-50 TURBINE SECTION

Airframe

Left

#1 Engine

Position 1

Position 2

Edit Master Configuration

Cancel

Alternate Items

Go

Apply

Name MC 200

Revision 1

Description

Version 1

Status Draft

* Indicates required field

Edit Position

* Position Left

Position Description Left

Position Key 11741

* Quantity 1

* UOM Ea

Start Date 22-APR-2004

End Date

Item Group

Description

* Display Order 1

Necessity Optional

Alternate Subconfigurations

Previous

1-1 of 1

Next

Note: After adding the sub-configuration to the assembly hierarchy, the tree can be expanded and positions within the sub-configuration selected and their positions changed. The position code for a sub-configuration position defaults to the value defined within the sub MC. You can override that by defining the position code from the context of a higher level MC. The new position will only affect the sub-configuration when the sub-assembly is installed in this higher assembly allowing for the position to be applicable based on the installation.

6. Click the sub-configuration Focus icon changes the focus of the entire configuration to the sub-configuration. You can view the master configuration header and position details of the sub - master configuration.

Working With Master Configurations 5-29

Figure 5–19 Change Focus to Sub-configuration - View Master Configuration page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview | Alternate Parts | Composition List | Create

Master Configuration | Unit Configuration | Product Classification

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Engine Assy

- 72-20-00-01 Fan Module
- CFM-56 Core Assy-Turbofan CFM56
- LPT Module Assembly
- Separator-Air Oil

View Master Configuration

Cancel

Alternate Items

GO

* Name

CFM56-7B27G14

Revision

2

Description

ENGINE ASSY-BASIC ENG RF

Version

2

Status

Complete

* Indicates required field

View Position

* Position

Engine Assy

Position Description

Engine Assy, 72.00

Position Key

12120

Quantity

1

UOM

Ea

Start Date

18-MAY-2004

End Date

Item Group

CFM56

Description

CFM56 Engine Assu

Display Order

1

Necessity

Mandatory

Cancel

Alternate Items

GO

Note: You can associate sub master configurations with a position only when a sub-assembly has been defined under that position.

Creating Rules for a Configuration or Sub-configuration

You can setup rules for configurations, sub-configurations, positions, and items that work together, to control the allowable items to be installed into the configuration. The definition of configuration rules enables the enforcement of regulations for equipment configurations issued by OEM's and regulatory institutions such as the FAA. You can create rules for:

- Restricting items for a position
- Restricting configurations for a position
- Restricting positions based on other positions

5-30 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

- A reference for desired fleet percentages

Fields on the Create Rule page

Rule Name User-defined Rule name.

Description Description of the rule.

Rule Type can be Mandatory or Fleet. A rule type of mandatory indicates that the rule will be evaluated during installations, and a rule type of fleet indicates that the rule is created only as a reference to the fleet percentages.

Start Date/End Date Select from calendar. The end date must be greater than the start date.

Sequence User defined value to determine the order of the rules defined.

Left and Right Parenthesis Used to group two rule statements.

Subject Use the search icon to launch the 'Select Positions' page where you can select the position path for which you are defining the rule.

Operator(Predicate) Conditions in a rule. The possible values are: is installed, is not installed, has, does not have, must have, must not have, has same sub-configuration installed, does not have same sub-configuration installed.

Object Type You can select from the following Object types: item, configuration, configuration as position, item as position(1), or item as position.

Object Use the search icon to select an object based on the object type chosen.

Operator You can select from the following: And, Or, Implies, and Requires. The rule statements may be combined with these operators.

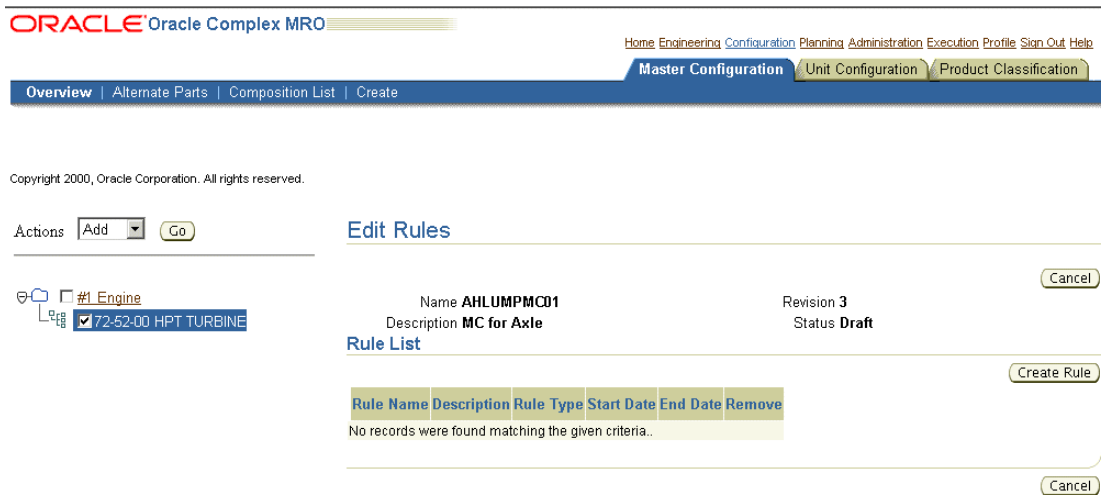
Prerequisites:

The configuration records, for which you want to define rules, must exist in the database. The positions must have been set up, and items associated with them.

To create rules for a configuration:

- 1. Choose Rules from the drop-down menu in the Edit Configuration page. Click go. The Edit Rules page appears.

Figure 5–20 Edit Rules page



- 2. To create rules, select Create Rule. The Create Rule page appears. Define a Rule Name. Optionally, enter a description, start date, and end date.
- 3. Choose a Rule Type.

Figure 5–21 Create Rule page

ORACLE®Oracle Complex MRO

HomeEngineeringConfigurationPlanningAdministrationExecutionProfileSign OutHelp

Master ConfigurationUnit ConfigurationProduct Classification

Overview | Alternate Parts | Composition List | Create

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ActionsAddGo

#1 Engine

72-52-00 HPT TURBINE

Create Rule

CancelApply

* Rule NameTest RuleDescription

* Rule TypeMandatoryStart DateEnd Date

Rule Definition

Remove SequenceSubjectOperatorObject TypeObject Obj. Attr.) Operator

No records were found matching the given criteria..

Add More Rows

CancelApply

4. Define the rule statement by entering data in the Rule Definition region. For field descriptions, see [Fields on the Create Rule page](#).

Working With Master Configurations 5-33

Figure 5–22 Enter Rule Definition - Create Rule page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Copyright 2000, Oracle Corporation. All rights reserved.

Actions

Add

Go

#1 Engine

72-52-00 HPT TURBINE

* Rule Name

Test Rule

* Rule Type

Mandatory

Start Date

Cancel

Apply

Description

End Date

Rule Definition

Remove	Sequence	(Subject	Operator	Object Type	Object

Add More Rows

5. Click Apply. The Rule record is added to the database.
6. To Edit a rule, select the link under Rule Name in the Edit Rules page. The rule details are displayed.

You can set up rule control for configurations, sub-configurations, positions, and items that work together to produce the rule or rule set to control a configuration. Each control area may be combined with one or multiple of the rule control methods to effectively control the assembly. Note the following rule controls:

Configuration Rule Control

For the configuration rule control the following apply:

Subject: Configuration

Objects: Positions and Instances

Using a configuration as the subject, the direct object pointers are one or many positions or the percent of instances to plan. The rule will include a chain or sub-construct of the other rule controls. Referencing Positions it requires, excludes,

or negates though the use of Necessity - mandatory, optional, and optional with a rule (containing Empty / Is Null, Installed / Is Not Null, Same As). Referencing Instances it implies the minimum and maximum percent or quantities by state / condition per configuration.

The outcome produces the following:

- Installation Allowed
- Installation Not Allowed
- Configuration Not Valid
- Configuration Valid

Position Rule Control

For the Position Rule Control the following apply:

Subject: Position

Objects: Sub-Configurations / Alternate Sub-Configurations, and Items

Using positions as the subject it will be in a sub-construct, if configuration control, or as a stand alone which contain sub-constructs, if node specific.

Referencing Sub-Configurations / Alternate Sub-Configurations it implies allowed by the association, excludes allowed by adding a rule, and requires by the use of mandatory or a rule.

Referencing Items though the item group association it implies allowed and excludes or requires through a rule.

The outcome produces the following:

- Installation Allowed
- Installation Not Allowed
- Configuration Not Valid
- Configuration Valid

Sub-Configuration / Alternate Sub-Configuration Rule Control

For the Sub-Configuration / Alternate Sub-Configuration Control the following apply:

Subject: Sub-Configuration / Alternate Sub-Configuration

Object: Position and Instances

Referencing Positions it requires, excludes, or negates though the use of Necessity - mandatory, optional, and optional with a rule (containing Empty / Is Null or Installed / Is Not Null)

Referencing Instances it implies the minimum and maximum percent or quantities by state / condition per configuration.

The outcome produces the following:

- Installation Allowed
- Installation Not Allowed
- Configuration Not Valid
- Configuration Valid

Item Rule Control

For the Item Control the following apply:

Subject: Item or Item #

Object: Item #, Is Installed, Previously Installed, Interchangeability Type, Interchangeability Code, and Instances

Referencing the item number it excludes, requires, or negates based on the hierarchy for which the rule is contained.

Referencing Item # and Is Installed or Previously Installed requires, excludes, or negates based on the current or historical reference.

Referencing Interchangeability Type and Interchangeability Code with the item # requires, excludes, negates, or implies based the type, code, or combination.

Referencing the priority with the item # provides defaults.

Referencing Instances it implies the minimum and maximum percent or quantities by state / condition per configuration. This rule is not evaluated.

The outcome produces the following:

- Installation Allowed
- Installation Not Allowed
- Configuration Not Valid
- Configuration Valid

Instance Rule Control

For the Instance Control the following apply:

Subject: Instance (Implied)

Object: Minimum, Maximum, Percent, Quantity, State / Condition

Referencing the object combination implies the instance quantity allowed per condition. This rule is not evaluated

The following table includes examples of some legal rule statements:

Table 5–1

Subject	Predicate	Object	Outcome
Position	is installed / is not installed		T/F
Position	has / does not have	item	T/F/U if uninstalled
Position	has / does not have	sub-master configuration (rev specific)	T/F/U if uninstalled
Position	must have / must not have	item	T/F

The outcome of each rule evaluation is as follows:

- Success (T)
- Unable to determine true or false (U)
- Rule failed in evaluation (F)

When a rule is applied, the units affected by the configuration are validated. Once a list of applicable rules are defined for each position, then each rule is evaluated individually. The statements will require mapping position path to UC item instance and comparing instance properties against the rule requirements. The result of validation is either status “S” for success or a table of rule violations. If the validation fails the status of the configuration changes to incomplete. When you add a rule to a configuration or update a rule for a sub-configuration, the configuration and position path information are populated into the rule when the selection is made. When updating a rule for a sub-configuration from a higher assembly the modified rule will only apply to the higher assembly. You cannot alter the base rule.

Editing Position Ratios

The Edit Position Ratio page allows you to add information about service timer ratios in cases where the value derived from a service timer should be a multiple of the timer reading. For example, a powerplant operated in a high-temperature, high-altitude environment might run at much higher RPM to produce the same torque as compared to a less severe environment.

Prerequisites:

The master configuration record with the position that you want to define the position ratio for, must exist in the database. The values for the fields UOM and Rule Code should be set up by your organization.

To edit position ratios:

1. Retrieve the master configuration records that match your requirement (see [Finding Master Configuration Records](#)).
2. Select the pertinent record from the Master Configuration List on the Search Master Configuration page.
3. The Edit Master Configuration page appears. Use the tree to find the position that needs to be changed. Click Position Ratio.
4. The Add Position Ratio page appears on the right.
5. Enter the information in the fields provided. If no position ratios are defined, the page will be empty. To define a position ratio, click Add More Rows. This will add three rows to the table. Enter information in the provided fields.
 - UOM indicates the unit of measurement that the operational service timer for this position represents. In most cases, this unit will be hours of time. You cannot enter text directly in this field because the text value must exist in the database. Enter a text search argument (e.g., MACHINE%), and click Go to retrieve and display all records from the database that match the search argument. Click the correct value from the records displayed on the Select UOM page to have the text value returned to the field.
 - Description refers to a text description of the unit of measure, and is automatically placed in this field when the UOM is selected from the database.
 - Ratio is a multiplying factor to be applied to an operational service timer to yield the service life value of the component. Typically, this ratio will be a number greater than or equal to 1.

- Rule Code is a field containing a drop-down list box from which you can select a value. The set of values in this list is created when your configuration of Oracle Complex Maintenance, Repair, and Overhaul is installed.
6. Click Apply to retain the Position Ratio information in the database.
 7. To remove a position ratio from the configuration hierarchy, select the record from the Position Ratio List, check the remove check box then click Apply.

Attaching Documents to a Position

The Edit Master Configuration page allows you to access the Attach Documents page, where you can search for, and enter documents that you want to attach as references for a component position in the hierarchy. This allows maintenance personnel to refer to the right documents while carrying out maintenance activities at a specific location in a system assembly. For more information on Document References, see [Working With Maintenance Documents](#).

Prerequisites:

The master configuration with the position to which you want to attach the documents must exist in the database.

To attach documents to a position:

1. Retrieve the master configuration records that match your requirement (see [Finding Master Configuration Records](#)).
2. Select the pertinent record from the Master Configuration List on the Search Master Configuration page.
3. Click the Edit icon next to the record you want to edit. The Edit Master Configuration page appears.
4. Select a position. Choose Documents from the drop-down menu. Click Go. The Edit Document Associations page appears on the right.

Figure 5–23 Edit Document Associations page

ORACLEOracle Complex MRO

HomeEngineeringConfigurationPlanningAdministrationExecution ProfileSign Out Help

Master ConfigurationUnit ConfigurationProduct Classification

Overview | Alternate Parts | Composition List | Create

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ActionsAddGo

Airframe

Access Unit, Loading

Edit Document Associations

CancelApply

Master Configuration Details

Name000-MC-000Revision1

DescriptionVersion1

StatusDraft

Position Details

PositionAirframePosition DescriptionAirframe

NecessityMANDATORYDescriptionMandatory

Document List

RemoveDocument TitleRevisionTypeChapterSectionSubjectPageFigureNoteUse Latest

No records were found matching the given criteria.

Add More Rows

CancelApply

5. To attach documents to the position, click Add More Rows. Enter the following information:
- Document refers to the name of a maintenance document previously recorded using the Document Index module. You cannot enter text directly in this field. Enter a search string with the generic substitution meta character%, and click Go to launch the Select Document Number page. The lower half of the Select Document Number page displays the list of documents in the database. Click the pertinent document record to return this value to the Document List fields in the Attach Documents page.

Title is the document title that is automatically placed in this field when the Document Name is selected from the database.

Chapter refers to the chapter number where the required reference is available. If the component at this level in the hierarchy is described by a single chapter or less in the maintenance document, enter the chapter number here in this field.

- Section refers to the section identifier of the maintenance document that describes maintenance procedures for the component described by the current configuration position.
- Page, Figure, and Note fields allow you to provide more specific information about the maintenance documentation for the items in the current configuration hierarchy position.
- Use Latest field contains a drop-down list box from which you can select a value from a set of values set up when your Oracle Complex Maintenance, Repair, and Overhaul configuration was installed.

If you have attached a document reference to the selected position, the page will display the attached document in the Document List field.

Figure 5–24 Attach Documents to Positions - Edit Document Associations page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

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Actions: Add Go

☐ Airframe
☒ Access Unit, Loading

Edit Document Associations

Cancel Apply

Master Configuration Details

Name	000-MC-000	Revision	1
Description		Version	1
Status	Draft		

Position Details

Position	Airframe	Position Description	Alt
Necessity	MANDATORY	Description	Mz

Document List

Remove	Document	Title	Revision	Type	Chapter	Section	Subject
	000-BEHAT-0	Bhat's	#%@^	LOCOMOTI			

6. Click Apply to store your maintenance document definition for the selected configuration position in the database.

Figure 5–25 Save Document Association - Edit Document Associations page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Master ConfigurationUnit ConfigurationProduct Classification

Overview | Alternate Parts | Composition List | Create

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ActionsAddGo

Airframe

Access Unit, Loading

Confirmation1 Document(s) Attached

Edit Document Associations

CancelApply

Master Configuration Details

Name000-MC-000Revision1

DescriptionVersion1

StatusDraft

Position Details

PositionAirframePosition DescriptionAirframe

NecessityMANDATORYDescriptionMandatory

Document List

Previous1-1 of 1Next

Remove	Document	Title	Revision	Type	Chapter	Section	Subject	Page
<input type="checkbox"/>	000-BBHAT-0	Bhat's #%@*	LOCOMOTIVE					

7. To remove a document reference attachment, select the Remove check box, and click Apply.

Managing Alternate Items Information

Fleet vehicles with long service lives are designed and constructed with similar items from different suppliers. For example, aircraft can often be ordered from manufacturers with powerplant choice. A master configuration template definition that serves as a general model for a unit configuration definition, provides the fleet operator an opportunity to define an optional item group for any part position in the configuration.

The alternate items listed in the master configuration template allows you to derive a unit configuration that represents the “as-operated” configuration of a fleet unit. You can create Tracked item groups for association with master configurations, and Non-tracked item groups for use in item compositions. After creating the item group, you may submit it for approval. Once approved the new revision will

replace the current revision. This allows the item group to be revised independently from the Master Configuration eliminating the need to revise the Master Configuration for each item group change. The new changes will be inherited into the Master Configuration upon the item group approval.

See:

- [Adding Alternate Items Information](#)
- [Finding Alternate Items Information](#)
- [Editing Alternate Items Information](#)

Fields Associated with Alternate Items Information

The following fields appear on Master Configuration pages that relate to managing alternate items information:

Group Name is the name for the set of item option selections at this node. You cannot enter text directly in this field because the text value must exist in the database. Enter a text search argument (example, MACHINE%), and click Go to retrieve and display all records from the database that match the search argument. Click the correct value from the records displayed on the Select Group page, to have the text value returned to the field.

Description refers to the description of the item options set, and is displayed automatically when you retrieve the Group Name.

Type refers to the Tracked and Non-Tracked Item groups. Tracked Item Group is a group of install base tracked items, which can be associated with positions in a master configuration. Non-Tracked Item Groups is a group of non tracked items, that are contained in a tracked item and may be required for use in a route to maintain a component.

Item field contains the identifier of the item that you want to add to the group of items that can be installed in this position. You cannot enter text directly in this field because the text value must exist in the database. Use the LOV icon to launch the Select Item List page. Enter a text search argument (example, MACHINE%), and click Search to retrieve and display all records from the database that match the search argument. Click the correct value from the records displayed to have the text value returned to the field.

Status Status of the item group. The options are: All, Complete, Draft, Approval Pending, Removed, and Approval Rejected.

Description (item) is the item description automatically placed in this field when the Item Number is selected from the database. You cannot enter a value in this field.

Organization Code refers to the code for the inventory organization assigned to the alternate item when the item information is created in inventory. This information exists in the database. Use the LOV icon to launch the Select Organization List page. Enter the generic substitution meta character% in the field, and click Search to retrieve and display all records from the database. Click the record of your choice to return this value to the Organization Code field on the Search Alternate Items page.

Revision field contains a item revision identifier. You cannot enter text directly in this field because the revision must exist in the inventory database. Enter a text search argument (example, MACHINE%), and click Go to retrieve and display all records from the database that match the search argument. Click the correct value from the records displayed to have the text value returned to the field.

UOM field contains a unit of measure in which the item is usually supplied. You cannot enter text directly in this field because the text value must exist in the database. However, you can enter a text search argument (example, MACHINE%), and click Go to retrieve and display all records from the database that match the search argument. Click the correct value from the records displayed on the Select UOM page to have the text value returned to the field.

Quantity specifies the number of optional items in this group that is to be installed.

Priority specifies the preferred selection order of items in the group. The most preferred item should be assigned a value of 1.

Interchangeability Type refers to the selection of a item for a configuration. One-way interchangeability means that the item can only be used for a single configuration. Two-way interchangeability means that the item can be used in multiple configurations. Other values are Deleted, Obsolete, Reference, and Superseded. You can choose one of the following from the drop-down menu.

Reason refers to the technical justification for one-way interchangeability. You can enter text directly in this field.

Composition This will launch the Item Composition List Page for the selected item.

Adding Alternate Items Information

The Alternate Parts secondary tab allows you to access the Add Alternates page where you can add items, identified by item numbers existing in the database, to a particular group name. The group name specifies the set of item option selections at a node. You can also record any revision made to alternate item information in a group. You can create either a tracked item group or a non-tracked item group.

Prerequisites:

Values for Group Name, Item Number, Revision, Type, Interchangeability, and Reason fields should exist in the database.

To add alternate items:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Configuration Management Global button. The Master Configuration page appears.
2. Click on the Alternate Parts secondary tab to launch the Search Alternate Items page.

Figure 5–26 Search Alternate Items page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Master Configuration](#) [Unit Configuration](#) [Product Classification](#)

[Overview](#) | [Alternate Parts](#) | [Composition List](#) | [Create](#)

Search Alternate Items

Group Name

Description

Organization

Item

Type

Status

All

Go

Clear

Item Group List

Create

Select	Group Name	Description	Status	Type	Edit	Remove
No records were found matching the given criteria..						

- 3. Click Create to launch the Add Alternates page.

5-46 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 5–27 Add Alternates page

ORACLE® Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | **Alternate Parts** | Composition List | Create

Add Alternates

Group Name Description

Type Status **Draft**

[Cancel](#) [Apply](#)

Item List

Remove	Item	Organization	Description	Revision	UOM	Quantity	Priority	Interchangeability	Type	Reason
No records were found matching the given criteria.										
Add More Rows										

[Cancel](#) [Apply](#)

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4. Enter the information in the fields provided. For field descriptions, see [Fields Associated with Alternate Items Information](#).

Figure 5–28 Add Items to Alternate Group - Add Alternates page

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[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

[Master Configuration](#) [Unit Configuration](#) [Product Classification](#)

[Overview](#) | [Alternate Parts](#) | [Composition List](#) | [Create](#)

Add Alternates

Group NameAlt Group 1

Description

TypeTracked

StatusDraft

Cancel

Apply

Item List

Remove	Item	Organization	Description	Revision	UOM	Quantity	Priority	Interchangeability Type	Reason	Composition
	00PKBOI	V1	BODY FOR PKCTO		Ea	3	1	Reference		
	00PKCTC	V1	00 PK CTO CELLPH		Ea	2	2	Reference		

Add More Rows

Cancel

Apply

- 5. Click Apply to add the alternate items information to the database.

Figure 5–29 Edit Alternates page

ORACLE® Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview | **Alternate Parts** | Composition List | Create

Master Configuration | Unit Configuration | Product Classification

Confirmation

Item Group (Alt Group 1) is created. 2 Item(s) Added to Item Group

Edit Alternates

Group NameAlt Group 1

TypeTracked

Description

StatusDraft

Cancel

Copy

Submit for Approval

Apply

Item List

Previous1-2 of 2Next

Remove	Item	Organization	Description	Revision	UOM	Quantity	Priority	Interchangeability Type	Reason	Composition
<input type="checkbox"/>	00PKBODY	V1	BODY FOR PKCTO CELL		Ea	3	1	Reference		
<input type="checkbox"/>	00PKCTOCELL V1		00 PK CTO CELLPHONE1		Ea	2	2	Reference		

Add More Rows

Previous1-2 of 2Next

Cancel

Copy

Submit for Approval

Apply

Finding Alternate Items Information

Use the Search Alternate Items page to retrieve alternate item information that you want to edit. You can search for alternate items based on Group Name, Description, Item, Type, Status, and the Organization Code for the item.

Prerequisites:

The alternate item groups must be created.

To find alternate items:

- 1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Configuration Management Global button. The Master Configuration page appears.
- 2. Select Alternate Parts secondary tab to launch the Search Alternate Items page.

- 3. Enter the alternate item information in the fields provided. For field descriptions, see [Fields Associated with Alternate Items Information](#).
- 4. Click Search to generate all alternate item groups that match the search criteria.

Figure 5–30 Find Alternate Items - Search Alternate Items page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Master Configuration

Unit Configuration

Product Classification

[Overview](#) | [Alternate Parts](#) | [Composition List](#) | [Create](#)

Search Alternate Items

Group Name

Alt Group 1

Description

Organization

Item

Type

Status

All

Go

Clear

Item Group List

Create

Select Item Group and ...

Submit for Approval

Go

Previous

1-1 of 1

Next

Select	Group Name	Description	Status	Type	Edit	Remove
<input type="radio"/>	Alt Group 1		Draft	Tracked		

Previous

1-1 of 1

Next

Select Item Group and ...

Submit for Approval

Go

Editing Alternate Items Information

The Search Alternate Items page allows you to access the Edit Alternates page, where you can make necessary changes to alternate item information.

Prerequisites:

Values for Item Number/Item, Revision, Type, Interchangeability, and Reason fields should exist in the database.

5-50 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

To edit alternate item information:

1. Retrieve the pertinent alternate item group record from the database (see [Finding Alternate Items Information](#)).
2. To delete an alternate item group, click the remove icon in the search results list. Only Alternate Item Groups with no association to a master configuration position can be deleted.
3. To view the configurations with which an alternate item group is associated, select the group from the Item Group List on the Search Alternate Items page, and choose View Positions from the drop-down menu. This will launch the Edit Associated Positions page. See [Viewing Alternate Item Associations](#).

Figure 5–31 Edit Associated Positions

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Edit Associated Positions

Cancel

Group Name **00-CMRO-00** Description **CMRO Test PG Grp**
 Type **Tracked** Status **Complete**

Configuration Positions List

Previous 1-4 of 4 Next

Configuration Name	Configuration Description	Revision	Status	Position	Position Description	Necessity	Edit
00-MC-00	00-MC-00	1	Complete	Airframe	Airframe	Mandatory	
00-MC-00	00-MC-00	1	Complete	Left	Left	Mandatory	
00-MC-00	00-MC-00	2	Draft	Airframe	Airframe	Mandatory	
00-MC-00	00-MC-00	2	Draft	Left	Left	Mandatory	

Previous 1-4 of 4 Next

Cancel

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4. To submit an Alternate Item Group for approval, select the Item Group, and choose Submit for Approval from the drop-down menu. You can submit an Item Group for approval from the Edit Alternates page also. To initiate the approval workflow, at least one item should have the interchangeability 1-Way

or 2-Way and the quantity should not exceed 1 if any position it is associated with has child position associations.

Figure 5–32 Submit Item Group for Approval - Search Alternate Items page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview | **Alternate Parts** | Composition List | Create

Master ConfigurationUnit ConfigurationProduct Classification

Confirmation • Item Group was submitted for approval successfully.

Search Alternate Items

Group Name

Description

Organization

Item

Type

Status

Draft

Go

Clear

Item Group List

Create

Select Item Group and ...

Submit for Approval

Go

Previous

1-10 of 105

Next

Select	Group Name	Description	Status	Type	Edit	Remove
<input type="radio"/>	00-CMRO-00	CMRO Test PG Grp	Draft	Tracked		
<input type="radio"/>	00-KM-00		Draft	Tracked		
<input type="radio"/>	00-KM-00-2	jh%(*%*	Draft	Tracked		
<input type="radio"/>	00-KM-00-3		Draft	Tracked		
<input type="radio"/>	00-KM-00-Copy	This is a copy test	Draft	Tracked		

Note: The status of the item group changes from Draft to Approval Pending and finally to Complete on approval. An item group created for the first time and in Draft status can be associated with master configurations. When its status changes to Complete on approval, the information is recorded in history tables.

- 5. To copy an Item Group, select the record from the Item Group List, and choose Copy from the drop-down menu. The Add Alternates page appears where you can add, delete, and/or modify items in the group. The Copy button is also available in the Edit Alternates page.

- To edit alternate item details, select the required alternate item group name from the Item Group List on the Search Alternate Items page, and click the Edit icon. This launches the Edit Alternates page showing the alternate items contained in the selected item Group.

Figure 5–33 View Alternate Item List - Edit Alternates page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Edit Alternates

Group Name: Description:
 Type: **Tracked** Status: **Draft**

Cancel Copy Submit for Approval Select Applicable Positions Apply

Item List

Previous 1-3 of 3 Next

Remove	Item	Organization	Description	Revision	UOM	Quantity	Priority	Interchangeability Type	Reason	Composition
<input type="checkbox"/>	CMRO unit item 1 PM		CMRO unit item 1	<input type="text"/>	Ea	1	1	1-Way Interchangeable	This is a te	
<input type="checkbox"/>	CMRO unit item 2 PM		CMRO unit item 2	<input type="text"/>	Ea	1	2	1-Way Interchangeable	This is a te	
<input type="checkbox"/>	CMRO unit item 3 PM		CMRO unit item 3	<input type="text"/>	Ea	1	3	1-Way Interchangeable	This is a te	

Add More Rows

Previous 1-3 of 3 Next

Cancel Copy Submit for Approval Select Applicable Positions Apply

Note: A temporary copy of the group is created to allow for editing a completed item group, while the completed group is in use. You can also access this page from the Edit Master Configuration page using the Alternates button (Search > Search Master Configuration page > Edit > Edit Master Configuration page > Edit Master Configuration tree page > Alternate Items).

- Select the item record that you want to modify, and make the necessary changes in the fields provided. For field descriptions, see [Fields Associated with Alternate Items Information](#).

You can also add alternate item records to the group, using the fields provided in the Items List section on the Edit Alternates page (see [Adding Alternate Items Information](#)).

8. To remove an alternate item from the item group, select the Remove check box for that item, and click Apply. If the alternate item group you edited is not attached to additional master configurations and positions, the changes are saved. If the alternate item group you selected is attached to a master configuration or position other than the one currently being edited, and you click Remove or Apply, the application will prompt you, "This item group is associated with more than one position. Do you want to force the changes to all positions?"
9. To apply the changes to all the configuration positions to which the item group is attached, click OK.
10. To cancel the changes and return to the Edit Alternates page, click Cancel.
11. To view the Composition List for an item in the Item List, click the corresponding icon under the Composition column. For information on Composition Lists, see [Creating an Item Composition](#).
12. To edit position associations, click Select Applicable Positions in the Edit Alternates page. The Edit Associated Positions page appears.

Figure 5–34 Modify Position Associations - Edit Associated Positions page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | **Alternate Parts** | Composition List | Create

Edit Associated Positions

Cancel Apply

Group Name **00-CMRO-00** Description **CMRO Test PG Grp**
 Type **Tracked** Status **Draft**

Configuration Positions List

Previous 1-4 of 4 Next

Associate	Configuration Name	Configuration Description	Revision	Status	Position	Position Description	Necessity
<input checked="" type="checkbox"/>	00-MC-00	00-MC-00	1	Complete	Airframe	Airframe	Mandatory
<input checked="" type="checkbox"/>	00-MC-00	00-MC-00	1	Complete	Left	Left	Mandatory
<input checked="" type="checkbox"/>	00-MC-00	00-MC-00	2	Draft	Airframe	Airframe	Mandatory
<input checked="" type="checkbox"/>	00-MC-00	00-MC-00	2	Draft	Left	Left	Mandatory

Previous 1-4 of 4 Next

Cancel Apply

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- 13.** To remove a position association for that item group, uncheck the Associate check box. Click Apply. This launches the Associate Item Group to Positions Page, where you can associate the item group to the position once again.

Any modifications to an item group and/or items in the group, impacts the Unit Configuration it is associated with, in the following ways:

- If an item that has its item instance associated with a node in unit configuration, is removed or if the Interchangeability Type is modified to 'Reference' or 'Deleted', the relationship between the Item Instance and the node is deleted. If the Status of the unit configuration is Complete, it changes to 'Incomplete'. For any other status, it remains the same.
- If the Interchangeability is modified to 'Obsolete' or 'Supersede', there is no impact on the existing unit configuration associations, but these items are no longer allowed for the position.

Creating Item Group Revisions

You can create multiple versions of an item group. If an item group in Draft status having an existing version in the status of Complete, is submitted for approval, it overwrites the existing item group, and the change is recorded in the history tables.

Prerequisites:

The item group that you want to revise must exist in the database.

To create item group revisions:

- 1. Navigate to the Search Alternates Items page. See [Finding Alternate Items Information](#).
- 2. To create an item group revision, select the item group, and choose Create Revision from the drop-down menu. Revisions can only be created for Alternate Item Groups in Complete status. A draft version of the Item Group is created.

Figure 5–35 Create Revision - Edit Alternates page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Overview](#) | [Alternate Parts](#) | [Composition List](#) | [Create](#)

Master Configuration

Unit Configuration

Product Classification

Confirmation

Item Group new revision was created sucessfully.

Edit Alternates

Cancel

Copy

Submit for Approval

Select Applicable Positions

Apply

Group Name16T_Vert_Stab

DescriptionVertical Stabilizer1

TypeTracked

StatusDraft

Item List

Previous1-2 of 2Next

Remove	Item	Organization	Description	Revision	UOM	Quantity	Priority	Interchangeability Type	Reason	Composition
<input type="checkbox"/>	MRO-16T9001-831	PM	Vertical Stabilizer Assy	<input type="text"/>	Ea	1	1	2-Way Interchangeable	<input type="text"/>	
<input type="checkbox"/>	MRO-16T9001-832	PM	Vertical Stabilizer Assy	<input type="text"/>	Ea	1	2	2-Way Interchangeable	<input type="text"/>	

Add More Rows

Previous1-2 of 2Next

Cancel

Copy

Submit for Approval

Select Applicable Positions

Apply

5-56 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Editing Master Configuration Records

After you create a master configuration template, you can edit the record to add additional attributes. Because the configuration template must consist of all item locations, item installation options, and pertinent maintenance documents, the configuration hierarchy is completed by retrieving a previously created Master Configuration record from the database, and extending it, using the Edit Master Configuration page. Remember that the hierarchy must include a topmost position (the fleet unit itself).

After you view the topmost position in the configuration template, you can drill down into the hierarchy by clicking on the Position link. You have reached the bottom of the configuration tree when Master Configuration finds no more records. Do not attempt to add any attributes at this point by clicking the Add Configuration, Position Ratio, Documents, or Alternates buttons. You will see a message about a “String Index Out Of Bounds Exception” error.

Prerequisites:

The master configuration record that you want to edit must exist in the database.

To edit master configuration records:

1. Search for the master configuration records that match your requirement (see [Finding Master Configuration Records](#)).
2. Select the Master Configuration record from the search results, and click the corresponding Edit icon to launch the Edit Master Configuration page. You can edit the Master Configuration header information like the Revision and Description fields as well as the top node information.

Figure 5–36 Modify Master Configuration Record - Edit Master Configuration page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview | Alternate Parts | Composition List | Create

Master Configuration | Unit Configuration | Product Classification

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Actions

Add

Go

Airframe

Left

Name00-MC-00

Description00-MC-00

StatusDraft

Revision2

Version2

* Indicates required field

Edit Position

PositionAirframe

Position Key11740

Quantity1

Start Date22-APR-2004

Item Group00-CMRO-00

Display Order1

Position DescriptionAirframe

UOMEa

End Date

DescriptionCMRO Test PG Grp

NecessityMandatory

Cancel

Alternate Items

GO

Apply

3.

To change the description or status of the master configuration record, enter the relevant values in the Description and Status fields then click Apply.

4.

Navigate through the tree to go to the position that needs to be edited. To edit information, click the position name link in the tree. The right hand part of the page displays the position information.

5-58 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 5–37 Edit Position Details - Edit Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

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Actions: Add

☐ Airframe
☒ Left
☒ #1 Engine

Edit Master Configuration

Cancel Alternate Items

Name **00-MC-00** Revision **2**
Description **00-MC-00** Version **2**
Status **Draft**

* Indicates required field

Edit Position

* Position Position Description **#1 Engine**
Position Key **11961**
* Quantity * UOM
Start Date End Date
Item Group Description **To track uc issues**
* Display Order Necessity

Alternate Subconfigurations

5. Make necessary changes in the fields provided. For field descriptions, see [Fields Associated with Master Configuration Records](#).
6. Click Apply to store the changes in the database.
7. You can change the item groups associated with a position using the Item Groups LOV icon.
8. You can alter the sub configurations associated to a position in a master configuration by adding or deleting version specific child master configurations.
9. You can choose the following options from the actions drop- down menu:
 - Choose Alternate Items to view the alternate items associated with the master configuration and/or with a specific position.
 - Choose Documents to view and edit the document references attached to the master configuration.

- Choose Submit for Approval to submit the entire MC for approval. This option is only available for a Master Configuration in the status of 'Complete'.
 - Select a position in the Master Configuration tree, and choose Position ratio to view the position ratio for that node.
 - Choose Rules to view the list of rules which pertains to this position.
10. You can also add, delete, and copy positions using the options in the Actions drop-down menu.

See:

- [Editing Position Ratios](#)
- [Attaching Documents to a Position](#)
- [Editing Alternate items Information](#)
- [Creating Positions in a Master Configuration](#)
- [Copying Existing Configurations to a Position](#)
- [Associating Item Groups with a Position](#)
- [Associating a Sub-Configuration/ Alternate Sub-Configuration with a Position](#)
- [Creating Rules for a Configuration or Sub-Configuration](#)

Creating Master Configuration Revisions

Prerequisites:

The master configuration record must be the latest version of that record, and should be in the status of 'Complete'.

To create a master configuration revision:

1. Retrieve the master configuration records that match your requirement (see [Finding Master Configuration Records](#)).
2. Select the record from the Master Configuration List on the Search Master Configuration page, and choose Create Revision from the drop-down menu. Click Go. If the validations pass, then the master configuration header details, relationships, counter rules, document associations, rules, and rule statements will be copied to a new version. A confirmation message will be displayed and

the new revision will appear in the Master configuration List in Draft status. You can edit the new MC version while it is in the Draft status.

Figure 5–38 View New Master Configuration Revision - Search Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Confirmation • A new revision of the Master Configuration "737-800" is created.

Search Master Configuration

Name:
 Description:
 Position:
 Go Clear

Revision:
 Status: All
 Item:

Master Configuration List

Create

Select Master Configuration and ... Re-Open Go

Previous 1-10 of 155 Next

Select	Name	Revision	Version	Edit	Description	Status	Close
<input type="radio"/>	00-MC-00	1	1		00-MC-00	Complete	
<input type="radio"/>	00-MC-00	2	2		00-MC-00	Draft	
<input type="radio"/>	000-MC-000	1	1			Draft	
<input type="radio"/>	1000	1	1			Draft	

Approving Master Configurations

You can set up an approval hierarchy to review and approve master configurations. Master configurations can be submitted for approval at the time of creation and/or modification. Changes made to the master configurations affect unit configurations and maintenance plans for all the units based off the updated master configuration. The Approval Workflow tracks and controls these changes. When a configuration is submitted for approval, a validation is performed to ensure that the configuration is complete, and that complete item groups and/or complete sub-configurations have been associated to each position. Errors are returned if the configuration is incomplete.

Prerequisites:

The Master configuration record, which you want to submit for approval, must exist in the database. All positions must have been set up. The item groups and/or sub-configurations associated with these positions must be in Complete status.

To approve master configurations:

- 1. Retrieve the master configuration records that match your requirement (see [Finding Master Configuration Records](#)).
- 2. Select the pertinent master configuration from the Master Configuration List on the Search Master Configuration page, and choose Submit for Approval from the drop-down menu.

Figure 5–39 Submit Master Configuration for Approval - Search Master Configuration page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Master ConfigurationUnit ConfigurationProduct Classification

OverviewAlternate PartsComposition ListCreate

Search Master Configuration

Name

Description

Position

Revision

Status

Item

Go

Clear

Master Configuration List

Create

Select Master Configuration and ...

Submit For Approval

Go

Previous

1-10 of 63

Next

Select	Name	Revision	Version	Edit	Description	Status	Close
<input checked="" type="radio"/>	00-MC-00	2	2		00-MC-00	Draft	
<input type="radio"/>	000-MC-000	1	1			Draft	
<input type="radio"/>	1000	1	1			Draft	
<input type="radio"/>	AHL-MC271103-1	2	2		Master Configuration -- New Part grp	Draft	
<input type="radio"/>	AHLUMPMC01	3	3		MC for Axle	Draft	
<input type="radio"/>	ALEX	1	1			Draft	

Completeness Check - A concurrent program checks for the completeness of the unit to determine if the unit is Complete or Incomplete. Each mandatory position

5-62 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

must be mapped to an instance. If any Optional positions are mapped to item instances, then its child Mandatory positions must be mapped to instances as well. Any sub-units mapped within the main unit must be complete. If all sub-units are 'Complete' and all Mandatory positions (except those with "Optional" parent positions and no corresponding parent item instance) are mapped, the completeness check is successful, the configuration is approved, and the status changes from Approval Pending to Complete.

If rejected the configuration status changes to Approval Rejected and a list of position paths that are missing mandatory item instances, as well as extras and rule violations are displayed. The configuration is treated like a draft configuration, which the user can modify.

Viewing Master Configuration Records

View master configuration details using the following procedure.

Prerequisites:

The master configuration record must exist in the database.

To view master configuration details:

1. Retrieve the master configuration records that match your requirement (see [Finding Master Configuration Records](#)).
2. Click the Master Configuration Name link. The View Master Configuration page appears showing the Name, Description, and Status of the configuration. The topmost node in the configuration is shown in the Position List.

Figure 5–40 View Configuration Details - View Master Configuration

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

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Airframe
Left

View Master Configuration

Cancel Alternate Items GO

* Name	00-MC-00	Revision	1
Description	00-MC-00	Version	1
Status	Complete		

* Indicates required field

View Position

* Position	Airframe	Position Description	Airframe
Position Key	11740		
Quantity	1	UOM	Ea
Start Date	22-APR-2004	End Date	
Item Group	00-CMRO-00	Description	CMRO Test PG Grp
Display Order	1	Necessity	Mandatory

Cancel Alternate Items GO

You can edit the Position Ratio, Documents, and Alternate Items, and Rules associated with a node in the configuration, by choosing the corresponding option from the drop-down menu.

See:

- [Viewing Position Details](#)
- [Viewing Position Ratio](#)
- [Viewing Documents Associated with a Position](#)
- [Viewing Alternate items associated with a Position](#)
- [Viewing Rules](#)

Viewing Position Details

You can view the position details of master configuration nodes using the following procedure.

Prerequisites:

The master configuration record must exist in the database.

To view position details:

1. Retrieve the master configuration records that match your requirement (see [Finding Master Configuration Records](#)).
2. Check the select radio button next to the pertinent master configuration from the Master Configuration List on the Search Master Configuration page. Click the Master Configuration Name link. The View Master Configuration page appears showing the Name, Description, and Status of the configuration. The topmost node in the configuration is shown in the Position List.
3. The node hierarchy is represented by the tree structure on the left. Navigate to the node that you want to view using the tree structure; click on the plus icon next to a node listing to display subordinate nodes.
4. Click on a node to display the position details corresponding to the node.

Figure 5–41 View Configuration Positions - View Master Configuration page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Overview | Alternate Parts | Composition List | Create

Master Configuration | Unit Configuration | Product Classification

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Airframe

Left

View Master Configuration

Cancel

Alternate Items

Go

Apply

Name00-MC-00

Revision1

Description00-MC-00

Version1

StatusComplete

* Indicates required field

View Position

* PositionLeft

Position DescriptionLeft

Position Key11741

* Quantity1

* UOMEa

Start Date22-APR-2004

End Date

Item Group00-CMRO-00

DescriptionCMRO Test PG Grp

* Display Order1

NecessityMandatory

Select FocusNameRevisionDescriptionStatusPriorityStart DateEnd Date

No records were found matching the given criteria.

Viewing Position Ratios Associated with a Position

You can view position ratios associated with a position in a master configuration using the following procedure.

Prerequisites:

The position ratios of the master configuration position must be defined. See [Editing Position Ratios](#).

To view position ratios associated with a position:

1. Retrieve the master configuration records that match your requirement (see [Finding Master Configuration Records](#)).
2. Check the select radio button next to the pertinent master configuration from the Master Configuration List on the Search Master Configuration page. Click the Master Configuration Name link. The View Master Configuration page

appears showing the Name, Description, and Status of the configuration. The topmost node in the configuration is shown in the Position List.

3. Navigate to the node that you want to view position ratios for, using the tree structure; click on the plus icon next to a node listing to display subordinate nodes. Click on a node to select it. The position details corresponding to the node appear.
4. Choose Position Ratio from the drop down menu. The View Position Ratio page appears.

Viewing Documents Attached to a Position

Use the following procedure to view documents attached to a master configuration node.

Prerequisites:

Documents relating to the master configuration node must be defined. See [Attaching Documents to a Position](#).

To view the documents attached to a position:

1. Retrieve the master configuration records that match your requirement (see [Finding Master Configuration Records](#)).
2. Check the select radio button next to the pertinent master configuration from the Master Configuration List on the Search Master Configuration page. Click the Master Configuration Name link. The View Master Configuration page appears showing the Name, Description, and Status of the configuration. The topmost node in the configuration is shown in the Position List.
3. The node hierarchy is represented by the tree structure on the left. Navigate to the node for which you want to view the documents association for, using the tree structure; click on the plus icon next to a node listing to display subordinate nodes. Click on a node to select it. The position details corresponding to the node appear.
4. Choose Documents from the drop-down menu. The Documents List appears, displaying all documents associated with the selected position.

Figure 5–42 View Document List - Edit Document Associations page

ORACLEOracle Complex MRO

HomeEngineeringConfigurationPlanningAdministrationExecution ProfileSign Out Help

Master ConfigurationUnit ConfigurationProduct Classification

OverviewAlternate PartsComposition ListCreate

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#1 Engine
Airframe

Edit Document Associations

CancelApply

Master Configuration Details

NameAHL-KM271103Revision1

DescriptionThis is a MC to test the approval validation and rulesVersion1

StatusComplete

Position Details

Position#1 EnginePosition Description#1 Engine

NecessityMANDATORYDescriptionMandatory

Document List

Previous1-1 of 1Next

Document	Title	Revision	Type	Chapter	Section	Subject	Page	Figure	Note	Use Latest
MBAHL020	MBAHL020Rev1	SERVICE BULLETIN							N	

Previous1-1 of 1Next

Viewing Alternate items Associated with a Position

Use the following procedure to view alternate items associated with different nodes in a master configuration.

Prerequisites:

Alternate items must be defined for the position prior to viewing the items associated with a position in a master configuration. See [Adding Alternate items Information](#).

To view alternate items associated with a position:

1. Retrieve the master configuration records that match your requirement (see [Finding Master Configuration Records](#)).
2. Check the select radio button next to the pertinent master configuration from the Master Configuration List on the Search Master Configuration page. Click

5-68 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

the Master Configuration Name link. The View Master Configuration page appears showing the Name, Description, and Status of the configuration. The topmost node in the configuration is shown in the Position List.

3. Navigate to the node you want to view documents for using the tree structure; click on the plus icon next to a node listing to display subordinate nodes. Click on a node to select it. The position details corresponding to the node appear.
4. Choose Alternate Items from the drop-down menu. The Item Group details are displayed.

Figure 5–43 View Associated Alternate items/Items - Master Configuration Details page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview Alternate Parts Composition List Create

Copyright 2000, Oracle Corporation. All rights reserved.

Engine
Airframe

Cancel Create Revision

Master Configuration Details

Name	AHL-KM271103	Revision	1
Description	This is a MC to test the approval validation and rules	Version	1
Status	Complete		

Item Group Details

Group Name	AHL-KM27112003	Description	AHL Part group -- Tracked Items
Type	Tracked	Status	Complete

Item List

Previous 1-1 of 1 Next

Item	Organization	Description	Revision	UOM	Quantity	Priority	Interchangeability Type	Reason
AHLITEM001	PM	This is a item for AHL in PM		Ea	1	1	2-WAY INTERCHANGEABLE	Test

Previous 1-1 of 1 Next

Viewing Positions Associated with an Alternate item Group

Use the following procedure to view the configuration positions with which an alternate item group is associated.

Prerequisites:

The alternate item group must be created.

To view positions associated with an alternate item group:

1. Retrieve the pertinent alternate item group record from the database (see [Finding Alternate items Information](#)).
2. To view the configurations with which an alternate item group is associated, select the pertinent group from the items Group List on the Search Alternate items page, and click View Positions.

This will launch the Edit Associated Positions page. The Configuration Positions List displays all the configurations and positions where the item group is attached.

Viewing Rules

Use the following procedure to view the rules defined for configurations, sub-configurations, positions, and items.

Prerequisites:

The rule that you want to view must exist in the database.

To view rules:

1. Navigate to the View Master Configuration page. See [Viewing Master Configuration Records](#).
2. Choose Rules from the drop-down menu. The View Rules page appears, displaying the rules defined for the selected master configuration.

Closing Master Configuration Records

Prerequisites:

The master configuration record that you want to close must exist in the database. The master configuration must be in 'Complete' status and must not have any unit configurations associated with it.

To close master configuration records:

1. Retrieve the master configuration records that match your requirement (see [Finding Master Configuration Records](#)).
2. Select a record, and click the corresponding Trash icon under the Close column. A message is displayed asking you to confirm whether you want to close the record.

Figure 5–44 Closing Master Configuration - Search Master Configuration page

ORACLE® Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Search Master Configuration

Name Revision

Description Status

Position

Master Configuration List

Select Master Configuration and ...

71-80 of 155

Select	Name	Revision	Version Edit	Description	Status	Close
<input type="radio"/>	LPT	1	1	Low Pressure Turbine	Draft	
<input type="radio"/>	M-1900 Aircraft	1	1	M-1900 Aircraft	Draft	
<input type="radio"/>	M-1900 Aircraft -- COPY Rev 1	1	1	M-1900 Aircraft -- COPY	Draft	
<input type="radio"/>	MC 200	1	1		Draft	
<input type="radio"/>	MC Test 004	1	1		Draft	
<input checked="" type="radio"/>	MC-22032004	1	1	This is to test the IB issue	Complete	

3. Click Ok. A confirmation message is displayed, and the search results list is refreshed with the status of the selected master configuration record changed to Closed.

Figure 5–45 View Closed Record - Search Master Configuration page

Confirmation

Master Configuration successfully closed.

Search Master Configuration

Name

Description

Position

Go

Clear

Revision

Status

All

Item

Master Configuration List

Create

Select Master Configuration and ...

Re-Open

Go

Previous

71-80 of 155

Next

Select	Name	Revision	Version	Edit	Description	Status	Close
<input type="radio"/>	LPT	1	1		Low Pressure Turbine	Draft	
<input type="radio"/>	M-1900 Aircraft	1	1		M-1900 Aircraft	Draft	
<input type="radio"/>	M-1900 Aircraft -- COPY Rev 1	1			M-1900 Aircraft -- COPY	Draft	
<input type="radio"/>	MC 200	1	1			Draft	
<input type="radio"/>	MC Test 004	1	1			Draft	
<input checked="" type="radio"/>	MC-22032004	1	1		This is to test the IB issue	Closed	
<input type="radio"/>	MC-KM004	1	1		This is a sample MC. Do not use this for association	Expired	
<input type="radio"/>	MC001	1	1		This is a test MC	Expired	

Reopening Closed Records

You can reopen a master configuration record that was previously deleted.

Prerequisites:

The master configuration record must have been previously defined, and then removed.

Note: You can only reopen master configuration records with status Closed or Expired.

To reopen closed master configuration records:

- Retrieve the master configuration records that match your requirement (see [Finding Master Configuration Records](#)).

2. Select the pertinent record from the Master Configuration List on the Search Master Configuration page.

Figure 5-46 Reopen Master Configuration Record - Search Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Search Master Configuration

Name

Description

Position

Go Clear

Revision

Status Closed

Item

Go

Master Configuration List

Create

Select Master Configuration and ... Re-Open Go

Previous 1-1 of 1 Next

Select	Name	Revision	Version	Edit	Description	Status	Close
<input checked="" type="radio"/>	Verify bug #3565859	1	1		This is a MC to test approvals and associations	Closed	

Previous 1-1 of 1 Next

Select Master Configuration and ... Re-Open Go

3. Choose Reopen from the drop-down menu. The search result list is refreshed with the status of the selected master configuration changed to Draft.

Working With Unit Configurations

In the maintenance, repair, and overhaul industry, the “as-constructed” configuration of an assembly determines the specific maintenance program required to ensure the operational readiness of that asset. Even if two units have the same part number, or belong to the same product family, the as-constructed configurations may be different due to optional subsystems selected by fleet operators, and due to the asset’s operational and service history. Ultimately, maintenance organizations must manage maintenance activities for each unit in the fleet. For maintenance purposes, an aircraft, for example, might consist of a thousand items that you must monitor. As you remove, overhaul, or replace items, you must associate the monitored items that have unique model and serial numbers with a fleet unit, and retain the maintenance history of those items. Many systems, such as aircraft flight management computers, contain software that is revised during their service lives. The Oracle Complex Maintenance, Repair, and Overhaul Unit Configuration module describes the configuration for each unit, and enables maintenance organizations to define and monitor items in a fleet unit.

This chapter discusses the key functions supported by the Oracle Complex Maintenance, Repair, and Overhaul Unit Configuration module. The chapter provides process-oriented, task based procedures for using the application to perform essential tasks for managing maintenance activities of fleet units.

See:

- [Creating Unit Configuration Records](#)
- [Finding Master Configuration Records](#)
- [Creating Unit Configuration](#)
- [Assigning Items to Unit Configuration Positions](#)
- [Finding Unit Configuration Records](#)

- [Validating Unit Configuration Records](#)
- [Migrating Unit Configurations](#)
- [Editing Unit Configuration Records](#)
- [Approving Unit Configurations](#)
- [Viewing Alternate Items Utilization](#)
- [Assigning Alternate Items to Unit Configuration Positions](#)
- [Creating and Updating Item Information \(Create Product and Search Product\)](#)

What is Unit Configuration?

Unit Configuration is a subsystem that describes the structure of an assembled electromechanical system. Unit Configuration is also concerned with monitored components modeling to support the management of a single part of interest, or a complex assembly that consists of a hierarchy of monitored items.

Unit Configuration manages information about the service readiness of any component, and implements Closed Loop Asset Tracking techniques, the result of which is instantaneous online intelligence about the location and state of components. Another important feature of Unit Configuration is the ability to precisely record the utilization of as many items or subassemblies in a fleet unit as required. Oracle Complex Maintenance, Repair, and Overhaul allows you to represent the part lifetime using industry-standard units of measure, such as operating hours, flight cycles, elapsed time, and calendar time. Unit Configuration also allows you to define and maintain the maintenance requirements for a subassembly or subsystem. Maintenance requirements for each fleet unit support detailed maintenance planning for the fleet as a whole.

Key Business Processes

The Unit Configuration module of Oracle Complex Maintenance, Repair, and Overhaul supports the following business processes:

Managing Equipment As-Installed Configurations When a product is in service, some components may need replacement for maintenance and modification, or upgrade purposes. Knowing the current or “as-installed” configuration is critical to plan the required maintenance actions. The Oracle Complex Maintenance, Repair, and Overhaul Unit Configuration module allows you to track the as-installed

configuration of a complex assembly, component installation and removal history, and the software installed in a unit.

Managing Configuration Changes When a current equipment configuration does not meet the future needs, operators modify the existing equipment, instead of replacing it. Organizations also maintain multi-purpose equipment that require a configuration change between different modes of operation. Oracle Complex Maintenance, Repair, and Overhaul allows you to compare the unit (current) configuration with its master configuration to derive the effort required for the modification. Unit Configuration also allows you to validate allowable installation, and whether a configuration is complete.

Tracking Utilization of a Unit Utilization is a major factor determining the maintenance required to preserve an equipment's operational utility. When an assembly is made up of different components that may require different parameters to measure utilization and aging, the resulting maintenance forecast process can be complicated. Unit Configuration will precisely track the utilization of each individual component within an assembly by tracking current utilization of units, such as age, odometer reading, and flight hours since overhaul. Unit Configuration applies the appropriate unit of measure to suit different types of utilization or aging.

Tracking Maintenance Requirements of a Unit The key functions of maintenance planning include identifying the maintenance requirements of a unit, and calculating the service life before the next maintenance event. Fleet Maintenance Program provides this functionality. Unit Configuration enables you to model the maintenance requirement applicable to individual units, by providing a tracking mechanism for maintenance requirements.

Closed Loop Asset Management Maintenance organizations track information about a unit using multiple systems throughout the service life of the unit. To build a continuous "cradle-to-grave" event history of a unit, may require great efforts. The Unit Configuration module provides an anchor to tie all the transactions required to build the full history of a unit. It tracks all transactions associated to unit location and status changes.

Tracking Unit Specific Business Information Some critical business information resides at the individual unit level, and will require special attention and tracking. Unit Configuration provides a platform to track unit-specific information such as ownership.

Creating Unit Configuration Records

Master configuration provides a template for the structure of an electromechanical system with rules for component location and component selection, and applicable maintenance operations. An instance of a master configuration models the general characteristics of a fleet unit. You can derive a unit configuration modeling the structure of an “as-operated” electromechanical system from a master configuration.

Creating a unit configuration from an existing master configuration record involves three stages:

1. [Finding the master configuration record](#) (that serves as the unit configuration template)
2. [Creating Unit Configuration](#)
3. [Assigning items to unit configuration positions](#)

Finding Master Configuration Records

When searching for a master configuration record that will serve as the unit configuration template, you can search using the master configuration template name, or the hierarchical position reference where a master configuration is connected. You can also retrieve all records by providing no search criteria, and clicking Search. For more information about master configurations, see [Working With Master Configurations](#).

Prerequisites:

Master configuration records from which you want to derive unit configurations must exist in the database.

To find a master configuration record:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Configuration Management link. The Search Master Configuration page appears.
2. Click the Unit Configuration tab. The Search Unit Configuration page appears.

Figure 6–1 Search Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

Search Unit Configuration

Unit Config Name
Item
Instance Number
Serial Number
Lot Number

Unit Config Status
Master Config Name
Master Config Revision
Master Config Status
Search For

Go Clear

Unit Configuration List

Create

Select	Unit Configuration	Edit	Instance Number	Item	Serial Number	Lot Number	Status	Installed	Master Configuration	Revision
No records were found matching the given criteria..										

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- Click Create. The Search Master Configuration page appears. Alternatively, you can navigate to this page by selecting the Create From Master secondary tab.

Figure 6–2 Search Master Configuration page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

[Master Configuration](#) [Unit Configuration](#) [Product Classification](#)

[Search Unit](#) | [Create From Master](#) | [Search Product](#) | [Create Product](#)

Search Master Configuration

Name

Description

Go

Clear

Revision

Position

Master Configuration List

Select

Name

Revision

Description

Position

No records were found matching the given criteria..

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- 4. To retrieve master configuration templates by name, enter part of the master configuration name followed by the generic substitution metacharacter% (example, Air%) in the Name field, and click Go.
- 5. To retrieve master configuration records by position in the hierarchy, enter part of the position name followed by the generic substitution metacharacter% in the Position field, and click Go. Alternatively, use the search icon.
- 6. To search for a particular revision of a master configuration, enter the revision number.
- 7. If you do not know the name or position of the master configuration, use the Description field to enter your search string, and click Go. The Description field contains a text description of the master configuration that will serve as the basis for the new unit configuration.
- 8. The lower half of the page displays all matching master configuration records.

Figure 6–3 Master Configuration Search Results - Search Master Configuration page

ORACLE Oracle Complex MRO


Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

Search Master Configuration

Name Revision

Description Position 

Master Configuration List

Select Master Configuration and ...

Previous 1-10 of 89 Next

Select	Name	Revision	Description	Position
<input type="radio"/>	00-MC-00	2	00-MC-00	Airframe
<input type="radio"/>	00-MC-00	1	00-MC-00	Airframe
<input type="radio"/>	737-800	1	Boeing Airframe	Airframe
<input type="radio"/>	737-800	4	Boeing Airframe	Airframe
<input type="radio"/>	737-800	3	Boeing Airframe	Airframe
<input type="radio"/>	737-800	5	Boeing Airframe	Airframe
<input type="radio"/>	737-800	2	Boeing Airframe	Airframe
<input type="radio"/>	AHL-KM271103 1		This is a MC to test the approval validation and rules #1 Engine	
<input type="radio"/>	AHL-KM271103 5		This is a MC to test the approval validation and rules #1 Engine	
<input type="radio"/>	AHL-KM271103 2		This is a MC to test the approval validation and rules #1 Engine	

The application will display all master configuration records matching the search criteria you provided, as long as the Status of the master configuration record is “Complete”. The system will not permit you to create unit configuration records from master configuration templates of any other Status value.

Creating Unit Configuration

After retrieving a master configuration template from the database, you can create a unit configuration that represents an individual fleet unit, and shares attributes in common with other fleet units derived from the same master configuration template. To create a unit configuration, provide a name for the unit configuration, and select the item instance for the top position.

Prerequisites:

The master configuration record that serves as template for the unit configuration must exist in the database. The instances that can be associated with the top node need to be defined at the Installed Base level. The user would decide the top node instance from the available instances.

To create unit configuration:

- 1. Retrieve the master configuration record that serves as the template for creating the new unit configuration (see [Finding Master Configuration Records](#)).
- 2. Select the pertinent master configuration record, and click Create Unit Configuration to launch the Create Unit Configuration page.

Figure 6–4 Create Unit Configuration page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

[Master Configuration](#) [Unit Configuration](#) [Product Classification](#)

[Search Unit](#) | [Create From Master](#) | [Search Product](#) | [Create Product](#)

Create Unit Configuration

* Unit Config Name

Master Config Name

Master Config Description

MC0206

New MC

Unit Config Status

Master Config Revision

Position

Draft

1.0

Barrel Set

Cancel

Apply

Select Item Instance For Top Position

* Instance Number

Serial Number

Owner

Location

Description

Item

Lot Number

Owner Name

Location Address

Party Type

* Indicates required field

Cancel

Apply

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- 3. Enter the information in the fields provided. Information in fields marked with asterisk is mandatory.

- Unit Config Name represents a descriptive name for this unit configuration record. Your organization must have established a naming convention for you to follow. In the Unit Config Name field, if you do not enter a name, then the Unit Configuration name will be automatically generated (item number plus instance number) after you select the top node instance. You can update the name after it is automatically generated. The Unit Config text field will become read only when the record gets approved or is in Complete or Incomplete status.
 - Instance Number is the Install Base Instance Number of the tracked item.
4. Alternatively, you can search for an item instance using the Search icon. Enter information in the fields for which you know the value, and click Go. All instances existing for the item are displayed in the Alternate item instance list. Choose an Item Instance and click Select. This will return the Create Unit configuration page.

The application populates the Party Type, Description, Serial Number, Owner, Owner Name, Location, and Location Address fields in the Create Unit Configuration page when you select an instance number. These field values represent the description, and the attributes of the fleet unit, such as serial number, owner, and current location. The attributes are defined when a part information is added or updated. You cannot update the values in these fields, you can only view them.

Figure 6–5 View Unit Configuration Details - Create Unit Configuration page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

[Master Configuration](#) [Unit Configuration](#) [Product Classification](#)

[Search Unit](#) | [Create From Master](#) | [Search Product](#) | [Create Product](#)

Create Unit Configuration

* Unit Config NameUnit 600

Master Config NameMC0206

Master Config DescriptionNew MC

Unit Config StatusDraft

Master Config Revision1.0

PositionBarrel Set

Cancel

Apply

Select Item Instance For Top Position

* Instance Number92551

Serial NumberSN0244

Owner1005

Location1331

DescriptionNew Item

ItemVG0205

Lot Number

Owner NameAT&T Universal Card

Location Address115 INDUSTRIAL BLVD.;AVENUE CHARLES DE GAULE;SAN MATEO;94401;CAUS

Party TypeParty

* Indicates required field

Cancel

Apply

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- 5. Click Apply to add the unit configuration record to the database. The Edit Configuration page appears, displaying the position details and the item association for the top node of the Unit configuration tree.

Figure 6–6 Edit Unit Configuration page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

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Barrel Set

Edit Unit Configuration

Unit Configuration Unit Config Status **Draft**
Master Configuration **MC0206** Master Config Revision **1.0**
Description **New MC**

Position Details

Position	Barrel Set	Necessity	Mandatory
Item	VG0205	Description	New Item
Serial Number	<input type="text" value="SN0244"/> <input type="button" value="From Inventory"/>	Mfg Date	<input type="text"/>
Lot Number	<input type="text"/>	Instance Number	92551
Revision	<input type="text"/>	UOM	Ea
Quantity	1	Owner Name	AT&T Universal Card
Owner	1005	Location	115 INDUSTRIAL BLVD.;AVENUE CHARLES DE GAULE;SAN MATEO;94401;CAUS
Install Date	11-FEB-2004	Condition	
Status	Out of the Enterprise		

6. You can assign item instances to position references in this page. To assign items to the unit configuration, See [Assigning Items to Unit Configuration Positions](#).

See also:

[Validating Unit Configuration Records](#)

[Migrating Unit Configuration Records](#)

[Editing Unit Configuration Records](#)

[Approving Unit Configurations](#)

Assigning Items to Unit Configuration Positions

Creating a unit configuration logical record from a master configuration results in the connection of a unit configuration record with at least one item in the inventory catalog, and with an actual part or assembly in the inventory database. A unit configuration cannot exist without an item definition and a position definition.

After you create a unit configuration header in the database, you can add item instances to all the positions that were defined in the template master configuration. All the item instances that you assign must exist in a group created using the Master Configuration module.

Prerequisites:

The unit configuration record, with which you want to associate item instances, must exist in the database, and the Status must be flagged as Draft.

To assign items to a unit configuration position:

1. In the Edit Configuration page, click the position reference that you want to associate the item instance/part with. Under the Configuration details, the following two regions are displayed:
 - Create and Assign New Item Instance - You can create an item instance, and then associate it with the position reference.
 - Assign Item - You can assign applicable existing item instances as well as item instances removed from extra nodes to the position references. If items have been assigned to the position at the master configuration level, they will be displayed in the Assign Item table. You can select an existing item instance and assign it to the position. You can also view the part utilization for that item.

Figure 6–7 Assign Item Instance - Edit Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

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Airframe
#1 Engine
Barrel Set

Create and Assign New Item Instance

* Item Revision
 Lot Number Mfg Date
 Serial Number From Inventory

* Indicates required field

Assign Item

Select Item Instance and ...

Previous 1-1 of 1 Next

Select	Item	Instance Number	Serial Number	Lot Number	Owner	Location	Mfg Date	Instance Status
<input type="radio"/>	KM-MC001	106006	KM600		A. C. Networks	Rue Pont Neuf,Nanterre Ville,NANTERRE,92000FR		Out of the Enterprise

Previous 1-1 of 1 Next

Select Item Instance and ...

- To create a new item instance, select the Item using the search icon.

Figure 6–8 Create New item Instance - Edit Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

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Airframe
#1 Engine
Barrel Set

Edit Unit Configuration

Unit Configuration **Unit Aircraft 2** Unit Config Status **Draft**
Master Configuration **MC Aircraft** Master Config Revision **2**
Description
Position **#1 Engine** Necessity **Mandatory**

Create and Assign New Item Instance

* Item Revision
Lot Number Mfg Date
Serial Number Temporary

* Indicates required field

[Assign Item](#)

Select Item Instance and ...

3. Optionally, you can enter the following additional information for the item instance:
 - Lot No - is an identification number representing the part's manufacturing lot. Search for a lot number using the search icon. If lot control is defined for the part/item instance, the page lists all the lot number records for this part. If no lot control is defined when the part information is created in the database, you cannot enter a value in this field. The application will return error messages if you enter a value in this field for a part with no lot control defined.
 - Mfg. Date represents the date of manufacture of the part. You can enter a value in this field only if manufacturing date control is defined for the part when this part record is created in the database. To enter a value in this field, click the calendar icon beside the field. Click the correct date to copy this value into the field.

- Revision represents the part revisions introduced by manufacturers. Part revisions are made to accommodate changes that may somehow improve the efficiency of the part. You can enter a value in this field only if revision control definitions exist for this part record in the database. The application returns errors when you enter revision values for items that do not have revision control defined. To enter a value in this field, follow the same procedure as you did for the Lot No.
 - Serial number indicates that the item is under serial control. You can assign a temporary serial number, which can be updated in the production stage. Optionally, you can enter a serial number existing in inventory but not in use.
4. A master configuration, on which the unit configuration is based on, may have sub-configurations assigned to its position reference. In the Unit configuration, you need to assign sub-units based on that sub-configuration, to the position reference. If sub-units based on the master configuration exist in the database, they will be available for selection in the Assign Items table. The status of available sub-units must be consistent with the status of the parent unit into which it will be installed (i.e. 'Complete/Incomplete' sub units can only be installed into 'Complete/Incomplete' units and 'Draft' sub units can only be installed into 'Draft' units). Select the sub-assembly, and click Assign.

Figure 6–9 Assign Sub-configurations - Edit Unit Configuration page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

[Master Configuration](#) [Unit Configuration](#) [Product Classification](#)

Search Unit | Create From Master | Search Product | Create Product

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Airframe

#1 Engine

Barrel Set

#1 Engine

Position 1

Edit Unit Configuration

Unit ConfigurationUnit Aircraft 2

Unit Config StatusDraft

Master ConfigurationMC Aircraft

Master Config Revision2

Description

Cancel

Position Details

Unassociate Position

Remove

Apply

PositionBarrel Set

Sub Master Config737-800

Sub Unit Configsub unit2

Item737-800

Serial Number02

From Inventory

Lot Number

Revision

Quantity1

Owner1143

Install Date

StatusIn Relationship

NecessityMandatory

Sub Config Rev1

Description737-800

Mfg Date

Instance Number119085

UOMEa

Owner NameA. C. Networks

LocationRue Pont Neuf;Nanterre Ville;NANTERRE;92000FR

Condition

5. Alternatively, you may have to create sub-units for the master configuration. To create sub-units, select the Create from Master sub-tab. See [Creating Unit Configuration](#).

Note: The sub-units must be in draft status to be assigned to the unit configuration.

6. After creating the sub-unit, search for the unit by Sub Master Config name. The Sub Unit Config field will be automatically populated with the unit name.

7. Click Apply to add the part to the unit configuration structure.

When you click Apply, the application checks to ensure that all required fields have been completed with valid entries. The application rejects invalid records with error messages.

6-16 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

8. To associate an existing item instance, select the item from the Assign Item table, and click Assign.

Figure 6–10 Assign Existing Item Instance - Edit Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

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- Airframe
 - #1 Engine
 - Barrel Set
 - #1 Engine
 - Position 1
 - Position 2
 - 28B545-7-300

Create and Assign New Item Instance

Apply

* Item

Revision

Lot Number

Mfg Date

Serial Number From Inventory

* Indicates required field

Assign Item

Select Item Instance and ... View Utilization Assign

Previous 1-1 of 1 Next

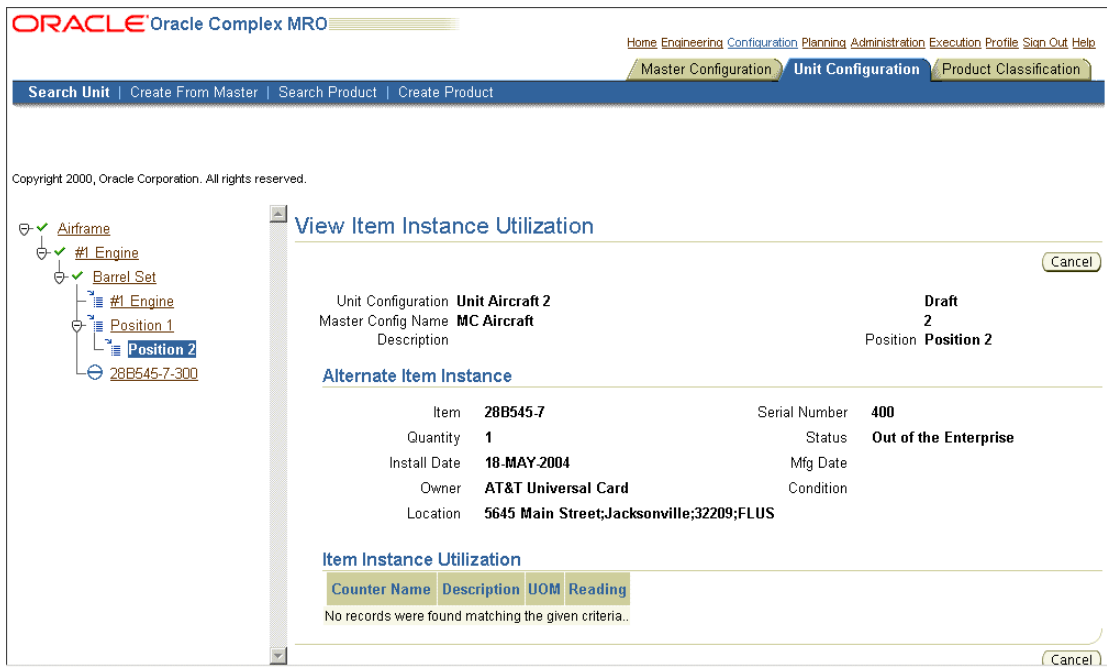
Select	Item	Instance Number	Serial Number	Lot Number	Owner	Location	Mfg Date	Instance Status
<input checked="" type="radio"/>	28B545-7	109308	400		AT&T Universal Card	5645 Main Street, Jacksonville, 32209, FL, US		Out of the Enterprise

Previous 1-1 of 1 Next

Select Item Instance and ... View Utilization Assign

9. To view utilization for an item instance, select the item and click View Utilization.

Figure 6–11 View Item Instance Utilization page



Note: Unit Configuration records the utilization of each component within an assembled hierarchy by monitoring current utilization of units and component hierarchies. Unit Configuration uses appropriate units of measurement including Time Since New, Time Since Overhaul, Time Since Repair, utilization cycles, Hobbs meter time, and many others. Unit Configuration also records utilization history of a revenue fleet unit, serialized part, or component hierarchy.

You can assign alternate items to unit configuration positions after viewing the utilization gained by each allowable part listed for a position.

- 10. You can remove an item instance from an extra node or other nodes. When you remove an item instance from an extra node, the node itself is removed from the tree structure. When you remove an item instance from a non-extra node, only

the item instance is removed from the node. The position is now empty, and the Create Item Instance UI is displayed where the user can assign an item instance to the empty position.

11. If the instance from an extra node can be installed into a missing node, then this instance will be displayed in the item instance table list together with other applicable instances. You can then select and assign it to a missing node.

Finding Unit Configuration Records

Oracle Complex Maintenance, Repair, and Overhaul helps you to retrieve any unit configuration record that exists in the database, by name, serial number, instance number, lot number and other additional search criteria. You can also retrieve all records in the database by providing no search criteria, and clicking Go.

Prerequisites:

The unit configuration record you want to retrieve must exist in the database.

To find unit configuration records:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Configuration Management link. The Search Master Configuration page appears.
2. Click on the Unit Configuration tab to launch the Search Unit Configuration page. This is also the default Unit Configuration page.

Figure 6–12 Find Unit Configuration Records - Search Unit Configuration page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

[Master Configuration](#) [Unit Configuration](#) [Product Classification](#)

[Search Unit](#) | [Create From Master](#) | [Search Product](#) | [Create Product](#)

Search Unit Configuration

Unit Config Name

Item

Instance Number

Serial Number

Lot Number

Unit Config Status

Master Config Name

Master Config Revision

Master Config Status

Search For

All

All

All

Go

Clear

Unit Configuration List

Create

Select	Unit Configuration	Edit	Instance Number	Item	Serial Number	Lot Number	Status	Installed	Master Configuration	Revision
No records were found matching the given criteria.										

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- 3. To retrieve unit configuration records by name, enter part of the unit configuration name followed by the generic substitution metacharacter% (example, Air%) in the Name field, and click Go.
- 4. To retrieve unit configuration records by serial number, enter the value in the Serial Number field, and click Go. Serial Number represents a unique identifier for the fleet unit, provided by the original equipment manufacturer, or the re builder.
- 5. To retrieve unit configuration records by instance number, enter the value in the Instance Number field and click Go. Alternatively, you can search for an instance number using the Search icon.
- 6. To retrieve unit configuration records by lot number, enter the value in the Lot Number field and click Go.
- 7. To retrieve Unit Configuration records by the Master Configuration template it is based on, enter the name in the Master Config Name field. If the unit

configuration is based on a particular version of the master configuration, enter the revision number in the Master Config Revision field. Click Go.

8. The lower half of the screen displays the Unit Configuration List of all matching records in the database.

Figure 6–13 View Unit Configuration List - Search Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

Search Unit Configuration

Unit Config Name

Item

Instance Number

Serial Number

Lot Number

Unit Config Status

Master Config Name

Master Config Revision

Master Config Status

Search For

Unit Configuration List

Select Unit Configuration and ...

Previous 1-10 of 25 Next

Select	Unit Configuration	Edit	Instance Number	Item	Serial Number	Lot Number	Status	Installed	Master Configuration	Revision
<input type="radio"/>	Bug #3584044		106249	KM-MC002	KM1003		Draft		KM-MC-TestUC1	1
<input type="radio"/>	Config100		107812	CMRO unit item 1	KM001		Draft		APS MC 001	1
<input type="radio"/>	config200		107814	CMRO unit item 1	KM002		Draft		00-MC-00	1
<input type="radio"/>	KMUC-Test		106247	KM-MC002	KM1001		Draft		KM-MC-TestUC1	1

Validating Unit Configuration Records

You can validate a unit against the master configuration structure, allowed items and sub-configurations, and the rule applicable to a configuration. You can independently validate the completeness of a unit. You can also validate a unit after migrating it to a new master configuration, or to a revision of an existing master configuration.

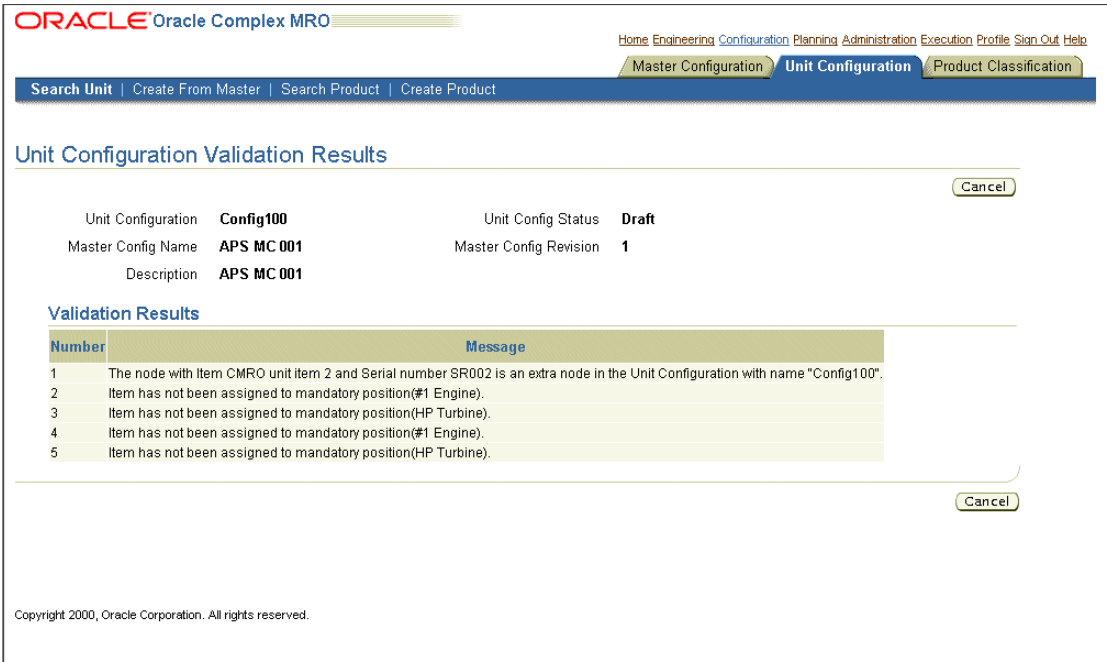
Prerequisites:

The unit configuration record you want to validate must exist in the database.

To validate a unit:

- 1. Retrieve the unit configuration record that you want to validate (see [Finding Unit Configuration Records](#)). The search results appear in the lower half of the page.
- 2. Select the unit configuration record, and click Validate. The Unit Configuration Validation Results page appears displaying the errors for structure and rule violations, if any.

Figure 6–14 Unit Configuration Validation Results page



Migrating Unit Configurations

Master configurations may be revised over a period of time. Often these changes can be implemented immediately across the fleet. However at times, it is necessary to transition the units throughout a given period or to a completely different master configuration. In Unit Configuration, the modification process is broken into steps allowing the user to choose when to migrate and what configuration to migrate to,

allowing a staged lifecycle change. A Unit Configuration can migrate to a new master configuration or to another revision of the existing master configuration when desired throughout the unit's lifecycle.

When a master configuration is revised, certain part positions may be added or removed from the existing configuration. When a part or sub-assembly exists that is not defined in the master configuration, it will show up as an extra part in the unit configuration tree. You can unassociate these position references. Master configuration positions that do not have item association, are identified by the missing items icon in the configuration tree.

The alternate items/sub-assemblies appear in the Assign Items Table for sibling positions which are empty. You can assign these items to the empty position. You can then validate the completeness as needed. Optionally, you can create new Item Instances, and sub-units to assign to these position references.

Prerequisites:

The Unit configuration that you want to migrate must exist in the database. The new or revised Master configuration must also exist in the database.

To migrate a unit configuration:

1. Retrieve the unit configuration record that you want to validate (see [Finding Unit Configuration Records](#)). The search results appear in the lower half of the page.
2. Select the Unit configuration that you want to migrate, and click Migrate. The Migrate Unit Configuration page appears.

Figure 6–15 Migrate Unit Configuration page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

[Master Configuration](#) [Unit Configuration](#) [Product Classification](#)

[Search Unit](#) | [Create From Master](#) | [Search Product](#) | [Create Product](#)

Migrate Unit Configuration

Search and select a Master Configuration to which the Unit is to be migrated. Cancel

Unit Configuration

Master Config Name

Config100

APS MC 001

Unit Config Status

Master Config Revision

Draft

1

Search Master Configuration

Name

Revision

Description

Position

Go

Clear

Select

Name

Revision

Description

Position

No records were found matching the given criteria..

Cancel

3. Search for the new or revised Master Configuration that you want the unit configuration to migrate to. You can query for a specific version of a master configuration by entering a version number in the Revision field. The records matching your search criteria are displayed in the Master Configuration list.

6-24 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 6–16 Select Master Configuration - Migrate Unit Configuration page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Master Configuration](#)
[Unit Configuration](#)
[Product Classification](#)

[Search Unit](#) | [Create From Master](#) | [Search Product](#) | [Create Product](#)

Migrate Unit Configuration

Search and select a Master Configuration to which the Unit is to be migrated. Cancel

Unit Configuration
Master Config Name

Config100
APS MC 001

Unit Config Status
Master Config Revision

Draft
1

Search Master Configuration

Name
Description

Revision
Position

Go Clear

Master Configuration List

Select Master Configuration and ...

Migrate

Previous

1-10 of 80

Next

Select	Name	Revision	Description	Position
<input type="radio"/>	00-MC-00	1	00-MC-00	Airframe
<input type="radio"/>	737-800	1	Boeing Airframe	Airframe
<input type="radio"/>	737-800	3	Boeing Airframe	Airframe

4. Select the relevant master configuration, and click Migrate. The Edit Unit Configuration page appears, displaying the unit hierarchy and the position details for the top node.

Figure 6–17 View Configuration Tree - Edit Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

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Edit Unit Configuration

Unit Configuration: Config100 Unit Config Status: Draft
Master Configuration: CMRO mc 1 Master Config Revision: 1
Description: CMRO mc 1

Position Details

Position	Airframe	Necessity	Mandatory
Item	CMRO unit item 1	Description	CMRO unit item 1
Serial Number	KMD001 From Inventory	Mfg Date	
Lot Number		Instance Number	107812
Revision		UOM	Ea
Quantity	1	Owner Name	A. C. Networks
Owner	1143	Location	Site Alcatel;Place Trocadero;75016 Paris;ParisFR
Install Date	04-MAY-2004	Condition	
Status	Out of the Enterprise		

The following mapping is done when you migrate an unit configuration:

- If the node in unit configuration (UC) is a sub-unit and it matches one of the sub-configuration defined in that node of the new master configuration (MC), no further mapping is required.
 - If the node in UC is a sub-unit but it doesn't match any sub-configurations defined in that node of the new MC, the sub-unit is treated as an extra node and its tree structure is retained.
 - If the node in UC is not a sub-unit and it matches one of the nodes in the same level of the new MC, further mapping is required.
 - If the node in UC is not a sub-unit and it doesn't match any node in the same level of the new MC, then the node and all its decedents in the UC are treated as extra nodes.
5. To remove the extra nodes, select the node and click Remove.

6. To assign item instances to the position references missing items, select the item instance from the Assign item table, and click assign. Optionally, you can assign a new item instance.
7. The extra items will be displayed in the unit hierarchy corresponding to the empty sibling position. To associate this item, you can select it from the Assign Item table and click Assign.

Figure 6–18 Assign Extra Item - Edit Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

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Airframe

- #1 Engine
 - HP Turbine
 - CMRO unit item 2-SR002

* Item Revision

Lot Number Mfg Date

Serial Number From Inventory

* Indicates required field

Assign Item

Select Item Instance and ... View Utilization Assign

Previous 1-1 of 1 Next

Select	Item	Instance Number	Serial Number	Lot Number	Owner	Location	Mfg Date	Instance Status
<input type="radio"/>	CMRO unit item 2	106164	SR002		AT&T Universal Card	Site Alcatel;Place Trocadero;75016 Paris;ParisFR		In Relationship

Previous 1-1 of 1 Next

Select Item Instance and ... View Utilization Assign

Cancel

8. Optionally, you can remove or unassociate the position references that are not mandatory. See [Editing Unit Configuration Records](#).

Editing Unit Configuration Records

Maintenance organizations alter fleet unit configurations to suit different modes of operation, or to comply with changes in business rules. These alterations may also result from component replacements with allowable items at certain hierarchical

positions. Oracle Complex Maintenance, Repair, and Overhaul allows you to retrieve and update unit configuration records to reflect these changes.

To edit unit configuration records:

- 1. Retrieve the unit configuration record that you want to edit (see [Finding Unit Configuration Records](#)). The search results appear in the lower half of the page.
- 2. To remove a unit configuration record, select the pertinent record from the Unit Configuration List, and click Remove. You can only delete unit configurations that are in 'Draft' or 'Approval Rejected' status. You can reuse the item represented by the unit configuration that you remove.
- 3. To edit a unit configuration record, click the Edit icon for the pertinent record in the Unit Configuration List. This launches the Edit Unit Configuration page.

Figure 6–19 Edit Details - Edit Unit Configuration page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Master Configuration

Unit Configuration

Product Classification

[Search Unit](#) | [Create From Master](#) | [Search Product](#) | [Create Product](#)

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Airframe

Left

Edit Unit Configuration

Unit Configurationconfig200Unit Config StatusDraft

Master Configuration00-MC-00Master Config Revision1

Description00-MC-00

Position Details

PositionAirframe

ItemCMRO unit item 1

Serial NumberKMD002From Inventory

Lot Number

Revision

Quantity1

Owner1143

Install Date04-MAY-2004

StatusOut of the Enterprise

NecessityMandatory

DescriptionCMRO unit item 1

Mfg Date

Instance Number107814

UOMEa

Owner NameA. C. Networks

LocationSite Alcatel;Place Trocadero;75016 Paris;ParisFR

Condition

Cancel

Apply

6-28 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Note: You cannot add or update position references in the unit configuration after changing the Status to Complete. Make sure that you assign items to all the positions in the unit configuration hierarchy before changing the Status to Complete.

4. To edit a position in the unit configuration hierarchy, use the tree structure on the left. The position references beneath the selected node in the unit configuration appear with corresponding part information. You can view the position details by clicking a position reference.

Figure 6–20 View Position Details - Edit Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

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Airframe
Left

Edit Unit Configuration

Unit Configuration **config200** Unit Config Status **Draft**
Master Configuration **00-MC-00** Master Config Revision **1**
Description **00-MC-00**

Position Details

Position **Left** Necessity **Mandatory**
Item **CMRO unit item 1** Description **CMRO unit item 1**
Serial Number **kM006** From Inventory
Lot Number
Revision
Quantity **1**
Owner **1143**
Install Date **04-MAY-2004**
Status **In Relationship**

Unassociate Position Remove Apply

Mfg Date
Instance Number **107819**
UOM **Ea**
Owner Name **A. C. Networks**
Location **Site Alcatel;Place Trocadero;75016 Paris;ParisFR**
Condition

5. To remove a position reference from the unit configuration record, click on the position reference. Select Remove in the Position details region. You can reuse the item represented by the position reference that you remove from the unit configuration.

Note: You cannot remove a position reference that is defined as Mandatory in the master configuration. The Edit Unit Configuration page presents this information in the Necessity field under Unit Configuration Structure.

- 6. To unassociate an items position, without removing the nodes from the Unit configuration tree, select the position reference and click Unassociate. This allows you to map the positions manually, when the correct installation cannot be automatically determined.

Figure 6–21 Unassociate Position - Edit Unit Configuration page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Search Unit

Create From Master

Search Product

Create Product

Master Configuration

Unit Configuration

Product Classification

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Airframe

Left

CMRO unit item 1-KM006

Edit Unit Configuration

Unit Configurationconfig200Unit Config StatusDraft

Master Configuration00-MC-00Master Config Revision1

Description00-MC-00

Position Details

PositionAirframe

ItemCMRO unit item 1

Serial NumberKM002From Inventory

Lot Number

Revision

Quantity1

Owner1143

Install Date04-MAY-2004

StatusOut of the Enterprise

NecessityMandatory

DescriptionCMRO unit item 1

Mfg Date

Instance Number107814

UOMEa

Owner NameA. C. Networks

LocationSite Alcatel;Place Trocadero;75016

Paris;ParisFR

Condition

Cancel

Apply

- 7. To assign a part to a position in the unit configuration, select the pertinent position reference. If item instances for that position exist in the database, they will appear in the Assign Item table. Optionally, you can create and assign a new item instance. See [Assigning Items to Unit Configuration Positions](#).

Approving Unit Configurations

Creating or updating unit configurations is supported with an approval workflow.

You can setup an approval hierarchy to review and approve the unit creation. You can also submit a unit configuration for approval when you make a manual change to a complete unit configuration. Manual changes are necessary to record a discrepancy; all the other unit configuration changes should be performed through the proper production flow with work order sign off etc. Both the creation and the manual update of a unit configuration are critical tasks and need to be controlled.

After the Unit configurations have been created and/or edited, the unit is submitted for approval. When approved, if the unit is not complete it will be given the status of “Incomplete Approved” and if complete it will be assigned the “Complete Approved” status.

Prerequisites:

The Unit Configuration records that you want to submit for approval must exist in the database.

To approve unit configurations:

1. Retrieve the unit configuration record that you want to submit for approval (see [Finding Unit Configuration Records](#)). The search results appear in the lower half of the page.
2. To approve a unit configuration record, select the pertinent record from the Unit Configuration List, and click Submit for Approval. The status changes to Incomplete Approved or Complete Approved, based on whether the unit configuration is complete with all associations or not.

Figure 6–22 Submit Unit Configuration for Approval - Search Unit Configuration page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Master Configuration](#) [Unit Configuration](#) [Product Classification](#)

[Search Unit](#) | [Create From Master](#) | [Search Product](#) | [Create Product](#)

Confirmation

The request for approval has been successfully submitted.

Search Unit Configuration

Unit Config Name

Item

Instance Number

Serial Number

Lot Number

Unit Config Status

Master Config Name

Master Config Revision

Master Config Status

Search For

Go

Clear

Unit Configuration List

Create

Select Unit Configuration and ...

Submit for Approval

Validate

Migrate

Remove

Previous

1-10 of 24

Next

Select	Unit Configuration	Edit	Instance Number	Item	Serial Number	Lot Number	Status	Installed	Master Configuration	Revision
<input type="radio"/>	Bug #3584044		106249	KM-MC002	KM1003		Draft		KM-MC-TestUC1	1
<input type="radio"/>	config200		107814	CMRO unit item 1	KM002		Draft		00-MC-00	1

Viewing Alternate Items Utilization

Unit Configuration records the utilization of each component within an assembled hierarchy by monitoring current utilization of units and component hierarchies. Unit Configuration uses appropriate units of measurement including Time Since New, Time Since Overhaul, Time Since Repair, utilization cycles, Hobbs meter time, and many others. Unit Configuration also records utilization history of a revenue fleet unit, serialized part, or component hierarchy.

You can assign alternate items to unit configuration positions after viewing the utilization gained by each allowable item listed for a position.

Prerequisites:

An assigned item must exist for the pertinent position in the unit configuration, and the Unit Configuration record Status must be flagged Complete.

To view alternate item utilization:

1. Retrieve the unit configuration record that you want to edit (see [Finding Unit Configuration Records](#)). Search results appear in the lower half of the page.
2. To remove a unit configuration record, select the pertinent record from the Unit Configuration List, and click Remove.
3. To view the use of alternate items, select the pertinent record from the Unit Configuration List, and click Edit Details. The Edit Unit Configuration page appears. Using the tree structure on the left, navigate to the node you want to edit.
4. Select the position to which you want to assign alternate items.
5. Click Alternates to launch the Alternate Items List page. This is the allowable items list defined for the selected position. Note that the Alternates button is enabled only when the unit configuration status is Complete.
6. Select the alternate item for which you want to view the utilization.
7. Click Utilization to launch the Alternate Item Utilization page. The page displays the Name, Description, Unit of Measurement, and the Reading for the selected part.

Assigning Alternate Items to Unit Configuration Positions

When a fleet unit is in operation providing a transport service, eventually some components will require replacement to preserve the operational readiness of that unit. A unit configuration inherits the alternate items list for each component position in the hierarchy, from its master configuration template. Use this procedure to assign alternate items to a component position in an assembly. This will enable you to manage the “as-installed” configuration details of any fleet unit.

Prerequisites:

An assigned item must exist for the pertinent position in the unit configuration, and the Unit Configuration record Status must be flagged Complete.

To assign an alternate item to a unit configuration position:

1. Retrieve the unit configuration record that you want to edit (see [Finding Unit Configuration Records](#)). Search results appear in the lower half of the page.
2. To remove a unit configuration record, select the pertinent record from the Unit Configuration List, and click Remove.

3. To assign alternate items to a unit configuration position, select the pertinent record from the Unit Configuration List, and click Edit. This launches the Edit Unit Configuration (Unit Configuration Structure) page.
4. Click the topmost node in the unit configuration that appears in the Position field under Unit Configuration Structure. The position references beneath the selected node appear with corresponding part information.
5. Select the position to which you want to assign alternate items.
6. Click Alternates to launch the Alternate Items List page. This is the allowable items list defined for the selected position.
7. Select the alternate item that you want to assign to the position.
8. Click Assign. This assigns the selected alternate item to the position, and the item previously assigned to the selected position is marked Out-of-Service and returned to the Alternate Items List.

Creating and Updating Item Information

Oracle Complex Maintenance, Repair, and Overhaul uses Oracle Install Base, part of the Oracle e-Business Suite, to create and update item information.

- Click the Create Product secondary tab in the Unit Configuration module to launch the Create Product page.
- Click the Search Product secondary tab in the Unit Configuration module to launch the Search My Products page.

For instructions on using these pages to create, find, and update part information, refer to *Oracle Install Base Concepts and Procedures*. The chapter, “Using the Product Tabbed Page” in this guide provides all the information you need to use the Create Product and Search My Product pages.

Managing Product Classification

In the transportation business, the term fleet commonly describes a group of related vehicles. A fleet may be divided into smaller groups, or subfleets, each consisting of products that are similar with regard to manufacturer, operating region, or other pertinent attribute. Because maintenance requirements are often based on such attributes, product classification is needed to provide a hierarchy within which the products can be grouped.

Throughout the MRO industry, businesses need to define how MRO maintenance and supporting documents apply to physical units. These MRO documents typically represent other parts or technical information, and their purpose is to express what requirements apply to what units.

A product classification will group products logically across multiple levels. Examples are the family-model-version classification for engines and the fleet-series-model classification for aircraft. A product classification can be represented by a tree structure in which individual units can be attached to the nodes of the tree, with the implication that maintenance requirements and maintenance documents applicable to such a node “flow down” to the attached units or parts.

This chapter presents the key functions supported by the Oracle Complex Maintenance, Repair, and Overhaul Product Classification module. The chapter provides process-oriented, task base procedures for using Oracle Complex Maintenance, Repair, and Overhaul to perform essential product classification tasks.

See:

- [Finding Product Classifications](#)
- [Working with Product Classifications:](#)
 - [Creating a Product Classification](#)

- Copying a Product Classification
- Editing a Product Classification
- Working with Nodes:
 - Adding a Node
 - Editing a Node
 - Removing a Node
- Viewing Nodes
- Associating Documents to a Node
- Attaching Units in Product Classification
- Viewing Utilization Forecasts
- Viewing associated Maintenance Requirements
- Checking Completeness
- Launching the Approval Process

What is Product Classification?

A product classification is a logical categorization of units or parts pertaining to maintenance, with a unit being the physical instance of an item and a part being the general item definition from which a unit is instantiated. Product Classification allows an organization to group its units or parts together from multiple viewpoints. Examples are the general product family classification, a classification per geographical location or a classification based on the type of usage of a unit or part. The affiliation of a unit or part to certain classifications is used to define the applicability of maintenance requirements and maintenance documents. In case of changing a product classification by adding, deleting or moving a unit or a part, the unit maintenance plan of the affected unit(s) is changed automatically to represent the maintenance requirements based on the edited product classification. This gives an organization a powerful set up of maintenance applicability with a minimum of maintenance of the engineering set up when implementing maintenance plan changes.

Key Business Processes

Product Classification supports the following business processes:

Product Classification Oracle Complex Maintenance, Repair, and Overhaul provides a maintenance engineer with the ability to create and maintain product classifications. Product Classification provides a hierarchy within which parts and units can be grouped. Organizations are able to create, copy and maintain product classification and for the use of maintenance definition of the parts or units within a product classification, they can associate documents and view association of the associated maintenance requirements.

Maintenance Personnel can:

- Search the database to quickly refer to a product classification.
- Create new product classifications or product classifications revisions.
- Edit and copy product classifications.
- Associate documents to a nodes product classifications.
- Attach parts or units to product classifications.
- View maintenance requirements associated to a product classification node.
- View Utilization forecast of a product classification.
- Check for completeness of primary product classifications.
- Launch the approval process for a draft product classification.

Parts and Unit Classification Oracle Complex Maintenance, Repair, and Overhaul allows organizations to group parts or units in multiple product classifications. A product classification is represented in a tree model hierarchy. This supports organizations to group parts or units together from different viewpoints and enables them to define maintenance requirements and maintenance documents based on the parts or units product classification(s) association.

Primary and Supplementary Classification Oracle Complex Maintenance, Repair, and Overhaul supports primary and supplementary classifications. For a primary classification all parts or units of that classifications' product type need to be associated to this primary classification. An organization can have one primary classification per product type. This gives the organization a view of all the parts or units for a specific product type. An example of that would be the complete fleet of an airline. A supplementary classification can represent a subset of the parts and units for a particular product type. An organization can have multiple supplementary classifications for a particular product type. This allows an organization to group the parts and units together from different viewpoints. An

example of that would be a categorization by geographical location of the parts and units.

Association of Maintenance Documents Oracle Complex Maintenance, Repair, and Overhaul allows you to associate maintenance documents to any node within the product classification hierarchy.

View Maintenance Requirement Association Oracle Complex Maintenance, Repair, and Overhaul displays the maintenance requirements associated to a node in a product classification. The association itself happens in Fleet Maintenance Program.

Unit Maintenance Plan Update When a part or unit changes its product classification or is newly added or deleted from a product classification. The system automatically runs the re-calculation of the affected units' maintenance plan.

Fields Associated with Product Classification

The following sections provide descriptions of fields appearing on each Product Classification page.

Note: The Search icon beside fields implies the availability of a List of Values to choose from for those field values. To populate these fields, enter a partial search string using the generic substitution meta character%, and click the icon to retrieve and display matching results on a Select <field name> page. Click the relevant record on this page to return this value to the field on your maintenance requirement page.

Fields on the Search Product Classification Page

The following fields appear on the Search Product Classification page:

Name refers to the name of the product classification.

Product type refers to the kind of product, such as airplane, train, car, and so on. This is a seeded field. All classifications have a product type defined to control the association of a unit or a part. This is to ensure that different types of products do not get mixed up in the same classification (i.e. Airplanes and Engines). When

defining the Product Classification's Product Type, the value chosen by the user must match the master item's User Item Type as defined in Oracle Inventory.

Status refers to the state of the classification which is one of the following: Draft, Approval Pending, Approval reject, or Complete. When creating a product classification the default is Draft. This is a seeded field.

Primary Classification One of two types of product classifications, primary or supplementary. A primary classification is used to give an overview of all existing units that make up a complete list of components. For an operator in the transportation industry, this consist of all airplanes, trains, buses, ships, cars, and so forth. Multiple primary classifications can be defined but must associate an item type to a primary classification for validation purposes. For example, you can define multiple primary classifications for the complete fleet of Airplanes and the complete list of Engines. Only parts of product type 'Airplane' can be associated to the primary classification for the fleet of Airplanes and only parts of product type 'engine' could be associated to the Engine classification. Since one part can only have one product type, there is no duplication when associating parts or units to a primary classification. Every unit defined as part of the fleet has to be part of the primary product classification. Supplemental classifications are applied to group certain units for specific classification needs based on geography, types not covered through the primary classification or any other attribution. A supplementary classification does not necessarily resemble the complete fleet it therefore does not have to have every unit assigned to a leaf node.

Association Type refers to the kind of association; either unit or part.

Document refers to the document number set from document index.

Revision refers to the revision number of the associated document.

Maintenance Requirements refers to the maintenance requirements determined in Fleet Maintenance Program.

Unit refers the name of the unit

Part refers to the part number.

Fields on the Attach Documents Page

This page displayed in Product Classification is part of Document Index. For more information on the fields of this page, see [Fields Associated with Document References](#) in Visit Work Package.

Fields on the View Maintenance Requirements Page

This page displayed in Product Classification is part of Fleet Maintenance Program. For more information on the fields of this page, see [Fields on the Search Maintenance Requirements Page](#).

Fields on the View Utilization Forecast Page

This page displayed in Product Classification is part of Unit Maintenance Plan. For more information on the fields of this page, see [Fields on the Update Part Utilization Forecast Page](#).

Finding Product Classifications

Maintenance organizations refer to existing product classification records while defining solutions for similar maintenance requirements. Oracle Complex Maintenance, Repair, and Overhaul permits use of meta characters when you type a word, or part of a word, to use as a search argument. Use % to represent any string of zero or more characters. Use _ to represent any single character. For example, if the database contains a record with the value "ENGINE" in a field, typing "E%" will return all records where the field value begins with "E".

Prerequisites:

The product classification record you want to retrieve must exist in the database.

To find a product classification record:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Configuration Management link. The Search Master Configuration page of Master Configuration appears.
2. Select the Product Classification tab. The Search Product Classification page appears in Product Classification.

Figure 7–1 Search Product Classification page

ORACLE® Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Master Configuration](#) [Unit Configuration](#) [Product Classification](#)

Overview

Search Product Classification

Name

Item Type

Primary Classification

Document

Revision

Unit

Go

Clear

Description

Status

Association Type

Maintenance Requirements

Item

Product Classification Results

Create

Select	Name	Description	Item Type	Status	Primary Classification	Association Type	Tree	Remove
No records were found matching the given criteria..								

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- 3. Enter the information in the fields for which you know the value. For field descriptions, see [Fields on the Search Product Classification Page](#).
- 4. Click Go. The lower half of the screen displays the Product Classification results for all matching records in the database.

Figure 7–2 Product Classification Search results - Search Product Classification page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Master Configuration

Unit Configuration

Product Classification

Overview

Search Product Classification

Name

Item Type

Primary Classification

Document

Revision

Unit

Description

Status

Association Type

Maintenance Requirements

Item

Go

Clear

Product Classification Results

Create

Select classification and ...

Check Complete

Copy

Previous1-10 of 101Next

Select	Name	Description	Item Type	Status	Primary Classification	Association Type	Tree	Remove
<input type="radio"/>	AHLPC001	This is a PC to certify bug	IT21042004	Complete	Yes	Unit		
<input type="radio"/>	AHLPC001	This is a PC to certify bug	IT21042004	Draft	Yes	Unit		
<input type="radio"/>	AHLPC001 test	This is a PC to certify bug	IT21042004	Draft	No	Unit		

5. To restart a search for records, click Clear. All the search fields on the page will clear. (If you have retrieved records being displayed in the lower half of the screen, these records will remain).

After entering the new search criteria, click Go to begin searching the database for records that match.

See:

- Working With Product Classifications

Working With Product Classifications

Product Classification provides a multilevel hierarchy that permits the logical grouping of products. Product classifications are used mainly to define maintenance requirements and documents applicability. There are two types of classification - Primary and Secondary. There can be only one Primary classification for one

7-8 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

product type. Oracle Complex Maintenance, Repair, and Overhaul allows you to copy, edit, and create product classifications.

See:

- [Creating Product Classifications](#)
- [Copying Product Classifications](#)
- [Editing Product Classifications](#)

Creating a Product Classification

Prerequisites:

You should know the name, product type, classification status, and association type of the product classification you want to create.

To create a product classification:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Configuration Management link. The Search Master Configuration page of Master Configuration appears.
2. Select the Product Classification tab. The Search Product Classification page appears in Product Classification.
3. Click the Create button in the Product Classification Results in the lower half of the page. The Create Product Classification page appears.

Figure 7–3 Create Product Classification page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution Profile

Sign Out

Help

Master Configuration

Unit Configuration

Product Classification

Overview

Create Product Classification

* Indicates required field

Cancel

Apply

Product Classification Details

* Name

Status

Draft

* Item Type

* Primary Classification

True

False

* Association Type

Unit

Item

Description

Cancel

Apply

4. Enter the information in the fields for which you know the value. Fields marked with asterisks require an entry.

Figure 7–4 Enter Product Classification Details - Create Product Classification page

ORACLE® Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Master Configuration](#) [Unit Configuration](#) [Product Classification](#)

Overview

Create Product Classification

* Indicates required field

Cancel

Apply

Product Classification Details

* Name

PClassType

Status

Draft

* Item Type

ATO item

* Primary Classification

☐ True

☒ False

* Association Type

☒ Unit

☐ Item

Description

Cancel

Apply

- 5. Click Apply to save the changes to the database. You should see a message: Confirmation—Product Classification successfully created. The Edit Product Classification page appears, displaying the new Product Classification.

Figure 7–5 Edit Product Classification page

ORACLE

Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Overview

Master Configuration

Unit Configuration

Product Classification

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Action

Delete Node

Go

Confirmation

Product Classification successfully created.

Edit Product Classification

Cancel

Submit

Apply

* Indicates required field

Product Classification Details

Name

PClassType

Status

Draft

* Item Type

ATO item

* Primary Classification

☐ True

☒ False

* Association Type

☒ Unit

☐ Item

Description

6. Click Cancel to return to the previous page.

See:

- [Copying Product Classifications](#)
- [Editing Product Classifications](#)

Copying a Product Classification

Prerequisites:

A draft status product classification must exist in the database.

To copy a product classification:

1. Retrieve the product classification you want to copy. See [Finding Product Classifications](#).

2. Select the product classification you want to copy from the Product Classification Results on the lower half of the page, then click Copy.
3. The Copy Product Classification page appears. Give the copy a new name—each product classification must have a unique name.

Figure 7–6 Copy Product Classification page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration **Product Classification**

Overview

Copy Product Classification

* Indicates required field

Product Classification Details

Name **AHLPC001**

* New Name

Status **Draft**

* Item Type

* Primary Classification ☒ True ☐ False

* Association Type ☒ Unit ☐ Item

Description

Other Components

Component
<input type="checkbox"/> Documents

Cancel Apply

4. Change any other information about the copy in the fields provided.

Note: Only one primary product classification is permitted for any product type. If you also want to copy other components, such as any associated Unit/Parts or Documents, click the check boxes next to the relevant component.

- 5. Click Apply to save the changes to the database. You should see a message: Confirmation—Product Classification successfully copied. The Edit Product Classification page appears, displaying the copied Product Classification.

Figure 7–7 View Confirmation - Edit Product Classification page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Master ConfigurationUnit ConfigurationProduct Classification

Overview

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ActionDelete NodeGo

☐ Root Node☐ Child Node

ConfirmationProduct Classification successfully copied.

Edit Product Classification

* Indicates required field

Product Classification Details

NameAHLPC150

StatusDraft

* Item TypeIT21042004

* Primary Classification☐ True☒ False

* Association Type☒ Unit☐ Item

DescriptionThis is a PC to certify bug

CancelSubmitApply

- 6. Click Cancel to return to the previous page.

See:

- [Creating Product Classifications](#)
- [Editing Product Classifications](#)

Editing a Product Classification

Oracle Complex Maintenance, Repair, and Overhaul Product Classifications can be edited only if the status of the Product Classification is in “draft” status. If the status is “complete” changes are not allowed, including any changes in associations of maintenance requirements and documents.

Prerequisites:

A draft status product classification must exist in the database.

To edit product classification:

1. Retrieve the product classification you want to edit. See [Finding Product Classifications](#).
2. Select the product classification that you want to edit, and click the corresponding tree icon. The Edit Product Classification page appears.

Figure 7–8 Update Product Classification - Edit Product Classification page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview

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Action: Delete Node Go

Root Node Child Node

Edit Product Classification

* Indicates required field

Product Classification Details

Name: AHLPC001

Status: Draft

* Item Type: IT21042004

* Primary Classification: ☒ True ☐ False

* Association Type: ☒ Unit ☐ Item

Description: This is a PC to certify bug

Cancel Submit Apply

3. Make the necessary changes in the fields provided. Note that only one primary product classification is permitted for any product type.
4. Click Apply to save the changes to the database. The page refreshes and displays 'Product Classification successfully updated'.

Figure 7–9 Update Product Classification page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Master ConfigurationUnit ConfigurationProduct Classification

Overview

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ActionDelete NodeGo

☐ Root Node☒ Child Node 10

ConfirmationProduct Classification Node successfully updated.

Update Product Classification

CancelMore DetailsApply

Product Classification NameAHLPC001

DescriptionThis is a PC to certify bug

StatusDraft

Item TypeIT21042004

Primary ClassificationYes

Association TypeUnit

* Indicates required field

Node Details

* NameChild Node 10

DescriptionThis is child

See:

- [Creating Product Classifications](#)
- [Copying Product Classifications](#)
- [Working with Nodes](#)

Working With Nodes

Assigning a part, instead of the unit to a node is an easier way to classify the products if a differentiation is not needed on the instance level. Oracle Complex Maintenance, Repair, and Overhaul uses a hierarchy tree to graphically display the structure of product classifications and the elements related to them. In Product Classification, you can add, edit, and remove nodes in addition to attaching documents, associate units/parts, and view the maintenance requirements for any selected product classification.

See:

- [Adding a Node](#)
- [Editing a Node](#)
- [Removing a Node](#)

Adding a Node

Prerequisites:

A draft status product classification must exist in the database.

To add a node:

1. Find the product classification to which you want to add a node. See [Finding Product Classifications](#).
2. Click the corresponding tree icon. The Edit Product Classification page appears. The node tree appears on the left hand side of the page, displaying the nodes defined.

Figure 7–10 View Node Tree - Edit Product Classification page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Overview

Master Configuration Unit Configuration Product Classification

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Action

Delete Node

Go

Root Node

Child Node 10

Edit Product Classification

* Indicates required field

Product Classification Details

Name

AHLPC001

Status

Draft

* Item Type

IT21042004

* Primary Classification

☒ True

☐ False

* Association Type

☒ Unit

☐ Item

Description

This is a PC to certify bug

Cancel

Submit

Apply

- 3. Select a Node, and choose Add Node from the Action pull down menu. Click Go.
- 4. Node Details appears on the lower right hand of the page. Enter the information in the fields for which you know the value.

Figure 7–11 Enter Node Details - Update Product Classification page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration **Product Classification**

Overview

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Action

☐ Root Node
☒ Child Node 10

Update Product Classification

Product Classification Name **AHLPC001**
 Description **This is a PC to certify bug**
 Status **Draft**
 Item Type **IT21042004**
 Primary Classification **Yes**
 Association Type **Unit**

* Indicates required field

Node Details

* Name

Description

5. Click Apply to save the changes to the database.
6. The page refreshes and displays “Confirmation: Product Classification Node successfully created” and the tree displays the new node.

Figure 7–12 View New Node - Update Product Classification page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Master ConfigurationUnit ConfigurationProduct Classification

Overview

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ActionAdd NodeGo

Root Node

Child Node 10

Child Node 20

Confirmation

Product Classification Node successfully created.

Update Product Classification

CancelMore DetailsApply

Product Classification Name

AHLPC001

Description

This is a PC to certify bug

Status

Draft

Item Type

IT21042004

Primary Classification

Yes

Association Type

Unit

* Indicates required field

Node Details

* Name

Child Node 20

Description

See:

- [Editing a Node](#)
- [Removing a Node](#)

Editing a Node

Prerequisites:

A draft status product classification and an editable node must exist in the database.

To edit a node:

1. Retrieve the product classification records. See [Finding Product Classifications](#).
2. Select the product classification that you want to make changes to, and click the corresponding tree icon. The Edit Product Classification page appears. The

node tree appears on the left hand side of the page, displaying the nodes defined.

3. Use the tree to find the node you want to edit, and select the node. The details for that node appear.

Figure 7–13 Edit Node - Update Product Classification page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview

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Action:

☐ Root Node
☒ Child Node 10
☐ Child Node 20

Update Product Classification

Product Classification Name: AHLPC001
 Description: This is a PC to certify bug
 Status: Draft
 Item Type: IT21042004
 Primary Classification: Yes
 Association Type: Unit

* Indicates required field

Node Details

* Name:

Description:

4. Make the necessary changes in the fields provided. Click the More details button if you want to associate documents or attach parts.
5. Click Apply to save the changes to the database. The page refreshes and displays "Product Classification Node successfully updated."
6. Click Cancel to return to the previous page.

See:

- [Adding a Node](#)
- [Removing a Node](#)

- [Associating Documents to a Node](#)
- [Attaching Units in Product Classification](#)

Removing a Node

Prerequisites:

The node you want to remove must exist in the database.

To remove a node:

1. Find the product classification that has the node that you want to remove. See [Finding Product Classifications](#).
2. Select the product classification record, and click the corresponding tree icon. The Edit Product Classification page appears. The node tree appears on the left hand side of the page, displaying the nodes defined.
3. Use the tree to find the node that you want to remove. Select Delete Node from the Action pull down menu and click Go.
4. The page refreshes and displays “Confirmation: Product Classification Node(s) successfully deleted.” The node, all its associations, and sub nodes are deleted.

Figure 7–14 Delete Node - Edit Product Classification page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration **Product Classification**

Overview

Copyright 2000, Oracle Corporation. All rights reserved.

Action **Delete Node** **Go**

☐ **Root Node**

Confirmation • 1 Product Classification Node(s) successfully deleted.

Edit Product Classification

* Indicates required field

Product Classification Details

Name **AHLPC001**

Status **Draft**

* Item Type

* Primary Classification ☒ True

☐ False

* Association Type ☒ Unit

☐ Item

Description

Cancel **Submit** **Apply**

5. Click Apply to save the changes to the database.

6. Click Cancel to return to the previous page.

See:

- [Adding a Node](#)
- [Editing a Node](#)

Viewing Nodes

Oracle Complex Maintenance, Repair, and Overhaul uses a hierarchy tree to graphically display the structure of product classifications and the elements related to them. You can use Product Classification to view any nodes associated to a product classification.

Prerequisites:

A product classification with associated nodes must exist in the database.

To view a node:

1. Find the product classification that has the node that you want to view. See [Finding Product Classifications](#).
2. Select the product classification record, and click the corresponding tree icon. The Edit Product Classification page appears. The node tree appears on the left hand side of the page, displaying the nodes defined.
3. Navigate through the tree by clicking on the plus/minus icons next to the node names.

Figure 7–15 View Nodes - Update Product Classification page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Master ConfigurationUnit ConfigurationProduct Classification

Overview

Copyright 2000, Oracle Corporation. All rights reserved.

ActionDelete NodeGo

Root Node

Child Node

Update Product Classification

CancelMore DetailsApply

Product Classification NameAHLPC150

DescriptionThis is a PC to certify bug

StatusDraft

Item TypeIT21042004

Primary ClassificationNo

Association TypeUnit

* Indicates required field

Node Details

* NameChild Node

DescriptionThis is child

CancelMore DetailsApply

Associating Documents to a Node

Product Classification uses a tree structure to graphically display the structure of product classifications and the elements related to them. Documents can be associated with product classifications by attaching them to the appropriate node of this tree structure. You can search for relevant documents from document index then use Product Classification to attach documents to a node.

Prerequisites:

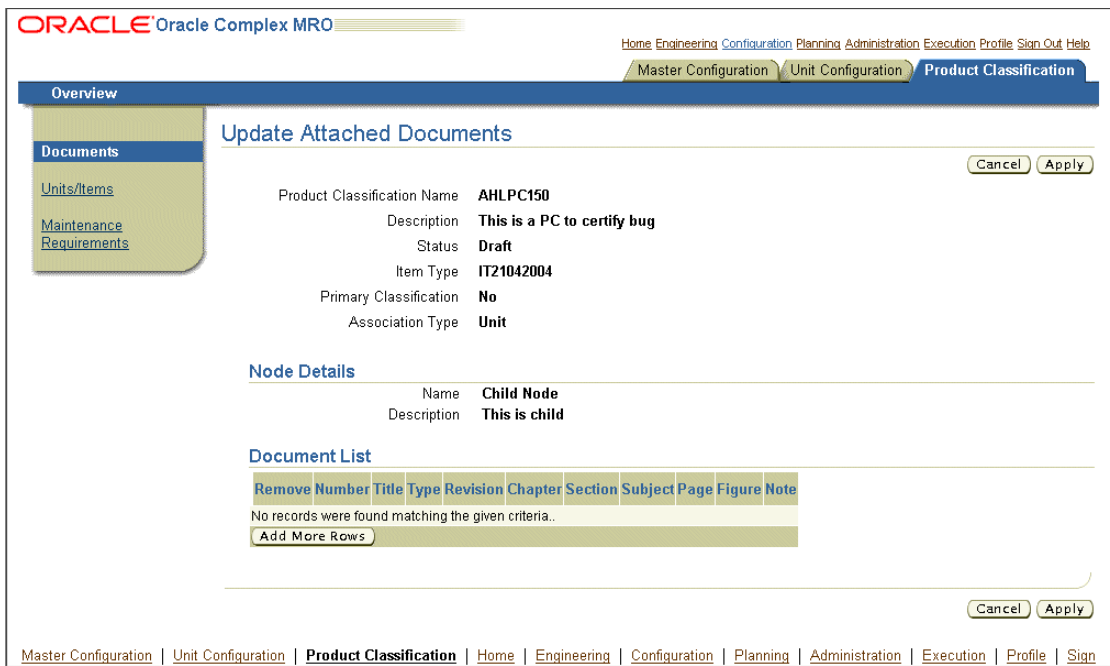
A draft status product classification must exist in the database.

To associate a document to a node:

1. Find the product classification that has the node that you want to associate with a document. See [Finding Product Classifications](#).

- 2. Select the product classification record, and click the corresponding tree icon. The Edit Product Classification page appears. The node tree appears on the left hand side of the page, displaying the nodes defined.
- 3. Use the tree to find the node to which you want to associate a document.
- 4. Select the node. The Edit Product Classification page refreshes with information on that node. Click More Details.
- 5. The Update Attached Documents page should appear. If it does not, click Documents on the left hand side menu to bring up the page.

Figure 7–16 Update Attached Documents page



- 6. The Update Attached Documents page displays currently attached documents. To add a document, click Add More Rows.

Figure 7–17 Attach Documents to Product Classification - Update Attached Documents page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Master Configuration](#) [Unit Configuration](#) [Product Classification](#)

Overview

Documents

[Units/Items](#)

[Maintenance Requirements](#)

Update Attached Documents

Product Classification Name

AHLPC150

Description

This is a PC to certify bug

Status

Draft

Item Type

IT21042004

Primary Classification

No

Association Type

Unit

Node Details









Name

Child Node

Description

This is child

Document List

Remove	Number	Title	Type	Revision	Chapter	Section	Subject
	<input type="text"/>	 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	 <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- 7. Select a document from the document number list of values. Click Apply to save the changes to the database.

Managing Product Classification 7-27

Figure 7–18 View Attached Document - Update Attached Documents page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution Profile

Sign Out

Help

Master Configuration

Unit Configuration

Product Classification

Overview

Documents

Units/Items

Maintenance Requirements

Confirmation

1 Document(s) successfully associated with the Product Classification Node.

Update Attached Documents

Cancel

Apply

Product Classification Name

AHLPC150

Description

This is a PC to certify bug

Status

Draft

Item Type

IT21042004

Primary Classification

No

Association Type

Unit

Node Details

Name

Child Node

Description

This is child

Document List

Previous

1-1 of 1

Next

Remove	Number	Title	Type	Revision	Chapter	Section	Subject	Page	Figure	Note
<input type="checkbox"/>	000-BBHAT-000	Bhat's Locomotive #%@^								

Add More Rows

8. Click Cancel to return to the previous page.

Attaching Units in Product Classification

Product Classification uses a tree structure to graphically display the structure of product classifications and the elements related to them. Units can be associated with product classifications by attaching them to the appropriate node of this tree structure.

Prerequisites:

A draft status product classification must exist in the database.

To attach a part or unit:

- Find the product classification that has the node that you want to associate with a unit. See [Finding Product Classifications](#).

2. Select the product classification record, and click the corresponding tree icon. The Edit Product Classification page appears. The node tree appears on the left hand side of the page, displaying the nodes defined.
3. Use the tree to find the node to which you want to attach a part or unit.
4. Click the node link. The Edit Product Classification page refreshes with information on that node. Click More Details.
5. The Update Attached Documents page appears. Click Units/Items from the left hand navigation menu. The Update Attached Units page appears, displaying any currently attached units.

Figure 7–19 Update Attached Units page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Master Configuration](#) [Unit Configuration](#) [Product Classification](#)

Overview

Documents

Units/Items

Maintenance Requirements

Update Attached Units

Cancel

Apply

Product Classification Name	AHLPC150
Description	This is a PC to certify bug
Status	Draft
Item Type	IT21042004
Primary Classification	No
Association Type	Unit

Node Details

Name	Child Node
Description	This is child

Attached Units

Remove	Name	Item	Serial Number
No records were found matching the given criteria..			
Add More Rows			

Cancel

Apply

[Master Configuration](#) | [Unit Configuration](#) | [Product Classification](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

6. To add a unit, click Add More Rows. Select an unit from the Name list of values.

Figure 7–20 Add Unit to Product Classification - Update Attached Units page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Master Configuration

Unit Configuration

Product Classification

Overview

Documents

Units/Items

Maintenance Requirements

Update Attached Units

Cancel

Apply

Product Classification Name

AHLPC150

Description

This is a PC to certify bug

Status

Draft

Item Type

IT21042004

Primary Classification

No

Association Type

Unit

Node Details











Name

Child Node

Description

This is child

Attached Units

Remove	Name	Item	Serial Number
	AHLUC001	 AHLITEM007	SR001
			
			
			
			

7. Click Apply to save the changes to the database.

Figure 7–21 View Attached Units - Update Attached Units page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration **Product Classification**

Overview

Documents

Units/Items

Maintenance Requirements

Confirmation • 1 Unit(s) successfully attached to the Product Classification Node.

Update Attached Units

Cancel Apply

Product Classification Name **AHLPC150**

Description **This is a PC to certify bug**

Status **Draft**

Item Type **IT21042004**

Primary Classification **No**

Association Type **Unit**

Node Details

Name **Child Node**

Description **This is child**

Attached Units

Previous 1-1 of 1 Next

Remove	Name	Item	Serial Number
<input type="checkbox"/>	AHLUC001	AHLITEM007	SR001

Add More Rows

Previous 1-1 of 1 Next

- Click Cancel to return to the previous page.

Viewing Utilization Forecasts

The Oracle Complex Maintenance, Repair, and Overhaul Product Classification module allows you to view any utilization forecasts related to a particular product classification.

Prerequisites:

A draft status product classification must exist in the database.

To view utilization forecasts:

- Retrieve the relevant product classification records. See [Finding Product Classifications](#).

2. Select the product classification record from the results table, and click the corresponding tree icon. The Edit Product Classification page appears. The node tree appears on the left hand side of the page, displaying the currently defined nodes.
3. Select the node, whose related utilization forecast you want to view. The Edit Product Classification page refreshes with information on that node. Click More Details.
4. The Update Attached Documents page appears. Click Utilization Forecast from the left hand navigation menu. The View Utilization Forecast page appears, displaying any related utilization forecasts.
5. Click Cancel to return to the previous page.

Viewing Associated Maintenance Requirements

The Oracle Complex Maintenance, Repair, and Overhaul Product Classification module allows you to view any maintenance requirements related to a particular product classification.

Prerequisites:

A product classification with associated maintenance requirements must exist in the database.

To view an associated maintenance requirement:

1. Find the product classification that has the node with the associated maintenance requirements you want to view. See [Finding Product Classifications](#).
2. Select the record, and click the corresponding tree icon. The Edit Product Classification page appears. The node tree appears on the left hand side of the page, displaying the currently defined nodes.
3. Use the tree to find the node with the maintenance requirement you want to view.
4. Select the node. The Edit Product Classification page refreshes with information on that node. Click More Details.
5. The Update Attached Documents page appears. Click Maintenance Requirements from the left hand navigation menu. The View Maintenance Requirement page appears, displaying any currently relevant maintenance requirements.

Figure 7–22 View Maintenance Requirement page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration **Product Classification**

Overview

Documents

Units/Items

Maintenance Requirements

View Maintenance Requirement

Cancel

Product Classification Name **AHLPC150**

Description **This is a PC to certify bug**

Status **Draft**

Item Type **IT21042004**

Primary Classification **No**

Association Type **Unit**

Name **Child Node**

Description **This is child**

Maintenance Requirement List

Title	Revision	Description	Program Type	Status	Effective From	Effective To
No records were found matching the given criteria..						

Cancel

Master Configuration | Unit Configuration | **Product Classification** | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

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6. Click Cancel to return to the previous page.

Checking Completeness

The Oracle Complex Maintenance, Repair, and Overhaul Product Classification module allows you to check a draft product classification for completeness before launching an approval process.

Prerequisites:

A primary product classification must exist in the database.

To check the completeness of a product classification:

1. Retrieve the product classification you want to check. See [Finding Product Classifications](#).

Figure 7-23 Find Product Classification Record - Search Product Classification page

ORACLE

Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Master Configuration

Unit Configuration

Product Classification

Overview

Search Product Classification

Name

Description

Item Type

Status

Primary Classification

Association Type

Document

Maintenance Requirements

Revision

Item

Unit

Go

Clear

Product Classification Results

Create

Select classification and ...

Check Complete

Copy

Previous 1-10 of 103 Next

Select	Name	Description	Item Type	Status	Primary Classification	Association Type	Tree	Remove
<input type="radio"/>	AHLPC001	This is a PC to certify bug	IT21042004	Complete	Yes	Unit		
<input type="radio"/>	AHLPC001	This is a PC to certify bug	IT21042004	Draft	Yes	Unit		
<input type="radio"/>	AHLPC001 test	This is a PC to certify bug	IT21042004	Draft	No	Unit		

- 2. Select the product classification you want to check completeness for from the Product Classification Results on the lower half of the page, then click Check Complete. Note that you cannot initiate the check complete process on a non-primary Product Classification.
- 3. Oracle Complex Maintenance, Repair, and Overhaul performs the check, then displays a confirmation message. Completeness errors, if any, are also displayed.

Figure 7–24 View Completeness Error - Unapplied Units page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Master Configuration

Unit Configuration

Product Classification

Overview

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Root Node

Unapplied Units

Please select a leaf node to attach unit(s) to.

Cancel

Product Classification Name

AHLPC001

Description

This is a PC to certify bug

Status

Draft

Item Type

IT21042004

Primary Classification

Yes

Association Type

Unit

Previous

1-1 of 1

Next

Name

Item

Serial Number

AHLUC001

AHLITEM007

SR001

Previous

1-1 of 1

Next

Cancel

Launching the Approval Process

The Oracle Complex Maintenance, Repair, and Overhaul Product Classification module allows you to start the approval process for a draft product classification.

Prerequisites:

There must be a draft status process classification in the database.

To launch the approval process:

1. Find the product classification for which you want to launch an approval process. See [Finding Product Classifications](#).
2. Select the record, and click the corresponding tree icon. The Edit Product Classification page appears, displaying the currently selected product classification.

Figure 7–25 Submit Product Classification for Approval - Edit Product Classification page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Master ConfigurationUnit ConfigurationProduct Classification

Overview

Copyright 2000, Oracle Corporation. All rights reserved.

ActionDelete NodeGo

Node 1

Node 2

Node 3

Edit Product Classification

* Indicates required field

Product Classification Details

NameKM24122003

StatusDraft

* Item TypeAsset Activity

* Primary ClassificationTrueFalse

* Association TypeUnitItem

Descriptionthis is a test pc

CancelSubmitApply

- 3. Click Submit. The Product Classification status changes from Draft to Approval Pending.

Figure 7–26 View Approval Status - Edit Product Classification page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Master ConfigurationUnit ConfigurationProduct Classification

Overview

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Node 1

Node 2

Node 3

Confirmation

Product Classification successfully updated.

Edit Product Classification

Cancel

Product Classification Details

Name

KM24122003

Status

Approval Pending

Item Type

Asset Activity

Primary Classification

Yes

Association Type

Unit

Description

this is a test pc

Cancel

Working With Unit Maintenance Plans

In a Maintenance, Repair, and Overhaul (MRO) environment, it is necessary to plan work on complex equipment and simple components. This work is typically specified by a set of maintenance requirements that have been defined by the engineering organization to ensure proper operation of the equipment or component. Unit Maintenance Plan is used to ensure that all maintenance requirements are accomplished on or prior to their due date, and provides the “demand” over a planning time window by forecasting the due date of maintenance requirements associated to a unit. It searches and displays maintenance requirements that are due for an equipment unit and provides maintenance personnel instant access to maintenance requirements, due date estimation, accomplishment history, and planning information for a unit configuration.

This chapter discusses the key functions supported by the Oracle Complex Maintenance, Repair, and Overhaul Unit Maintenance Plan module. The chapter provides process-oriented, task based procedures for using the application to perform essential tasks for managing maintenance planning activities.

See:

- [Finding Unit Maintenance Plan Records](#)
- [Associating a Maintenance Requirement to a Visit](#)
- [Calculating Maintenance Requirement Due Dates](#)
- [Viewing Unit Maintenance Requirement Detail and History](#)
- [Viewing Group Maintenance Requirements](#)
- [Initializing a Maintenance Requirement](#)
- [Viewing Unit Maintenance Requirement Details](#)

- [Viewing Maintenance Requirement Thresholds](#)
- [Finding Item Utilization Forecasts](#)
- [Updating Item Utilization Forecasts](#)
- [Finding and Updating a Product Classification Utilization Forecast](#)
- [Finding and Updating an Unit Configuration Utilization Forecast](#)
- [Entering Service Requests](#)

What is Unit Maintenance Plan?

Unit Maintenance Plan serves as a repository of the maintenance requirements related to units and any related subassemblies or components. It also enables forecasting of usage to determine due dates for fleet maintenance activities.

Unit Maintenance Plan manages information about the service readiness of any component or subassembly, and offers instantaneous online intelligence about the maintenance requirement due date, the planning status and the history of all the maintenance works performed on the unit. Another important feature of Unit Maintenance Plan is the ability to precisely forecast the maintenance due dates.

Key Business Processes

Unit Maintenance Plan supports the following business processes:

Maintain utilization forecast Unit Maintenance Plan allows maintenance personnel to forecast utilization for each unit in a fleet using appropriate units of measure such as operation hours, cycles, or mileage, for a period of time specified by the personnel.

View remaining serviceable time (UOM) of units. Determining the remaining service time of units, expressed in relevant units of measure (UOM), such as hours, cycles, or mileage is critical for maintenance planning. Unit Maintenance Plan has a full featured search for viewing and determining the remaining service time of units.

Model repetitive maintenance requirement over a time period. Replicate the maintenance requirement for any repetitive requirements over a user defined period, and provide the relevant unit of measure remaining for each occurrence of a maintenance requirement.

Calculate due dates of maintenance requirement Calculate due dates based on utilization forecast and maintenance frequency if a fixed due date is not specified.

Associate a Maintenance Requirement to a Visit Unit maintenance plan uses Oracle Complex Maintenance, Repair, and Overhaul Visit Work Package to associate a maintenance requirement to a visit. Unit Maintenance Plan allows you to schedule by associating a maintenance requirement group to visit appointments.

View Service Requests Track unplanned maintenance by viewing service requests created to meet maintenance requirements originating from inspections, or other administrative and executive actions.

Create CMRO Non-Routine Service Requests: Log problems that occurred with the unit, whether it occurs during operation, or is the result of a maintenance inspection.

Associate Maintenance Requirements to Non-Routine Service Requests: Diagnose the problem and identify the Fleet Maintenance Requirement to resolve the problem. If there is no available Fleet Maintenance Requirement existing in FMP, the user has to create the required maintenance requirement in the CMRO Fleet Maintenance Program Module before he/she is able to associate it with the Non-routine service request.

Fields Associated with Unit Maintenance Plans

The following fields appear on Unit Maintenance Plan pages that relate to creating, finding, and editing unit maintenance records.

Note: The Search icon beside fields implies the availability of a List of Values to choose from for those field values. To populate these fields, enter a partial search string using the generic substitution meta character%, and click the icon to retrieve and display matching results on a Select <field name> page. Click the relevant record on this page to return this value to the field on your unit maintenance page.

Fields on the Search Unit Maintenance Plan Page

This page is for searching and displaying any maintenance requirements that are due on a unit. The following fields appear on the Search Unit Maintenance Plan Page:

Unit Name User-defined name for a serialized part or assembly stored in the Oracle Complex Maintenance, Repair, and Overhaul database as a unit configuration. At this screen, the user provides all or part of name of an equipment record to be used to search Installed Base. For aviation users, this field might contain the FAA registration ID (called tail number) of the aircraft.

Part Number Inventory identifying number. Note that the Oracle Inventory does not store what is actually in stock, only what is available to stock, so in that way it is more like a catalog. Actual warehouse contents are stored in Oracle Installed Base. This field might contain an aircraft type, like "B777-200".

Sort By This field is not part of the database, but is used by the program to order the query results. The values displayed in the "pick-one" list are the names of other fields on this page. They are stored as seeded data and created by default. You can sort by due date, MR program, MR category, and implement status.

MR Title Search argument field that contains a user-defined title of the maintenance requirement for which the user is searching. The maintenance requirement itself is created using Fleet Maintenance Program when the maintenance plans are loaded into the database.

Due From Starting date range argument for imminent maintenance requirements.

Serial Number User-defined ID that uniquely identifies a part for which the user wants to view maintenance requirements.

MR Status Maintenance requirements can be in different states. These states are provided by default in Oracle Complex Maintenance, Repair, and Overhaul, but can be expanded by the user as needed. This search argument field permits specifying a status in the retrieval query.

Program Type The user may specify the name of a maintenance program that will be used as a search argument in retrieving imminent maintenance requirements. A maintenance program type might be "Corrosion Prevention." A maintenance requirement may be one of many that belong to the same program.

Due To Ending date range argument for imminent maintenance requirements.

Fields on the Search Visits Page

This page displayed in Unit Maintenance Plan is part of Visit Work Package. For more information on the fields of this page, see [Fields on the Search Visit Page](#) in Visit Work Package.

Fields on the View MR Detail & History Page

The following fields appear on the MR Detail & History Page:

Due Date is the date on which an imminent task is due to be completed. Click the calendar icon to display a calendar from which you can select a due date

Set Due Date determines the calendar due date for the maintenance requirement.

Accomplished Date indicates the date the maintenance was performed.

Status Maintenance requirements can be in different states. These states are provided by default in Oracle Complex Maintenance, Repair, and Overhaul, but can be expanded by the user as needed. This search argument field permits specifying a status in the retrieval query.

Fields on the Unit Maintenance Plan - Group MR Page

The following fields appear on the Unit Maintenance Plan - Group MR Page:

MR Status Maintenance requirements can be in different states. These states are provided by default in Oracle Complex Maintenance, Repair, and Overhaul, but can be expanded by the user as needed. This search argument field permits specifying a status in the retrieval query.

Visit Number refers to the Visit Number attribute of the visit template record retrieved.

Visit Date refers to the date on which the relevant maintenance visit is scheduled.

Fields on the View Maintenance Requirement Pages

The following pages in Unit Maintenance Plan are from Fleet Maintenance Program: View Attached Documents, View Attached Actions, View Effectivity, Relationships, and View Affected Items. For more information on the fields on these pages, see [Managing Maintenance Requirements](#).

Fields on the View Threshold Page

The following fields appear on the View Threshold Page:

Start Value The start counter value of the range from which the interval specified is valid. Start value is mutually exclusive with the Stop value, and begins the range for the interval in relation to the associated counter. This field does not apply for one time maintenance requirements.

Stop Value The stop counter value of the range before which the interval specified is valid. This value is mutually exclusive with the Start value, and ends the range for the interval in relation to the associated counter. This field does not apply for one time maintenance requirements

Interval Value The interval value for repetitive maintenance requirements, and drop-dead counter values for one time maintenance requirements. When used with one time maintenance requirements, interval will be a count down of the associated counter. When used with repetitive maintenance requirements, interval will represent the frequency of occurrence according to the associated counter.

Tolerance Before The number of counter units of measure that is acceptable for maintenance requirement accomplishment before the specified interval. This aids in planning maintenance jobs.

Tolerance After The number of counter units of measure that is permissible for maintenance requirement accomplishment after the specified interval. This value aids in planning maintenance jobs.

Start Date The start date of the range before which the interval specified is valid. This field value is mutually exclusive with the Stop Date, and begins the range for the interval in relation to the associated counter. This field does not apply for one time maintenance requirements.

Stop Date The stop date of the range before which the interval specified is valid. This date is mutually exclusive with Start Date, and ends the range for the interval

in relation to the associated counter. This field is not applicable for one time maintenance requirements.

Counter UOM The Unit of Measure as per the associated counter. This field value is returned when the counter is selected. This value is not editable.

Fields on the Search Part Page

The following fields appear on the Search Part Page:

Part Number Inventory identifying number. Note that the Oracle Inventory does not store what is actually in stock, only what is available to stock, so in that way it is more like a catalog. Actual warehouse contents are stored in Oracle Installed Base. This field might contain an aircraft type, like “B777-200”.

Search With A pull-down menu that allows you to specify items with an associated forecast, or with no forecast, or with both.

Forecast Available indicates if a forecast is available for this part.

Product Classification displays the product classification number for the part.

Product Type refers to the group the product belongs to according to its use or category.

Fields on the Update Item Utilization Forecast Page

The following fields appear on the Update Part Utilization Forecast Page:

Start Date Marks the start of a utilization forecast period.

End Date End of utilization forecast period. If left empty, Unit Maintenance assumes there is no end date and the forecast is unlimited.

Usage Per Day Estimates usage per day (as 100 miles per day).

UOM refers to the quantity (unit of measure) required to perform the task. The unit used is user defined, and can be in miles, hours, or cycles.

Fields on the Search Product Classification Page

The following fields appear on the Search Product Classification Page:

Name is an alphanumeric description of the product classification.

Document Title gives the name of the document associated with the product.

Unit Equipment unit identification number as stored in the unit configuration database.

Product Type refers to the group the product belongs to according to its use or category.

Fields on the Search Unit Page

The following fields appear on the Search Unit Page:

Search With A pull-down menu that allows you to specify items with an associated forecast, no forecast, or both.

Part Number The part identification number in the inventory database.

Serial Number The serial number of the part related to the unit.

Unit Equipment unit identification number as stored in the unit configuration database.

Forecast Available indicates if a forecast is available for this unit.

Product Classification indicates how the product associated with this unit is classified.

Product Type refers to the group the product belongs to according to its use or category.

Fields on the Utilization Forecast Page

This page permits the user to retrieve a product classification record from the database. A product classification groups equipment units by function. Maintenance requirements can be associated with product classifications. Planners can then manage maintenance based on the purpose to which equipment is put. For

example, a product classification called “short-haul” might be created for aircraft with a low flight hour/pressurization cycle ratio.

Name User-defined product classification name search criterion field.

Product Type The inventory number corresponding to the product type.

Unit Equipment unit identification number as stored in the unit configuration database.

Part The part identification number in the inventory database.

Start Date Marks the start of a utilization forecast period.

End Date End of utilization forecast period. If left empty, Unit Maintenance assumes there is no end date and the forecast is unlimited.

Usage Per Day Estimates usage per day (as 100 miles per day).

UOM refers to the quantity (unit of measure) required to perform the task. The unit used is user defined, and can be in miles, hours, or cycles.

Finding Unit Maintenance Plan Records

The Unit Maintenance Plan module allows you to search for records using any or nearly any combination of the following criteria: unit name, part number, serial number, MR Title, MR status, program type, or due date ranges.

Prerequisites:

Any relevant maintenance requirements must already be set up in Fleet Maintenance. The Unit configuration records from which you want to derive a unit maintenance plan for must exist in the database. It will help to know at least part of the unit name, part or serial number, or the MR Title of the sought after unit(s) in order to conduct a search.

To find Unit Maintenance Plan records:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of Unit Maintenance Plan appears.

Figure 8–1 Search Unit Maintenance Plan page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview | Utilization Forecast

Unit Maintenance PlanVisit Work PackageLong Term Planning

Search Unit Maintenance Plan

Unit Name

Item

Sort by

Due Date

Title

Due from

☐ Show Dependent Components

☐ Show Replicate

Go

Clear

Serial Number

Status

Open

Program Type

Due to

☐ Include Tolerance Dates

☐ Show Child Maintenance Requirements

Results: Unit Maintenance Requirements

Select	Program Type	Title	Item	Serial Num	UOM	Remain	Cnt	Earlier Due	Due Date	Latest Due	Tolerance	Status	Sched. Date	Visit	Originator Title	Dependent Title	Deferred From	Deferred To
No records were found matching the given criteria.																		

2.

Enter the information in the fields for which you know the value. For field descriptions, see [Fields on the Search Unit Maintenance Plan Page](#).
3.

Click Go. The lower half of the screen displays all matching records in the database.

Figure 8–2 View Search Results - Search Unit Maintenance Plan page

Search Unit Maintenance Plan

Unit Name

Item

Sort by

Due Date

Title

Due from

☐ Show Dependent Components

☐ Show Replicate

Go

Clear

Serial Number

Status

Open

Program Type

Due to

☐ Include Tolerance Dates

☐ Show Child Maintenance Requirements

Results: Unit Maintenance Requirements

Select Unit Maintenance Plan and ...Associate to Visit

Previous

1-10 of 2906

Next

Select	Program Type	Title	Item	Serial Num	UOM	Cnt	Earlier Due	Due Date	Latest Due	Tolerance	Status	Sched. Date	Visit	Originator Title	Dependent Title	Deferred From
<input type="radio"/>	Corrosion R-FMP100		RADITEM1-APS-Trackable	NegCounterTest				19-NOV-2003								
<input type="radio"/>	Corrosion R-FMP100		RADITEM1-APS-Trackable	APS5				19-NOV-2003								
<input type="radio"/>	Corrosion R-FMP100		RADITEM1-APS-Trackable	APS3				19-NOV-2003								

4. To restart a search for records, click Clear. All the search fields on the page will clear. (If you have retrieved records being displayed in the lower half of the screen, these records will remain).

After entering the new search criteria, click Go to begin searching the database for records that match.

Use the Due From and Due To fields to narrow your search to units due for maintenance between specified dates, or any units due before or after a specified date. If you are not sure of the dates you are looking for, pull up a calendar by clicking on the calendar icon next to the relevant field. 'Due to' represents the end of a period of time during which the Maintenance Requirement due date is valid within the Due From date.

Note: Select the 'Show Dependent Components' check box to return any maintenance requirements for any other components of the assembly or sub assembly to which the unit belongs. Select 'Show Replicate' to return the repeating maintenance requirements of the unit based on interval frequency and a rolling time window.

Associating a Maintenance Requirement to a Visit

The Unit Maintenance Plan module is able to associate a maintenance requirement or the maintenance requirement routes to a visit by calling Visit Work Package.

Prerequisites:

Any relevant maintenance requirements must already be set up in Fleet Maintenance. The Unit configuration records from which you want to derive unit maintenance plan must exist in the database. It will help to know at least part of the unit name, part or serial number, or MR Title of the sought after unit(s) in order to conduct a search.

To associate a maintenance requirement to a visit:

From the search results page in Unit Maintenance Plan:

1. Retrieve the unit maintenance plan record that you want to associate with a visit (see [Finding Unit Maintenance Plan Records](#)).
2. Select the record, and choose Associate to Visit from the pull-down menu in the results header.

Figure 8–3 Select Associate to Visit Option - Search Unit Maintenance Plan page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast

Search Unit Maintenance Plan

Unit Name

Item

Sort by

Title

Due from

☐ Show Dependent Components

☐ Show Replicate

Serial Number

Status

Program Type

Due to

☐ Include Tolerance Dates

☐ Show Child Maintenance Requirements

Results: Unit Maintenance Requirements

Select Unit Maintenance Plan and ... Associate to Visit

Previous 1-10 of 2906 Next

Select	Program Type	Title	Item	Serial Num	UOM	Cnt	Earlier Due	Due Date	Latest Due	Tolerance	Status	Sched. Date	Visit	Originator Title	Dependent Title	Deferred From
<input type="radio"/>	Corrosion R-FMP100		RADITEM1-APS-Trackable	NegCounterTest				19-NOV-2003								

3. Click Go. The Search Visit page appears.

Figure 8–4 Search Visit page

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Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview | Utilization Forecast

Unit Maintenance Plan

Visit Work Package

Long Term Planning

Search Visit

Item

Serial Number

NegCounterTest

Organization

Visit Number

Start From Date

Visit Status

Planning

Category

Unit

Service Request

Department

Visit Name

Start To Date

Visit Type

Go

Clear

Search Results

Cancel

Select

Visit Number

Visit Name

Item

Unit

Serial Number

Visit Type

Organization

Department

Start Date

Visit Status

No records were found matching the given criteria..

4. Search for a visit, and associate it with the unit maintenance plan. The Create Planned Task page appears, displaying the association. You can click Apply to navigate to the Search Visit Tasks page, and define tasks for the visit.

Figure 8–5 Create Planned Task page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast

Create Planned Task

Visit Number 2	Visit Type A Check	Item MRO-C1600
Unit C-1600, Tail # 101	Start Date	Organization
Serial Number 101	End Date	Department

[Unit Maintenance Plan Requirements](#)

Maintenance Requirement R-FMP100	Due By Date 19-NOV-2003
Item RADITEM1-APS-Trackable	Serial Number NegCounterTest

[Task Header Information](#)

Department	<input type="text"/>
Service Request	<input type="text"/>

Cancel Revert Apply

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Calculating Maintenance Requirement Due Dates

You can use Unit Maintenance Plan to estimate due dates and any repetitive maintenance requirement for the selected unit.

Prerequisites:

Any relevant maintenance requirements must already be set up in Fleet Maintenance. The relevant maintenance requirements must be initialized, and the information for Last Accomplishment must be set up. A product classification forecast and/or an unit utilization forecast must be defined to calculate due dates.

To calculate maintenance requirement due dates:

1. Retrieve the unit maintenance plan record for which you want to view maintenance requirement details (see [Finding Unit Maintenance Plan Records](#)).

- 2. Select the record, and choose Calculate Due Dates from the drop-down menu in the results header. Click the Go button.
- 3. Unit Maintenance Plan will calculate the due dates for the selected record, then confirm that it has done so.

Figure 8–6 Calculate Due Dates - Search Unit Maintenance Plan page

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[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Overview | Utilization Forecast

Unit Maintenance Plan | Visit Work Package | Long Term Planning

Confirmation

Due Date has been calculated Successfully.

Search Unit Maintenance Plan

Unit Name

Item

Sort by

Title

Due from

☐ Show Dependent Components

☐ Show Replicate

Go

Clear

Serial Number

Status

Program Type

Due to

☐ Include Tolerance Dates

☐ Show Child Maintenance Requirements

Results: Unit Maintenance Requirements

Select Unit Maintenance Plan and ...

Calculate Due Date

Previous

1-10 of 2906

Next

Select	Program Type	Title	Item	Serial Num	UOM	Cnt	Earlier Due	Latest Due	Tolerance	Status	Sched. Date	Visit	Originator Title	Dependent Title	Deferred From
--------	--------------	-------	------	------------	-----	-----	-------------	------------	-----------	--------	-------------	-------	------------------	-----------------	---------------

Viewing Unit Maintenance Requirement Detail and History

The Unit Maintenance Plan module allows you to view maintenance requirement details.

Prerequisites:

Any relevant maintenance requirements must already be set up in Fleet Maintenance. The Unit configuration records from which you want to derive unit maintenance plan must exist in the database. It will help to know at least part of the

unit name, part or serial number, or MR Title of the sought after unit(s) in order to conduct a search.

To view Unit Maintenance requirement history:

1. Retrieve the unit maintenance plan record for which you want to view details (see [Finding Unit Maintenance Plan Records](#)).
2. Select the record, and choose View Details & History from the drop-down menu. Click Go.
3. The View MR Detail and History page appears displaying the history and details relevant for the selected record.

Figure 8–7 View Maintenance Requirement Detail & History page

ORACLE Oracle Complex MRO

[Home](#)
[Engineering](#)
[Configuration](#)
[Planning](#)
[Administration](#)
[Execution Profile](#)
[Sign Out](#)
[Help](#)

Overview | Utilization Forecast

Unit Maintenance Plan
Visit Work Package
Long Term Planning

View Maintenance Requirement Detail & History

Unit Name
Status
Tolerance Flag
Date Run
Remarks
Counter Name
Visit End Date

Item
Program Type
Implement Status
Due Date
Revision
Visit Number
Visit Status

RADITEM1-APS-Trackable
Corrosion
Mandatory
19-NOV-2003

Serial Number
Title
Description
Category
Due Counter
Visit Start Date

AP55
R-FMP100
to test bug
Ground Service
Equipment

Results: Maintenance Requirement History

Due Date

Set Due Date

Accomplished Date

Remarks

Status

No records were found matching the given criteria..

4. Select 'Cancel' to return to previous page.

Viewing Group Maintenance Requirements

Unit Maintenance Plan allows you to view group Maintenance requirements.

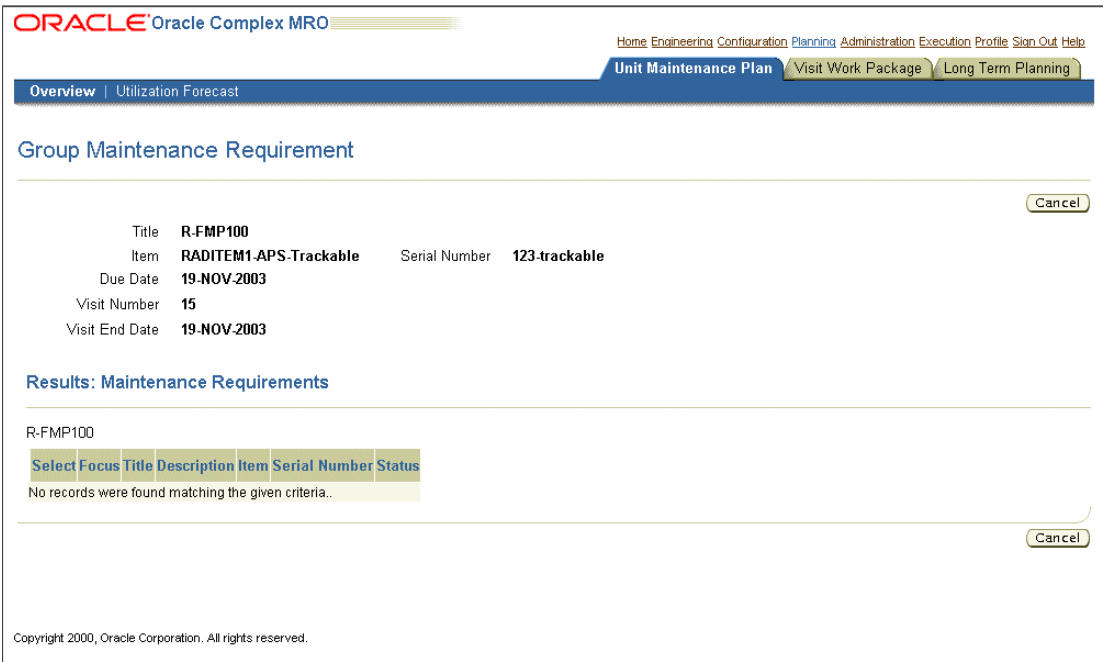
Prerequisites:

Any relevant maintenance requirements must already be set up in Fleet Maintenance.

To group Maintenance requirements:

- 1. Retrieve the unit maintenance plan record for which you want to view group maintenance requirement details (see [Finding Unit Maintenance Plan Records](#)).
- 2. Select the record, and choose View Group MR from the drop-down menu. Click Go.
- 3. The Unit Maintenance Plan - Group MR page appears displaying the group maintenance requirements relevant for the selected record.

Figure 8–8 Group Maintenance Requirement page



4. Select 'Cancel' to return to previous page.

Initializing Maintenance Requirements

Unit Maintenance Plan module allows you to initialize maintenance requirements.

Prerequisites:

Any relevant maintenance requirements must already be set up in Fleet Maintenance.

To initialize a maintenance requirement:

1. Retrieve the unit maintenance plan record you want to initialize (see [Finding Unit Maintenance Plan Records](#)).
2. Select the record, and choose Initialize MR from the drop-down menu. Click Go. The Initialize Maintenance Requirement page appears.

Figure 8–9 Initialize Maintenance Requirement page

ORACLE

Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview | Utilization Forecast

Unit Maintenance Plan | Visit Work Package | Long Term Planning

Initialize Maintenance Requirement

Item

R-ITEM1-Trackable

Serial Number

ctr-sno-1

Program

Corrosion

Title

FMP-Dec4

Init. Action

First Due

Set Date

Cancel

Apply

Remove

Counter Name

Counter Value

UOM

No records were found matching the given criteria..

Add More Rows

Cancel

Apply

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3. Select Initializing action, First Due, or Initial Accomplishment from the Init. Action pull-down menu.
4. Select a date you want to set the initialization on, in the Set Date field.
5. To define first due or last accomplished counter values for the requirement, click Add More Rows. Enter information in the provided fields.
6. Click the Apply button.
7. A header on the page should display the following message:
“Confirmation—Maintenance Requirement Initialized”

Figure 8–10 View Confirmation - Initialize Maintenance Requirement page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Overview

Utilization Forecast

Unit Maintenance Plan

Visit Work Package

Long Term Planning

Confirmation

Maintenance Requirement Initialized

Initialize Maintenance Requirement

Cancel

Apply

Item

R-ITEM1-Trackable

Serial Number

ctr-sno-1

Program

Corrosion

Title

FMP-Dec4

Init. Action

First Due

Set Date

17-JUN-2004

Remove

Counter Name

Counter Value

UOM

No records were found matching the given criteria.

Add More Rows

Cancel

Apply

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8. Select 'Cancel' to return to the previous page.

Viewing Unit Maintenance Requirement Details

The Unit Maintenance Plan module can display all maintenance requirements applicable to a selected unit. You can sort the results by due date, category, program type, implement status, or group type. Maintenance Requirements with unspecified due dates appear at the top of the list by default. You can calculate the remaining time of a maintenance requirement based on many factors, including the usage counter, the UOM time remaining, and utilization forecast and maintenance requirement thresholds.

The system will allow the user to filter by maintenance requirement type or by status: Accomplish, Terminate, Initialized or Open.

Prerequisites:

Any relevant maintenance requirements must already be set up in Fleet Maintenance. It will help to know at least part of the unit name, part or serial number, or MR Title of the sought after unit(s) in order to conduct a search.

To view maintenance requirement details:

- 1. Retrieve the unit maintenance plan record for which you want to view maintenance requirement details (see [Finding Unit Maintenance Plan Records](#)).
- 2. Select the record, and choose View MR Details from the drop-down menu. Click Go.
- 3. The View Maintenance Requirement page appears displaying the information for that record.

Figure 8–11 View Maintenance Requirement page



- 4. From the View Maintenance Requirement page, you can use the side navigation menu to navigate to the following pages:

- Documents
- Routes
- Action
- Effectivities
- Relationships
- Effected Items

5. Select 'Cancel' to return to the previous page.

Viewing Maintenance Requirement Thresholds

The Unit Maintenance Plan module allows you to view maintenance requirement thresholds.

Prerequisites:

Any relevant maintenance requirements must already be set up in Fleet Maintenance. The Unit configuration records from which you want to derive unit maintenance plan must exist in the database. It will help to know at least part of the unit name, part or serial number, or MR Title of the sought after unit(s) in order to conduct a search.

To view maintenance requirement thresholds:

1. Retrieve the unit maintenance plan record for which you want to view maintenance requirement thresholds (see [Finding Unit Maintenance Plan Records](#)).
2. Select the record, and choose View Threshold from the drop-down menu. Click Go.
3. The Unit Maintenance Plan - View Threshold page appears, displaying the thresholds relevant for the selected record.

Figure 8–12 Unit Maintenance Plan - View Threshold page

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[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview | Utilization Forecast

Unit Maintenance PlanVisit Work PackageLong Term Planning

Unit Maintenance Plan - View Threshold

Cancel

Item

R-ITEM1-Trackable

Due Date

18-DEC-2003

Counter Name

FMP-Dec4

Title

FMP-Dec4

Serial Number

ctr-sno-1

Due Counter

Program

Corrosion

Results: Maintenance Thresholds

Start Value	Stop Value	Interval Value	Tolerance Before	Tolerance After	Start Date	Stop Date	Counter UOM	Counter Name	Triggered
No records were found matching the given criteria..									

Cancel

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- 4. Select 'Cancel' to return to previous page.

Finding Item Utilization Forecasts

Oracle Complex Maintenance, Repair, and Overhaul permits use of meta characters when you type a word, or part of a word, to use as a search argument. Use% to represent any string of zero or more characters. Use _ to represent any single character. For example, if the database contains a record with the value “ENGINE” in a field, typing “E%” will return all records where the field value begins with “E”.

Prerequisites:

Any relevant maintenance requirements must already be set up in Fleet Maintenance. The Unit configuration records from which you want to derive unit maintenance plan must exist in the database. It will help to know at least part of the unit name, part or serial number, or MR Title of the sought after unit(s) in order to conduct a search.

To find an item utilization forecast:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of Unit Maintenance Plan appears.
2. Select the Utilization Forecast secondary tab. The Search Item page appears.

Figure 8–13 Search Item page

ORACLE® Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast

Search Item

Search Product Classification
Search Unit

Item

Description

Search With

Go Clear

Search Results

Select	Item	Description	Forecast Available	Product Classification	Item Type
No records were found matching the given criteria..					

Unit Maintenance Plan | Visit Work Package | Long Term Planning | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

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3. Enter the information in the fields for which you know the value. For field descriptions, see [Fields on the Item Utilization Forecast Page](#).
4. Click Go. The lower half of the screen displays all matching records in the database.

Figure 8–14 View Item Search Results - Search Item page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Unit Maintenance Plan [Visit Work Package](#) [Long Term Planning](#)

Overview | Utilization Forecast

Search Item

[Search Product Classification](#)

[Search Unit](#)

Search Item

Item

Description

Search With

Go

Clear

Search Results

Select Item and ..

Utilization Fo

Previous 1-4 of 4 Next

Select	Item	Description	Forecast Available	Product Classification	Item
<input type="radio"/>	Capital Item KM001	This is a test item for item type Capital Item for AHL	No	KM-PC31122003	Capital It
<input type="radio"/>	Radhika Item1 aps take2	Radhika Item1 aps take2	Yes	apspc	APSTYPE
<input type="radio"/>	Radhika Item2 aps p	Radhika Item2 aps p	Yes	apspc	APSTYPE
<input type="radio"/>	VG0205	New Item	Yes	PC0304	PTO Opti

Previous 1-4 of 4 Next

Select Item and ..

Utilization Forecast

Updating Item Utilization Forecasts

The Unit Maintenance Plan module allows you to create and update item configuration utilization forecasts.

Prerequisites:

Any relevant maintenance requirements must already be set up in Fleet Maintenance. The Unit configuration records from which you want to derive unit maintenance plan must exist in the database. It will help to know at least part of the unit name, part or serial number, or MR Title of the sought after unit(s) in order to conduct a search.

To update an item utilization forecast:

1. Retrieve the part record with the forecast you want to update (see [Finding Item Utilization Forecasts](#)).

8-26 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

2. Select the record, and click Utilization Forecast. The Update Part Utilization Forecast page appears.

Figure 8–15 Update Item Utilization Forecast page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast

Confirmation • 1 records updated

Update Item Utilization Forecast

Product Classification **KM-OC31122003-1** Item Type **Capital Item**

Item **Capital Item KM001** Description **This is a test item for item type Capital Item for AHL**

Utilization Forecast

Previous 1-1 of 1 Next

Remove	Start Date	End Date	Usage Per Day	UOM
<input type="checkbox"/>	17-JUN-2004	24-JUN-2004	20	10P

Add More Rows

Previous 1-1 of 1 Next

Cancel Copy Apply View

3. Enter the information in the fields provided. If no utilization forecast is defined, the page will be empty. To define a forecast, click Add More Rows. Enter information in the fields provided.

Figure 8–16 Enter Forecast Information - Update item Utilization Forecast page

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[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Unit Maintenance PlanVisit Work PackageLong Term Planning

Overview | Utilization Forecast

Update Item Utilization Forecast

Product Classification KM-OC31122003-1






Item Type Capital Item

Item Capital Item KM001

Description This is a test item for item type Capital Item for AHL

CancelCopyApplyView

Utilization Forecast

Remove	Start Date	End Date	Usage Per Day	UOM
	17-JUN-2004	24-JUN-2004	10	10P
				
				
				
				

Add More Rows

CancelCopyApplyView

- 4. Click Apply to retain the utilization forecast information in the database.

Figure 8–17 Save Forecast Record - Update Item Utilization Forecast page

ORACLE® Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast

Confirmation • 1 records created

Update Item Utilization Forecast

Product Classification **KM-OC31122003-1**

Item **Capital Item KM001**

Item Type **Capital Item**

Description **This is a test item for item type Capital Item for AHL**

Utilization Forecast

Previous 1-1 of 1 Next

Remove	Start Date	End Date	Usage Per Day	UOM
<input type="checkbox"/>	17-JUN-2004	24-JUN-2004	10	10P

Add More Rows

Previous 1-1 of 1 Next

Cancel Copy Apply View

- To remove a forecast from the list, select the Remove check box next to the forecast then click Apply.
- Select 'Cancel' to return to the previous page.

Finding and Updating a Product Classification Utilization Forecast

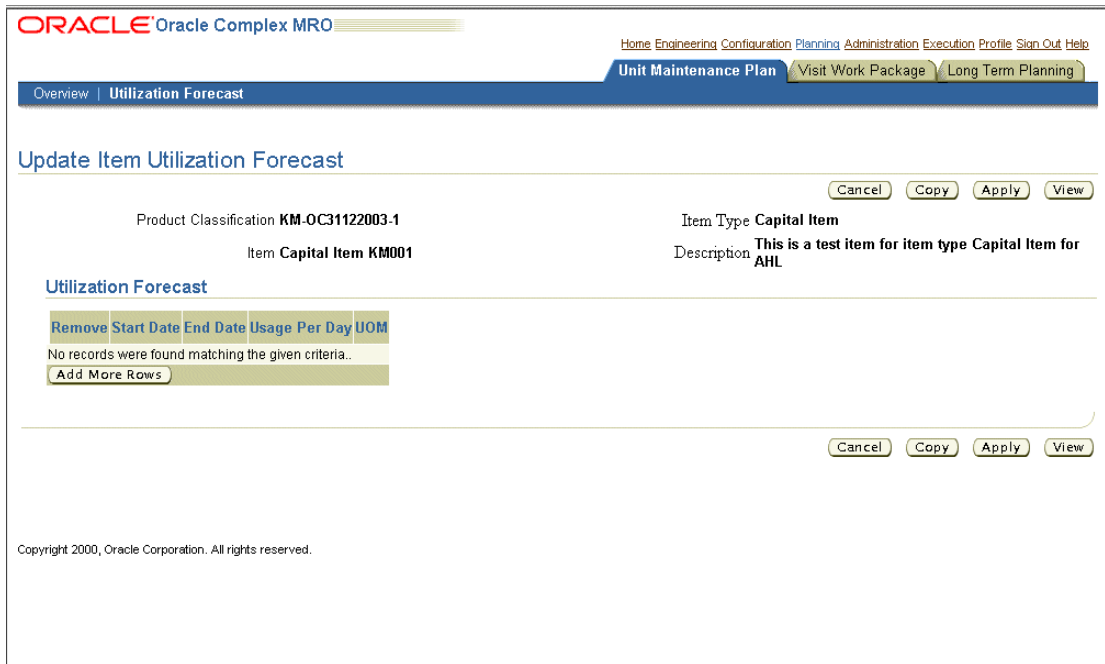
In order to estimate due dates for the Maintenance Requirement applied to the Unit Maintenance Plan, you need to be able to convert the remaining time of a maintenance requirement UOM that is in a form other than a calendar date into a calendar date. The Utilization Forecast page helps to facilitate this calculation. For example, an estimate of driving 50 miles a day will translate the requirement of changing engine oil every 3000 miles to 60 days.

Prerequisites:

The Unit configuration records on which you want to base an utilization forecast and the Primary Product Classification must exist in the database.

To update a product classification utilization forecast:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of Unit Maintenance Plan appears.
2. Select the Utilization Forecast secondary tab. The Search Part page appears.
3. Enter the information in the fields for which you know the value. For field descriptions, see [Fields on the Search Unit Maintenance Plan Page](#).
4. Click Go. The lower half of the screen displays all matching records in the database.
5. Select the part that you want to create or update the product classification for, and click Utilization Forecast.
6. The Update Part Utilization Forecast page appears. Make any necessary changes. Click Add More Rows to enter new forecast data.
7. Click Apply to add the changes to the database.

Figure 8–18 Edit Records - Update Item Utilization Forecast page


ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Overview | Utilization Forecast

Unit Maintenance Plan Visit Work Package Long Term Planning

Update Item Utilization Forecast

Product Classification **KM-OC31122003.1** Item Type **Capital Item**

Item **Capital Item KM001** Description **This is a test item for item type Capital Item for AHL**

Cancel Copy Apply View

Utilization Forecast

Remove	Start Date	End Date	Usage Per Day	UOM
No records were found matching the given criteria..				

Add More Rows

Cancel Copy Apply View

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Note: All Product Classification records are read-only.

To reset the form and start a new search, click on the Clear button.

Finding and Updating a Unit Configuration Utilization Forecast

The Unit Maintenance Plan module allows you to create and update unit configuration utilization forecasts.

Prerequisites:

Any relevant maintenance requirements must already be set up in Fleet Maintenance.

To create an Unit Configuration Utilization Forecast:

- 1. Using the Result Product Classification Tree Structure located on the left hand side of the page, double click on the Product Classification or Unit for which the utilization forecast is to be added or updated.
- 2. The Update Product Classification Utilization Forecast section appears directly to the right of the Product Classification Tree.
- 3. Click on the Add More Rows Icon to add a new utilization forecast.

Figure 8–19 Create Utilization Forecast - Update item Utilization Forecast page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast

Update Item Utilization Forecast

Cancel Copy Apply View

Product Classification **KM-OC31122003-1**
Item **Capital Item KM001**
Utilization Forecast

Item Type **Capital Item**
Description **This is a test item for item type Capital Item for AHL**

Previous 1-1 of 1 Next

Remove	Start Date	End Date	Usage Per Day	UOM
<input type="checkbox"/>	17-JUN-2004	24-JUN-2004	20	10P

Add More Rows

Previous 1-1 of 1 Next

- 4. Enter a start date in the Start Date field or click on the calendar selector icon next to the date field to bring up a calendar from which you can select the desired date.
- 5. Enter the end date in the Start Date field or click on the calendar selector icon next to the date field to bring up a calendar from which you can select the desired date. Note that the end date must be later or on the same date as the start date.

- 6. Enter the usage per day in the Usage Per Day field.
- 7. Enter the UOM directly to the UOM field or partial of UOM followed by the generic substitution meta character% in UOM field, and click the search icon. Select the UOM from the search result.
- 8. Click 'Apply' to Save the record. Before saving the record, the system will check for duplicate records and for any overlap of the utilization forecast.

Figure 8–20 View New Forecast Record - Update Item Utilization Forecast page

ORACLE®Oracle Complex MRO

HomeEngineeringConfigurationPlanningAdministrationExecutionProfileSign OutHelp

Unit Maintenance PlanVisit Work PackageLong Term Planning

Overview | Utilization Forecast

Confirmation • 1 records created

Update Item Utilization Forecast

Product Classification KM-OC31122003-1

Item Type Capital Item

Item Capital Item KM001

Description This is a test item for item type Capital Item for AHL

Utilization Forecast

Previous1-2 of 2Next

Remove	Start Date	End Date	Usage Per Day	UOM
<input type="checkbox"/>	17-JUN-2004	24-JUN-2004	20	10P
<input type="checkbox"/>	25-JUN-2004	30-JUN-2004	10	10P

Add More Rows

Previous1-2 of 2Next

CancelCopyApplyView

CancelCopyApplyView

Entering Service Requests

Service requests (SR) can be created to track requirements that are not generated by Fleet Maintenance Program. These maintenance requirements may arise in the following conditions:

- When a non-routine job/requirement is discovered - These non-routine, or unplanned, jobs can be accomplished in the originating visit, or they can be

deferred to subsequent visits. The Service Request is the instance of this requirement and is used for planning purposes to make sure that the requirement is accomplished.

- During the utilization of the applicable unit/item - An example of this in the aviation industry is the crew log. When a problem, or potential problem, is identified, the crew will enter it into the system to be followed up with in the maintenance process.
- Through administrative or executive actions - In the aviation industry, there might be a decision to change the paint scheme of a particular plane, or the seating arrangement.

An integrated service request system enables these requests to be fed directly into the planning process. You can associate predefined maintenance solutions and resource requirements with a service request. You can schedule these service requests as you schedule the requirements generated by FMP.

You can create a CMRO service request (SR) using the service request window in Oracle Service. You can associate one or multiple maintenance requirements with the SR. A Maintenance requirement with program type of non-routine is created in Unit Maintenance Plan. You can track not only planned maintenance in unit maintenance plan, but also the unplanned maintenance originating from production inspections or through the manual creation of a service request (i.e. pilot squawk).

See

- [Creating Non-Routine Service Requests](#)
- [Associating Maintenance Requirements](#)
- [Viewing Non-Routine Service Requests](#)
- [Updating Service Requests](#)

Creating Non-Routine Service Requests

Prerequisites:

CMRO Fleet Maintenance Program and Unit Maintenance plan must have been set up. A Service Request Type of Complex Maintenance must have been setup.

To create non-routine service request:

1. Change responsibility to Oracle Customer Support. From the navigator, select Service Request > Create Service Requests. The Service Request window appears.

Figure 8–21 Service Request window

Service Request - AmericaLos_Angeles

Log and Notes Profile...

Contact Type: **Customer** Customer Type: **Organization** Category: Item: Number: Reported: **17-JUN-2004 06:19**

First: Last: Email: Account: Desc: Type: **Depot Repair**

Relationship: Number: Instance: Status: **Open**

Phone: Phone Type: Serial: Severity: **High**

Group: **Eastern Regio**

Owner: **Abbott, Ms. R**

Subject Workbench Contacts / A... Tasks Interactions Related Obj... Service History Charges Work Order Maintenance... Custom1 Custom2

Item: Component: Subcomponent: Item Instance: System: Covered Site: Item Rev: Component Rev: Subcomponent Rev: Status: Lot Num: Sales PO Num:

Refresh Site (B) Instance Configuration (M) Instance Detail (J) Register Instance (K)

Contracts

Contract	Service	Description	Status	Coverage	Warranty	Start Date	End Date
<input type="checkbox"/>					<input checked="" type="checkbox"/>		
<input type="checkbox"/>					<input checked="" type="checkbox"/>		

☒ Entitled Contracts (X) ☐ All Contracts (Y) Get Contracts (Q)

2. Create a Service Request of type Complex Maintenance.
3. Enter information in the fields for which you know the value. The following fields are mandatory:
 - Type: Complex MRO Service Request Type, the LOV returns the Complex Maintenance Requirement Service Request Type.
 - Instance: CMRO Unit Maintenance Plan Instance number
 - Status: Open
 - Summary: This will appear as the description of the Unit Maintenance Plan

For information on other field descriptions, refer to the *Oracle Customer Support Implementation Guide*.

- 4. Save your work.

Figure 8–22 View Service Request - Service Request window

Service Request (41848 - testing cmro) America/Los_Angeles

Log and NotesProfile...

Contact Type

First

Last

Email

Number

Relationship

Phone

Customer Type

Name

Number

Account

Email

Phone

Phone Type

Organization

Business World

2813

1608

operations@orac

650 444 4444

Fax

Category

Item

Desc

Revision

Instance

Serial

Tag

Number

Reported

Type

Status

Severity

Group

Owner

41848

07-JAN-2004 01:01

Raj_CMRO_Type

Open

Low

Eastern Regi

Daugherty, M

Subject

Workbench

Contacts / A...

Tasks

Interactions

Related Obj...

Service History

Charges

Work Order

Maintenanc...

Custom1

Custom2

Item

Component

Subcomponent

Item Instance

System

Covered Site

MRO-74101054-2

70213

2391 L St; San Jose; CA; US; 95106

Fan, Equipment Cooling

Type

Order Num

Refresh Site (B)

MRO_AIRCRAFT

Item Rev

Component Rev

Subcomponent Rev

Status

Lot Num

Sales PO Num

CREATED

Instance Configuration (M)

Instance Detail (J)

Register Instance (K)

Contracts

Contract	Service	Description	Status	Coverage	Warranty	Start Date	End Date
<input checked="" type="checkbox"/> 21093	WR23763	Extended Notebook PC S	Entered	Gold Coverage	<input checked="" type="checkbox"/>	24-DEC-2003	23-FEB-2005
<input type="checkbox"/>					<input type="checkbox"/>		

☒ Entitled Contracts (X)

☐ All Contracts (Y)

Get Contracts (Q)

Note: Concurrently, a Maintenance requirement with program type of non-routine is created in CMRO Unit Maintenance Plan.

Associating Maintenance Requirements

Prerequisites:

The Service Request, with which you want to associate the maintenance requirements, must exist in the database. The maintenance requirement must have been defined in Fleet Maintenance Program.

To associate maintenance requirements:

1. Retrieve the Service Request Record, with which you want to associate the maintenance requirement.
2. In the Service Request window, select the Maintenance Requirement tab. The Maintenance Requirement tab is enabled only for service requests of type Complex MRO.

Figure 8–23 Maintenance Requirements tab - Service Requests window

The screenshot shows a software window titled "Service Request (40048 - test cmro) - America/Los_Angeles". The window contains a form with various fields for customer and service request information. The "Maintenance Requirements" tab is selected, showing a table with columns for Program Type, Title, Description, and Status. The table has one row with a yellow background.

Program Type	Title	Description	Status

3. Select the Maintenance Requirement to be associated by the following search criteria:
 - Program Type: CMRO Fleet Maintenance Program MR type
 - Title: CMRO Fleet Maintenance Program MR Title

Figure 8–24 Associate Maintenance Requirements - Service Request window

Service Request (40048 - test cmro) - America/Los_Angeles

Log and NotesProfile...

Contact TypeCustomer

FirstMS

LastAmy

Emailjack.wong@orac

Number3015

RelationshipEmployee Of

Phone213-861065510139

Customer TypeOrganization

NameBusiness World

Number2813

Account1608

Emailoperations@orac

Phone650-444-4444

Phone TypeFax

Category

ItemMRO-C1600

DescAirframe, Com

Revision

Instance70211

Serial101

Tag

Number40048

Reported06-JAN-2004 05:53

TypeJ_CMRO

StatusOpen

SeverityLow

Group

OwnerDaugherty, M

SubjectWorkbenchContacts / A...TasksInteractionsRelated Obj...Service HistoryChargesWork OrderMaintenance...Custom1Custom2

Program Type	Title	Description	Status
Corrosion	Raj_MR_06_Jan2	Raj_MR_06_Jan2	
Letter Check	21-150-00	Replace cabin temperature sensor.	

Note: Description is the CMRO Fleet Maintenance Program MR Description, while Status refers to the status of the associated CMRO Fleet Maintenance Program MR. You can associate a maintenance requirement with a non-routine service request when it is in Open status.

Viewing Non-Routine Service Requests

The Non-routine service request and its associated maintenance requirements are identified in Unit maintenance Plan by:

- Program Type of Non-routine
- Title comprising the Service Request Type and Number

To view Service Requests in Unit Maintenance Plan:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of Unit Maintenance Plan appears.
2. Enter information in the fields for which you know the value. Select Non-Routine from the Program Type drop-down menu. Click Go. The service request records matching your search criteria appear in the Unit Maintenance Requirements results table.

Figure 8–25 View Non-Routine Service Requests - Search Unit Maintenance Plan window

ORACLE® Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast

Search Unit Maintenance Plan

Unit Name

Item

Serial Number

Status

Sort by

Title

Program Type

Due from

Due to

☐ Include Tolerance Dates

☐ Show Dependent Components

☐ Show Child Maintenance Requirements

☐ Show Replicate

Results: Unit Maintenance Requirements

Select Unit Maintenance Plan and ...

Previous 1-10 of 24 Next

Select	Program Type	Title	Item	Serial Num	UOM	Remain	Cnt	Earlier Due	Due Date	Latest Due	Tolerance	Status	Sched. Date	Visit	Originator Title	Dependent Title	Deferred From	Deferred To
<input type="radio"/>	Non-Routine	J_CMRO-36846	AS54888						31-DEC-2003									

The following conditions apply to service requests:

- You cannot associate maintenance requirements with, and/or remove maintenance requirements from the service request after it has been closed.

- You can change the SR type from CMRO to non-CMRO irrespective of the status of the service request. All associated UMP records will be deleted in this case.
 - You can change the SR type from non-CMRO to CMRO only if the service request is in the Open status. A new UMP record will be created for the service request.
 - If a service request has associated maintenance requirements:
 - The Instance Number on the SR cannot be modified
 - The SR type cannot be changed from CMRO to non-CMRO
 - The SR cannot be closed unless all maintenance requirements are accomplished
 - If a maintenance requirement associated with a service request, is terminated or revised in Fleet Maintenance Program, then the association is also nulled.
 - You cannot associate duplicate maintenance requirements with a service request.
3. To view the details and history of the service request, select the Service Request, and choose View Detail and History from the drop-down menu. Click Go. The View Maintenance Requirement Detail & History page appears.
 4. The service request may have group maintenance requirements associated with it. To view group maintenance requirements, select the service request, and choose View Group Maintenance Requirement from the drop-down menu. The Group Maintenance Requirement page appears.

Updating Service Requests

You can close a non-routine service request using the Service request window. The maintenance requirements associated with the service request must be in Accomplished or Cancelled status. The instance created in Unit Maintenance Plan is removed when the service request is closed or cancelled.

Working with Maintenance Visits

Transportation services, including aviation, railway and marine require complex and high-valued unit maintenance. Maintenance of such systems is complex and expensive, and organizations seek to minimize operational costs while maximizing operational revenues.

In addition to the conflicting requirements of service availability versus service reliability, a maintenance planner seeks to optimize a maintenance plan, taking into consideration the following:

- Service efficiency: Do not replace a unit component or the unit itself any sooner than economically necessary.
- Constrain off-line maintenance duration: Organizations earn revenue when their units are in operation, not when under maintenance.
- Constrain maintenance cost: Provide an infrastructure that permits maximum skilled worker productivity. Sequence maintenance tasks based on efficiency dependencies, and historical service records that help predict maintenance requirements.
- Meet safety and regulatory mandates.

The Oracle Complex Maintenance, Repair, and Overhaul Visit Work Package module permits a maintenance planner to organize a maintenance visit for an equipment unit, whether the unit be at a maintenance base, or in the field.

This chapter presents the key functions supported by the Visit Work Package module, and provides process-oriented, task-based procedures for using Oracle Complex Maintenance, Repair, and Overhaul to perform essential maintenance visit management tasks.

See:

- [Creating Maintenance Visit Records](#)

- Retrieving Existing Maintenance Visit Records
- Associating Tasks with Maintenance Visits
- Retrieving Existing Visit Task Records
- Updating Visit Records
- Creating Imminent Visit Tasks
- Creating Undated Visit Tasks
- Associating Item Serial Numbers and Service Requests to Tasks
- Creating Visit Tasks Unassociated with Routes
- Updating Visit Task Headers
- Defining Visit Task Hierarchy
- Viewing Maintenance Requirements for a Visit
- Creating an Associated Project
- Defining Visit Cost Structure
- Visit Costing and Pricing

What is Visit Work Package?

Visit Work Package is an Oracle Complex Maintenance, Repair, and Overhaul subsystem that provides planning capabilities to an organization responsible for complex and high valued unit maintenance. Visit Work Package permits a maintenance planner, skilled in the maintenance of the firm's units, and aware of cost and complexity, to organize maintenance tasks for a unit based on unit availability and forecasted maintenance requirement due dates.

Oracle Complex Maintenance, Repair, and Overhaul treats a unit as a hierarchy of other units and/or positions. The advantage of supporting such a unit structure is the capability to associate maintenance requirements with increasing component granularity. Maintenance requirements can be tracked at the unit level or at any of the unit's subcomponents. This allows forecasted requirements to move with subcomponent from one unit to another. This is especially important in an industry like aviation.

Visit Work Package allows the planner to group maintenance requirements applicable to a unit and its subcomponents into a single maintenance event. In defining the maintenance visit, the planner can add planned and unplanned

maintenance requirements and individual maintenance tasks. The individual tasks within a visit can be structured to optimize work performed on the production floor. Planners can also manage maintenance visits to the individual task level, based on the estimate costs at the task, route, task group, task package, and visit levels.

Key Business Processes

Visit Work Package supports the following business processes:

Equipment-Based Maintenance Visit Definition Visit Work Package provides a maintenance planner with the ability to create and manage a maintenance visit. A visit definition connects a unit with a block of tasks, a location where the maintenance work takes place, and a period of time in which the work is accomplished.

Adding Forecasted Maintenance Requirements to Visits When creating tasks for a maintenance visit, the planner will usually select forecasted requirements from Unit Maintenance Plan. By adding these requirements, the associated routes, and all the routes for any child maintenance requirements are added to the visit as tasks. Through the associated routes, the material and resource requirements are planned for at the task level. Additionally, any technical dependencies between associated routes, defining the sequence in which the work must be accomplished, are automatically created between the visit's tasks.

Adding Unplanned Maintenance Requirements to Visits In an industry like aviation, unplanned or non-routine requirements make up the majority of the work performed during production. These requirements are added to a visit based on discoveries made during the inspection process. These requirements may be added to a visit any time during the planning and production phases of a visit. When adding them during the production phase, the Push to Production function must be manually initiated from Visit work Package in order to create work orders for the new visit tasks.

In addition to non-routine maintenance added to a visit, unplanned requirements may be used for maintenance performed on third-party units. In this case, the forecasted maintenance is being tracked by outside parties and contracted to the CMRO user. After adding these requirements to a visit, maintenance will be tracked through the production process in the same way, regardless of whether the requirement is planned or unplanned.

Adding Unassociated Repair Tasks to Visits If a job needs to be done on an equipment unit, for a requirement not tracked by Unit Maintenance Plan or defined in Fleet Maintenance Program, the planner will create an unassociated repair task. These tasks are not associated with a route, but the scope of the work to be accomplished is manually described at the task header. Unassociated tasks are intended to address minor, non-routine repairs.

Resource Schedule Definition Efficient maintenance planning seeks to smooth the workload curve. Before a shop visit duration can be accurately determined, an organization's skilled workers' schedules and availability must be considered. Using Long Term Planning's Resource Leveling, the planner can view the resource capacities for visit requirements defined in Visit Work Package.

Visit Task Cost Structure Definition To calculate the costs incurred during a maintenance visit, a cost structure must be defined, so that labor, parts, and materials cost transactions associated with tasks can be configured, recorded, and accumulated using other Oracle eBusiness Suite modules, and used to account for overall visit costs. The cost structure is implied by the parent-child relationship between tasks. After costs have been defined by item and unit of measure, summary tasks, representing the maintenance requirements, can be defined as control breaks for subtotal cost calculations at any point in the visit hierarchy.

Visit Task Hierarchy Definition Visit Work Package permits the maintenance planner to precisely define the order of completion of all tasks that comprise a maintenance facility visit. The precedence order is established by parent-child relationships such that a child task has as many parents as it is technically dependent on. This feature ensures that complex routes are correctly planned and accomplished. Technical dependencies defined between routes for a maintenance requirement in Fleet Maintenance Program are automatically used to create a hierarchical relationship between a visit's tasks. This sequence of tasks within a visit is used to calculate the derived completion date of a visit, allowing the planner to make sure that it does not exceed the visit's defined end date.

Visit Costing and Pricing Costing and estimating the price for a service is very important for any service organization. Visit Work Package enables the maintenance planner to estimate the cost of an in-house maintenance visit, and calculate the visit price as a third-party service provider. The visit cost and price estimation enables the maintenance organization to calculate the profit, on providing such a service, before sending the quotation to the customer. By comparing the historical data including estimated costs and actual costs for visits, maintenance requirements, and tasks, the maintenance planner can plan the cost of future visits effectively.

Creating a Project for a Maintenance Visit Oracle Complex uses Projects as part of its maintenance planning and production flows. A project is created for each visit work package and project tasks assigned to it. A visit's corresponding project is used in the maintenance execution flow to collect costs associated with resource and material transactions performed in CMRO's Production module. Project Manufacturing's standard billing functionality can be used to generate the required reports for the corresponding visit work packages.

Fields Associated with Visit Work Packages

The following sections provide descriptions of fields appearing on each Visit Work Package module page.

Note: The Search icon beside a field implies the availability of a List of Values to choose from for those field values. To populate these fields, enter a partial search string using the generic substitution metacharacter%, and click the icon to retrieve and display matching results on a Select <field name> page. Click the relevant record on this page to return this value to the field on your visit package page.

Fields on the Create Maintenance Visit and Edit Maintenance Visit Pages

The following fields appear on the Create Visit page:

Visit Name is an alphanumeric description that uniquely identifies the visit you want to create.

Visit Type is a work package category that your organization has created for different types of shop, or field maintenance and service visits.

Item is the equipment type for which the visit is to be created. This equipment type description comes from the inventory catalog that your organization has created.

Unit is the name of the unit configuration. For example, it is the name of the configuration of the assembly, subassembly, plant, or vehicle, for which you would like to retrieve visit definitions. Enter the full name of an asset configuration, or use the field list of values pages by clicking the flashlight icon. If you link to the LOV page to select a unit configuration by part of its name, only Unit Configuration

objects that are complete display because maintenance visits can only be defined for complete unit configurations.

Service Request is the identifier of a request a type of unit service for which a visit definition has been created.

Category is a drop-down list field where you can choose the general class of visit for which to search.

Serial Number is the user or manufacturer-supplied part identifier to which the maintenance visit applies. The serialized part information is stored in the unit configuration repository.

Organization is the identifier of the business entity or division where the maintenance work is managed. In order to activate additional unit management features that are integrated with Oracle Complex Maintenance, Repair, and Overhaul, and are provided by Oracle Enterprise Asset Management, the organization that you choose for the visit header record must be eAM-enabled. Wherever a list of Organization values page is displayed, only those organizations that are eAM-enabled will be displayed. Additional unit management features include Activity Type Activity Cause, and Shutdown Type. See the [Oracle Inventory User's Guide](#) for more information about organization-level item definition

Department is the organization subdivision where the maintenance work is accomplished, and to which skilled workers, and other resources are assigned.

Start Date is the date on which the maintenance visit is expected to begin. The hour of the day at which work will start is also selected here.

Description contains any comments that you want to record for this visit.

Visit Number is a view-only field displayed only on the Update Visit page. This is a system-generated value.

Fields on the Search Visit Page

The following search argument fields appear on the Search Visit page:

Item is the equipment type for which a maintenance visit was defined. This equipment type description comes from the inventory catalog that your organization has created.

Serial Number is the user-supplied part identifier to which the maintenance visit applies. The serialized part information is stored in the unit configuration repository.

Organization is the identifier of the business entity or division where the maintenance work is managed. Information about your organizations is managed with Oracle Human Resources.

Unit is the name of the unit configuration. For example, it is the name of the configuration of the assembly, subassembly, plant, or vehicle, for which you would like to retrieve visit definitions. Enter the full name of a unit configuration, or use the field list of values pages by clicking the flashlight icon. If you link to the LOV page to select a unit configuration by part of its name, only Unit Configuration objects that are complete display because maintenance visits can only be defined for complete unit configurations.

Service Request is the identifier of a request a type of unit service for which a visit definition has been created.

Category is a drop-down list field where you can choose the general class of visit for which to search.

Department is the organization subdivision where the maintenance work is accomplished, and to which skilled workers and other resources are assigned. Information about your departments is managed with Oracle Bills of Material. If you provide a valid organization in the previous field, the set of department values available for your selection consists of departments that belong to the organization.

Visit Number is an alphanumeric value that uniquely identifies the visit definition that you wish to retrieve.

Visit Name is an alphanumeric description of the visit.

Start From Date is the earlier visit starting date search argument. Use the calendar icon to display a calendar to make the date value selection. Visit header records with a starting date on or later than your search date will be displayed.

Start To Date is the later visit starting date search argument. Use the calendar icon to select the date value. Visit header records with a starting date on or earlier than your search date will be displayed.

Visit Status provides a drop-down list from which to select a visit status. Only one status value can be active for the query.

Visit Type is a category of work package that your organization has created for different types of shop or field maintenance and service visits.

Fields on the Search Visit Task Page

The following fields appear on the Search Visit Task page:

Task Number is an alphanumeric value that uniquely identifies the task you retrieve.

Task Name is the name of the task that you want to retrieve.

Maintenance Requirement contains the ID of the maintenance requirement corresponding to the task that you want to retrieve.

Route is the identifier of the maintenance route to which the tasks you want to work with is connected. Use a value in this field to limit the tasks that are retrieved from the database.

Display Only is a drop-down list field that provides a task type to select when retrieving the visit's tasks.

Department is the name of the department that is responsible for completion of the maintenance task. Click the LOV icon to select from a list of departments for which visit tasks have been created.

Task Type is the task category that classifies the task as planned (imminent tasks), unplanned (required tasks, but not dated), or unassociated (ad hoc tasks).

Tasks Due By is the date on which an imminent task is due to be completed. Click the calendar icon to display a calendar from which you can select a due date.

Service Request is the service request identifier that corresponds to the task you want to retrieve.

Fields on the Create Planned Task Page

The following view-only context fields appear on the Create Planned Task page:

- Visit Number
- Serial Number
- Visit Type
- Start Date
- Item
- End Date

The fields that follow are used as search criteria when retrieving imminent, dated maintenance requirements for the unit being maintained.

Item is the equipment type attribute of the maintenance requirement.

Maintenance Requirement is the imminent requirement for which you want to create task records. When searching the database for maintenance requirements, the routes of which you wish to attach to a visit as tasks, you must provide a valid maintenance requirement identifier. Use the list of values to retrieve a match.

Serial Number is the user-supplied part identifier to which the imminent maintenance requirement applies.

Unit is the name of the unit configuration. For example, it is the name of the configuration of the assembly, subassembly, plant, or vehicle, for which you would like to retrieve visit definitions. Enter the full name of a unit configuration, or use the field list of values pages by clicking the flashlight icon. If you link to the LOV page to select a unit configuration by part of its name, only Unit Configuration objects that are complete display because maintenance visits can only be defined for complete unit configurations.

Route is the maintenance route associated with the displayed task records.

Fields on the Create Unplanned Visit Task Page

The following view-only context fields appear on the Create Unplanned Task page.

- Visit Number
- Serial Number
- Visit Type
- Start Date

- Item
- End Date

The fields that follow are used as search criteria when retrieving undated, type-specific maintenance requirements for the unit being serviced.

Item is the equipment type attribute of the maintenance requirement. You must provide a valid equipment type when searching for off-plan maintenance requirements. Use the list of values to retrieve a match.

Unit is the name of the unit configuration. For example, it is the name of the configuration of the assembly, subassembly, plant, or vehicle, for which you would like to retrieve visit definitions. Enter the full name of a unit configuration, or use the field list of values pages by clicking the flashlight icon. If you link to the LOV page to select a unit configuration by part of its name, only Unit Configuration objects that are complete display because maintenance visits can only be defined for complete unit configurations.

Maintenance Requirement is the maintenance requirement for which you want to create task records.

Route is the maintenance route associated with the displayed task records.

Fields on the Associate Serial Number/Service Request to Task Page

The following view-only context fields appear on the Associate Serial Number/Service Request to Task page:

- Visit Number
- Serial Number
- Visit Type
- Start Date
- Item
- End Date

The following fields update the association between a task, a service request, and a serialized component of the equipment unit:

(Associated to) Serial Number is the user-supplied part identifier to which the maintenance requirement applies.

Service Request is the identifier of the technical defect that is repaired by the accomplishment of the associated task.

Unit is the name of the unit configuration. For example, it is the name of the configuration of the assembly, subassembly, plant, or vehicle, for which you would like to retrieve visit definitions. Enter the full name of a unit configuration, or use the field list of values pages by clicking the flashlight icon. If you link to the LOV page to select a unit configuration by part of its name, only Unit Configuration objects that are complete display because maintenance visits can only be defined for complete unit configurations.

Fields on the Create Unassociated Task Page

The Visit Number, Unit, Visit Type, Start Date, Item, and End Date fields are view-only and appear as part of the context information on the Create Unassociated Task Page.

The following fields comprise a task record for the visit, where the task does not have an associated service requirement in the equipment maintenance plan.

Task Name contains any name for the task that you consider meaningful. The task name can contain any letters or numbers.

Item is the master configuration object with which this task is associated.

Service Request is the identifier of the technical defect that is repaired by the accomplishment of the associated task.

Cost Parent Task is the identifier of the summary task in the task hierarchy at which a subtotal of cost transactions, including the costs attached to the task being created, will be calculated. A top task must be a summary task.

Description contains a description of the work that this task consists of. This task does not have a corresponding route. You should therefore, provide a complete description including the resources required to finish the job, in this field.

Duration/Hour contains the duration in hours of this task.

Serial Number is the user-supplied part identifier to which this new task applies.

Start From Hours is the time offset in decimal hours, of this task, from the beginning of the visit being planned. Use this field to specify precisely when this task should start relative to the beginning of the visit.

Originating Task is the identifier of another task that requires the inclusion of the current task in the visit task package. A task may not originate itself. The originating task usually is part of a scheduled maintenance requirement.

Fields on the Update Visit Task Header Page

The following view-only context fields appear on the Update Visit Task page. These fields cannot be updated.

- Visit Number
- Serial Number
- Visit Type
- Start Date
- Item
- End Date

The following fields can be updated by a maintenance planner:

Task Number is an alphanumeric value that uniquely identifies the task you update.

Task Name contains any name for the task that you consider meaningful. The task name can contain any letters or numbers.

Maintenance Requirement indicates the imminent maintenance requirement to which this task applies. Updating this field might require that the route association must also be updated.

Service Request is the identifier of the technical defect that is repaired by the accomplishment of the associated task.

Cost Parent Task is the identifier of the summary task in the task hierarchy at which a subtotal of cost transactions, including the costs attached to the task being updated, will be calculated. A top task must be a summary task.

Description contains a description of the work that this task consists of. If the task does not have a corresponding route, you should provide a complete description, including the resources required to finish the job, in this field.

Duration/Hour contains the duration in hours of this task.

Serial Number is the user-supplied part identifier to which this task applies.

Route is the maintenance route associated with the previously selected maintenance requirement.

Start From Hours is the time offset in decimal hours, of this task, from the beginning of the visit being planned. Use this field to specify precisely when this task should start relative to the beginning of the visit.

Originating Task is the identifier of another task that requires the inclusion of the current task in the visit task package. A task may not originate itself. The originating task usually is part of a scheduled maintenance requirement.

Fields on the Update Visit Task Hierarchy Page

The following view-only task context fields appear on the Update Visit Task Hierarchy page:

- Task Name
- Service Request
- Maintenance Requirement
- Route
- Zone
- Sub Zone

The fields that follow contain values that are created and updated to maintain the sequence of tasks during the maintenance visit.

Task Name identifies the task that you want to associate in a parent or child relationship with the task in context. A task can have one or more parent or child task relationships.

Relationship is a seeded value. Select Parent or Child.

Fields on the Visit Cost Structure Page

The following view-only visit context fields appear on the Visit Cost Structure page.

- Visit Number
- Serial Number
- Visit Type
- Start Date
- Item
- End Date
- Task Number
- Duration

The following fields can be updated by a maintenance planner who needs to modify a visit's task structure for costing purposes. The tree-structured task graphic shows the relationships between the tasks. Select the Task Name link corresponding to the task that you want to update. You can also search for a task using the Search icon.

Task Name contains any name for the task that you consider meaningful. The task name can contain any letters or numbers.

Serial Number is the user-supplied part identifier to which this task applies.

Maintenance Requirement is the imminent requirement to which this task applies. Updating this field might require that the route association is also updated.

Service Request is the report identifier of the technical defect that is repaired by the accomplishment of the associated task.

Cost Parent Task is the mid-level task to which the current task is connected as a low-level task. Note that only low-level tasks can have associated cost transactions.

Originating Task is the identifier for a task that requires the inclusion of the current task in the visit task package. A task may not originate itself. The originating task usually is part of a scheduled maintenance requirement.

Description contains a description of the work that this task consists of. If the task does not have a corresponding route, you should provide a complete description, including the resources required to finish this job, in this field.

Fields on the Visit Cost and Price Page

Price List A list containing the base selling price per unit for a group of items, item categories, or service offered. All prices in a price list are for the same currency.

Estimated Cost It is the cost calculated based on the material and resource requirements for a job.

Actual Cost It is the cost calculated based on the material and resource transactions for a job.

Estimated Price It is the price quoted by a maintenance organization for performing a third- party service, and is based on the price of the required material and resources for the service.

Actual Price It is the price for performing a service at a third party location, calculated based on the actual price of the used material and resources.

Estimated Profit It is calculated by subtracting the estimated cost from the estimated price.

Actual Profit It is calculated by subtracting the actual cost from the actual price.

Creating Maintenance Visit Records

The following explains the procedures required to create a visit record. Additionally, preparing visits for production planning is explained.

See:

[Creating Maintenance Visit Records](#)

[Preparing the Maintenance Visit for Production Planning](#)

Creating Maintenance Visit Records

A maintenance visit represents the intersection of several entities:

- Equipment to be maintained
- Location where the maintenance jobs will take place
- Period of time, called a visit slot, during which the maintenance will be accomplished
- Maintenance requirements to be completed during the visit

The number of tasks that can be in a visit and the duration a visit have no limits.

Visit Work Package continues the workflow begun in the Oracle Complex Maintenance, Repair, and Overhaul Unit Maintenance Plan module, where the maintenance requirements for tracked units are forecasted. The goal of the maintenance planner is to schedule requirements within the forecasted due by dates at capable facilities, while minimizing a unit's down time. The first process in creating a visit is to define the visit header. Its attributes include a name, number, organization, description, department, visit type, inventory item, serial number, etc. After the header has been created, maintenance requirements are added to the visit, which create tasks to complete the visit definition. Tasks can be attached to the visit from the maintenance plan associated through Unit Maintenance Plan, or through unplanned requirements from Fleet Maintenance Program, or as ad hoc tasks.

The following procedure initiates a visit work package creation by allowing you to create a visit header record in the database.

Prerequisites:

The item and serial number to which the maintenance visit applies must exist in the database. The organization and the department in which the visit is to be carried out must exist in the repository.

To create a maintenance visit record:

1. On the Oracle Complex Maintenance, Repair, and Overhaul Home page, click the Planning link at the top right corner to access the Visit Work Package tab.
2. Click the Visit Work Package tab. This launches the Search Visit page under the Visit subtab.

Figure 9–1 Search Visit page

ORACLE®Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Unit Maintenance Plan](#) [Visit Work Package](#) [Long Term Planning](#)

Visit

Search Visit

Item

Unit

Serial Number

Service Request

Organization

Department

Visit Number

Visit Name

Start From Date

Start To Date

Visit Status

Visit Type

Category

Go

Clear

Search Results

Create

SelectVisit NumberVisit NameItemUnitSerial NumberVisit TypeOrganizationDepartmentStart DateVisit StatusCost StructureRemove

No records were found matching the given criteria..

3. On the Search Maintenance Visit page, click Create to launch the Create Visit page.

Figure 9–2 Create Visit page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Unit Maintenance Plan](#) [Visit Work Package](#) [Long Term Planning](#)

Visit

Create Visit

CancelRevertApply

* Indicates required field

Visit Header Info

Visit Name

* Visit Type

Unit

Organization

Service Request

Start Date

Description

* Item

* Serial Number

Department

Category

CancelRevertApply

4. Enter the visit header field values. Asterisks indicate mandatory fields. For field descriptions, refer to [Fields on the Create Maintenance Visit and Edit Maintenance Visit Pages](#).

9-18 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 9–3 Enter Visit Header Details - Create Visit page

ORACLE® Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Create Visit

Cancel Revert Apply

* Indicates required field

Visit Header Info

Visit Name	<input type="text" value="Visit_CMRO"/>		
* Visit Type	<input type="text" value="A Check"/>	* Item	<input type="text" value="161A1100-40"/>
Unit	<input type="text"/>	* Serial Number	<input type="text" value="161A-L1"/>
Organization	<input type="text"/>	Department	<input type="text"/>
Service Request	<input type="text"/>	Category	<input type="text"/>
Start Date	<input type="text"/> Hour <input type="text" value="00"/> <input type="text" value="00"/>		
Description	<input type="text"/>		

Cancel Revert Apply

- Click Apply to save the visit record in the database, and proceed to the Update Visit (Visit Header Info) page to update the visit header information, or to navigate to the Visit Tasks page to associate tasks with the visit record. See [Associating Tasks with Maintenance Visits](#).

Figure 9–4 Update Visit page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Unit Maintenance Plan

Visit Work Package

Long Term Planning

Visit

Details

Visit Tasks

Maintenance Requirements

Cost Details

Update Visit

Cancel

Revert

Apply

* Indicates required field

Visit Header Info

Visit Number

469

Visit Name

Visit_CMRO

* Visit Type

A Check

Item

161A1100-40

Unit

Serial Number

161A-L1

Organization

Department

Service Request

Category

Simulation Plan

Primary Plan

Start Date

Hour

00

00

Planned End Date

Hour

00

00

End Date

Due By Date

Visit Status

Planning

Description

Cancel

Revert

Apply

Preparing the Maintenance Visit for Production Planning

Once you have finished developing and refining the structure of a maintenance visit, you can transfer the visit, including the visit header and all of the associated tasks to Oracle Complex Maintenance, Repair, and Overhaul Production Planning for final adjustments before the maintenance project is started.

You can validate a visit and/or push it to production.

Validating Visits

This process checks that the visit structure meets all business logic requirements.

Prerequisites:

The visit record you want to validate must exist in the database.

To validate a visit:

1. On the Oracle Complex Maintenance, Repair, and Overhaul Home page, click the Planning link at the top right corner to access the Visit Work Package tab.
2. Select the Visit Work Package tab. This launches the Search Visit page under the Visit subtab.
3. Find the visit that you want to validate by entering the relevant search criteria. For field descriptions, see [Fields on the Search Visit Page](#).
4. Select the visit from the results table, and choose **Validate** from the drop-down menu. Validation errors, if any, will be displayed.

Figure 9–5 Visit Errors page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Visit Errors

Visit Number 2 Visit Type A Check Item MRO-C1600

Unit C-1600, Tail # 101 Start Date Organization [Back](#)

Serial Number 101 End Date Department

Error List

Number	Description
1	ERROR: Visit Number 2 : Start Date Time Missing
2	ERROR: Visit Number 2 : Organization Missing
3	ERROR: Visit Number 2 : Department Missing
4	ERROR: Visit Number 2 : Planned end date missing
5	ERROR: Visit Number 2 : No Project is associated to this Visit
6	ERROR: Visit Number 2 : Department has no department shift
7	ERROR: Visit Number 2 : MR Routes associated to some tasks not exists

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Push to Production

If the visit structure is logically correct, push the visit to production on the Visit Overview page; the visit structure logic is checked prior to the transfer. Visit tasks are exported to Oracle Projects as a complete set.

Prerequisites:

The visit record that you want to push to production must exist in the database.

To push a job to production:

- 1. On the Oracle Complex Maintenance, Repair, and Overhaul Home page, click the Planning link at the top right corner to access the Visit Work Package tab.
- 2. Select the Visit Work Package tab. This launches the Search Visit page under the Visit subtab.
- 3. Enter your search criteria. For field descriptions, see [Fields on the Search Visit Page](#).
- 4. Select the visit from the results table and choose **Push to Production** from the drop-down menu.

Figure 9–6 Push a Visit to Production - Search Visit page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Unit Maintenance Plan

Visit Work Package

Long Term Planning

Visit

Search Visit

Item

Serial Number

Organization

Visit Number

Start From Date

Visit Status

Category

Unit

Service Request

Department

Visit Name

Start To Date

Visit Type

Go

Clear

Search Results

Create

Select a Visit and ..

Push To Production

Go

Previous

1-10 of 439

Next

Select	Visit Number	Visit Name	Item	Unit	Serial Number	Visit Type	Organization	Department	Start Date	Visit Status	Cost Structure	Remove
<input checked="" type="checkbox"/>	2	A-Check for N101	MRO-C1600	C-1600, Tail # 101	101	A Check				Planning		

Note: Only complete sets of tasks are transferred to Projects and to the Oracle Complex Maintenance, Repair, and Overhaul production modules. If an error occurs during the export of tasks to production jobs, the Projects object is not rolled back. Instead, the relationships between visit tasks and tasks in Projects are maintained, and another attempt is made to export production jobs when pushing the visit structure to production.

The following visit attributes are checked when a visit and its tasks are exported to maintenance production:

- The visit is associated with a valid department, and a valid organization.
- The visit has a starting date and time. The visit end date and time is automatically calculated.
- The visit is associated with a valid Item, and a correct Unit from Install Base.
- The visit is in the Planning stage.
- A correct visit type is selected for the visit.
- The visit definition is a member of a primary simulation plan. See [Long Term Plan](#).
- All visit tasks not based on a repair or service route defined by Fleet Maintenance Program as pertinent to the equipment being serviced may not have a duration of zero.
- Visit tasks based on an expired maintenance requirement or route cannot be scheduled for maintenance production.
- Only tasks associated with parent maintenance requirements by Fleet Maintenance Program that apply to the type of equipment being maintained may be included in a visit. This check prevents the inclusion of erroneously selected tasks in a visit.
- The inventory part template and serial number associated with a task must exist in the Unit Configuration structure for the asset for which the visit definition was created.
- For tasks added to a visit because of a corresponding maintenance requirement in the plan for the asset, derived as imminent by Unit Maintenance Plan, the effectivity must be for the same maintenance requirement and task.

- Each department in which a maintenance task is planned must belong to the related organization.

After successfully checking all of these conditions, Visit Work Package will return a message indicating that the visit was correctly defined.

Retrieving Existing Maintenance Visit Records

Maintenance planners need to retrieve existing maintenance visit records for reference or new visits based on an existing visit. Oracle Complex Maintenance, Repair, and Overhaul permits efficient retrieval of visit records saved in the database. The Search Visit page provides the ability to search and display all maintenance visits regardless of their status.

While entering the search criteria, use the generic substitution metacharacter% to represent any string of zero or more characters. Use _ to represent any single character. For example, if the database contains a record with the value "ENGINE" in a field, typing "E%" will return all records where the field value begins with "E".

Prerequisites:

The visit record you want to retrieve must exist in the database.

To retrieve existing maintenance visit records:

1. On the Oracle Complex Maintenance, Repair, and Overhaul Home page, click the Planning link at the top right corner to access the Visit Work Package tab.
2. Select the Visit Work Package tab. This launches the Search Visit page under the Visit subtab.
3. Enter your search criteria. For field descriptions, see [Fields on the Search Visit Page](#).

Note: You can also execute a search without specifying any search criteria. In this case, the system returns all the records existing in the database that have the selected Status (Released, Planning, or Closed).

4. Click Go. The lower half of the screen displays the Search Results.

Figure 9–7 View Search Results - Search Visit page

Search Visit

Item

Unit

Serial Number

Service Request

Organization

Department

Visit Number

Visit Name

Start From Date

Start To Date

Visit Status

Visit Type

Category

Go

Clear

Search Results

Create

Select a Visit and ..

Push To Production

Go

Previous

1-10 of 439

Next

Select	Visit Number	Visit Name	Item	Unit	Serial Number	Visit Type	Organization	Department	Start Date	Visit Status	Cost Structure	Remove
<input checked="" type="radio"/>	2	A-Check for N101	MRO-C1600	C-1600, Tail # 101	101	A Check				Planning		
<input type="radio"/>	8	C-Check for N101	MRO-C1600	C-1600, Tail # 101	101	C Check			07-MAY-2004	Planning		
<input type="radio"/>	10	test	CMROITEM1		1	A Check	San Diego Manufacturing	Outside Processing	24-JUN-2003	Released		
<input type="radio"/>	11	COPY FROM PLAN	MRO-16T9001-831		4456555	A Check	San Diego Manufacturing	Outside Processing	02-DEC-2003	Planning		
							San Diego	Outside	13-NOV-			

- To restart a search, click Clear. (If you have retrieved records being displayed in the lower half of the screen, these records will remain).

After entering the new search criteria, click Go to begin searching the database for records that match.

- To validate a visit before releasing to production, select the pertinent record, and choose Validate from the drop-down menu.

Note: You can only validate visits that are in the Planning Status.

- To remove a visit record from the database, click the Remove icon corresponding to that record.
- To view the cost and/or price information for the visit, select the visit, and choose Cost and price information from the drop-down menu. Click Go. The Visit Cost and Price page appears.

Figure 9–8 Visit Cost and Price page

ORACLE

Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Unit Maintenance Plan](#) [Visit Work Package](#) [Long Term Planning](#)

Visit

[Details](#)
[Visit Tasks](#)
[Maintenance Requirements](#)
Cost Details

Visit Cost and Price

Cancel

Visit Number 457

Unit Ucd0206

Serial Number SN0206

Visit Type A Check

Start Date 26-MAY-2004

End Date 26-MAY-2004

Item VG0205

Organization San Diego Manufacturing

Department Outside Processing

Cost/Price Details

Estimate Price

Price Snapshot

Cost Snapshot

Items Without Price

Apply

Revert

☒ Visit for Outside Party

Price List

Price List 0204

Currency ANY

Estimated Cost 171.9

Estimated Price 299.46

Estimated Profit 127.56

Actual Cost 28.65

Actual Price 49.91

Actual Profit 21.26

Estimate Price

Price Snapshot

Cost Snapshot

Items Without Price

Apply

Revert

[Unit Maintenance Plan](#) | [Visit Work Package](#) | [Long Term Planning](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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9. To view the Maintenance Requirements for the visit, choose Maintenance Requirements from the drop-down menu and click Go. The Search Maintenance Requirement page appears.

9-26 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 9–9 Search Maintenance Requirements page

ORACLE® Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Unit Maintenance Plan](#) [Visit Work Package](#) [Long Term Planning](#)

Visit

Details

Visit Tasks

Maintenance Requirements

Cost Details

Search Maintenance Requirements

Visit Number **457**

Unit **Ucd0206**

Serial Number **SN0206**

Visit Type **A Check**

Start Date **26-MAY-2004**

End Date **26-MAY-2004**

Item **VG0205**

Organization **San Diego Manufacturing**

Department **Outside Processing**

Maintenance Requirement

Description

[Go](#) [Clear](#)

Previous 1-1 of 1 Next

Title	Description	Type	Item	Serial Number	Tasks	Cost/Price
MR0421			VG0205	SN0206		

Previous 1-1 of 1 Next

[Cancel](#)

[Unit Maintenance Plan](#) | [Visit Work Package](#) | [Long Term](#)

[Planning](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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10. To search tasks associated with the visit, select Search Tasks from the drop-down menu. The Search Visit Task page appears.

Figure 9–10 Search Visit Task page

ORACLE®Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Unit Maintenance Plan](#) [Visit Work Package](#) [Long Term Planning](#)

Visit

Details

Visit Tasks

Maintenance Requirements

Cost Details

Search Visit Task

Cancel

Visit Number 456

Unit UC0426

Serial Number SN0426

Visit Type A Check

Start Date 26-MAY-2004

End Date

Item AHLITEM002

Organization

Department

Task Number

Maintenance Requirement

Task Type

Work Order

Service Request

Item

Task Name

Route

Tasks Due By

Work Order Status

Department

Serial Number

Go

Clear

Search Results

Create Planned Task

Create Unplanned Task

Create Unassociated Task

Create Summary Task

Previous

1-2 of 2

Next

Task Number	Task Name	Item	Serial Number	Maintenance Requirement	Route	Department	Start Time	End Time	Task Type	Hierarchy	Cost/Price	Remov
-------------	-----------	------	---------------	-------------------------	-------	------------	------------	----------	-----------	-----------	------------	-------

- 11. To view the task cost structure for a visit, click the Cost Structure icon corresponding to that record.

9-28 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 9–11 Cost Structure page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Cost Structure

Visit Number 457	Visit Type A Check	Item VG0205
Unit Uc0206	Start Date 26-MAY-2004	Organization San Diego Manufacturing
Serial Number SN0206	End Date 26-MAY-2004	Department Outside Processing

Visit0526A
MR0421

Visit Cost Information

Estimated Cost 171.9	Actual Cost 28.65
-----------------------------	--------------------------

Cancel

- To edit visit header details, and associated tasks, click the pertinent Visit Number link.

Note: You can update the header information and associated tasks only for a visit that is in the Planning state. If the selected visit is in the Released or Closed states, the application generates the details and associated tasks page in view-only mode. You can also view the cost details and the maintenance requirements, associated with a visit, by clicking the corresponding link in the left-hand navigation panel.

Associating Tasks with Maintenance Visits

After a maintenance planner has completed the visit header creation, the planner can add new tasks to the visit structure. A maintenance plan can consist of three task types:

1. Tasks based on routes that comprise a maintenance requirement, and can have required completion dates based on the forecast in Unit Maintenance Plan. For more information about this process, see [Creating Imminent Visit Tasks](#).
2. Tasks based on routes from unplanned requirements that is not forecasted in Unit Maintenance Plan, but might apply, in the judgment of the planner, to the equipment being maintained. These tasks are created from routes associated with maintenance requirements that pertain to the equipment type. For more information, see [Creating Undated Visit Tasks](#).
3. Tasks can be added on an ad hoc basis, even if no corresponding route exists. The description of the work to be accomplished is stored as a task remark. For more information, refer to [Creating Visit Tasks Unassociated With Routes](#).

The following sections detail procedures for associating tasks with maintenance visits:

Prerequisites:

The visit record to which you want to attach tasks must exist in the database.

To associate tasks with maintenance visits:

1. Retrieve the visit records that match your need. See [Retrieving Existing Maintenance Visit Records](#).
2. In the Search Results list, click the Visit Number link of the record you want to edit. This launches the Update Visit page if the visit record is in the Planning state. If the visit record is in the Released or Closed status, the application generates the View Visit Details page.

Figure 9–12 View Visit Details - Update Visit page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Details

[Visit Tasks](#)

[Maintenance Requirements](#)

[Cost Details](#)

Update Visit

Cancel Revert Apply

* Indicates required field

Visit Header Info

Visit Number	456	Visit Name	Visit0526
* Visit Type	A Check	Item	AHLITEM002
Unit	UC0426	Serial Number	SN0426
Organization		Department	
Service Request		Category	Category 5
		Simulation Plan	Primary Plan
Start Date	26-MAY-2004	Hour	05 00
Planned End Date	31-MAY-2004	Hour	08 00
End Date		Due By Date	
Visit Status	Planning		
Description	New Visit		

Cancel Revert Apply

- On the side navigation menu, click Visit Tasks. This launches the Search Visit Task page with the visit context information, and the list of tasks, if any, already associated with the visit.

Figure 9–13 Find a Visit Task - Search Visit Task page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Unit Maintenance Plan

Visit Work Package

Long Term Planning

Visit

Details

Visit Tasks

Maintenance Requirements

Cost Details

Search Visit Task

Cancel

Visit Number 456

Unit UC0426

Serial Number SN0426

Visit Type A Check

Start Date 26-MAY-2004

End Date

Item AHLITEM002

Organization

Department

Task Number

Task Name

Maintenance Requirement

Route

Task Type

Tasks Due By

Work Order

Work Order Status

Service Request

Department

Item

Serial Number

Go

Clear

Search Results

Create Planned Task

Create Unplanned Task

Create Unassociated Task

Create Summary Task

Previous

1-2 of 2

Next

Task Number	Task Name	Item	Serial Number	Maintenance Requirement	Route	Department	Start Time	End Time	Task Type	Hierarchy	Cost/Price	Remov
-------------	-----------	------	---------------	-------------------------	-------	------------	------------	----------	-----------	-----------	------------	-------

Note: You can also navigate to this page from the Search Visit UI, For details, see [Retrieving Existing Maintenance Visit Records](#).

- 4. To update a task associated with the visit, click the Name link corresponding to the pertinent task. This launches the Update Visit Task page. For details, see [Updating Visit Task Headers](#).
- 5. To create a task corresponding to an unplanned maintenance requirement, click Create Unplanned Task. For details, refer to [Creating Undated Visit Tasks](#).
- 6. To create a new task, unassociated to any maintenance route, click Create Unassociated Task. This launches the Create Unassociated Task page. For details, refer to [Creating Visit Tasks Unassociated with Routes](#).

Figure 9–14 Create Unassociated Task page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Create Unassociated Task

Visit Number **456** Visit Type **A Check** Item **AHLITEM002**
Unit **UC0426** Start Date **26-MAY-2004** Organization
Serial Number **SN0426** End Date Department

Cancel Revert Apply

* Indicates required field

Task Header Information

* Task Name
Department
* Item
Service Request
Cost Parent Task
Task Description

* Duration /Hour
* Serial Number
Start From Hours
Originating Task

Cancel Revert Apply

7. To create a task based on an imminent maintenance requirement, click Create Planned Task. For details, see [Creating Imminent Visit Tasks](#).
8. To remove a task associated to the visit, click the corresponding Remove icon.
When you remove a task associated to a maintenance visit, note the following:
 - If all tasks associated to a maintenance requirement summary task are deleted, the summary task is deleted as well.
 - You can delete a task that is the originating task for another only if the association is first removed.
 - You must first remove the association to delete a task with associated child tasks.
 - You cannot delete a task that has other tasks dependent on it.

Retrieving Existing Visit Task Records

After a maintenance planner creates a visit structure, the Search Visit Tasks page permits the planner to retrieve tasks associated with a particular visit, or to add new tasks to the visit structure.

After retrieving visit tasks based on desired search criteria, the planner can select a task for subsequent editing. The Search Visit Tasks page also allows maintenance personnel to link to pages that permit creation of tasks associated with serialized inventory items, for both imminent and undated maintenance requirements, and tasks associated only with non-serialized assemblies.

Prerequisites:

The visit record for which you want to retrieve associated tasks must exist in the database, and must have tasks assigned to it.

To retrieve existing visit tasks:

1. Click the Planning link at the top right corner of the Oracle Complex Maintenance, Repair, and Overhaul Home page to access the Visit Work Package tab.
2. Click Visit Work Package. The Search Visit page appears.
3. Find the visit associated with the task you want to retrieve. Enter information in the fields for which you know the value then click **Go**. For field descriptions, see [Fields on the Search Visit Tasks Page](#).
4. The lower half of the screen displays the Search Results. Select the visit, and choose Search Tasks from the drop-down menu. The Search visit task page appears, displaying the details of the tasks associated with the visit.

Figure 9–15 View Task Search results - Search Visit Tasks page

Search Visit Task Cancel

Visit Number **455** Visit Type **A Check** Item **Radhika Item2 aps p**
 Unit Start Date **26-MAY-2004** Organization **San Diego Manufacturing**
 Serial Number **apsplan100** End Date **27-MAY-2004** Department **Outside Processing**

Task Number Task Name
 Maintenance Requirement Route
 Task Type Tasks Due By
 Work Order Work Order Status
 Service Request Department
 Item Serial Number

Search Results

Previous 1-2 of 2 Next

Task Number	Task Name	Item	Serial Number	Maintenance Requirement	Route	Department	Start Time	End Time	Task Type	Hierarchy	Cost/Price	Remove
1	fmpaps planned	Radhika Item2 aps p	apsplan100	fmpaps planned					Summary			
2	routeaps planned	Radhika Item2 aps p	apsplan100	fmpaps planned	routeaps planned		26-MAY-2004 7:00	27-MAY-2004 9:00	Planned			

5. To create a task corresponding to an imminent maintenance requirement, click **Create Planned Task**.
6. To create a task corresponding to an undated maintenance requirement, click **Create Unplanned Task**.
7. To create a visit task that is unassociated to a route, click **Create Unassociated Task**.
8. To update visit task details, click the Task Number link.

Figure 9–16 Summary Task Details page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Unit Maintenance Plan](#) [Visit Work Package](#) [Long Term Planning](#)

Visit

Details

Cost Details

Summary Task Details

Visit Number455

Unit

Visit TypeA Check

Start Date26-MAY-2004

ItemRadhika Item2 aps p

OrganizationSan Diego Manufacturing

Serial Numberapsplan100

End Date27-MAY-2004

DepartmentOutside Processing

Cancel

Revert

Apply

* Indicates required field

Task Header Information

Task Number1

* Task Namefmpaps planned

Department

ItemRadhika Item2 aps p

Serial Numberapsplan100

Maintenance Requirementfmpaps planned

Service Request

Cost Parent Task

Originating Task

Task Description

Cancel

Revert

Apply

[Unit Maintenance Plan](#) | [Visit Work Package](#) | [Long Term](#)

[Planning](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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Note: You can update the visit task details and associated information only if the visit record is in the Planning state. If the visit record is in the Released or Closed status, the system generates the visit task details page in view-only mode.

9. To remove a task associated to the visit, click the Remove icon corresponding to the task record.

Note: You can only remove a task that is in the Planning state. To delete a task from a Primary visit, any task associated to it in a simulation visit must have the association removed. If you delete all tasks associated to a maintenance requirement summary task, the summary task is deleted as well. To remove a task that is the originating task for another task, the associations must be first removed. To remove a task with associated children tasks, the association must first be removed. Also, a task with other technically dependent tasks cannot be removed. Any material requests defined in Long Term Planning for a task must be cancelled before it can be deleted.

Updating Visit Records

Oracle Complex Maintenance, Repair, and Overhaul allows you to retrieve existing maintenance visit records and edit the header and associated tasks information.

The following explains how you can update existing visit records:

Note: You can update these attributes only for a visit record that is in the Planning state. If the selected visit is in the Released or Closed states, the application generates the details and visit tasks pages in view-only mode.

Prerequisites:

The visit record you want to edit must exist in the database. The record must be in the Planning state.

To update visit details:

1. Retrieve the visit records that match your need. See [Retrieving Existing Maintenance Visit Records](#).
2. In the Search Results list, click the Visit Number link of the record that you want to edit. This launches the Update Visit page if the visit record is in the Planning state.

Figure 9–17 Update Visit Details - Update Visit page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Unit Maintenance Plan

Visit Work Package

Long Term Planning

Visit

Details

Visit Tasks

Maintenance Requirements

Cost Details

Update Visit

Cancel

Revert

Apply

* Indicates required field

Visit Header Info

Visit Number

456

Visit Name

Visit0526

* Visit Type

A Check

Item

AHLITEM002

Unit

UC0426

Serial Number

SN0426

Organization

Department

Service Request

Category

Category 5

Simulation Plan

Primary Plan

Start Date

26-MAY-2004

Hour

05

00

Planned End Date

31-MAY-2004

Hour

08

00

End Date

Due By Date

Visit Status

Planning

Description

New Visit

Cancel

Revert

Apply

3.

Make the necessary changes to the field values. For field descriptions, see [Fields on the Create Maintenance Visit and Edit Maintenance Visit Pages](#).
4.

Click Apply to record the changes.

If the visit record you selected has the status Released, or Closed, the application launches the View Visit page. If necessary, a Super-User can change the details of a visit. This is possible if such a user responsibility has been created while setting up Oracle Complex Maintenance, Repair, and Overhaul.
5.

To update tasks associated with the visit, use the side navigation menu. See [Associating Tasks with Maintenance Visits](#).

Creating Imminent Visit Tasks

When creating tasks for serialized inventory items, Visit Work Package allows the maintenance planner to select maintenance requirements derived as imminent for the serialized assembly or equipment unit in the Oracle Complex Maintenance,

Repair, and Overhaul Unit Maintenance Plan module. The planner can then select one or more routes associated with the pending maintenance requirement for attachment to the visit as tasks.

The Create Planned Task page provides the ability to search and display unit effectivity. Maintenance planners can create tasks associated with a selected Unit Effectivity ID.

Prerequisites:

The visit record for which you want to create planned tasks must exist in the database in the Planning state. The unit maintenance requirement that you want to associate to the visit must exist in the database.

To create imminent visit tasks:

1. Find the visit you want to create a task for. See [Retrieving Existing Visit Task Records](#).
2. Select the Visit you want to create a task for, and choose **Search Tasks** from the drop-down menu. The Search Visit Task page appears.

Figure 9–18 Find Task Record - Search Visit Task page

Search Visit Task

Cancel

Visit Number 435

Unit

Serial Number 300

Visit Type A Check

Start Date 28-SEP-2004

End Date 30-SEP-2004

Item 737-800

Organization San Diego Manufacturing

Department Inspection Department

Task Number

Task Name

Maintenance Requirement

Route

Task Type

Tasks Due By

Work Order

Work Order Status

Service Request

Department

Item

Serial Number

Go

Clear

Search Results

Create Planned Task

Create Unplanned Task

Create Unassociated Task

Create Summary Task

Previous

1-10 of 11

Next

Task Number	Task Name	Item	Serial Number	Maintenance Requirement	Route	Department	Start Time	End Time	Task Type	Hierarchy	Cost/Price	Remove
1	737-800 Maintenance Check	737-800	300	737-800 Maintenance Check					Summary			
2	RTS Route	737-800	300	737-800 Maintenance Check	RTS Route		29-SEP-2004 10:00	29-SEP-2004 10:30	Unplanned			
	R and R APU	737-800		R and R APU								

3. Click **Create Planned Task** to create an imminent on-plan task. The Search Unit Maintenance Plan page appears.

Figure 9–19 Search Unit Maintenance Plan page

ORACLE® Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Unit Maintenance Plan

Visit Work Package

Long Term Planning

Visit

Search Unit Maintenance Plan

Cancel

Unit Name

Item 737-800

Serial Number 300

Sort by Due Date

Status Open

Title

Program Type

Due from

Due to

☒ Show Dependent Components

☐ Show Child Maintenance Requirements

☐ Show Replicate

Go Clear

Results: Unit Maintenance Requirements

Select Unit Maintenance Plan and ...

Associate to Visit

Go

Previous

1-3 of 3

Next

Select	Program Type	Title	Item	Serial Num	UOM	Remain	Cnt	Earlier Due	Due Date	Latest Due	Tolerance	Status	Sched. Date	Visit	Originator Title	Dependent Title	Deferred From	Deferred To
<input checked="" type="radio"/>	Letter Check	737-800 Maintenance Check	737-800	300	2000	TSN		04-DEC-2004	14-DEC-2004	24-DEC-2004								

4. Search for the relevant information, then select a Maintenance requirement from the existing plan for which you want to create a visit task. Select Associate to Visit from the menu and click **Go**. The Create Planned Task page appears.

Figure 9–20 Create Planned Task page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Unit Maintenance Plan](#) [Visit Work Package](#) [Long Term Planning](#)

Visit

Create Planned Task

Visit Number 435

Unit

Serial Number 300

Visit Type A Check

Start Date 28-SEP-2004

End Date

Item 737-800

Organization San Diego Manufacturing

Department Inspection Department

Cancel

Revert

Apply

Unit Maintenance Plan Requirements

Maintenance Requirement R and R APU Generator

Item 737-800

Due By Date

Serial Number 300

Task Header Information

Department

Service Request

Cancel

Revert

Apply

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- 5. To specify that the added Maintenance requirement is performed by another department, select a department from the Department LOV. You can only select a department in the same organization. The department defined for the visit header is the default choice. If the Maintenance requirement is motivated by a service request, select the service request from the Service Request LOV.
- 6. Click **Apply**. The Search Visit Task page appears, displaying the associated Planned task.

Note: You can also access the Create Planned Task page from the Visit Tasks page by clicking the Create Planned Tasks button. See [Associating Tasks with Maintenance Visits](#).

Special conditions to consider when adding tasks to a visit definition:

- Maintenance requirements can occur in groups. See [Fleet Maintenance Program](#) for more information about grouped maintenance requirements. Periodic work

packages often include more frequently scheduled work packages. If you select a group maintenance requirement, and do not select one or more of the routes that comprise any of the maintenance requirements in the group, then all of the routes that comprise the maintenance requirement will be retrieved.

- If there are already associated routes from the imminent maintenance requirement that you just selected to tasks in the current visit, those tasks will be shown as linked.
- If the visit definition already includes one or more tasks that are linked to the previously selected maintenance requirement and one of its routes, and the same serial number as is currently selected, those tasks will be connected to the corresponding imminent maintenance requirement from Unit Maintenance Plan.
- If the visit definition already includes a task created from the same maintenance requirement and route, does not have a corresponding unit identifier, and is present in the visit because of a different service request, a new task record is created for the current service request.
- If the visit definition already includes a task for the same maintenance requirement, route, and unit serial number, but a different department, a new task record is created.
- Visit Work Package creates the task name from the corresponding route identifier.
- For each maintenance requirement to be accomplished during the visit, a summary task that serves as a placeholder in the task hierarchy is created. The summary task receives its name from the title of the maintenance requirement.
- All of the tasks created for the corresponding routes that comprise a maintenance requirement have the Maintenance requirement's summary task as both the parent and originating tasks.
- If you decide to attach all of an Maintenance requirement's routes to a visit as tasks, any work sequence dependencies defined when the maintenance plan was transferred to Fleet Maintenance Program will be reproduced in the visit's task sequence. Conversely, tasks created from routes that are not in a sequence network must be manually added. If task sequencing dependencies have already been defined for this visit, route sequence dependencies defined in Fleet Maintenance Program are not applied in order to avoid disrupting the task network defined in the visit. These must also be manually created. More information about the task network is found in the section [Defining Visit Task Hierarchy](#).

Creating Undated Visit Tasks

The following details procedures for creating undated maintenance visit tasks. Apart from the pending maintenance requirements for serialized items, maintenance planners can associate undated maintenance requirements with a visit instance. These requirements are defined in the Oracle Complex Maintenance, Repair, and Overhaul Fleet Maintenance Program module. The duration of each task is captured from the route definition that is created when the original maintenance plan is entered and managed with the Oracle Complex Maintenance, Repair, and Overhaul Route Management module.

The Create Unplanned Task page provides the ability to retrieve and display maintenance requirement routes. Maintenance planners can create tasks associated with selected maintenance requirement routes. This feature is useful if you have the need to use an existing maintenance route that is not part of the scheduled maintenance plan for the equipment unit, to accomplish a repair or service procedure. This is a two-step process. You first select the route(s) from maintenance requirement for the equipment type, and create a corresponding task. Then, you specify the part and its serial number that will be serviced by the task.

Prerequisites:

The visit record for which you want to create undated tasks must exist in the database in the Planning state. The maintenance requirement that you want to associate to the visit must exist in the database.

To create undated visit tasks:

1. Find the Visit you want to create a undated visit task for. See [Retrieving Existing Visit Task Records](#).
2. Select the visit and choose **Search Tasks**. The Search Visit Task page appears.
3. Click **Create Unplanned Tasks**. The Search Maintenance Requirements page appears.

Figure 9–21 Search Maintenance Requirements page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Search Maintenance Requirements

Title	<input type="text"/>	Revision	<input type="text"/>
Originating Document	<input type="text"/>	Status	Complete
Program Type	<input type="text"/>	Parent Title	<input type="text"/>
Category	<input type="text"/>	Description	<input type="text"/>
Associated Item	737-800	Route Number	<input type="text"/>

Maintenance Requirements Results

Select	Title	Revision	Description	Program Type	Status	Effective From	Effective To
No records were found matching the given criteria..							

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Note: You can also access the Create Unplanned Task page from the Visit Tasks page by clicking the Create Unplanned Tasks button. See [Associating Tasks with Maintenance Visits](#).

- Enter the field values as required to specify the search criteria. Asterisks indicate mandatory fields. For field descriptions, see [Fields on the Create Unplanned Task Page](#).
- Click **Go**. The lower half of the screen displays the Search Results list of all matching maintenance routes in the database.

If the maintenance requirement you selected is a group maintenance requirement, then all the child maintenance requirements and associated routes will be displayed in the Search Results. Also, if a task associated to the visit has the matching Item, Maintenance Requirement, and Route combination, then the

system displays the task name in the Search Results Task column. The task names are unique in this visit, and are editable.

All tasks associated to a route will store the applicable maintenance requirement place holder task as the originating and the cost parent task.

Figure 9–22 Maintenance Requirements Search Results - Search Maintenance Requirements page

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[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Unit Maintenance Plan](#) [Visit Work Package](#) [Long Term Planning](#)

Visit

Search Maintenance Requirements

Title

Originating Document

Program Type

Category

Associated Item

Revision

Status

Parent Title

Description

Route Number

737-800

Complete

Go

Clear

Maintenance Requirements Results

Associate To Visit

Cancel

Previous

1-3 of 3

Next

Select	Title	Revision	Description	Program Type	Status	Effective From	Effective To
<input type="radio"/>	737-800 Maintenance Check	737-800	Maintenance Check	Letter Check	Complete	18-MAY-2004	
<input type="radio"/>	Inspect Aft Cargo Compartment Floor		Remove floor board of aft cargo compartment and inspect skin for corrosion as per diagram 53-31-10.	Letter Check	Complete	19-MAY-2004	
<input type="radio"/>	R and R APU Generator		Remove and Replace APU generator.	Letter Check	Complete	19-MAY-2004	

Previous

1-3 of 3

Next

- 6. To restart a search, click **Clear**. (If you have retrieved records being displayed in the lower half of the screen, these records will remain).
After entering the new search criteria, click **Go** to begin searching the database for records that match.
- 7. Select a maintenance requirement, and click **Associate to Visit**. The Create Unplanned Visit Task page appears.

Figure 9–23 Create Unplanned Visit Task page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Create Unplanned Visit Task

Visit Number 435	Visit Type A Check	Item 737-800	
Unit	Start Date 28-SEP-2004	Organization San Diego Manufacturing	<input type="button" value="Cancel"/> <input type="button" value="Revert"/> <input type="button" value="Apply"/>
Serial Number 300	End Date 30-SEP-2004	Department Inspection Department	

Fleet Maintenance Plan Requirements

Maintenance Requirement **R and R APU Generator**

* Indicates required field

Task Header Information

* Item <input type="text"/>	* Serial Number <input type="text"/>
Department <input type="text"/>	Service Request <input type="text"/>

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8. Select an Item and Serial Number from the corresponding LOVs. Optionally, select a department and Service Request.

Figure 9–24 Enter Task Header Details - Create Unplanned Visit Task page

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[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

[Unit Maintenance Plan](#) [Visit Work Package](#) [Long Term Planning](#)

Visit

Create Unplanned Visit Task

Visit Number 435

Unit

Serial Number 300

Visit Type A Check

Start Date 28-SEP-2004

End Date 30-SEP-2004

Item 737-800

Organization San Diego Manufacturing

Department Inspection Department

Cancel

Revert

Apply

Fleet Maintenance Plan Requirements

Maintenance Requirement R and R APU Generator

* Indicates required field

Task Header Information

* Item 737-800

Serial Number 300

Department

Service Request

Cancel

Revert

Apply

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9. Click Apply. The Search Visit Task page appears displaying the associated Unplanned task.

Associating Item Serial Numbers and Service Requests with Tasks

A repair job required to fix a defect reported by built-in test equipment, monitoring and control systems, operating personnel, or maintenance personnel during inspections, might not have a corresponding route in the unit maintenance plan. In such cases, it may be necessary to select a maintenance requirement and routes to add to a visit for the equipment type. See [Creating Undated Visit Tasks](#) for more information.

After a technician has inspected a part, the equipment type task must be associated with an actual part in the unit configuration. The task can also be connected with a service request by adding the service request identifier to the task record. If the part to be serviced or repaired is not serialized, or not of sufficient importance to

describe in the Unit Configuration, the task can be associated with the visit header's equipment type and serial number.

Prerequisites:

The equipment specific task must exist in the database. The service request to be connected to the ad hoc task must exist in the database. The serial number of the part to be serviced must exist as part of the unit configuration.

To associate serial numbers and service requests with a task:

1. Navigate to the Create Unplanned Visit Task page, as explained in [Creating Undated Visit Tasks](#). The page displays the Visit Number, Visit Type, Item, Unit, Start Date and End Date as context information. The Item subcomponent in the visit package to which the service request or serial number is to be associated is also displayed as view-only.

Figure 9–25 View Task Header Information - Create Unplanned Visit Task page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Unit Maintenance Plan
Visit Work Package
Long Term Planning

Visit

Create Unplanned Visit Task

Visit Number 2	Visit Type A Check	Item MRO-C1600	
Unit C-1600, Tail # 101	Start Date	Organization	<input type="button" value="Cancel"/> <input type="button" value="Revert"/> <input type="button" value="Apply"/>
Serial Number 101	End Date	Department	

Fleet Maintenance Plan Requirements

Maintenance Requirement **21-040-00**

* Indicates required field

Task Header Information

* Item	<input type="text"/>	* Serial Number	<input type="text"/>
Department	<input type="text"/>	Service Request	<input type="text"/>

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- 2. Select an Item using the Item LOV. Enter a Serial Number. Use the Search icon to retrieve and display all matching records in the database. Click the pertinent search result to return the value to the corresponding field. Only a serial number that corresponds to the item for which the task was created can be used.

Asterisks indicate mandatory fields. For field descriptions, see [Fields on the Associate Serial Number/Service Request to Task Page](#).

Figure 9–26 Associate Item and Serial Number to Tasks - Create Unplanned Visit Task page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Unit Maintenance PlanVisit Work PackageLong Term Planning

Visit

Create Unplanned Visit Task

Visit Number2

Visit TypeA Check

ItemMRO-C1600

UnitC-1600, Tail #101

Start Date

Organization

Serial Number101

End Date

Department

Cancel

Revert

Apply

Fleet Maintenance Plan Requirements

Maintenance Requirement 21-040-00

* Indicates required field

Task Header Information

* ItemMRO-C1600

* Serial Number101

Department

Service Request

Cancel

Revert

Apply

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- 3. If the task is being added to the visit in response to a service request, select the service request identifier from the list of values. Optionally, assign the task to a department.
- 4. Click Apply to associate the Item Serial Number and Service Request, if any, to the selected task.

Note: The unit configuration name is displayed as part of the visit context information, and is a display-only field on this page.

Creating Visit Tasks Unassociated with Routes

The following provides detailed procedures for creating tasks that are unassociated with any maintenance route for attachment to visits. This process supports the creation of an ad hoc task, usually to repair or replace a component, to be included in a shop or field maintenance visit. Tasks can be added to a visit on an ad hoc basis, even if no corresponding route exists. The description of the work to be accomplished, and the required tools and materials is stored as a task remark.

The Create Unassociated Task page is used to create a task that is not associated with any maintenance route.

Prerequisites:

The visit record for which an ad hoc task is to be created must exist in the database. The part type to which the task pertains must exist in the unit configuration hierarchy of the equipment to which the visit applies.

To create visit tasks unassociated with routes:

1. On the Search Visit Task page (see [Retrieving Existing Visit Task Records](#) for navigation), use the Visit Number field to select the visit record to which you want to associate tasks that are unassociated with routes.
2. Click Create Unassociated Tasks. This launches the Create Unassociated Task page with the visit context information.

Figure 9-27 Define New Unassociated Task - Create Unassociated Task page

ORACLE

Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Unit Maintenance Plan

Visit Work Package

Long Term Planning

Visit

Create Unassociated Task

Visit Number 458

Unit Ucd0206

Serial Number SN0206

Visit Type A Check

Start Date

End Date

Item VG0205

Organization

Department

Cancel

Revert

Apply

* Indicates required field

Task Header Information

* Task Name

Department

* Item

Service Request

Cost Parent Task

Task Description

* Duration /Hour

* Serial Number

Start From Hours

Originating Task

Cancel

Revert

Apply

Note: You can also access the Create Unassociated Task page from the Visit Tasks page by clicking the Create Unassociated Tasks button. See [Associating Tasks with Maintenance Visits](#).

3. Enter the field values. Asterisks indicate mandatory fields. For field descriptions, see [Fields on the Create Unassociated Task Page](#).
- Use the Remarks field to describe the work to be completed, the level of skill required to accomplish the task, the part kits required, and any tools and materials required.

Figure 9–28 Enter Task Header Information - Create Unassociated Task page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Create Unassociated Task

Visit Number 458	Visit Type A Check	Item VG0205	
Unit UC0206	Start Date	Organization	<input type="button" value="Cancel"/> <input type="button" value="Revert"/> <input type="button" value="Apply"/>
Serial Number SN0206	End Date	Department	

* Indicates required field

Task Header Information

* Task Name	<input type="text" value="Task100"/>		
Department	<input type="text"/>	* Duration /Hour	<input type="text" value="10"/>
* Item	<input type="text" value="VG0205"/>	* Serial Number	<input type="text" value="SN0206"/>
Service Request	<input type="text"/>	Start From Hours	<input type="text"/>
Cost Parent Task	<input type="text"/>	Originating Task	<input type="text"/>
Task Description	<input type="text"/>		

- To refresh the screen with empty fields without saving the task information, click Cancel.
- Click Apply to save the unassociated task, and proceed to update the visit task. For more information, see [Updating Visit Task Headers](#).

Figure 9–29 Update Task Header page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Unit Maintenance Plan](#) [Visit Work Package](#) [Long Term Planning](#)

Visit

Details

[Hierarchy](#)

[Cost Details](#)

Update Task Header

Visit Number 458

Unit Uc0206

Serial Number SN0206

Visit Type A Check

Start Date

End Date

Item VG0205

Organization

Department

Cancel

Revert

Apply

* Indicates required field

Task Header Information

Task Number 1

Department

Item VG0205

Service Request

Cost Parent Task

Planned Start Time

Task Description

* Task Name Task100

* Duration /Hour 10

* Serial Number SN0206

Start From Hours

Originating Task

Planned End Time

Cancel

Revert

Apply

[Unit Maintenance Plan](#) | [Visit Work Package](#) | [Long Term](#)

[Planning](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

Updating Visit Task Headers

Oracle Complex Maintenance, Repair, and Overhaul allows you to retrieve existing maintenance visit task records, and edit the header and task hierarchy information. For updating task hierarchy, see [Defining Visit Task Hierarchy](#).

The following explains how you can update existing visit headers. After a maintenance planner associates maintenance requirements with a visit by retrieving the routes defined for the imminent maintenance work, the resulting set of tasks can be edited.

The planner can modify the task attributes that are unique to the current visit association. Attributes inherited from the route definition cannot be updated.

Use the Update Task Header page to update visit task header details, and to navigate to pages that allow you to update task dependency and task hierarchy.

You can access the Update Task Header page using any of the following methods.
For field descriptions, refer to [Fields on the Update Task Header Page](#).

- 1. From the Search Task page:
 - a. Retrieve desired visit task records from the database. See [Retrieving Existing Visit Task Records](#).
 - b. On the Search Results list, click the Task Number link of the task record that you want to update. This launches the Update Task Header page.

Figure 9–30 Modify Information - Update Task Header page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Unit Maintenance Plan](#) [Visit Work Package](#) [Long Term Planning](#)

Visit

Details

[Hierarchy](#)

[Cost Details](#)

Update Task Header

Visit Number 449

Visit Type C Check

Item 737-800

Unit

Start Date 10-DEC-2004

Organization San Diego Manufacturing

Serial Number 300

End Date 11-DEC-2004

Department Inspection Department

Cancel

Revert

Apply

Indicates required field

Task Header Information

Task Number 2

Department

Item 737-800

Maintenance Requirement 737-800 Maintenance Check

Zone

Service Request

Cost Parent Task 1

Due By Date

Tolerance Before

Planned Start Time 10-DEC-2004 7:00

Task Description

Task Name RTS Route

Duration /Hour 0.5

Serial Number 300

Route RTS Route

Sub Zone

Start From Hours

Originating Task 1

Tolerance After

Planned End Time 10-DEC-2004 7:30

- c. Enter or update the field values as required.

Note: You cannot update a task if a maintenance requirement or maintenance requirement route is associated with the task.

- d. Click Apply to save the changes.

- e. To proceed to defining or updating task dependencies and hierarchy, use the side navigation menu.
2. From the Create Unplanned Visit Task page:
 - a. Associate Item Serial Numbers or Service Requests to visit tasks. See [Associating Item Serial Numbers and Service Requests to Tasks](#). Clicking Apply to save the association will launch the Update Task Header page.
 - b. Enter or update the field values as required.

Note: You cannot update a service request if a maintenance requirement(MR) route is associated with the task.

- c. Click Apply to save the changes.
3. From the Create Unassociated Task page:
 - a. Create an unassociated task for a visit. For details, refer to [Creating Visit Tasks Unassociated with Routes](#). Click Apply to save the unassociated task will launch the Update Task Header page.
 - b. Enter the field values as required.
 - c. Click Apply to save the changes.
 - d. To proceed to defining or updating task dependencies and hierarchy, use the side navigation menu.

Defining Visit Task Hierarchy

The following details procedures for defining and editing visit task hierarchy. After visit tasks are attached to the visit header, further refinement of the visit structure involves three processes: removing redundant tasks, defining the task hierarchy for costing purposes, and arranging the tasks sequence. It may be possible to remove redundant tasks if more than one job will be done in the same area of the equipment. To support cost transaction summarization during and after production, a task hierarchy specifies the summary tasks for subtotal calculations using the Oracle Projects features. The tasks sequence specifies the temporal order of tasks to be carried out during the visit, respecting the technical considerations of task dependencies.

After defining task dependencies, the planner can create a final task structure by deriving the task network connecting tasks to each other in a parent-child

relationship. The task network complies with the technical dependencies between tasks while becoming the optimal structure for more efficient maintenance resources utilization.

The Visit Work Package module allows maintenance planners to retrieve visit tasks, select a task record, and define the parent-child relationship between the selected task and other tasks in the visit structure using the Task Hierarchy page.

Prerequisites:

The visit and the associated maintenance task for which you want to define the hierarchy must exist in the database. The visit record must be in the Planning state.

To define visit task hierarchy:

1. Retrieve desired visit task records from the database. See [Retrieving Existing Visit Task Records](#).
2. On the Search Results list, click the Task Name link of the task record that you want to update. This launches the Update Task Header page.
3. Click Hierarchy on the side navigation menu to launch the Task Hierarchy page. The task header context information is displayed on the page. Optionally, you can use the Hierarchy icon in the Search Visit Task page, to navigate to the Task Hierarchy page for a particular task.

Figure 9–31 Task Hierarchy page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Unit Maintenance Plan

Visit Work Package

Long Term Planning

Visit

Details

Hierarchy

Cost Details

Task Hierarchy

Task Number2

Service Request671

Maintenance RequirementMR0205

Zone

Task NameRoute0205

DepartmentOutside Processing

RouteRoute0205

Sub Zone

Cancel

Revert

Apply

Hierarchy

Select	Task Number	Task Name	Department	Zone	Sub Zone	Start From Hours	Relationship
No records were found matching the given criteria..							
<div>Add More Rows</div>							

Cancel

Revert

Apply

Unit Maintenance Plan

Visit Work Package

Long Term

Planning

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

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- 4. To edit the workflow hierarchy information of an associated task, select the task using the radio button, and click Edit Hierarchy. This launches the Update Visit Task Hierarchy page. For field descriptions, see [Fields on the Update Visit Task Hierarchy Page](#).
- 5. To remove a task from the hierarchy, click the corresponding Remove icon on the Task Hierarchy page.
- 6. Click Apply to save the changes, and refresh the Hierarchy list with new rows.

Viewing Maintenance Requirements for a Visit

The Search Maintenance Requirements page provides an overview of maintenance requirements associated with a visit. You can search for, view the details, the applicable tasks and the costing information for all maintenance requirements.

Prerequisite:

The maintenance requirement that you want to view details of must exist in the database and must have been associated with the visit.

To view maintenance requirements associated with a visit:

1. Retrieve the visit records that match your needs. See [Retrieving Existing Maintenance Visit Records](#).
2. In the Search results list, click the Visit Number link of the record that you want to view the maintenance requirements for. This launches the Update Visit page if the visit record is in the Planning state. If the visit record is in the Released or Closed status, the application generates the View Visit Details page.
3. On the side navigation menu, click Maintenance Requirements. The Search Maintenance Requirements page appears displaying a list of all the maintenance requirements.

Figure 9–32 View Maintenance Requirements - Search Maintenance Requirements page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Unit Maintenance Plan](#) [Visit Work Package](#) [Long Term Planning](#)

Visit

[Details](#)
[Visit Tasks](#)
Maintenance Requirements
[Cost Details](#)

Search Maintenance Requirements

Visit Number 420

Unit Ucd0206

Serial Number SN0206

Visit Type A Check

Start Date 07-MAY-2004

End Date 07-MAY-2004

Item VG0205

Organization San Diego Manufacturing

Department Outside Processing

Maintenance Requirement

Description

Go

Clear

Previous

1-1 of 1

Next

Title	Description	Type	Item	Serial Number	Tasks	Cost/Price	Remove
MR0205	New MR		VG0205	SN0206			

Previous

1-1 of 1

Next

Cancel

[Unit Maintenance Plan](#) | [Visit Work Package](#) | [Long Term](#)

[Planning](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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- 4. To view task and cost/price information, click the corresponding icon in left-hand navigation panel.

9-60 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 9–33 View Cost/Price Details - Visit Cost and Price page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Unit Maintenance Plan](#) [Visit Work Package](#) [Long Term Planning](#)

Visit

[Details](#)
[Visit Tasks](#)
[Maintenance Requirements](#)
[Cost Details](#)

Visit Cost and Price

Visit Number 420
Unit Ucd0206
Serial Number SN0206

Visit Type A Check
Start Date 07-MAY-2004
End Date 07-MAY-2004

Item VG0205
Organization San Diego Manufacturing
Department Outside Processing

Cost/Price Details

☐ Visit for Outside Party

Price List
Estimated Cost

Currency ANY
Actual Cost

Estimate Cost

Estimate Cost

[Unit Maintenance Plan](#) | [Visit Work Package](#) | [Long Term](#)

[Planning](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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Creating an Associated Project

Oracle Projects is used to collect transaction costs during a maintenance visit. Each CMRO visit is associated with a project to use Oracle Project Manufacturing's billing and report functionality. The project is created from the default project template defined in the applicable CMRO profile. For information on Oracle CMRO's integration with Oracle Projects, refer to the *Oracle Complex Maintenance, Repair, and Overhaul Implementation Guide*.

Prerequisites:

You must have a valid visit. The visit must have valid start and end dates, and must be scheduled to an organization and department. The visit must have at least one task associated with it.

To create an associated project:

1. Navigate to the Search Visits UI. See [Retrieving Existing Maintenance Visit Records](#).
2. Select a visit and choose Projects from the drop-down menu. An associated project is created with the same number as the visit's. Project tasks are created for each of the visit's tasks.

Note: The Project parameters is also automatically defined.

Defining Visit Cost Structure

The following section provides detailed procedure on defining visit cost structures. A maintenance planner may not wish to export all planned visit definitions to Oracle Projects. Using the Oracle Complex Maintenance, Repair, and Overhaul Long Term Planning module, the planner may define a set of visit options, called simulations. Each member of a simulation set is a complete visit definition. The planner uses the simulation set to determine the task package that is optimal with respect to the scheduling of repair facilities, and the materials necessary to complete each job.

Prerequisites:

The visit and tasks must exist in the database. The visit cost structure must be known for accounting purposes.

To define visit cost structure:

1. Retrieve the desired visit records from the database. See [Retrieving Existing Visit Records](#).
2. On the Search Results list, click the Cost Structure icon corresponding to the visit for which you want to define or update cost structure. This launches the Visit Cost Structure page with the visit context information.

Figure 9–34 Define Visit Cost Structure - Cost Structure page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Cost Structure

Visit Number 436	Visit Type A Check	Item 737-800
Unit	Start Date 12-OCT-2004	Organization San Diego Manufacturing
Serial Number 300	End Date 14-OCT-2004	Department Inspection Department

☐ gantas_mat_req_visit
☐ 737-800 Maintenance Check
☒ RTS Route
☐ R and R APU Generator

* Indicates required field

Cost Information

Estimated Cost	Actual Cost
----------------	-------------

Summary Task Header Info

Task Number **1**

* Task Name Department

Item **737-800** Serial Number **300**

Maintenance Requirement **737-800 Maintenance Check** Service Request

Cost Parent Task Originating Task

Task Description

3. Enter the field values as required. Although several fields can be updated on this page, Cost Parent Task field determines which other task will be the current task's immediate predecessor in the cost accounting structure. For field descriptions, see [Fields on the Visit Cost Structure Page](#).
4. Click Apply to save the visit cost structure.

Visit Costing and Pricing

You can calculate the cost and/or price for a maintenance visit. Costs can be estimated at any stage of the visit planning, based on resource and material requirements. Actual costs are calculated based on the material and resource transactions for a job.

Prices are calculated for third-party maintenance visits. When performing third-party maintenance, a predefined price list is associated with the visit. Prices are estimated based on the required materials and resources. The actual price of the

visit is generated out of the used materials and resources. Additionally, you can calculate the cost for such a visit, and determine the profit arising out of a service provided, by comparing it with the visit price. The difference between the visit price and the cost is your profit.

See:

- [Visit Costing](#)
- [Visit Pricing](#)

Visit Costing

Visit Costing is the collection of all costs incurred in executing a maintenance project. Costs arise out of the materials and resources allocated for the visit. You can estimate the cost of a visit based on these material and resource requirements. When the visit is pushed to production, the actual cost of the execution is calculated from the shop floor transactions. Costs are rolled up at every level of the visit's costing structure. You can view the cost at the task, maintenance requirement, and visit level.

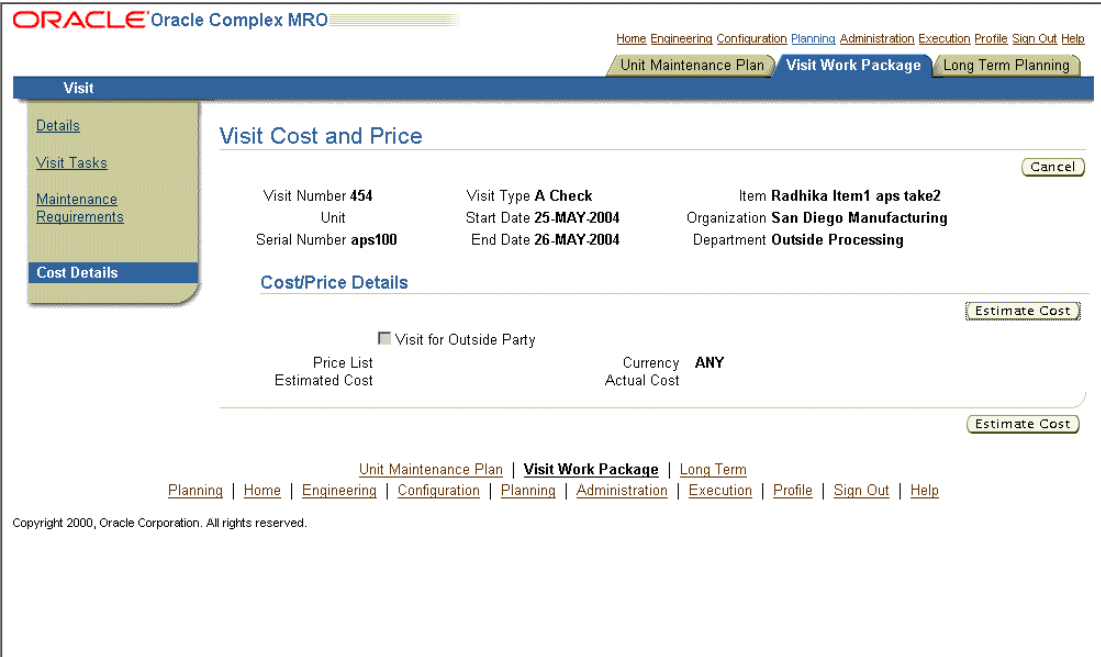
Prerequisites:

Billing items must be setup in Oracle Inventory. Billing items are defined as non-stockable and non-transactable items. For each Maintenance Requirement, you must select the respective billing item in Fleet Maintenance Program at the MR header. Visits which include these MRs will have price information.

To estimate the cost of a visit:

1. Create a visit, and associate tasks with it. For information, see [Creating Maintenance Visit Records](#), and [Associating Tasks with Maintenance Visits](#).
2. Navigate to the Update Visit page. Select Cost Details from the side navigation menu. The Visit Cost and Price page appears.

Figure 9–35 Estimate Visit Cost - Visit Cost and Price page



ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Details
Visit Tasks
Maintenance Requirements
Cost Details

Visit Cost and Price

Visit Number **454** Visit Type **A Check** Item **Radhika Item1 aps take2**
Unit Start Date **25-MAY-2004** Organization **San Diego Manufacturing**
Serial Number **aps100** End Date **26-MAY-2004** Department **Outside Processing**

Cost/Price Details

☐ Visit for Outside Party

Price List Estimated Cost Currency **ANY** Actual Cost

Estimate Cost

Estimate Cost

Unit Maintenance Plan | **Visit Work Package** | Long Term
Planning | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

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- Click Estimate Cost to initiate the cost estimation process. The cost will be displayed in the Cost/Price Details region.

The following can be applied to the cost estimation process:

- You will be prompted to re-estimate costs when tasks are added and/or deleted from the visit
- If you modify a material or resource requirement, and/or perform a material or resource transaction, the system automatically displays the updated estimated and actual costs.
- For an MR/Visit/Task that does not have an associated work order, a corresponding work order in Draft status is created in WIP, when you click the Estimate Cost Button.
- The actual task cost is the sum of the cost of the service item for the route, and actual cost calculated. When a task has an associated OSP work order,

the actual cost will be sum of the cost of the OSP line and actual cost calculated. The estimated task cost is the same as the actual cost.

- The estimated cost of the MR is the sum of the estimated costs of the tasks in that MR. The actual cost of the MR is the sum of the actual costs of the tasks in that MR.
- The estimated cost of the visit is the sum of the estimated costs of the MRs and other tasks that are associated with the visit. The actual cost of the visit is the sum of the actual costs of the MRs and other tasks that are associated with the visit.

To view cost information:

1. Retrieve the visit task record, for which you want to view the cost information. For information, see [Retrieving Existing Visit Task Records](#).
2. To view the cost rollup, select the visit, and click the corresponding Cost Structure icon. The cost structure page appears. Nodes in the cost structure correspond to the Visit, and its associated MR and tasks.
3. Click on any node in the tree structure to view the cost details. If the node does not have a corresponding work order in WIP, then the Estimated Cost and Actual Cost fields will be empty
4. To view cost information at the visit level, select the visit in the Search Visits page, and choose Cost and Price Information from the drop-down menu. Click Go. The Visit Cost and Price page appears displaying the estimated and actual cost information.

Figure 9–36 View Cost Estimate - Visit Cost and Price page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Details
Visit Tasks
Maintenance Requirements
Cost Details

Visit Cost and Price

Cancel

Visit Number 424	Visit Type A Check	Item 737-800
Unit	Start Date 20-MAY-2004	Organization San Diego Manufacturing
Serial Number 300	End Date 21-MAY-2004	Department Outside Processing

Cost/Price Details

Cost Snapshot

☐ Visit for Outside Party

Price List	Currency ANY
Estimated Cost 2200	Actual Cost 200

Cost Snapshot

Unit Maintenance Plan | **Visit Work Package** | Long Term

Planning | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

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- To view costs at the task level, click Visit Tasks in the side navigation menu. The Search Visit Task page appears, displaying a list all the tasks associated with the visit.
- To view cost information for a task, select the corresponding Cost/Price icon. The Task Cost and Price page appears, displaying the estimated and actual task costs.

Figure 9–37 Task Cost and Price page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Unit Maintenance Plan](#) [Visit Work Package](#) [Long Term Planning](#)

Visit

Details

Cost Details

Task Cost and Price

Cancel

Task Number1

Service Request

Maintenance Requirement737-800 Maintenance Check

Zone

Task Name737-800 Maintenance Check

Department

Route

Sub Zone

Cost/Price Details

Price List

Estimated Cost2200

CurrencyANY

Actual Cost200

[Unit Maintenance Plan](#) | [Visit Work Package](#) | [Long Term Planning](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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- 7. To view costs at the MR level, in the Visit Cost and Price page, click Maintenance Requirements in the side navigation menu. The Search Maintenance Requirement page appears, displaying the list of MRs associated with the visit.
- 8. To view cost of an MR, click the corresponding Cost/Price icon. The Maintenance Requirement Cost and Price page appears, displaying the cost details.

Figure 9–38 Maintenance Requirement Cost and Price page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Maintenance Requirement Cost and Price

Cancel

Visit Number 424	Visit Type A Check	Item 737-800
Unit	Start Date 20-MAY-2004	Organization San Diego Manufacturing
Serial Number 300	End Date 21-MAY-2004	Department Outside Processing

Maintenance Requirement Details

Title	737-800 Maintenance Check	Description	737-800 Maintenance Check
Billing Item			

Cost/Price Details

Currency	ANY		
Estimated Cost	2200	Actual Cost	200

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You can store the cost estimate that you are viewing, by selecting Cost Snapshot. This snapshot can be used for comparison with other snapshots of the same visit with different tasks or in a different location.

Note: If the visit cost has not been estimated, then the system will automatically calculate the actual and estimated costs, when a visit is closed.

Visit Pricing

A maintenance organization may perform a service for an outside party or customer. Pricing is the calculation of costs arising out of third-party maintenance. You can define a price list at visit level or at task level. The price list at task level is optional and supersedes the price list defined at visit level. For price information at task level, you have to define the material and resource requirements as price items in the price list. You can also calculate prices for Maintenance Requirements (MR).

Billing items must be created, and linked to the maintenance requirement. Visit Work Package, then takes the price of the maintenance requirement from the price list associated at visit work package level.

Prerequisites:

The System Profile Option QP: Licensed For Product must be set to Oracle Complex MRO. A Service Request must be associated with the visit.

To calculate the price for a visit:

- 1. Create a visit, and associate a service request with it. Save the record.
- 2. In the Update Visit page, select Cost Details from the side navigation menu. The Visit Cost and Price page appears. Select the Visit for Outside Party check box.

Figure 9–39 Mark a Visit for Outside Party - Visit Cost and Price page

ORACLE

Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Unit Maintenance Plan

Visit Work Package

Long Term Planning

Visit

Details

Visit Tasks

Maintenance Requirements

Cost Details

Visit Cost and Price

Visit Number 471

Unit

Serial Number SN001

Visit Type A Check

Start Date 21-JUN-2004

End Date

Item 1319M11P04

Organization

Department

Cost/Price Details

☒ Visit for Outside Party

Price List

Estimated Cost

Currency

Actual Cost

Estimate Cost

Apply

Revert

Estimate Cost

Apply

Revert

Unit Maintenance Plan

Visit Work Package

Long Term Planning

[Planning](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

- 3. Select a Price List using the Search icon. You can only associate a price list that has been created for the customer specified in the service request, and is valid

for the period between the visit start and end date. Click Apply. The Estimate Price button appears in the Cost/Price Details region.

Figure 9–40 Estimate Price - Visit Cost and Price page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Details
Visit Tasks
Maintenance Requirements
Cost Details

Visit Cost and Price

Cancel

Visit Number **471** Visit Type **A Check** Item **1319M11P04**
 Unit Start Date **21-JUN-2004** Organization
 Serial Number **SN001** End Date Department

Cost/Price Details

☒ Visit for Outside Party

Price List Currency
 Estimated Cost Actual Cost
 Estimated Price Actual Price
 Estimated Profit Actual Profit

Estimate Price Estimate Cost Items Without Price Apply Revert

Unit Maintenance Plan Visit Work Package Long Term
 Planning Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

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4. Create tasks for the visit. For information, see [Associating Tasks with Maintenance Visits](#).

Note: Each BOM resource used in the task resource requirements or work order transactions must be associated with an Item. For the system to be able to calculate price for a task, all the materials and resources' billing items should be orderable and defined in the price list associated with the task/visit.

5. Click Estimate Price in the Visit Cost and Price page, to initiate the price calculation process.

The following can be applied to the price calculation process:

- The price of a task, associated with a route, is estimated by adding the price of the materials and resources required to perform that task. The estimated price for a task without a route association is always zero. The actual price is calculated by adding the prices of the materials and resources transacted. If the task price is re-calculated, and the amount differs from the former estimate, then the MR and visit prices are adjusted accordingly.
- For an MR with a billing item associated, the estimated price is the price of the billing item. For an MR with no Billing Item associated, the estimated price is the sum of the estimated prices of the tasks in that MR. The actual price of the MR is calculated by adding the actual prices of the tasks in that MR. If the MR price is re-calculated, and the new price differs from the old one, then visit price will be adjusted accordingly.
- The estimated price of the visit is the sum of the estimated prices of the MRs and other tasks that are not through an MR. The actual price of the visit is the sum of the actual prices of the MRs and other tasks that are not through an MR. When an MR or a task is deleted from the visit, the MR/task price is subtracted from the visit price.

To view price information:

1. Retrieve the visit task record, for which you want to view the price information. For information, see [Retrieving Existing Visit Task Records](#).
2. To view the cost rollup, select the visit, and click the corresponding Cost Structure icon.
3. To view price information at the visit level, select the visit in the Search Visits page, and choose Cost and Price Information from the drop-down menu. Click Go. The Visit Cost and Price page appears displaying the estimated and actual prices.

Figure 9–41 View Prices - Visit Cost and Price page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

[Details](#)
[Visit Tasks](#)
[Maintenance Requirements](#)
Cost Details

Visit Cost and Price

Cancel

Visit Number **457** Visit Type **A Check** Item **VG0205**
Unit **Ud0206** Start Date **26-MAY-2004** Organization **San Diego Manufacturing**
Serial Number **SN0206** End Date **26-MAY-2004** Department **Outside Processing**

Cost/Price Details

Estimate Price Price Snapshot Cost Snapshot Items Without Price Apply Revert

☒ Visit for Outside Party

Price List	Price List 0204	Currency	ANY
Estimated Cost	171.9	Actual Cost	28.65
Estimated Price	299.46	Actual Price	49.91
Estimated Profit	127.56	Actual Profit	21.26

Estimate Price Price Snapshot Cost Snapshot Items Without Price Apply Revert

Unit Maintenance Plan | **Visit Work Package** | Long Term
Planning | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

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- To view price at the task level, click Visit Tasks in the side navigation menu. The Search Visit Task page appears, displaying a list all the tasks associated with the visit.

Figure 9-42 Find Tasks Associated With a Visit- Search Visit Task page

Search Visit Task

Cancel

Visit Number 457

Unit Uc0206

Serial Number SN0206

Visit Type A Check

Start Date 26-MAY-2004

End Date 26-MAY-2004

Item VG0205

Organization San Diego Manufacturing

Department Outside Processing

Task Number

Task Name

Maintenance Requirement

Route

Task Type

Tasks Due By

Work Order

Work Order Status

Service Request

Department

Item

Serial Number

Go

Clear

Search Results

Previous

1-2 of 2

Next

Task Number	Task Name	Item	Serial Number	Maintenance Requirement	Route	Department	Start Time	End Time	Task Type	Hierarchy	Cost/Price
1	MR0421	VG0205	SN0206	MR0421					Summary		
2	Route0421	VG0205	SN0206	MR0421	Route0421		26-MAY-2004 7:00	26-MAY-2004 13:00	Unplanned		

Previous

1-2 of 2

Next

- 5. To view the task price, select the corresponding Cost/Price icon. the Task Cost and Price page appears, displaying the estimated and actual task prices.

9-74 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 9–43 View Task Price - Task Cost and Price page

ORACLE® Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Details

Cost Details

Task Cost and Price

Task Number 1
Service Request
Maintenance Requirement **MR0421**
Zone

Task Name **MR0421**
Department
Route
Sub Zone

Cancel

Cost/Price Details

Price List		Currency	ANY	Estimate Price	Items Without Price
Estimated Cost	171.9	Actual Cost	28.65		
Estimated Price	299.46	Actual Price	49.91		
Estimated Profit	127.56	Actual Profit	21.26		

Estimate Price Items Without Price

Estimate Price Items Without Price

Unit Maintenance Plan | Visit Work Package | Long Term

Planning | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

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- To view price at the MR level, in the Visit Cost and Price page, click Maintenance Requirements in the side navigation menu. The Search Maintenance Requirement page appears, displaying the list of MRs associated with the visit.
- To view the MR price, click the corresponding Cost/Price icon. The Maintenance Requirement Cost and Price page appears, displaying the price.

Figure 9–44 View Maintenance Requirement Price - Maintenance Requirement Cost and Price page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Unit Maintenance Plan](#) [Visit Work Package](#) [Long Term Planning](#)

Visit

Maintenance Requirement Cost and Price

Visit Number 457
Unit Ud0206
Serial Number SN0206

Visit Type A Check
Start Date 26-MAY-2004
End Date 26-MAY-2004

Item VG0205
Organization San Diego Manufacturing
Department Outside Processing

Cancel

Maintenance Requirement Details

Title MR0421
Billing Item

Description

Estimate Price

Items Without Price

Cost/Price Details

Currency ANY
Estimated Cost 171.9
Estimated Price 299.46
Estimated Profit 127.56

Actual Cost 28.65
Actual Price 49.91
Actual Profit 21.26

Estimate Price

Items Without Price

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8. To view a list of the items not defined in the price list, for a task, MR and/or visit, click Items Without Price. The Items without Price page appears, displaying the items, if any.

Figure 9–45 Items without Price page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Items without Price

Cancel

Visit Number **457** Visit Type **A Check** Item **VG0205**
 Unit **Uc0206** Start Date **26-MAY-2004** Organization **San Diego Manufacturing**
 Serial Number **SN0206** End Date **26-MAY-2004** Department **Outside Processing**

Previous 1-1 of 1 Next

Organization	Item	Item Description	Maintenance Requirement	Task Number	Task Name
San Diego Manufacturing	VG0415	New Item	MR0421	2	Route0421

Previous 1-1 of 1 Next

Cancel

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You can take a snapshot of the task, MR, or visit price by clicking Price Snapshot in the Visit Cost and Price page.

Note: The profit and loss information is displayed only when both the cost and price have been calculated for a visit. Profit is calculated by subtracting the cost from the price.

Managing Long Term Planning

The Oracle Complex Maintenance, Repair, and Overhaul Long Term Plan module maximizes maintenance scheduling by balancing maintenance requirements with available maintenance capacity. It allows you to simulate a visit or sequence of visit combinations in order to find the optimal maintenance visit schedule.

This chapter discusses the key functions supported by the Oracle Complex Maintenance, Repair, and Overhaul Long Term Planning module. The chapter provides process-oriented, task based procedures for using the application to perform essential tasks for planning the long term maintenance needs of fleet units.

See:

- [Finding Scheduled and Unscheduled Visits](#)
- [Assessing a Work Schedule](#)
- [Scheduling a Visit](#)
- [Unscheduled a Maintenance Visit](#)
- [Viewing Scheduled Visit Details](#)
- [Assigning Spaces to a Visit](#)
- [Material Demand Planning and Scheduling](#)
- [Checking Material Availability](#)
- [Checking the Material Schedule](#)
- [Managing Simulation Plans](#)
- [Creating a New Simulation Plan](#)
- [Deleting a Simulation Plan](#)
- [Adding Visits to a Simulation Plan](#)

- [Deleting a Simulation Visit](#)
- [Setting a Simulation Plan as Primary](#)
- [Deleting a Simulation Visit](#)
- [Copying a Visit to a New Simulation Plan](#)
- [Running Resource Leveling Plans](#)

What is Long Term Plan?

The Long Term Planning (LTP) module is used by a maintenance planner to schedule maintenance visits based on the optimal use of capable maintenance facilities, available resources and material constraints. The maintenance planner using Long Term Plan is able to make a complete assessment of the maintenance resources available at all maintenance locations. The maintenance planner is able to do this by balancing visits created for forecasted maintenance requirement information from Unit Maintenance Plan against projected maintenance capacity. The planner will schedule maintenance visits, assess capacity and reserve required materials.

Key Business Processes

Create a Visit A visit is created in Visit Work Package and is a group of events created by the maintenance planner made up of selected maintenance requirements—defined in Unit Maintenance Plan or directly from Fleet Maintenance Program—and associated routes, with projected compliance times based the unit's forecasted operational times. This visit is used to group events together for long and short term capacity planning, and to facilitate scheduling to a maintenance base. Visits are used for production through Visit Work Package and Production Planning. Creation of a maintenance visit consists of selecting and creating tasks for maintenance requirements and associated routes, and projecting compliance times based the unit's forecasted operational times.

Define a Visit's Resource Requirements Maintenance visit resource requirements must be defined to allow accurate scheduling and capacity planning. Visit resource requirements are based on the maintenance requirement's associated routes—which are created in Route Management—and the man hour requirements by skill, skill level and certification, required tooling, required materials, duration and required completion times as defined by Unit Maintenance Plan.

Schedule a Visit After a visit has been created it must be scheduled at a maintenance facility. Availability for this is based on currently scheduled visits, material constraints, and the forecast resources of the maintenance facility. The visit start time is set by considering due dates calculated for maintenance requirements by Unit Maintenance Plan. Required materials are reserved and the maintenance planner can determine if capacity is exceeded or does not fulfill requirements.

Schedule Required Materials After a visit has been created and scheduled to a capable maintenance facility, the associated material requirements are factored into the supply chain plan through Oracle's Advanced Supply Chain Planning application. The visit's required materials, defined through the routes associated to each task, are scheduled based on the start date and time of each task for the applicable organization. LTP provides the planner, functionality to identify any schedule conflicts, when the required materials will not be available by the start date of the applicable visit task. Alternate items for these requirements may be selected and scheduled, or the planner may make scheduling changes to ensure that the materials will be available by the start of the associated work order.

Capacity Versus Work Load Requirements You can compare resource capacity versus resources required for the projected workload, which is an essential tool for accurate scheduling and planning and ensures that available resources are used as efficiently as possible. This is accomplished through the Resource Leveling feature of Long Term Plan. To derive the optimal schedule, you must have the ability to adjust visit schedules, change maintenance locations, and remove and add visit requirements.

Simulations The simulation function works in conjunction with both the scheduling and resource leveling functions of Long Term Plan. This allows the user to test different scheduling scenarios without changing the original visits. Visits can be copied into a simulation plan and their schedule or structure changed. After evaluating these visits, and taking into account schedule and resource consumption, the changes can be implemented for the entire simulation plan, or for individual visits within the plan.

Fields Associated with Long Term Planning

The following sections provide descriptions of fields appearing on each Long Term Planning page.

Note: The Search icon beside fields implies the availability of a List of Values to choose from for those field values. To populate these fields, enter a partial search string using the generic substitution meta character%, and click the icon to retrieve and display matching results on a Select <field name> page. Click the relevant record on this page to return this value to the field on your maintenance requirement page.

Fields on the Search Visits Page

The Search Visits page is an overview for Long Term Planning. From here you can view all primary visits, scheduled and unscheduled. All visits that need to be associated to an item (model) or serial number, all visits of a certain visit type, all visits due during a defined period, or all visits associated to an organization and department.

The following fields appear on the Search Visits Page:

Organization Visits are associated to an “Organization” that represents the larger group, company, or division where maintenance is performed. All Organizations defined in Oracle HR associated to the user's responsibility can be selected.

Department Departments are a sub group of Organizations. Visits are associated to a Department and all Departments are associated to an Organization. For example, an Organization may be SFO Airport, and a Department may be “Hangar 1.” All Departments are defined in the Bill of Materials, associated to the selected Organization and also associated to the user's responsibility can be selected.

Item The item refers to a part number or a model name—e.g., Boeing 747-200B—that the visit is associated to. All visits must be associated to an item. This field is not required for the search, but filtering the table of visits by item gives a basic picture of the maintenance workload required for a particular model. All items defined in the Inventory associated to the user's responsibility can be selected.

Due From, Due To These two attributes allow the user to filter the displayed visits based on when a visit is due. The due date of a visit is defined by associated maintenance requirements from Unit Maintenance Plan. The maintenance requirements are associated to the visit's tasks. The earliest due date from the associated requirements is the due date of the visit. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.

Start From, Start To Lists the date of the first day of effectivity of an operation.

Display Only A drop down menu used to filter displayed visits by Scheduled, Unscheduled, or Visits with conflicting end dates. This field is empty by default. A visit is considered scheduled if its start date is defined and it is associated with a department and organization. Visits not assigned to any organization and/or department and with no Start Date are Unscheduled Visits. Conflicting visits are visits whose Derived End Date is greater than it's Planned End Date.

Visit Type This defines what kind of maintenance visit is required, e.g, C-Check, D-Check, Preflight. The types are user defined. This allows maintenance to be classified into categories. Larger visits can include many different maintenance requirements, but can still be grouped together under one visit type. Filtering the table of visits by visit type is useful, as the visit type in general and indirectly represents visit's length and resource requirements.

Visit Number All maintenance visits are assigned a unique visit number. All visit numbers for all visits that have been created are available for selection.

Fields on the Simulation Plan Page

The following fields appear on the Simulation Plans page:

Plan Name refers to the name of the simulation plan. All visits are associated with a simulation plan. These plans are used in the scheduling process, and allow you to create different schedule scenarios. The optimal plan is identifying the optimal plan based on resource consumption and schedule flow. After determining the optimal plan, the changes made to the visits within the plan can be implemented, either for the entire plan or for individual visits.

Primary Plan indicates whether or not the plan is set as the primary plan. When visits are created in Visit Work Package, they are automatically included in the primary plan. Copies of these visits can then be added to other simulation plans.

Number of Visits in Plan indicates how many visits are included in the specified plan.

Fields on the View Simulation Plan Page

The following fields appear on the View Simulation Plan page:

Visit Number All maintenance visits are assigned a unique visit number. All visit numbers for all visits can be selected.

Item The item refers to a model name—e.g., Boeing 747-200B—that the visit is associated to. All visits must be associated to an item. This field is not required for the search, but filtering the table of visits by item gives a basic picture of the maintenance workload required for a particular model. All items defined in the Inventory associated to the user's responsibility can be selected.

Visit Type Visit type defines what kind of maintenance visit is required. This allows maintenance to be classified into categories. Larger visits can include many different maintenance requirements, but can still be grouped together under one visit type. Filtering the table of visits by visit type is useful, as the visit type in general and indirectly represents visit's length and resource requirements.

Unit refers to the serial number of a specific item.

Organization Visits are associated to an “Organization” that represents the larger group, company, or division where maintenance is performed. All Organizations defined in Oracle HR associated to the user's responsibility can be selected.

Department Departments are a sub group of Organizations. Visits are associated to a Department and all Departments are associated to an Organization. For example, an Organization may be SFO Airport, and a Department may be “Hangar 1.” All Departments are defined in the Bill of Materials, associated to the selected Organization and also associated to the user's responsibility can be selected.

Start Date Lists the date of the first day of effectivity of this operation.

Fields on the Schedule Visit Page

The Schedule Visit page is accessed from the Search Visits page or the View Simulation Plan page by selecting a visit and clicking on the Schedule button. The selected visit is displayed in context. This page allows you to assign a visit to an organization and department. You also must define its start date. All three of these attributes must be assigned and define a visit as “scheduled.” After a visit has been scheduled, spaces can be assigned and Long Term Planning's resource leveling functionality can be used. You can also reschedule a visit from this screen as long as the visit is still in the “planning” status.

Visit Number All maintenance visits are assigned a unique visit number. All visit numbers for all visits that have been created are available for selection

Duration This is the total length of the visit in days. It is the sum total of the durations of the associated visit tasks. Maintenance visits can be any length, from an hour to an unlimited number of days. A D-Check on a larger aircraft might take 90 days, where a preflight on a small plane might only take 5 minutes.

Visit Type Attribute of the visit in context selected from the previous screen. The visit type values are defined in Oracle Complex Maintenance, Repair, and Overhaul and represent all possible maintenance visits, C-Check, D-Check, Preflight, etc. This allows maintenance to be classified into categories. Some of the larger visits, like a D-Check, will often include many different maintenance requirements, but can still be grouped together under once visit type. Filtering the table of visits by visit type is useful, as the visit type in general and indirectly represents visit's length and resource requirements.

Due By The due date of a visit is defined by the associated maintenance requirements from Unit Maintenance Plan. The maintenance requirements are associated to the visit's tasks. The earliest due date from the associated requirements is the due date of the visit. This is a required field. It is an attribute of the visit in context selected from the previous screen.

Item The item is the model, Boeing 747, 737, etc., that the visit is associated to. All visits must be associated to an item. This is not a required field for the search parameters, but filtering the table of visits by item allows the user to see a basic picture of the maintenance workload required by a particular model. This field is an attribute of the visit in context selected from the previous screen.

Unit refers to the serial number of a specific item.

Simulation Plan Attribute of the visit in context selected from the previous screen. This further identifies the visit by allowing the user to know which simulation plan the visit in context is part of or if it is a visit in the Primary Plan. When coming from the Search Visits screen, the visit will always be part of the Primary Plan. When coming from the View Simulation Plan screen, the value is defined by the plan in context.

Organization All visits are associated to an Organization. An organization represents the larger group, company, division, etc., where the maintenance visit is

to be performed. All Organizations defined in Oracle HR associated to the user's responsibility are available for selection.

Department All visits are associated to a Department and all Departments are associated to an Organization. The Department represents the group below the organization, such as SFO Airport, or the hangar where the maintenance visit is to be performed.

Start Date This is a required field. It is an attribute of the visit in context selected from the previous screen. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.

Planned End Date Displays the planned end date of the visit.

Planned End Time Displays the time at which the visit was planned to end.

Service Category The service category attribute is used to filter the planned requirements.

Fields on the Select Resource Leveling Criteria Page

Organization All visits are associated to an Organization. An organization represents the larger group, company, division, etc., where the maintenance visit is to be performed. All Organizations defined in Oracle HR associated to the user's responsibility are available for selection.

Department All visits are associated to a Department and all Departments are associated to an Organization. The Department represents the group below the organization, such as SFO Airport, or the hangar where the maintenance visit is to be performed.

Start Date This is a required field. It is an attribute of the visit in context selected from the previous screen. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.

End Date This is a required field. It is an attribute of the visit in context selected from the previous screen. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.

Simulation Plan Attribute of the visit in context selected from the previous screen. This further identifies the visit by allowing the user to know which simulation plan

the visit in context is part of or if it is a visit in the Primary Plan. When coming from the Search Visits screen, the visit will always be part of the Primary Plan. When coming from the View Simulation Plan screen, the value is defined by the plan in context.

Required Capacity% This field sets the percentage of capacity that you want to hold in reserve. The table of required resources will be filtered by this percentage. All resources required for each period for all visits in the selected simulation plan are balanced against the total available resources.

Finding Scheduled and Unscheduled Visits

The Search Visit page provides the ability to search and display all maintenance visits regardless of their status.

While entering the search criteria, use the generic substitution meta character % to represent any string of zero or more characters. Use _ to represent any single character. For example, if the database contains a record with the value "ENGINE" in a field, typing "E%" will return all records where the field value begins with "E".

Prerequisites:

The visit you want to retrieve must exist in the database.

To find a visit:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of the Unit Maintenance Plan module appears.
2. Click on the Long Term Planning tab, then select the Visits secondary tab to launch the Search Visits page.

Figure 10–1 Search Visits page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Unit Maintenance PlanVisit Work PackageLong Term Planning

Visits | Simulations | Resource Leveling

Search Visits

Organization

Department

Item

Unit

Due From Date

Start Date From

Display Only

Serial Number

Visit Type

Visit Number

Visit Status

Due To Date

Start Date To

Service Category

Go

Clear

Visits

Select

Visit Number

Item

Visit Type

Serial Number

Organization

Department

Start Date

Planned End Date

End Date

No records were found matching the given criteria..

- 3. Enter the schedule information in the fields for which you know the value. For field descriptions, see [Fields on the Search Visits Page](#).
- 4. Click Go. The lower half of the page displays all of the spaces matching the search criteria you provided. Note that selected visits may be edited and/or deleted.

Figure 10–2 View Visit Search Results - Search Visits page

Search Visits

Organization

Department

Item

Unit

Due From Date

Start Date From

Display Only

Serial Number

Visit Type

Visit Number

Visit Status

Due To Date

Start Date To

Service Category

Go

Clear

Visits

Plan Visit

Unschedule

Previous

1-10 of 290

Next

Select	Visit Number	Item	Visit Type	Serial Number	Organization	Department	Start Date	Planned End Date	End Date
<input type="radio"/>	2	MRO-C1600	A Check	101					
<input type="radio"/>	7	MRO-C1600	A Check	101	San Francisco Aviation Maintenance Center	MRO Satellite Department	04-JUN-2002		
<input type="radio"/>	8	MRO-C1600	C Check	101			07-MAY-2004		
<input type="radio"/>	9	MRO-C1600	C Check	101	San Francisco Aviation Maintenance Center	MRO Headquarters	25-MAR-2002		
<input type="radio"/>	11	MRO-16T9001-831	A Check	4456555	San Diego Manufacturing	Outside Processing	02-DEC-2003		

5. To search for a visit, in production or in planning stage, whose derived end date has exceeded the manually defined planned end date, select Visits with Confliction End Dates from the Display Only drop-down menu. Click Go. You can manually adjust the planned end date in the Schedule Visit UI. See [Scheduling a Visit](#).

Assessing a Work Schedule

Long Term Planning allows quick identification of a maintenance base's workload. This assessment identifies the current scheduled visits at an organization's capable department and spaces for a given maintenance visit.

Prerequisites:

A primary plan with at least one visit must exist in the database. It is helpful if there are maintenance requirements, associated tasks and routes in also in the database.

Managing Long Term Planning 10-11

To assess a work schedule:

- 1. Retrieve the visit schedule you want to assess (see Finding Scheduled and Unscheduled Visits). The search results appear in the lower half of the page.
- 2. Select the appropriate visit, then click Plan Visit. The Schedule Visit page appears.

Figure 10–3 Schedule Visit page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Unit Maintenance Plan | Visit Work Package | Long Term Planning

Visits | Simulations | Resource Leveling

Schedule Visit

[Scheduled Visits](#)

[Scheduled Materials](#)

[Material Availability](#)

Schedule Visit

* Indicates required field

Cancel

Apply

Visit Number456

Duration / Hour

Due By

Serial NumberSN0426

ItemAHLITEM002

Simulation PlanPrimary Plan

UnitUC0426

* Department

* Organization

Planned End Date31-MAY-2004

* Start Date26-MAY-2004

Planned End Time Hours08

* Start Time Hours05

Service CategoryCategory 5

* Visit TypeA Check

Assigned Spaces

Select

Space

No records were found matching the given criteria..

Add More Rows

Cancel

Apply

Unit Maintenance Plan | Visit Work Package | Long Term

Planning | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

- 3. Click Scheduled Visits from the left-hand navigation panel. The Scheduled Visits page appears.
- 4. Enter the schedule information in the fields for which you know the value.

Figure 10–4 Scheduled Visits page

ORACLE® Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Unit Maintenance Plan](#) [Visit Work Package](#) [Long Term Planning](#)

[Visits](#) | [Simulations](#) | [Resource Leveling](#)

[Schedule Visit](#)
Scheduled Visits
[Scheduled Materials](#)
[Material Availability](#)

Available for schedule

Unavailable for schedule

Single visit scheduled

Multiple visits scheduled

Visit Number

456

Visit Status

Planning

Unit

UC0426

Organization

Department

Start Date

26-MAY-2004

End Date

Visit Type

A Check

Service Category

Category 5

Serial Number

SN0426

Item

AHLITEM002

Simulation Plan

Primary Plan

Planned End Date

31-MAY-2004

Due By

Scheduled Visits

* Indicates required field

Available for schedule

Unavailable for schedule

Single visit scheduled

Multiple visits scheduled

Visit Number

456

Visit Status

Planning

Unit

UC0426

Organization

Department

Start Date

26-MAY-2004

End Date

Visit Type

A Check

Service Category

Category 5

Serial Number

SN0426

Item

AHLITEM002

Simulation Plan

Primary Plan

Planned End Date

31-MAY-2004

Due By

Scheduled Visits

Display Period

Days

* Start Date

02-FEB-2004

* Organization

Vision Project Mfg

Department

Space

Service Category

Go

Clear

Scheduled Visits

[View Department Space Service Category](#)

5. Click Go. All Visits within the selected criteria are displayed, showing the Organization, Department, Space, and Category. The schedule is indicated by icons, which are defined at the top of the page. For example, there is an Available for Schedule icon, and a Single visit scheduled icon, etc.

Managing Long Term Planning 10-13

Figure 10–5 View Visit Schedule - Scheduled Visits page

Scheduled Visits

* Indicates required field

Available for schedule

Unavailable for schedule

Single visit scheduled

Multiple visits scheduled

Visit Number456

Visit StatusPlanning

UnitUC0426

Organization

Department

Start Date26-MAY-2004

End Date

Visit TypeA Check

Service CategoryCategory 5

Serial NumberSN0426

ItemAHLITEM002

Simulation PlanPrimary Plan

Planned End Date31-MAY-2004

Due By

Search Scheduled Visits

Display PeriodDays

* Start Date02-FEB-2004

* OrganizationVision Project Mfg

Department

Space

Service Category

Go

Clear

Scheduled Visits

Previous1-1 of 1Next

View	Department	Space	Service Category	02/02	03/02	04/02	05/02	06/02	07/02	08/02	09/02	10/02	11/02	12/02	13/02	14/02	15/02
	061120031																

Previous1-1 of 1Next

Scheduling a Visit

Long Term Plan permits maintenance organizations to schedule visits, which can be created specifically for a maintenance requirement. An empty visit can be created and later be associated to requirements.

Prerequisites:

The visit to be scheduled must exist in the database.

10-14 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

To schedule a visit:

1. Retrieve the visit you want to schedule (see [Finding Scheduled and Unscheduled Visits](#)). The search results appear in the lower half of the page.
2. Select the visit you want to schedule, then click the Plan Visit button. The Schedule Visit page appears.
3. Make any necessary changes, then click Apply to save the changes to the database. You can also adjust the planned end date for a visit with conflicting planned and derived end dates.

Figure 10–6 Enter Schedule information - Schedule Visit page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visits Simulations Resource Leveling

Schedule Visit

* Indicates required field

Cancel Apply

Visit Number	456	Duration / Hour	26
Due By		Serial Number	SN0426
Item	AHLITEM002	Simulation Plan	Primary Plan
Unit	UCD426	* Department	061120031
* Organization	Vision Project Mfg	Planned End Date	31-MAY-2004
* Start Date	26-MAY-2004	Planned End Time Hours	08
* Start Time Hours	05	Service Category	Category 5
* Visit Type	A Check		

Assigned Spaces

Select	Space
No records were found matching the given criteria.	

Add More Rows

Cancel Apply

Unit Maintenance Plan Visit Work Package Long Term Planning

Planning Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

You can schedule and re-schedule a visit while viewing current visit details in the Scheduled Visits UI. You can search for availability periods using the following search criteria:

- Display Period
- Start Date

- Organization
- Department
- Space
- Service Category

The extensive search criteria enables you to schedule the visit in context by selecting the applicable department or space and visit start date, and to quickly identify maintenance opportunities and/or conflicts.

To schedule and re-schedule visits using the Scheduled Visits UI:

1. Navigate to the Scheduled Visits page to view details for a currently scheduled visit number (see [Viewing Scheduled Visit Details](#)).

Figure 10–7 View Visit Header Information - Scheduled Visits page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visits | Simulations | Resource Leveling

[Schedule Visit](#)

Scheduled Visits

[Scheduled Materials](#)

[Material Availability](#)

Scheduled Visits

* Indicates required field

Available for schedule Unavailable for schedule Single visit scheduled Multiple visits scheduled

Visit Number	46	Visit Type	A Check
Visit Status	Planning	Service Category	Category 1
Unit	DRW unit 1	Serial Number	101
Organization	San Diego Manufacturing	Item	DRW unit item 1
Department	Outside Processing	Simulation Plan	Primary Plan
Start Date	09-FEB-2004	Planned End Date	21-DEC-2004
End Date	20-DEC-2004	Due By	

Search Scheduled Visits

Display Period * Start Date

* Organization Department

Space Service Category

Scheduled Visits

[View Department Space Service Category](#)

- 2. Enter information in the relevant fields to retrieve visit information based on the search criteria. Click Go. The schedule details appear in the Scheduled Visits results table.

Figure 10–8 View Detailed Visit Schedule - Scheduled Visit page

Search Scheduled Visits

Display PeriodDays

* Start Date12-JAN-2004

* OrganizationSan Diego Manufacturing

Department

Space

Service Category

GoClear

Scheduled Visits

Previous1-8 of 8Next

View	Department	Space	Service Category	12/01	13/01	14/01	15/01	16/01	17/01	18/01	19/01	20/01	21/01	22/01	23/01	24/01	25/01
	Assembly Department																
	Inspection Department																
	Testing Department																
	Outside Processing																
	P3 Resource Department																
	Mechanical Workshop																
	MU Department																
	Outside Processing	Hanger 1, Dock A	Category 6														

Previous1-8 of 8Next

- 3. Click on the intersecting icon between the start date and corresponding department or space to schedule the visit to the applicable organization, department and space. The Schedule Visit page appears.

Figure 10–9 Schedule a Visit - Schedule Visit page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution Profile

Sign Out

Help

Unit Maintenance Plan

Visit Work Package

Long Term Planning

Visits

Simulations

Resource Leveling

Schedule Visit

Scheduled Visits

Scheduled Materials

Material Availability

Schedule Visit

* Indicates required field

Cancel

Apply

Visit Number

46

Duration / Hour

5377

Due By

Item

Unit

DRW unit item 1

DRW unit 1

Serial Number

101

* Organization

San Diego Manufacturing

* Start Date

12-JAN-2004

Planned End Date

21-DEC-2004

* Start Time Hours

10

Planned End Time Hours

10

* Visit Type

A Check

Service Category

Category 1

Simulation Plan

Department

Primary Plan

Inspection Department

Assigned Spaces

Select

Space

4. Enter the schedule details, and click Apply.
5. To reschedule a visit, click on the icon, denoting scheduled visit, in the results table. Make the necessary changes, and click Apply. Optionally, assign Spaces. For information, see [Assigning Spaces to a Visit](#). The Space information is carried over to the Schedule Visit page for assignment.
6. To view the visit details assigned to a department or space, click on the View icon for the applicable row in the results table. When you click on the view icon for a row representing a department, the View Details UI has the department in context and all scheduled visits starting during the previously defined period are displayed. Similarly, when you click on the view icon for a row representing a space, the View Details UI has the space in context and the scheduled visits starting during the previously defined period are displayed.

Figure 10–10 Visit Details page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visits | Simulations | Resource Leveling

Visit Details

Organization **San Diego Manufacturing** Space
Department **Outside Processing** Simulation Plan **Primary Plan**

[Previous](#)

[Schedule](#)

Previous 1-5 of 5 Next

Select	Visit Number	Visit Name	Visit Type	Unit	Item	Serial Number	Start Date	Due By	End Date	Additional Spaces Assigned
<input type="radio"/>	61	DRW unplanned mat reqs, items 1, 2 & 3	A Check	DRW unit 1	DRW unit item 1	101	13-JAN-2004		13-JAN-2004	
<input type="radio"/>	62	DRW unplanned mat reqs, items 1, 2 & 3	A Check	DRW unit 1	DRW unit item 1	101	20-JAN-2004		20-JAN-2004	
<input type="radio"/>	50	DRW planned req, mr 1 & 2	A Check	DRW unit 1	DRW unit item 1	101	15-JAN-2004	27-JUN-2004	15-JAN-2004	
<input type="radio"/>	51	DRW planned req, mr 1 & 2	A Check	DRW unit 1	DRW unit item 1	101	22-JAN-2004	03-JUL-2004	22-JAN-2004	
<input type="radio"/>	67	DRW unplanned req, prod, items 1-4	A Check	DRW unit 1	DRW unit item 1	101	13-JAN-2004		13-JAN-2004	

Previous 1-5 of 5 Next

[Schedule](#)

The Additional Spaces Assigned column in the Visit Details page indicates whether or not additional spaces are assigned to the applicable visits. With a department in context, those visits that have a space assignment are identified by a 'Yes' in the Additional Space Assignment Column. With a space in context, those visits that have an additional space assignment, other than the space in context, are identified by a 'Yes' in the Additional Space Assignment Column.

- To return to the Scheduled Visits page, select the visit and click Schedule.

Note: You cannot re-schedule a Visit if a time slot is designated as Unavailable.

Unschedulering a Maintenance Visit

Prerequisite:

The visit to be removed from the schedule must exist in the database.

To unschedule a maintenance visit:

1. Retrieve the visit you want to schedule (see [Finding Scheduled and Unscheduled Visits](#)). The search results appear in the lower half of the page.
2. Select the visit you want to remove from the schedule, then click the Unschedule button.
3. The visit is removed from the schedule and no longer appears in the Visits results. The Organization, Department, Start Date and any associated Spaces are removed from the visit.

Viewing Scheduled Visit Details

Prerequisites:

A scheduled visit must exist in the database.

To view scheduled visit details:

1. Retrieve the visit for which you want to view details (see [Finding Scheduled and Unscheduled Visits](#)). The search results appear in the lower half of the page.
2. Select the visit you want to view details for, then click the Plan Visit button. The Schedule Visit page appears, displaying the currently scheduled visits for the relevant visit number.

Figure 10–11 View Schedule Details - Schedule Visit page

ORACLE® Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visits | Simulations | Resource Leveling

Schedule Visit

[Scheduled Visits](#)

[Scheduled Materials](#)

[Material Availability](#)

* Indicates required field

Cancel Apply

Visit Number	46	Duration / Hour	7584
Due By		Serial Number	101
Item	DRW unit item 1	Simulation Plan	Primary Plan
Unit	DRW unit 1		
* Organization	San Diego Manufacturing	* Department	Outside Processing
* Start Date	09-FEB-2004	Planned End Date	21-DEC-2004
* Start Time Hours	10	Planned End Time Hours	10
* Visit Type	A Check	Service Category	Category 1

Assigned Spaces

Delete

Previous 1-1 of 1 Next

Select Space

☐ Hanger 1, Dock A

Add More Rows

Previous 1-1 of 1 Next

Note: In the Schedule Visit page, you can edit the planned end date, department, and space assignments, for visits in Planning or Released Status.

Assigning Spaces to a Visit

Long Term Plan uses spaces to assign locations to the maintenance work required during a visit. One or more spaces may be assigned to a visit using the following process.

Prerequisites:

A visit must exist in the database, and it must be scheduled. A space must exist in the database and the space capabilities must match the visit in context. Additionally, the space must be active and available.

To assign spaces to a visit:

- 1. Retrieve the visit to which you want to assign a space (see [Finding Scheduled and Unscheduled Visits](#)). The search results appear in the lower half of the page.
- 2. Select the visit you want to assign a space to then click the Plan Visit button.
- 3. The Schedule Visit page appears. The Assigned Spaces information is displayed in the lower half of the page.

Figure 10–12 View Assigned Spaces - Schedule Visit page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Unit Maintenance Plan Visit Work Package Long Term Planning

Visits | Simulations | Resource Leveling

Schedule Visit

[Scheduled Visits](#)

[Scheduled Materials](#)

[Material Availability](#)

Schedule Visit

* Indicates required field

Cancel

Apply

Visit Number 12

Duration / Hour

Due By

Serial Number 45226

Item MRO-17C35-03

Simulation Plan Primary Plan

Unit C-1600, Tail # 103

Department Outside Processing

* Organization San Diego Manufacturing

Planned End Date 27-NOV-2003

* Start Date 13-NOV-2003

Planned End Time Hours 10

* Start Time Hours 15

Service Category Category 5

* Visit Type A Check

Assigned Spaces

Delete

Previous 1-1 of 1 Next

Select Space

☐ Space1113

Add More Rows

Previous 1-1 of 1 Next

- 4. To add spaces click Add More Rows. This will add several rows to the table. Enter information in the provided fields, then click apply to save the changes to the database.

Figure 10–13 Add Spaces - Schedule Visit page

ORACLE® Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Visits](#) | [Simulations](#) | [Resource Leveling](#)

[Schedule Visit](#)
[Scheduled Visits](#)
[Scheduled Materials](#)
[Material Availability](#)

Unit Maintenance Plan

Visit Work Package

Long Term Planning

Schedule Visit

* Indicates required field

Cancel

Apply

Visit Number

Due By

Item

Unit

12

MRO-17C35-03

C-1600, Tail # 103

Organization

Start Date

Start Time Hours

Visit Type

San Diego Manufacturing

13-NOV-2003

15

A Check

Duration / Hour

Serial Number

Simulation Plan

45226

Primary Plan

Department

Planned End Date

Planned End Time Hours

Service Category

Outside Processing

27-NOV-2003

10

Category 5

Assigned Spaces

Delete

Previous 1-1 of 1 Next

Select	Space
<input type="checkbox"/>	Space1113
<input checked="" type="checkbox"/>	Space2
<input type="checkbox"/>	

- 5. Spaces may be deleted by selecting the applicable rows and clicking on the Delete button. When a space is deleted, the table refreshes reflecting the change.
- 6. Click Cancel to return to the previous page.

Material Demand Planning and Scheduling

Oracle CMRO’s integration with Oracle Advanced Planning and Scheduling (APS) provides comprehensive material planning, scheduling and rescheduling capabilities. Planners have complete visibility into forecasted, planned, and unplanned material requirements. You can plan materials well in advance to accommodate fluctuations in demand and supply for both planned and unplanned material requirements. You can also maintain optimum stock to meet specific service levels under the defined inventory budget constraints. The APS integration includes the following:

Managing Long Term Planning 10-23

- **Material Demand Planning** - Material demand arises out of the planned maintenance requirements forecasted by Unit Maintenance Plan (UMP), defining when they must be accomplished. This forecast is based on the utilization of the applicable units. The material demand for all planned maintenance requirements in UMP is automatically stored every time the utilization forecast is updated or the “build unit effectivities” process is run. Material demand associated to unplanned, non-routine maintenance requirements is discovered during the production phase. Additionally, unplanned demand can be predicted based on the historical demand for each organization. This unplanned demand can be refined based on the historical relationship between the planned maintenance requirements, associated units and the unplanned material requirements.

Demand Planning collects these material requirements, factors them into the global demand, and feeds the global demand to Inventory planning and supply chain planning. The forecast/demand variability along with the supply variability (like supplier capacity and lead-times) is then used to specify time phased safety stock recommendations for the supply chain.

- **Supply Chain Planning** - After the planned maintenance requirements have been associated with a visit work package and scheduled to capable maintenance facilities, the required materials are scheduled through Oracle Advanced Supply Chain Planning. The Planning engine will first net existing supplies, and then generate planned orders to procure the required materials.

See:

[Material Demand Planning](#)

[Supply Chain Planning](#)

Material Demand Planning

The three primary material streams into the APS engine are global material demand from forecasted maintenance requirements, scheduled maintenance requirements and historical non-routine material requirements. Demand Planning factors the required materials into global material demand; and pushes it into Inventory Planning where the supply and demand variability is considered to compute safety stocks at all locations. Demand plans created in the process, provide visibility into the upcoming material requirements long before the applicable maintenance is scheduled to a facility.

Demand Planning includes the following procedures:

Create Demand Plans:

1. Change responsibility to Demand Planning System Administrator. From the navigator, choose Demand Plans. The Demand Plans window appears.

Figure 10–14 Demand Plans window

Demand Plans (TST:PM)

Name:

Description:

Base UOM:

Status:

☐ Calculate Dependent Demand

Exploze Demand Using:

Lowest Time Levels

Gregorian:

Manufacturing:

Fiscal:

Composite:

Dimensions | Input Parameters | Scenarios | Events | Price Lists | Options | Scope

Dimension	User Dimension
Ship from Location	Ship from Location
Product	Product
Time	Time

DP Hierarchies

Copy To | Validate Plan

2. Create a Demand Plan. For information on creating a Demand Plan, refer to the *Oracle Demand Planning User's Guide*.
3. You must define the following Input Parameters:
 - Material Requirements - Planned
 - Material Requirements - Scheduled
 - Material Usage History - Unplanned

Figure 10–15 *Enter Input Parameters - Demand Plans* window

Demand Plans (TST:PM)

Name: **TEST**

Description:

Base UOM: **Ea**

Status: **Invalid**

☐ Calculate Dependent Demand

Explode Demand Using:

Lowest Time Levels

Gregorian:

Manufacturing: **Day**

Fiscal:

Composite:

Dimensions | **Input Parameters** | Scenarios | Events | Price Lists | Options | Scope

Type	Name	Forecast by	Start Date	End Date
Material Requirements-		Request Date	01-APR-2004	31-DEC-2004
Material Requirements-		Request Date	01-APR-2004	31-DEC-2004
Material Usage History-		Request Date	01-JAN-2003	31-MAY-2004
Material Usage History-		Request Date	01-JAN-2003	31-MAY-2004

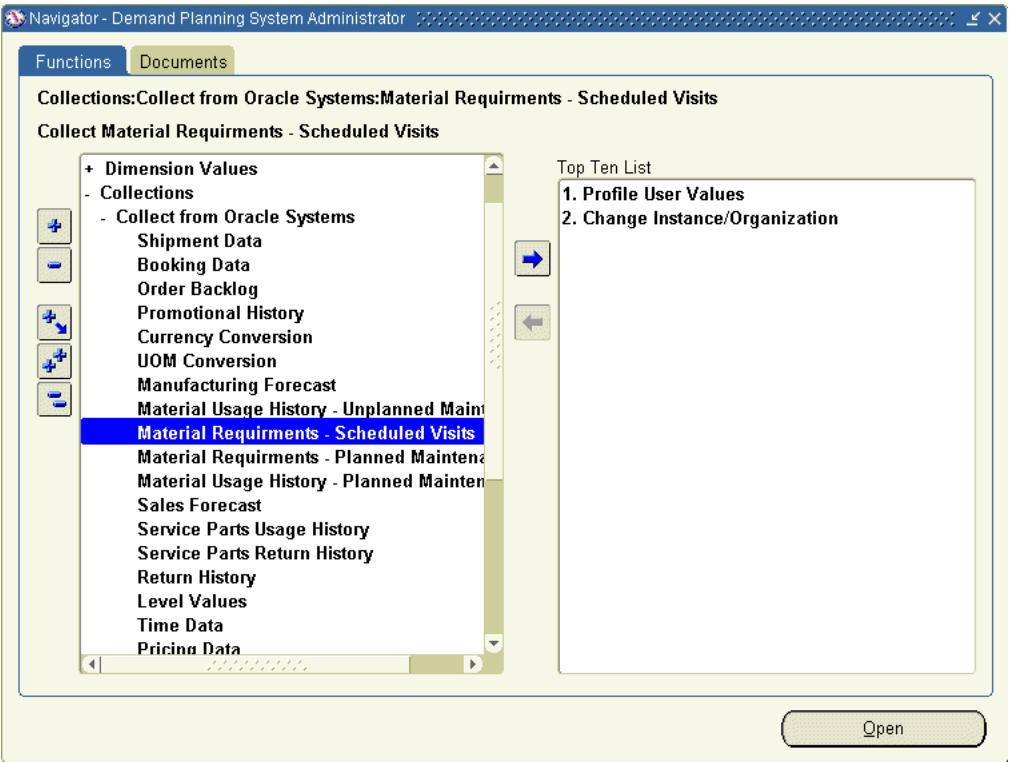
Copy To Validate Plan

These three streams account for global demand from Unit Maintenance Plan, scheduled requirements in Long Term Planning and historical requirements from non-routine maintenance defined during the production process.

Run data collections:

- From the navigator, choose Collections > Collect from Oracle Systems.

Figure 10–16 View Navigator - Demand Planning System Administrator window



5. Select the CMRO streams, and run collections. This process collects the material requirements from CMRO and populates demand plans with it.

Figure 10–17 Custom Stream Collection window

Custom Stream Collection

Data Stream Name

Material Requirements- Scheduled Visits

Source of Data

ERP

Collection Parameters

Collection Type

Collect

Instance

Complete Refresh

☒

Stream Designator

Start Date

End Date

Single Step Collection

☒

Validate Data

☒

Submit and Schedule

Submit

Cancel

Build Demand Plans:

Once a demand plan has been defined in the Demand Planning Server, you build the demand plan in the Demand Planning Engine.

- 6. From the Navigator, select Demand Plan Administration. A list of Demand Plans appears.
- 7. Select the demand plan that you want to work with, and build it. This process will build the Demand Planning databases, and download data from the Demand Planning server to these databases.

Refer to the *Oracle Demand Planning User's Guide*, for information on all the procedures mentioned above.

Supply Chain Planning

When maintenance requirements, forecast, routine, and non-routine, are scheduled to an organization through a visit, the associated material requirements are automatically picked up through Oracle Advanced Supply Chain Planning's (ASCP) collection process, and scheduled. The required materials are pegged against the applicable visit and task. Scheduled materials are then removed from the global demand defined for planned MRs to ensure that the requirements are not counted twice by the planning engine.

The scheduled dates and quantities are displayed in the Scheduled Materials UI. The collection process also returns exception dates, i.e. the dates on which the material is required but will not be available. If for a particular material requirement, either the scheduled date or the scheduled quantity is unsatisfactory, the maintenance planner can select alternate items, and schedule it using the same process.

The planner then creates an ASCP Plan to process the net existing supplies and generate Planned Orders. Material Demand is reflected as Sales Order in ASCP. The Sales Order number is displayed as concatenated visit number, task number and Complex MRO. (Ex. 100.2.Complex MRO). When the sales order is released, the Scheduled date and Scheduled quantity is automatically updated.

Supply Chain Planning involves the following processes:

Create an ASCP Plan

1. Change responsibility to Oracle Advanced Supply Chain Planner. From the Navigator, choose Supply Chain Plan > Names. The Supply Chain Names window appears.
2. Create a supply chain plan. Make it ATP enabled.

Figure 10–18 Supply Chain Plan Names window

Supply Chain Plan Names (TST.P3)

Production

ATP

Notifications

Name	Description				Plan Type	Inactive Date	
<input type="checkbox"/> CMRO-1	for ASCP - CMRO testing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Manufacturing Plan		
<input checked="" type="checkbox"/> CMRO-APS-4	CMRO APS Testing -- IDC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Manufacturing Plan		
<input type="checkbox"/> DRW-plan-1	do not use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Manufacturing Plan		
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Master Plan		
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Master Plan		
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Master Plan		
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Master Plan		
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Master Plan		
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Master Plan		
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Master Plan		
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Master Plan		

Copy Plan

Launch Plan

Plan Options

Run data collections:

- 3. From the Navigator, choose Collections > Oracle Systems > Standard Collections. The Planning Data Collection window appears

Figure 10–19 Planning Data Collection window

Planning Data Collection

Run this Request...

Request Set

Copy...

Program	Stage	Parameters	Language
Planning Data Pull	Planning Data Pull		American English
Planning ODS Load	Planning ODS Load		American English

Options...

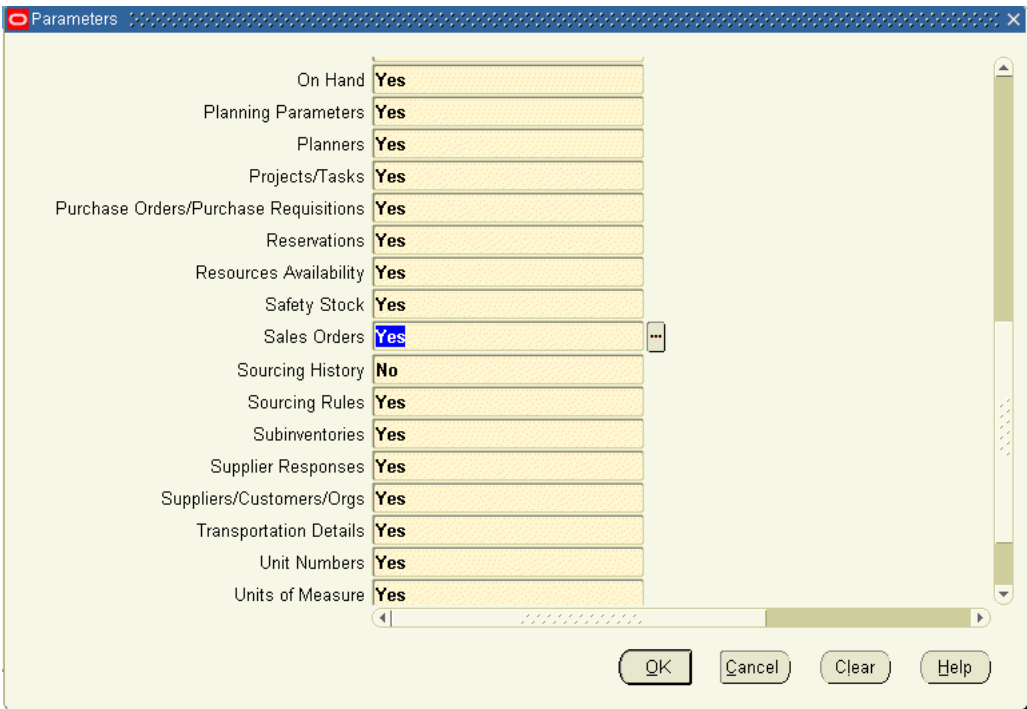
At these Times...

Schedule...

Help (A) Submit Cancel

4. Click in the Parameters field for Planning Data Pull. The Parameters window opens. The following two parameters must be set up to collect data from Oracle CMRO:
 - Select the applicable CMRO instance from the Instance list of values.
 - Select Yes from the Sales Orders LOV.

Figure 10–20 Planning Parameters window



This ensures that material requirements from CMRO are collected as sales orders for the correct organization and instance.

- 5. Launch the plan.

Checking the Material Schedule

Oracle Complex Maintenance, Repair, and Overhaul Long Term Plan provides the ability to check the material schedule in order to assess available material resources. When a visit is planned, materials are automatically scheduled. The scheduled materials show up in the Scheduled Materials UI. ASCP collections run on a regular basis to collect the requirements and provides exception dates if the material will not be available by the required date. When a conflict exists between a maintenance visit and the associated material schedule, the planner can select alternate items or reschedule the applicable visit, tasks within a visit, or maintenance requirement.

Prerequisites:

The material requirements must be defined in Route Management and tasks must be associated with the routes.

To check the material schedule:

1. Retrieve the visit, for which you want to check the scheduled materials (see Finding Scheduled and Unscheduled Visits). The search results appear in the lower half of the page.
2. Select the appropriate visit and click the Plan Visit button.
3. The Schedule Visit page appears. Click Scheduled Materials from the left-hand menu.
4. The Scheduled Materials page appears displaying information about the materials scheduled for the visit. The scheduled date and quantity is displayed for each scheduled material requirement. ASCP collection, that is set up to run on a regular basis, collects the requirements and provides any exception dates when the material will not be available by the required date.

Figure 10–21 View Scheduled Materials - Scheduled Materials page

[Schedule Visit](#)
[Scheduled Visits](#)
Scheduled Materials
[Material Availability](#)

Scheduled Materials

Visit Number 456
Visit Status Planning
Unit UC0426
Organization Vision Project Mfg
Department 061120031
Start Date 26 MAY 2004
End Date 27 MAY 2004

Visit Type A Check
Service Category Category 5
Serial Number SN0426
Item AHLITEM002
Simulation Plan Primary Plan
Planned End Date 31 MAY 2004
Due By

Search Materials

Task

Item

Replace % >=

Display Only

Rework % >=

Materials

Previous 1-8 of 8 Next

Position Path	Sub Configuration	Item	For Task	Order Number	Required Date	Quantity	UOM	Exception Date	Replace %	Rework %
		AHLITEM003		AHLPAR001	26-MAY-2004	10	Each		10	
		8932B13		AHLPAR001	26-MAY-2004	1	Each		60	
		R-ITEM3-Non-Trac		AHLPAR001	26-MAY-2004	20	Each		40	

- 5. To manually check for exception dates when collections have not run, select Schedule Conflicts from the Display Only drop-down menu. Click Go. The exception dates will be displayed in the Materials table.
- 6. Optionally, you can search for and plan materials using the following search criteria:
 - To search for material requirements for a specific task or item, use the Task and Item LOV.
 - To search for materials by disposition percentage, enter a Replace% or Rework%. These percentages indicate the likelihood of the materials being required when executing the task.
- 7. Click Go. The lower half of the page displays the results matching the search criteria you provided.

10-34 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 10–22 View Exception Dates - Scheduled Materials page

Visits | Simulations | Resource Leveling

[Schedule Visit](#)
[Scheduled Visits](#)
Scheduled Materials
[Material Availability](#)

Scheduled Materials

Visit Number	46	Visit Type	A Check
Visit Status	Planning	Service Category	Category 1
Unit	DRW unit 1	Serial Number	101
Organization	San Diego Manufacturing	Item	DRW unit item 1
Department	Inspection Department	Simulation Plan	Primary Plan
Start Date	12-JAN-2004	Planned End Date	21-DEC-2004
End Date	21-NOV-2004	Due By	

Search Materials

Task

Item

Replace % >=

Display Only

Rework % >=

Materials

Previous 1-1 of 1 Next

Position Path	Sub Configuration	Item	For Task	Order Number	Required Date	Quantity	UOM	Exception Date	Replace %	Rework %
		VG0430A	Route0419 Complex MRO	46.9.	12-JAN-2004	8	Each	24-JUN-2004		

Previous 1-1 of 1 Next

- 8. You can select alternate items, if defined for the associated route, from this UI to be rescheduled through Oracle's Advanced Supply Chain Planning application. You can also manually change the required quantity.
- 9. Click Cancel to return to the previous page.

Checking Material Availability

Oracle Complex Maintenance, Repair, and Overhaul’s Long Term Planning module provides the ability to check the availability of materials for task starting time and location through Oracle's Available to Promise application. The ASCP collection runs periodically to automatically schedule materials, when visits are assigned to organizations. Alternatively, maintenance planners can also manually schedule materials through the Material Availability UI.

Prerequisites:

The material requirements must be defined in Route Management and tasks must be associated to the routes.

To check material availability:

- 1. Retrieve the visit, for which you want to check material availability (see Finding Scheduled and Unscheduled Visits). The search results appear in the lower half of the page.
- 2. Select the visit for which you want to check availability, and then click the Plan Visit button.
- 3. The Schedule Visit page appears. Click Material Availability from the left-hand menu.
- 4. The Check Availability For page appears, displaying the material availability for the visit plan in context.

Figure 10–23 Material Availability page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visits | Simulations | Resource Leveling

Schedule Visit

Scheduled Visits

Scheduled Materials

Material Availability

Material Availability

Visit Number 456 Visit Type A Check

Visit Status Planning Service Category Category 5

Unit UC0426 Serial Number SN0426

Organization Vision Project Mfg Item AHLITEM002

Department 061120031 Simulation Plan Primary Plan

Start Date 26-MAY-2004 Planned End Date 31-MAY-2004

End Date 27-MAY-2004 Due By

Materials Availability for Selected Visit/Task

Cancel Check Availability For All Schedule Materials For All

Check Availability Schedule Materials

Previous 1-8 of 8 Next

Select	Item	For Task	Required Arrival Date	Available Quantity	Exception Date	Required Quantity	UOM
<input type="checkbox"/>	AHLITEM003	AHLPAR001	26-MAY-2004			10	Each
<input type="checkbox"/>	8932B13	AHLPAR001	26-MAY-2004			1	Each
<input type="checkbox"/>	R-ITEM3-Non-Trackable	AHLPAR001	26-MAY-2004			20	Each
<input type="checkbox"/>	VG0324A	AHLPAR001	26-MAY-2004			345	Each
<input type="checkbox"/>	AHLITEM003	AHLPAR001	26-MAY-2004			10	Each
<input type="checkbox"/>	8932B13	AHLPAR001	26-MAY-2004			1	Each
<input type="checkbox"/>	R-ITEM3-Non-Trackable	AHLPAR001	26-MAY-2004			20	Each

5. If needed, you can use the filter to search material requirements by the department that is associated to the route/operation's associated task.
6. To schedule materials, based on current material supply against given organization, select the relevant material requirement, and click Schedule Materials. The applicable requirements are passed through ATP and scheduled into the correct ASCP plan. Optionally, you can select Schedule Materials for All to schedule all the materials in the visit. When scheduling items, if the required quantity is not available by the required date, a warning will be displayed.

Note: This feature enables the maintenance planner to manually initiate the scheduling process, and determine conflicts if any, between the available quantities and the required quantities. This may be required for visits that have been recently scheduled or re-scheduled, or when additional maintenance requirements have been associated with a visit.

Figure 10–24 Schedule Materials Manually- Material Availability page

[Schedule Visit](#)
[Scheduled Visits](#)
[Scheduled Materials](#)
[Material Availability](#)

Confirmation • The Selected Materials have been Scheduled Successfully

Material Availability

Visit Number	456	Visit Type	A Check
Visit Status	Planning	Service Category	Category 5
Unit	UC0426	Serial Number	SN0426
Organization	Vision Project Mfg	Item	AHLITEM002
Department	061120031	Simulation Plan	Primary Plan
Start Date	26-MAY-2004	Planned End Date	31-MAY-2004
End Date	27-MAY-2004	Due By	

Materials Availability for Selected Visit/Task

Cancel
Check Availability For All
Schedule Materials For All

Check Availability
Schedule Materials

Previous
1-8 of 8
Next

Select	Item	For Task	Required Arrival Date	Available Quantity	Exception Date	Required Quantity	UOM
<input type="checkbox"/>	AHLITEM003	AHLPARO01	26-MAY-2004			10	Each
<input type="checkbox"/>	8932B13	AHLPARO01	26-MAY-2004			1	Each
<input type="checkbox"/>	R-ITEM3-Non-Trackable	AHLPARO01	26-MAY-2004			20	Each
<input type="checkbox"/>	VG0324A	AHLPARO01	26-MAY-2004			345	Each
<input type="checkbox"/>	AHLITEM003	AHLPARO01	26-MAY-2004			10	Each
<input type="checkbox"/>	8932B13	AHLPARO01	26-MAY-2004			1	Each
<input type="checkbox"/>	R-ITEM3-Non-Trackable	AHLPARO01	26-MAY-2004			20	Each
<input type="checkbox"/>	VG0324A	AHLPARO01	26-MAY-2004		28-JUN-2004	345	Each

Previous
1-8 of 8
Next

- 7. To check availability for all the materials, click Check Availability For All. Optionally, to check material availability for one material at a time, select an item, and click Check Availability. If the material will not be available by the required date, a warning is displayed.

Figure 10–25 Check Availability - Material Availability page

ORACLEOracle Complex MRO

HomeEngineeringConfigurationPlanningAdministrationExecution ProfileSign Out Help

Unit Maintenance PlanVisit Work PackageLong Term Planning

Visits | Simulations | Resource Leveling

Schedule Visit

Scheduled Visits

Scheduled Materials

Material Availability

Warning

For ItemAHLITEM003, Cannot meet request date or latest acceptable date

Material Availability

Visit Number456

Visit StatusPlanning

UnitUC0426

OrganizationVision Project Mfg

Department061120031

Start Date26-MAY-2004

End Date27-MAY-2004

Visit TypeA Check

Service CategoryCategory 5

Serial NumberSN0426

ItemAHLITEM002

Simulation PlanPrimary Plan

Planned End Date31-MAY-2004

Due By

Materials Availability for Selected Visit/Task

Cancel

Check Availability For All

Schedule Materials For All

Check Availability

Schedule Materials

Previous

1-8 of 8

Next

Select	Item	For Task	Required Arrival Date	Available Quantity	Exception Date	Required Quantity	UOM
<input type="checkbox"/>	AHLITEM003	AHLPARO01	26-MAY-2004			10	Each
<input type="checkbox"/>	8932B13	AHLPARO01	26-MAY-2004			1	Each
<input type="checkbox"/>	R-ITEM3-Non-Trackable	AHLPARO01	26-MAY-2004			20	Each
<input type="checkbox"/>	VG0324A	AHLPARO01	26-MAY-2004			345	Each
<input type="checkbox"/>	AHLITEM003	AHLPARO01	26-MAY-2004			10	Each

- 8. Click Cancel to return to the previous page.

Managing Simulation Plans

An important function of Long Term Planning is to balance the resources of work load requirements versus maintenance base resource capacity. This is important for scheduling purposes, to assure that the available resources are used as efficiently as possible. Simulation plans allow you to compare various plans before implementing them to enable selection of the most efficient maintenance plan.

See:

10-38 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

- [Viewing Simulation Plans](#)
- [Creating a New Simulation Plan](#)
- [Deleting a Simulation Plan](#)
- [Adding Visits to a Simulation Plan](#)
- [Deleting a Simulation Visit](#)
- [Setting a Simulation Plan as Primary](#)

Viewing Simulation Plans

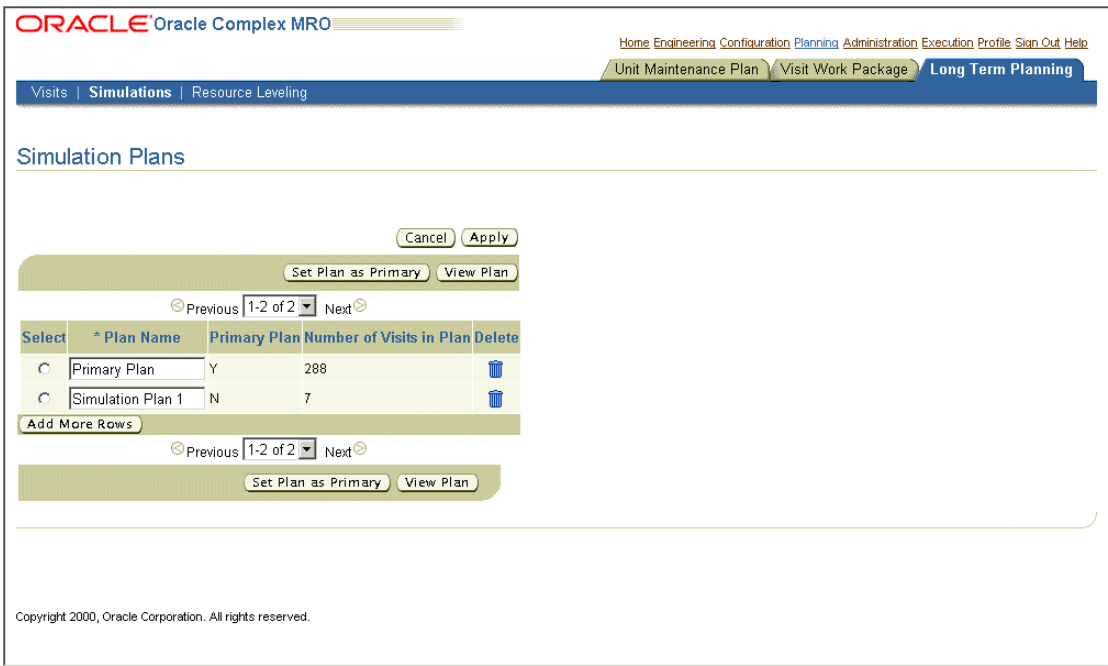
Prerequisites:

There must be a primary plan in the database. At least one visit associated to the primary plan must exist in the database.

To view simulation plans:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of the Unit Maintenance Plan module appears.
2. Click on the Long Term Planning tab, then select the Simulations secondary tab to bring up the Simulations Plan page.

Figure 10–26 Simulation Plans page



- 3. All simulation plans are displayed, showing for each the number of visits in the plan, and if the plan is set to primary. Plan names may be changed, but must remain unique.
- 4. To view the visits within a plan, select the plan and click on the View Plan button. The View Simulation Plan page appears, displaying the visit list.

Figure 10–27 View Simulation Plan page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visits | **Simulations** | Resource Leveling

View Simulation Plan

Simulation Plan **Primary Plan**

[Visit List](#)

Schedule Unschedule Copy to a New Plan Edit

Previous 1-10 of 288 Next

Select	Visit Number	Item	Visit Type	Serial Number	Organization	Department	Start Date	Delete
<input type="radio"/>	25	DRW unit item 4	A Check	101	San Diego Manufacturing Inspection Department		19-DEC-2003	
<input type="radio"/>	42	VG1210	A Check	SN1210	San Diego Manufacturing Outside Processing		11-DEC-2003	
<input type="radio"/>	43	VG1211	D Check	55			08-DEC-2003	
<input type="radio"/>	44	VG1201	B Check	T59			10-JUN-1996	
<input type="radio"/>	63	DRW unit item 1	A Check	101	San Diego Manufacturing Outside Processing		05-JAN-2004	
<input type="radio"/>	71	DRW unit item 1	A Check	101	San Diego Manufacturing		05-JAN-2004	
<input type="radio"/>	113	DRW unit item 4	A Check	101	San Diego Manufacturing Outside Processing		16-JAN-2006	
<input type="radio"/>	122	R-ITEM1-Trackable	A Check	ctr-sno-1000	San Diego Manufacturing Outside Processing		28-JAN-2004	
<input type="radio"/>	127	DRW unit item 1	A Check	101	San Diego Manufacturing Outside Processing		18-MAY-2004	
<input type="radio"/>	128	DRW unit item 1	A Check	101	Vision Project Mfg	061120031	15-JUN-2004	

Creating a New Simulation Plan

Prerequisites:

There must be a primary plan in the database. At least one visit associated to the primary plan must exist in the database.

To create a new simulation plan:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of the Unit Maintenance Plan module appears.
2. Click on the Long Term Planning tab, then select the Simulations secondary tab to bring up the Simulations Plan page.
3. Click Add More Rows to add several rows to the table. Enter information in the provided fields according to plans you wish to add.

Figure 10–28 Define Plan Name - Simulation Plans page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

[Unit Maintenance Plan](#) [Visit Work Package](#) [Long Term Planning](#)

Visits | **Simulations** | Resource Leveling

Simulation Plans

Cancel

Apply

Set Plan as Primary

View Plan

Previous

1-2 of 2

Next

Select	* Plan Name	Primary Plan	Number of Visits in Plan	Delete
<input checked="" type="radio"/>	Primary Plan	Y	288	
<input type="radio"/>	Simulation Plan 1	N	7	
	Sim Plan 2			

Add More Rows

Previous

1-2 of 2

Next

Set Plan as Primary

View Plan

- 4. Click Apply to save the changes to the database.

Figure 10–29 Add New Simulation Plan - Simulation Plans page

ORACLE® Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visits | **Simulations** | Resource Leveling

Simulation Plans

Cancel Apply

Set Plan as Primary View Plan

Previous 1-3 of 3 Next

Select	* Plan Name	Primary Plan	Number of Visits in Plan	Delete
<input type="radio"/>	Primary Plan	Y	288	
<input type="radio"/>	Simulation Plan 1	N	7	
<input type="radio"/>	Sim Plan 2	N	0	

Add More Rows

Previous 1-3 of 3 Next

Set Plan as Primary View Plan

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5. Click Cancel to return to the previous page.

Deleting a Simulation Plan

Prerequisites:

There must be a primary plan in the database. A non-primary plan with a visit and at least one visit associated to the primary plan must exist in the database.

To delete a simulation plan:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of the Unit Maintenance Plan module appears.
2. Click on the Long Term Planning tab, then select the Simulations secondary tab to bring up the Simulations Plan page.

3. Click the Select button next to the simulation plan you want to delete.
4. Click on the Delete button. If the Simulation Plan is not the Primary Plan, it is deleted.

Adding Visits to a Simulation Plan

Prerequisites:

A primary plan, a non-primary plan with a visit, and at least one visit associated to the primary plan must exist in the database.

To add a visit to a simulation plan:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of the Unit Maintenance Plan module appears.
2. Click on the Long Term Planning tab, then select the Simulations secondary tab to bring up the Simulations Plan page.
3. Click the Select button next to the simulation plan to which you want to add a visit.
4. Click the View Plan button. The View Simulation Plan page appears.

Figure 10–30 View Visit List - View Simulation Plan page

The screenshot displays the Oracle Complex MRO interface. At the top, the Oracle logo and 'Oracle Complex MRO' are visible. A navigation bar includes links for Home, Engineering, Configuration, Planning, Administration, Execution, Profile, Sign Out, and Help. Below this, a breadcrumb trail shows 'Unit Maintenance Plan' > 'Visit Work Package' > 'Long Term Planning'. The main content area is titled 'View Simulation Plan' and shows 'Simulation Plan Sim Plan 2'. Under the 'Visit List' section, there is a table with columns: Select, Primary Visit Number, Deleted Item, Visit Type, Serial Number, Organization, Department, Start Date, and Delete. The table is currently empty, with a message stating 'No records were found matching the given criteria..'. There are 'Cancel' and 'Apply' buttons above the table, and an 'Add More Rows' button below it. The footer contains the copyright notice: 'Copyright 2000, Oracle Corporation. All rights reserved.'

ORACLE® Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan / Visit Work Package / Long Term Planning

Visits | **Simulations** | Resource Leveling

View Simulation Plan

Simulation Plan **Sim Plan 2**

Visit List

Cancel Apply

Select	Primary Visit Number	Deleted Item	Visit Type	Serial Number	Organization	Department	Start Date	Delete
No records were found matching the given criteria..								
Add More Rows								

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5. Click Add More Rows to add several rows to the table. Enter information in the provided fields according to the visits you wish to add.

Figure 10–31 Add Visit to Simulation Plan - View Simulation Plan page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

Unit Maintenance PlanVisit Work PackageLong Term Planning

Visits | **Simulations** | Resource Leveling

View Simulation Plan

Simulation Plan **Sim Plan 2**

Visit List

Cancel

Select	Primary Visit Number	Deleted	Item	Visit Type	Serial Number	Organization	Department	Start Date
	25	No	DRW unit item	A Check	101	San Diego Manufacturing	Inspection Department	19-DEC-2003
	42		VG1210	A Check	SN1210	San Diego Manufacturing	Outside Processing	11-DEC-2003

Add More Rows

6. Click Apply to save the changes to the database.

Figure 10–32 Save Visit Record - View Simulation Plan page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visits | **Simulations** | Resource Leveling

View Simulation Plan

Simulation Plan **Sim Plan 2**

[Visit List](#)

Cancel Apply

Set Visit as Primary Toggle Simulated Delete Schedule Unschedule Copy to a New Plan Edit

Previous 1-2 of 2 Next

Select	Primary Visit Number	Deleted	Item	Visit Type	Serial Number	Organization	Department	Start Date	Delete
<input type="radio"/>	42	No	VG1210	A Check	SN1210	San Diego Manufacturing	Outside Processing	11-DEC-2003	
<input type="radio"/>	25	No	DRW unit item 4 A Check		101	San Diego Manufacturing	Inspection Department	19-DEC-2003	

Add More Rows

Previous 1-2 of 2 Next

Set Visit as Primary Toggle Simulated Delete Schedule Unschedule Copy to a New Plan Edit

- Click Cancel to return to the previous page.

Deleting a Simulation Visit

Prerequisites:

A primary plan, a non-primary plan with a visit, and at least one visit associated to the primary plan must exist in the database.

To delete a simulation visit:

- From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of the Unit Maintenance Plan module appears.
- Click on the Long Term Planning tab, then select the Simulations secondary tab to bring up the Simulations Plan page.

3. Click the Select button next to the simulation plan with the visit you want to delete.
4. Click the View Plan button. The View Simulation Plan page appears.
5. Click the Delete icon next to the visit you want to delete. The page refreshes with the visit deleted.

Setting a Simulation Plan as Primary

Prerequisites:

A simulation plan with at least one visit and a primary plan with at least one visit must exist in the database.

To calculate maintenance requirement due dates:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of the Unit Maintenance Plan module appears.
2. Click on the Long Term Planning tab, then select the Simulations secondary tab to bring up the Simulations Plan page.
3. Click the Select button next to the simulation plan you want to set as the primary plan.

Figure 10–33 Set Plan as Primary - Simulation Plans page

The screenshot shows the Oracle Complex MRO interface. At the top, there's a navigation bar with links: Home, Engineering, Configuration, Planning, Administration, Execution, Profile, Sign Out, Help. Below this is a sub-navigation bar with: Visits, Simulations, Resource Leveling. The main title is 'Simulation Plans'. Below the title, there are buttons: Cancel, Apply, Set Plan as Primary, and View Plan. A table lists simulation plans with columns: Select, * Plan Name, Primary Plan, Number of Visits in Plan, and Delete. The table contains three rows: Primary Plan (Y, 288), Simulation Plan 1 (N, 7), and Sim Plan 2 (N, 1). Below the table is an 'Add More Rows' button. At the bottom, there's a copyright notice: Copyright 2000, Oracle Corporation. All rights reserved.

Select	* Plan Name	Primary Plan	Number of Visits in Plan	Delete
<input type="radio"/>	Primary Plan	Y	288	
<input type="radio"/>	Simulation Plan 1	N	7	
<input checked="" type="radio"/>	Sim Plan 2	N	1	

4. Click on the Set Plan as Primary button.

Deleting a Simulation Plan

You can use Unit Maintenance Plan to estimate due dates and any repetitive maintenance requirement for the selected unit.

Prerequisites:

A primary plan, a non-primary plan with a visit, and at least one visit associated to the primary plan must exist in the database.

To delete a simulation plan:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of the Unit Maintenance Plan module appears.

2. Click on the Long Term Planning tab, then select the Simulations secondary tab to bring up the Simulations Plan page.
3. Click the Delete icon next to the plan you want to delete. The page refreshes with the plan deleted.

Copying a Visit to a New Simulation Plan

Prerequisites:

A primary plan with at least one visit and a simulated plan must exist in the database. Visits may only be added to non-primary plans from Long Term Plan. The visit that will be copied, must be in Planning status.

To copy a visit to a new simulation plan:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of the Unit Maintenance Plan module appears.
2. Click on the Long Term Planning tab, then select the Simulations secondary tab to bring up the Simulations Plan page.
3. Click the Select button next to the simulation plan with the visit you want to copy.
4. Click the View Plan button. The View Simulation Plan page appears.
5. Click the Select button next to the visit you want to copy, then click the Copy to a New Plan button. The Copy to a New Plan page appears. The visit and space information for that visit is displayed.

Figure 10–34 Copy to a New Plan page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visits | **Simulations** | Resource Leveling

Copy to a New Plan

* Indicates required field Cancel Apply

Visit Details

Assoc. Primary Visit Number	42	Visit Type	A Check
Item	VG1210	Serial Number	SN1210
Start Date	11-DEC-2003	End Date	11-DEC-2003
		* Simulation Plan	Simulation Plan 1

Assigned Space List

Organization	Department	Space
No records were found matching the given criteria.		

Cancel Apply

6. Select the plan you want to copy the visit to from the Simulation plan pull-down menu. When a primary visit is copied to a simulation plan, the new visit inherits all the unit effectivities associated with the parent visit. You can view the applicable visit's due by date, derived from the associated unit effectivities.
7. Click Apply to save the changes to the database.
8. Click Cancel to return to the previous page.

Running Resource Leveling Plans

Long Term Plan allows you to assess resources associated with the maintenance requirements of scheduled visits against the capacity of maintenance locations. Ideally, a certain percentage of maintenance capacity is kept free to allow for non routine maintenance needs. The resource leveling feature of Long Term Plan identifies shortcomings in your plan so that you can reschedule a visit or adjust it in

Visit Work Package in order to better utilize available resources. Running resource leveling on different simulation plans allows you to identify the best plan with regards to resource capacity.

Resource leveling takes task level department assignments into consideration. Resource leveling procedure allows you to filter and display only those required resources that exceed a defined level of capacity.

Note: Resource leveling can display only those required resources that exceed a defined level of capacity. This means that the full set of procedures must now be run at the beginning of the process, as opposed to the previous function that drilled into each resource requirement before making these calculations. Enter a value in the Required Capacity field to set the reserve level.

The resource leveling procedure allows you to easily identify where a potential problem exists with regards to conflicts or shortages in available resources. When planning visits, a scheduler needs to be able to leave a certain percentage or resources available in anticipation of non-routine maintenance. If the planned requirements consume too much of these resources, the over plan must be changed by either rescheduling entire visits, tasks within a visit or maintenance requirements associated with a visit. Setting a reserve with the Required Capacity field resolves this need in Long Term Plan. A resource's unused capacity is defined by summing the required units, subtracting these from the total number of applicable people or machines defined for the applicable department, and dividing that by the number of available units. Available units are the total number of persons or machines minus those that are not available due to existing work order assignments.

Results in Resource Leveling can be filtered to display only those required resources that exceed a defined level of capacity.

Note: Resource leveling can only be done for one organization and simulation plan at a time and if all of the applicable resources and resource requirements have been setup correctly.

Prerequisites:

A visit with tasks associated to a maintenance requirement from Fleet Maintenance Program, and a route from Route Management must exist in the database.

To run resource leveling:

- 1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of the Unit Maintenance Plan module appears.
- 2. Click on the Long Term Planning tab, then select the Resource Levelling secondary tab to bring up the Resource Leveling page.

Figure 10–35 Resource Leveling page

ORACLE® Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visits | Simulations | Resource Leveling

Resource Leveling

* Indicates required field

* Organization %

Department

* Simulation Plan Primary Plan

Available Capacity <= %

Go Clear

* Start Date

* End Date

* Period UOM Days

Resource Capacity and Requirements

Select	Date	Resource Type	Resource Name	Available Capacity %	Department
No records were found matching the given criteria.					

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- 3. Enter values in the fields provided. Department selection is optional, which allows you to view the resources for one department or for the selected simulation plan across many departments. For tasks without a department association, the visit's department is substituted. Asterisks indicate mandatory fields. For field descriptions, see [Fields on the Select Resource Leveling Criteria Page](#).
- 4. Click Go. The lower half of the page displays all of the spaces matching the search criteria you provided.

5. Click the Select button next to the visit you want more information on, and click View Resources.
6. The Resource Availability page appears. Select the resource you want more information on, then click View Details.
7. The Resource Consumption Details page appears. Select the Visit or task column to edit the respective visit or task in Visit Work Package.

Administration

This chapter discusses the key functions you can perform using the Administration link in Oracle Complex Maintenance, Repair, and Overhaul. You can create and edit spaces, determine the unavailability of a space, and also manage department shifts.

See:

- [Creating Department Shift Records](#)
- [Retrieving Department Shift Records](#)
- [Finding Maintenance Spaces](#)
- [Creating a Maintenance Space](#)
- [Editing Maintenance Spaces](#)
- [Deleting Maintenance Spaces](#)
- [Finding a Space's Unavailable Period](#)
- [Setting a Space as Unavailable](#)
- [Editing a Space's Unavailable Period](#)
- [Deleting a Space's Unavailable Period](#)

Key Business Processes

Departmental Work Shift Schedule Definition Efficient maintenance planning seeks to smooth the workload curve. Before a shop visit duration can be accurately determined, an organization's skilled workers' schedules must be considered. Using Visit Work Package, the planner can select shift schedules for the workers who will accomplish the inspections and repairs. As the task-to-shift matching is completed, the time required for the visit tasks to be completed can be calculated.

Fields on the Create Department Shift Page

The following fields are found on the Create Department Shift page:

Organization is the identifier of the business entity or division where calendars for workers have been created.

Department is the organization subdivision where the maintenance work is accomplished, and to which skilled workers are assigned.

Calendar is the identifier of the work calendar for the employees who are assigned to the current department.

Shift Number is the identifier of the shift that is to be associated with the departmental calendar.

Start Time is derived from the departmental shift number and is view-only.

End Time is also derived from the departmental shift number and is view-only.

Work Days identifies the workday patterns associated with the shift number, calendar and department.

Days On is derived from the work calendar and is view-only.

Days Off is derived from the work calendar and is view-only.

Fields on the Search Department Shift Page

The following fields are found on the Search Department Shift page:

Organization is the identifier of the business entity or division where calendars for workers have been created.

Department is the organization subdivision where the maintenance work is accomplished, and to which skilled workers are assigned.

Fields on the Search Spaces Page

The following fields appear on the Search Spaces page:

Organization visits are associated to an “Organization” that represents the larger group, company, or division where maintenance is performed. All Organizations defined in Oracle HR associated to the user's responsibility can be selected.

Department departments are a subgroup of Organizations. Visits are associated to a Department and all Departments are associated to an Organization. For example, an Organization may be an airline, and a Department may be “SFO Airport.” All Departments are defined in the Bill of Materials, associated to the selected Organization and also associated to the user's responsibility can be selected.

Space spaces are a subdivision of Departments and are used to refer to a specific location where maintenance takes place. For example, if a Department is “SFO Airport,” then a Space might be “Hangar 1”. Spaces might further subdivide a hangar into separate docks or maintenance bays. Spaces also define the maintenance capabilities of a department. Spaces break down a department into subgroups representing smaller maintenance areas. Each space can be assigned maintenance capabilities based on item and visit type and are assigned a maintenance category.

Status refers to the state of the space, which is either “active” or “inactive”. Inactive spaces are no longer used or considered in the scheduling process.

Item Capability the item refers to a model name—e.g., Boeing 747-200B— that the visit is associated to. All visits must be associated to an item. This field is not required for the search, but filtering the table of visits by item gives a basic picture of the maintenance workload required for a particular model. All items defined in the Inventory associated to the user's responsibility can be selected.

Visit Type Capability this defines what kind of maintenance visit is required, e.g, C-Check, D-Check, Preflight. All possible maintenance visits are listed here. This allows maintenance to be classified into categories. Larger visits can include many different maintenance requirements, but can still be grouped together under one visit type. Filtering the table of visits by visit type is useful, as the visit type in general and indirectly represents visit's length and resource requirements.

Category represents a maintenance space type. These are user defined and are used to quickly identify and group space together by the general type of work that can be performed there.

Fields on the Edit Spaces Page

The following fields appear on the Edit Spaces Page:

Space Name spaces are a subgroup of Departments and are used to refer to the specific locations where all of the actual maintenance takes place. For example, if a Department is “SFO Airport,” then a Space might be “Hangar 1”, or even “Dock 1” within a hangar.

Category the user defined category of the maintenance requirement. A common method of categorization would be based on the equipment type to which the maintenance requirement applies. For example, Airframe, Power plant, Ground Service Equipment.

Status refers to the state of the space, which is either “active” or “inactive”. Inactive spaces are no longer used or considered in the scheduling process.

Item the item refers to a model name—e.g., Boeing 747-200B— that the visit is associated to. All visits must be associated to an item. This field is not required for the search, but filtering the table of visits by item gives a basic picture of the maintenance workload required for a particular model. All items defined in the Inventory associated to the user's responsibility can be selected.

Visit Type visit Type defines what kind of maintenance visit is required, e.g, C-Check, D-Check, Preflight. The user defined list of maintenance visits are listed here. This allows maintenance to be classified into categories. Filtering the table of visits by visit type is useful, as the visit type indicates the visit's length and resource requirements.

Item Capability refers to the items that can be maintained at the space.

Visit Capability refers to the visits that the space is capable of handling.

Fields on the Search Space Availability Restrictions Page

The following fields appear on the Search Availability Restrictions Page:

Organization visits are associated to an “Organization” that represents the larger group, company, or division where maintenance is performed. All Organizations defined in Oracle HR associated to the user's responsibility can be selected.

Department departments are a sub group of Organizations. Visits are associated to a Department and all Departments are associated to an Organization. For example, an Organization may be SFO Airport, and a Department may be "Hangar 1." All Departments are defined in the Bill of Materials, associated to the selected Organization and also associated to the user's responsibility can be selected.

Space spaces are a subgroup of Departments and are used to refer to the specific locations where all of the actual maintenance takes place. For example, if a Department is "SFO Airport," then a Space might be "Hangar 1." This field allows you to search for the availability restrictions for specific spaces.

Unavailable From specifies the date after which the space is not available for scheduling. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.

Unavailable To specifies the date after which the space is available for scheduling. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.

Fields on the Add Availability Restriction Page

The following fields appear on the Add Availability Restriction Page:

Organization visits are associated to an "Organization" that represents the larger group, company, or division where maintenance is performed. All Organizations defined in Oracle HR associated to the user's responsibility can be selected.

Department departments are a sub group of Organizations. Visits are associated to a Department and all Departments are associated to an Organization. For example, an Organization may be SFO Airport, and a Department may be "Hangar 1." All Departments are defined in the Bill of Materials, associated to the selected Organization and also associated to the user's responsibility can be selected.

Space spaces are a subdivision of Departments and are used to refer to a specific location where maintenance takes place. For example, if a Department is "SFO Airport," then a Space might be "Hangar 1." Spaces might further subdivide a hangar into separate docks or maintenance bays. Spaces also define the maintenance capabilities of a department. Spaces break down a department into sub groups representing smaller maintenance areas. Each space can be assigned maintenance capabilities based on item and visit type and are assigned a maintenance category.

Unavailable From specifies the date after which the space is not available for scheduling. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.

Unavailable To specifies the date after which the space is available for scheduling. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.

Creating Department Shift Records

In order to derive the completion date of the maintenance visit, a departmental work shift must be created and factored into the derivation. The shift records for each department specify the actual daily work calendar for your skilled workforce.

Use the following procedure to create department shifts.

Prerequisites:

The maintaining organization, department, shift number, and work days must have been recorded in the database.

To create department shifts:

1. Click the Administration link at the top right corner of the Oracle Complex Maintenance, Repair, and Overhaul Home page to access the Visit Work Package tab.
2. Select the Department Shift tab. This launches the Search Department Shift page.

Figure 11–1 Search Department Shift page

ORACLE® Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Approvals

Workflow

Department Shift

Spaces

Space Unavailability

Search Department Shift

Organization

Department

Go

Clear

Search Results

Create

Organization	Department	Shift Number	Days On	Days Off	Start Time	End Time	Remove
No records were found matching the given criteria..							

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- 3. Click Create to launch the Create Department Shift page.

Figure 11–2 Create Department Shift page

ORACLEOracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution Profile

Sign Out

Help

Approvals

Workflow

Department Shift

Spaces

Space Unavailability

Create Department Shift

CancelApply

* Indicates required field

Shift Info

* Organization

* Department

* Calendar

* Shift Number

Start Time

End Time

* Work Days

Days On

Days Off

Cancel

Apply

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4. Enter the field values. Asterisks indicate mandatory fields. For field descriptions, see [Fields on the Create Department Shift Page](#).

Figure 11–3 Enter Shift Details - Create Department Shift page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Approvals Workflow **Department Shift** Spaces Space Unavailability

Create Department Shift

Cancel Apply

* Indicates required field

Shift Info

- * Organization Vision Project Mfg
- * Department 061120031
- * Calendar 6 Day calendar
- * Shift Number 3
 - Start Time 24:00
 - End Time 8:00
- * Work Days 6 day
 - Days On 6
 - Days Off 1

Cancel Apply

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5. Click Apply to save the record.

Retrieving Department Shift Records

Once departmental shift records have been created, they can be retrieved from the database, viewed, and if necessary, deleted. Shift records cannot be updated; they must be deleted and recreated.

Prerequisites: Shift records for a department within an organization must already have been created.

To retrieve departmental shift records:

1. Click the Administration link at the top right corner of the Oracle Complex Maintenance, Repair, and Overhaul Home page to access the Visit Work Package tab.

- 2. Select the Department Shift tab. This launches the Search Department Shift page.
- 3. Enter values for the Organization and Department where you want to view the shift records. For field descriptions, see [Fields on the Search Department Shift Page](#).
- 4. Click Go. The lower half of the screen displays the list of all matching records in the database.

Figure 11–4 Department Shift Search Results - Search Department Shift page

ORACLEOracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Approvals

Workflow

Department Shift

Spaces

Space Unavailability

Search Department Shift

Organization

Department

Go

Clear

Search Results

Create

Previous

1-7 of 7

Next

Organization	Department	Shift Number	Days On	Days Off	Start Time	End Time	Remove
San Diego Manufacturing	Outside Processing	1	5	2	7:00	15:00	
San Francisco Aviation Maintenance Center	MRO Headquarters	4	5	2	4:00	20:00	
San Francisco Aviation Maintenance Center	MRO Satellite Department	4	5	2	4:00	20:00	
San Diego Manufacturing	P3 Resource Department	1	5	2	7:00	15:00	
Vision Project Mfg	061120031	2	7	0	16:00	24:00	
San Diego Manufacturing	Inspection Department	1	5	2	7:00	15:00	
San Diego Manufacturing	Assembly Department	2	7	0	16:00	24:00	

Previous

1-7 of 7

Next

- 5. To restart a search, click Clear. (If you have retrieved records being displayed in the lower half of the screen, these records will remain).
After entering the new search criteria, click Go to begin searching the database for records that match.
- 6. To remove a department shift record, click the Remove icon corresponding to that record.

Finding Maintenance Spaces

Oracle Complex Maintenance, Repair, and Overhaul helps you retrieve any Long Term Planning spaces that exist in the database by organization, item capability, department, visit type, or space name, in order to identify or edit a space's capabilities. You can also retrieve all records in the database by providing no search criteria and clicking Search.

Prerequisites:

The space you want to retrieve must exist in the database.

To search maintenance spaces:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Administration link. The Search Approval Rules page appears.
2. Click the Spaces secondary tab to launch the Search Spaces page.

Figure 11–5 Search Spaces page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Approvals Workflow Department Shift **Spaces** Space Unavailability

Search Spaces

Organization

Department

Space

Status

Item Capability

Visit Type Capability

Service Category

Spaces

Space	Organization	Department	Service Category	Status	Delete
No records were found matching the given criteria.					

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- 3. Enter the information in the fields for which you know the value. For field descriptions, see [Fields on the Search Spaces Page](#).
- 4. Click Go. The lower half of the page displays all of the spaces matching the search criteria you provided. Note that selected spaces may be edited and/or deleted.

Figure 11–6 View Search Result - Search Spaces page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

[Approvals](#) [Workflow](#) [Department Shift](#) [Spaces](#) [Space Unavailability](#)

Search Spaces

Organization

Department

Space

Status

Item Capability

Visit Type Capability

Service Category

Spaces

Previous

1-10 of 22

Next

Create

Space	Organization	Department	Service Category	Status	Delete
Admin Test Space	San Diego Manufacturing	Pre-Fabrication Department	Category 6	Active	
Bay A-1	San Diego Manufacturing	Inspection Department	Category 1	Active	
Bay A-2	San Diego Manufacturing	Inspection Department	Category 1	Active	
CMRO Space 1	San Diego Manufacturing	Outside Processing	Category 6	Active	
Dock 1	San Francisco Aviation Maintenance Center MRO Headquarters		Category 1	Active	
Dock 2	San Francisco Aviation Maintenance Center MRO Headquarters		Category 2	Active	

- 5. To restart a search for records, click Clear. All the search fields on the page will clear. (If you have retrieved records being displayed in the lower half of the screen, these records will remain).

After entering the new search criteria, click Go to begin searching the database for records that match.

11-12 Product Title/BookTitle as a Variable

Creating a Maintenance Space

The Long Term Plan module takes you through the steps to create a maintenance space. A maintenance space is used in Long Term Plan as a subgroup of Departments. They provide define specific locations where maintenance tasks take place, the type of work that can be performed there and the item the work can be done on.

Note: The Search icon beside fields implies the availability of a List of Values to choose from for those field values. To populate these fields, enter a partial search string using the generic substitution meta character%, and click the icon to retrieve and display matching results on a Select <field name> page. Click the relevant record on this page to return this value to the field.

Prerequisites:

You should know the Organization and Department that the space is part of, the category it belongs to, as well as the name of the space you want to create. These fields are all required.

To create a maintenance space:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Administration link. The Search Approval Rules page appears.
2. Click the Spaces secondary tab to launch the Search Spaces page.
3. Click the Create button to open the Add Space page.

Figure 11–7 Add Space page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Approvals](#) [Workflow](#) [Department Shift](#) [Spaces](#) [Space Unavailability](#)

Add Space

* Indicates required field

Cancel

Apply

Space Details

* Organization

* Department

* Service Category

Category 6

▼

* Space Name

Cancel

Apply

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4. Enter values on the Add Space page in the fields provided. Asterisks indicate mandatory fields. For field descriptions, see [Fields on the Edit Spaces Page](#).

Figure 11–8 Enter Space Details - Add Space page

ORACLE® Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

ApprovalsWorkflowDepartment Shift**Spaces**Space Unavailability

Add Space

* Indicates required field

CancelApply

Space Details

* Organization

Vision Project Mfg

* Department

061120031

* Service Category

Category 6

* Space Name

Spac10

CancelApply

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5. Click the Apply button to save the space to the database. The Edit Space page appears.

Figure 11–9 Edit Space page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution Profile

Sign Out

Help

Approvals

Workflow

Department Shift

Spaces

Space Unavailability

Edit Space

* Indicates required field

Cancel

Apply

Space Details

Organization

Vision Project Mfg

Department

061120031

* Space Name

Spac10

Service Category

Category 6

Status

Active

Capabilities

Select

Item

Visit Type

No records were found matching the given criteria..

Add More Rows

Cancel

Apply

Editing Maintenance Spaces

Oracle Complex Maintenance, Repair, and Overhaul allows you to retrieve existing maintenance spaces and edit the space’s maintenance capabilities. After you create a space, you can edit the record to add additional attributes.

Prerequisites:

The maintenance space that you want to edit must exist in the database.

To edit a maintenance space:

1. Retrieve the space that you want to edit (see [Finding Maintenance Spaces](#)). The search results appear in the lower half of the page.
2. Click the Space name link from the search results to launch the Edit Space page for that record, where you can edit the space and its attributes.

11-16 Product Title/BookTitle as a Variable

- 3. Make any necessary changes in the fields provided. For field descriptions, see [Fields on the Edit Spaces Page](#).

Figure 11–10 Add Capabilities Information - Edit Space page

ORACLE[®] Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Approvals

Workflow

Department Shift

Spaces

Space Unavailability

Edit Space

* Indicates required field

CancelApply

Space Details

Organization

Vision Project Mfg

Department

061120031

* Space Name

Spac10

Service Category

Category 4

Status

Active

Capabilities

Select	Item	Visit Type
	00PKANT	A Check
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

- 4. Click Apply to store the changes in the database.

Deleting Maintenance Spaces

If a space is no longer needed, you can delete it using the Edit Space page.

Prerequisites:

The maintenance space that you want to delete must exist in the database and must not be scheduled to any open maintenance visits.

To delete a space:

- 1. Retrieve the space that you want to edit (see [Finding Maintenance Spaces](#)). The search results appear in the lower half of the page.
- 2. Click the Space name link from the search results to launch the Edit Space page for that record, where you can edit the space and its attributes.

Figure 11–11 Edit Space Record - Edit Space page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution Profile

Sign Out

Help

Approvals

Workflow

Department Shift

Spaces

Space Unavailability

Edit Space

* Indicates required field

Cancel

Apply

Space Details

Organization

Vision Project Mfg

Department

061120031

* Space Name

Spac10

Service Category

Category 4

Status

Active

Capabilities

Delete

Previous

1-1 of 1

Next

Select

Item

Visit Type

☐

00PKANT

A Check

Add More Rows

Previous

1-1 of 1

Next

- 3. Click the Delete button in the Capabilities section. If there are no visits associated to the space it is deleted; however, if there are still associated visits an error will display stating a space cannot be deleted until all visits are removed. This space cannot be deleted if there were previous visits that were associated to the space that are now closed. You can set it as inactive.

Finding a Space's Unavailable Period

Prerequisites:

The maintenance space that you are checking must exist in the database.

To find the unavailability of a space:

- 1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Administration link. The Search Approval Rules page appears.
- 2. Click on the Space Unavailability secondary tab to launch the Search Availability Restrictions page.

Figure 11–12 Search Availability Restrictions page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Approvals

Workflow

Department Shift

Spaces

Space Unavailability

Search Availability Restrictions

Organization

Department

Space

Unavailable From Date

Unavailable To Date

Go

Clear

Availability Restrictions

Create

Select Space	Organization	Department	Unavailable From Date	Unavailable To Date	Description
No records were found matching the given criteria..					

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- 3. Enter values on the Search Availability Restrictions page in the fields provided. Asterisks indicate mandatory fields. For field descriptions, see [Fields on the Search Availability Restrictions Page](#).

- 4. Click Go. The lower half of the page displays all of the spaces matching the search criteria you provided.

Figure 11–13 View Search Results - Search Availability Restrictions page

ORACLEOracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Approvals

Workflow

Department Shift

Spaces

Space Unavailability

Search Availability Restrictions

Organization

Department

Space

Unavailable From Date

Unavailable To Date

Go

Clear

Availability Restrictions

Create

Delete

Previous

1-5 of 5

Next

Select	Space	Organization	Department	Unavailable From Date	Unavailable To Date	Description
<input type="checkbox"/>	Bay A-2	San Diego Manufacturing	Inspection Department	21-MAY-2004	31-MAY-2004	Facility maintenance
<input type="checkbox"/>	Dock 1	San Francisco Aviation Maintenance Center	MRO Headquarters	14-APR-2003	24-DEC-2003	Paint Hanger Floor
<input type="checkbox"/>	Dock 2	San Francisco Aviation Maintenance Center	MRO Headquarters	14-APR-2003	17-APR-2003	Paint Hanger Floor
<input type="checkbox"/>	Space0213	San Diego Manufacturing	Outside Processing	24-JUN-2004	25-JUN-2004	Space
<input type="checkbox"/>	Space0627	San Diego Manufacturing	Outside Processing	29-JUN-2003	30-JUN-2003	

Previous

1-5 of 5

Next

Setting a Space as Unavailable

Prerequisites:

The space to be set as unavailable must exist in the database.

To set a space as Unavailable:

- 1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Administration link. The Search Approval Rules page appears.
- 2. Click the Space Unavailability secondary tab to launch the Search Availability Restrictions page.

- 3. Click the Create button to open the Add Availability Restriction page.

Figure 11-14 Add Availability Restriction page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

ApprovalsWorkflowDepartment ShiftSpacesSpace Unavailability

Add Availability Restriction

* Indicates required field

CancelApply

Availability Restriction Details

* Organization

* Department

* Space

* Unavailable From Date

* Unavailable To Date

Description

CancelApply

- 4. Enter values on the Add Availability Restriction page in the fields provided. Asterisks indicate mandatory fields. For field descriptions, see [Fields on the Add Availability Restriction Page](#).

Figure 11–15 Enter Restriction Details - Add Availability Restrictions page

ORACLE

Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#) [Help](#)

[Approvals](#) [Workflow](#) [Department Shift](#) [Spaces](#) [Space Unavailability](#)

Add Availability Restriction

* Indicates required field

Cancel

Apply

Add Availability Restriction Details

* Organization

Vision Project Mfg

* Department

061120031

* Space

Spac10

* Unavailable From Date

28-JUN-2004

* Unavailable To Date

29-JUN-2004

Description

Cancel

Apply

5. Click the Apply button to save the space to the database. If there are no visit scheduled to this space during this period the Edit Availability Restriction page is displayed with the space's unavailable period shown. If there are any visits scheduled to this space during this period an error is displayed.

Figure 11–16 Edit Availability Restriction page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Approvals

Workflow

Department Shift

Spaces

Space Unavailability

Edit Availability Restriction

* Indicates required field

Organization

Vision Project Mfg

Department

061120031

Space

Spac10

* Unavailable From Date

28-JUN-2004

* Unavailable To Date

29-JUN-2004

Description

Cancel

Apply

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Editing a Space's Unavailable Period

Prerequisites:

The maintenance space that you want to edit must exist in the database.

To edit a space's unavailable period:

1. Retrieve the space with the unavailable period that you want to edit (see [Find a Space's Unavailable Period](#)). The search results appear in the lower half of the page.
2. Select a space, and click the corresponding Space name link to launch the Edit Availability Restriction page for that record, where you can edit the space and its attributes.
3. Make any necessary changes in the fields provided.

4. Click Apply to store the changes in the database.
5. The Edit Availability Restriction page displays confirming your changes.

Deleting a Space's Unavailable Period

Prerequisites:

The relevant maintenance space and the period you want to delete must exist in the database.

To delete a space's unavailable period:

1. Retrieve the space with the unavailable period that you want to edit (see [Find a Space's Unavailable Period](#)). The search results appear in the lower half of the page.
2. Select the desired unavailable period from the list using the check box next to it.

Figure 11–17 Delete Unavailable Period - Search Availability Restrictions page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Approvals Workflow Department Shift Spaces **Space Unavailability**

Search Availability Restrictions

Organization Unavailable From Date
 Department Unavailable To Date
 Space

Availability Restrictions

Previous 1-5 of 5 Next

Select	Space	Organization	Department	Unavailable From Date	Unavailable To Date	Description
<input type="checkbox"/>	Bay A-2	San Diego Manufacturing	Inspection Department	21-MAY-2004	31-MAY-2004	Facility maintenance
<input type="checkbox"/>	Dock 1	San Francisco Aviation Maintenance Center MRO Headquarters		14-APR-2003	24-DEC-2003	Paint Hanger Floor
<input type="checkbox"/>	Dock 2	San Francisco Aviation Maintenance Center MRO Headquarters		14-APR-2003	17-APR-2003	Paint Hanger Floor
<input type="checkbox"/>	Space0213	San Diego Manufacturing	Outside Processing	24-JUN-2004	25-JUN-2004	Space
<input checked="" type="checkbox"/>	Space0627	San Diego Manufacturing	Outside Processing	29-JUN-2003	30-JUN-2003	

Previous 1-5 of 5 Next

3. Click Delete to remove the selected unavailable period(s).
4. Click the corresponding Space name link to launch the Edit Availability Restriction page for that record, where you can edit the space and its attributes.

Production Planning

In the maintenance, repair, and overhaul industry, it is necessary to identify, perform, and track maintenance execution to form a complete history of an unit while maintaining the units condition to ensure service availability and capturing the costs associated with the maintenance execution. While maintaining the unit it is necessary to identify defects, the corrective action steps, material, and resource requirements as well as charging resources, performing material transactions, and maintaining the quality for a job. This chapter discusses the key functions supported by the Oracle Complex Maintenance, Repair, and Overhaul Production Planning module. The chapter provides process-oriented, task based procedures for using the application.

See:

- [Working With Jobs](#)
 - [Finding Jobs and Visits](#)
 - [Viewing Job and Operation Dependencies](#)
 - [Editing Job Operations](#)
 - [Releasing Jobs to Production](#)
- [Editing Material Requirements](#)
- [Working With Resource Requirements](#)
 - [Viewing Resource Requirements](#)
 - [Editing Resource Requirements](#)
- [Working With Resource Assignments](#)
 - [Viewing Resource Assignments](#)
 - [Editing Resource Assignments](#)

What is Production Planning?

Production Planning is an Oracle Complex Maintenance, Repair and Overhaul module designed for the execution of Routine Tasks and Maintenance Requirements associated with a Visit and creation and execution of Non-Routine Tasks for a Visit. The Production module supports the execution of the tasks against an Install Base Tracked Item.

Key Business Processes

The Production Planning module of Oracle Complex Maintenance, Repair, and Overhaul supports the following business processes:

Search for Routine and Non-Routine Jobs After a Routine Job or Non-Routine Job is created, the Job or Service Request can be selected from the results of a search using the desired filtering elements.

Create Jobs from visit tasks for Scheduled, Unscheduled, and Convenience maintenance Jobs are created through the Production API when the tasks are pushed to Production from Visit Work Package or when a Service Request, from Oracle Complex Maintenance, Repair, and Overhaul Production, is created in a Visit where the tasks have been pushed to Production.

Create Service Requests to track reported problems Service Requests are created when an item has a service difficulty, requiring an action to address the issue. During the Service Request creation a Visit Task is created and a job is create if the Visit's Tasks have been pushed to Production. The Service Request creation will also be generated when an Install Base tracked item is returned or removed in the Unserviceable or MRB condition.

Create Operations to Non-Routine Jobs for work definition and tracking For Non-Route based jobs the user is allowed to create operations to describe the steps required to correct the service difficulty. For Route based jobs the operation steps are created from the definition in Route Management including the associated material and resource requirements that are valid for the execution organization.

Maintain Jobs The user maintains the job by adjusting the schedule, the status, completing, deferring, and selecting the actual start and end for a job. In addition, the user can select if the job is confirming the jobs necessity by selecting the confirmed failure flag. When a job is completed it triggers a check to determine if the job is the last as part of a maintenance requirement. If the job was the last job to

be completed for a maintenance requirement, the counters are reset as defined by Fleet Maintenance Program and Unit Maintenance Plan is updated to reflect the maintenance requirement is complete.

Maintain Operations The user maintains the operations by updating the operations, adding, removing, or updating the material and resource requirements, captures costs by Charging Resources, Issuing, and Returning Materials, viewing the resource assignments, recording part changes, and completing the operations.

Maintain Quality Quality is maintained using the Route setup from Route Management for the Job and Operation compliance and from the profile options for Non-Routine Job and Operation compliance, Job Deferral, MRB part disposition support, and by capturing counter readings at the job completion. The quality results are captured based on the setup storing them in Oracle Quality.

Fields Associated with Production Planning

The following sections provide descriptions of fields appearing on each Production Planning page.

Note: The Search icon beside fields implies the availability of a List of Values to choose from for those field values. To populate these fields, enter a partial search string using the generic substitution meta character%, and click the icon to retrieve and display matching results on a Select <field name> page. Click the relevant record on this page to return this value to the field on your maintenance requirement page.

Fields on the Create Service Request Page

The following fields appear on the Create Service Request Page:

Report Type The default Service Request type setup in the AHL Profile Options.

Report By Type The reporting type related to the Name.

Name The name of the reporting entity defaulted from the AHL Profile Option Default SR Customer Name.

Contact Type The type associated to the Contact.

Contact The entity to contact in reference to the Service Request

Date The date the Service difficulty is reported against.

Status The current status of the Service Request defaulted from the AHL Profile Option Default SR Status.

Severity The Severity of the Service Request defaulted from the AHL Profile Option Default SR Severity and is formed from the common listing defined using the EAM Activity Priority and the Service Request Severities.

Urgency The urgency in which the Service Request needs to be addressed.

Origination Visit The visit associated with the originating Job.

Origination Task The Task number associated with the Job the Service Request is being generated from.

Target Visit The Visit in which the Task will be placed upon creation.

Part Number The part number of the item for which the Service Request will be created.

Instance Number The Install Base Instance Number of the tracked item for which the Service Request will be created.

Serial Number The serial number, if serial controlled, of the tracked item for which the Service Request will be created.

Lot The Lot Number, if Lot controlled, of the tracked item for which the Service Request will be created.

Summary The summary of the service difficulty being reported.

Estimated Duration The estimated hours it will take to resolve the service difficulty defaulted from the AHL Profile Option Default Estimated Duration.

Problem Code The code associated with the problem being reported or resolved.

Resolution Code The code associated with the resolution of the service difficulty.

Fields on the Job Overview Page

The following fields appear on the Job Overview Page:

Organization The organization name.

Department The department name.

Department Class The class of department. Commonly used to distinguish Vendor class department for outside processing.

Item The tracked item for which the job has been created against.

Serial Number Enter the serial number if you want to display the jobs that are for a specific serialized part.

Visit Number The number generated for a visit.

Task Number The number generated for a task within a specific visit.

Unit Name The name used to distinguish a configuration defined in Unit Configuration.

Start Date The scheduled start date from which to begin the search.

Job Number The name generated for a job.

Project The project name associated with the job from Visit Work Package.

Project Task The project task name associated with the visit task and the job.

Accounting Class The maintenance type accounting class name.

Priority The priority of the job.

Confirmed Failure Used to search for jobs in which the user validated the justified need for the job to be executed.

Job Status The current status of a job.

Service Request The service request incident number for which a job was generated.

End Date The scheduled end date for which you want to limit the job search.

Fields on the Update Service Request Page

The following fields appear on the Update Service Request Page:

Contact Type The type associated to the Contact.

Contact The entity to contact in reference to the Service Request

Status The current status of the Service Request defaulted from the AHL Profile Option Default SR Status.

Urgency The urgency in which the Service Request needs to be addressed.

Problem Code The code associated with the problem being reported or resolved.

Resolution Code The code associated with the resolution of the service difficulty.

Fields on the Configuration Part Changes or Item Part Changes Page

The following fields appear on the Configuration Part Changes or Item Part Changes Pages:

Operation Seq The jobs operation sequence number on which the Remove, Replace, or Install / Add Component is to be performed.

Estimated Duration The time in hours that it is estimated to correct the service difficulty if removing in either the condition associated with unserviceable or MRB parts which generates a Service Request.

Condition The condition of the part being removed.

Subinventory The subinventory, if desired, to return the part.

Locator The locator within the subinventory to return the part, required if locator controlled.

Reason The reason code for the part being removed.

Removal Date The date the removal was performed.

Problem Code The code associated with the problem being reported or resolved.

Severity The severity of the service difficulty, if the part is being removed in the unserviceable or MRB condition.

Summary The summary of the service difficulty, if the part is being removed in the unserviceable or MRB condition.

Part Number The part number of the Item being installed.

Instance Number The Install Base Instance Number of the part being installed.

Installation Date The date the part was installed.

Fields on the Job Operations Page for the Job Details

The following fields appear on the Job Operations Page:

Department The department owning or responsible for the Job.

Job Status The current status for the Job.

Completion Sub Inventory The subinventory to complete the Item, if the Item is to be issued to the Job.

Locator The locator within the subinventory to complete the Item, if the Item is under locator control and the Item is to be issued to the Job.

Confirmed Failure The indicator for the job to show if the user has confirmed the justification / necessity for the job.

Scheduled Job Start Date The date for which the job is scheduled to start.

Scheduled Job Start Time The time of day the job is scheduled to start.

Scheduled Job End Date The date for which the job is scheduled to end.

Scheduled Job End Time The time of day the job is scheduled to end.

Actual Job Start Date The date for which the job is scheduled to start. Required to complete or defer the job.

Actual Job Start Time The time of day the job is scheduled to start. Required to complete or defer the job.

Actual Job End Date The date for which the job is scheduled to end. Required to complete or defer the job.

Actual Job End Time The time of day the job is scheduled to end. Required to complete or defer the job.

Fields on the Job Operations Page for the Operations

The following fields appear on the Job Operations Page:

Operation Sequence The jobs operation sequence number. Required on Creation.

Operation Code The standardized code for an operation. Selectable on a non-route based job, if the operation description has not been defined.

Operation Description The description of the work to be performed on an operation.

Actual Start Date The date for which the operation is scheduled to start. Required to complete an operation.

Actual End Date The date for which the operation is scheduled to end. Required to complete an operation.

Scheduled Start Date The date for which the operation is scheduled to start. Required on Creation.

Scheduled End Date The date for which the operation is scheduled to end. Required on Creation.

Department The department in which the operation is to be performed.

Operation Status The current status for the Operation.

Fields on the Operation Detail Page

The following fields appear on the Operation Detail Page:

Operation Sequence The jobs operation sequence number.

Operation Code The standardized code for an operation. Selectable on a non-route based job, if the operation description has not been defined.

Operation Type The type of operation being performed.

Operation Description The description of the work to be performed on an operation.

Actual Start Date The date for which the operation is scheduled to start. Required to complete an operation.

Actual End Date The date for which the operation is scheduled to end. Required to complete an operation.

Scheduled Start Date The date for which the operation is scheduled to start.

Scheduled End Date The date for which the operation is scheduled to end.

Department The department in which the operation is to be performed.

Operation Status The current status for the Operation.

Fields on the Update Material Requirements Page

The following fields appear on the Update Material Requirements Page:

Operation Sequence The jobs operation sequence number.

Item The Item Number for the requirement.

Description The Description of the Item defined.

Required Quantity The quantity desired for the requirement.

Scheduled Quantity The quantity scheduled by the Long Term Plan.

UOM The unit of measure for the Item's quantity.

Required Date The date the requirement is expected.

Scheduled Date The date the quantity is scheduled by Long Term Plan.

Fields on the Material Requirement Detail Page

The following fields appear on the Material Requirement Detail Page:

Operation Sequence The jobs operation sequence number.

Operation Code The standardized operation code, if selected.

Item The Item Number for the requirement.

Description The Description of the Item defined.

Required Quantity The quantity desired for the requirement.

Scheduled Quantity The quantity scheduled by the Long Term Plan.

UOM The unit of measure for the Item's quantity.

MRP Net If the Item is to be netted by MRP.

Required Date The date the requirement is expected.

Scheduled Date The date the quantity is scheduled by Long Term Plan.

Fields on the Update Resource Requirements Page

The following fields appear on the Update Resource Requirements Page:

Operation Sequence The jobs operation sequence number.

Resource Sequence The sequence number for the resource within an operation.

Resource Type The type of resource requirement.

Resource The resource name within the operations department.

Duration The length of time required.

UOM The unit of measure for the time required.

Quantity The quantity of resources required.

Start Date The start date for the resource.

End Date The end date for the resource.

Fields on the Resource Requirement Detail Page

The following fields appear on the Resource Requirement Detail Page:

Operation Sequence The jobs operation sequence number.

Resource Sequence The sequence number for the resource within an operation.

Resource Type The type of resource requirement.

Resource The resource name within the operations department.

Duration The length of time required.

UOM The unit of measure for the time required.

Quantity The quantity of resources required.

Total Required The Duration times the Quantity.

Applied The duration of the resource charged to date.

Open The duration of the resource difference between the Total Required and the Applied amount.

Charge Type The expected method of charging the resource.

Standard Rate Determines if the resource is to be charged at the standardized rate.

Basis Provides the basis for determining the resource requirement.

Operation Start Time The date for which the operation is scheduled to start.

Operation End Time The date for which the operation is scheduled to end.

Start Date The start date for the resource.

End Date The end date for the resource.

Fields on the Resource Assignments Page

The following fields appear on the Resource Assignments Page:

Operation Sequence The jobs operation sequence number.

Resource Sequence The sequence number for the resource within an operation.

Operation Status The status of the operation.

Operation Start Time The date for which the operation is scheduled to start.

Operation End Time The date for which the operation is scheduled to end.

Resource Type The type of resource requirement.

Employee Number The number assigned to identity the employee.

Employee Name The full name of the employee.

Serial Number The Serial Number used non-person type resources.

Start Date The start date for the assignment.

End Date The end date for the assignment.

Fields on the Perform Resource Transactions Page

The following fields appear on the Perform Resource Transactions Page:

Operation Sequence The jobs operation sequence number.

Resource Sequence The sequence number for the resource within an operation.

Resource The resource name within the operations department.

Department The department within the organization to be charged.

Employee The employee number to be charged.

Quantity The quantity of resources to be charged.

UOM The unit of measure for the quantity to be charged.

Activity Not currently supported do not select.

Reason The reason for charging the resource.

Reference User defined reference information.

Fields on the Perform Material Transactions Page for WIP Component Issue

The following fields appear on the Perform Material Transactions Page:

Operation Sequence The jobs operation sequence number.

Item The item number to be transacted.

Description The description of the item to be transacted.

Serial Number The item serial number, if serial controlled, to be transacted.

Lot The item lot number, if lot controlled, to be transacted.

Revision The item revision, if revision controlled, to be transacted.

Open The quantity difference between the material requirement and the transacted quantity.

Required Quantity The quantity to be transacted.

UOM The unit of measure for the quantity to be transacted.

Condition The condition of the part to be transacted.

On Hand The quantity in the subinventory selected for the item to be transacted.

SubInventory The subinventory for which the item is to be transacted.

Note: The Subinventory status and the items condition must match.

Locator The locator for which the item is to be transacted, if under locator control.

Fields on the Perform Material Transactions Page for WIP Component Return

The following fields appear on the Perform Material Transactions Page:

Operation Sequence The jobs operation sequence number.

Item The item number to be transacted.

Description The description of the item to be transacted.

Serial Number The item serial number, if serial controlled, to be transacted.

Lot The item lot number, if lot controlled, to be transacted.

Revision The item revision, if revision controlled, to be transacted.

Required Quantity The quantity to be transacted.

UOM The unit of measure for the quantity to be transacted.

Condition The condition of the part to be transacted.

On Hand The quantity in the subinventory selected for the item to be transacted.

SubInventory The subinventory for which the item is to be transacted.

Note: The Subinventory status and the items condition must match.

Locator The locator for which the item is to be transacted, if under locator control.

Reason The Reason code for the item is being returned.

Problem Code The code associated with the problem being reported or resolved, if returning a part in the Unserviceable or MRB profile option statuses. The problem code is used in the automated Service Request generation.

QA Results Select to enter quality results, if returning a part to an MRB subinventory.

Summary The service difficulty summary for the item being returned. The summary is used in the automated Service Request generation.

Working With Jobs

See:

- [Finding Jobs and Visits](#)
- [Viewing Job and Operation Dependencies](#)
- [Editing Job Operations](#)
- [Releasing Jobs to Production](#)

Also see [Creating a Job or Service Request](#) and [Maintaining a Job or Service Request in Production](#).

Finding Jobs and Visits

Prerequisites:

A visit or job must exist in the database.

To find a visit or job:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.

Figure 12–1 Job Overview page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Jobs | Resources | Materials | Maintenance Requirements

Production PlanningOutside Processing

Job Overview

Organization

Department

Department Class

Serial Number

Item

Visit Number

Visit Task

Unit Name

Maintenance Requirement

Start Date

Job Number

Project

Project Task

Accounting Class

Priority

Confirmed Failure

Job Status

Service Request

End Date

Go

Clear

Job List

Select	Job Number	Order Number	Task Number	Priority	Scheduled Start Date	Scheduled End Date	Status	ASR Order Number
--------	------------	--------------	-------------	----------	----------------------	--------------------	--------	------------------

2. Enter information in the fields for which you know the value then click **Go**. The search results appear in the lower half of the page.

12-16 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 12–2 View Search Results - Job Overview page

Job Overview

Organization <input type="text"/>	Job Number <input type="text"/>
Department <input type="text"/>	Project <input type="text"/>
Department Class <input type="text"/>	Project Task <input type="text"/>
Serial Number <input type="text"/>	Accounting Class <input type="text"/>
Item <input type="text"/>	Priority <input type="text"/>
Visit Number <input type="text"/>	Confirmed Failure <input type="text"/>
Visit Task <input type="text"/>	Job Status <input type="text"/>
Unit Name <input type="text"/>	Service Request <input type="text"/>
Maintenance Requirement <input type="text"/>	
Start Date <input type="text"/>	End Date <input type="text"/>

Job List

Previous 1-10 of 322 Next

Select	Job Number	Service Request	Task Number	Priority	Scheduled Start Date	Scheduled End Date	Status	OSP Order Number
<input type="radio"/>	WO3240		2		27-MAY-2004	27-MAY-2004	Unreleased	
<input type="radio"/>	WO3211	116114	13		20-MAY-2004	20-MAY-2004	Unreleased	
<input type="radio"/>	WO3181		11		20-MAY-2004	21-MAY-2004	Released	

3. Select the visit/job you are looking for from the Job List Results.

Viewing Job and Operation Dependencies

Prerequisites:

A visit or job must exist in the database.

To view job and operation dependencies:

1. Find the job or operation you want to view dependencies for. See [Finding Jobs and Visits](#).
2. Select the Job number, and choose Update job from the drop-down menu. The Job Operations page appears displaying the relevant information for that job.

Figure 12–3 Job Operations page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Jobs | Resources | Materials | Maintenance Requirements

Production Planning | Outside Processing

Operations

Materials

Resources

Assignments

Material Transactions

Resource Transactions

Job Operations

* Indicates required field

Cancel Revert Apply Defer

Job Details

Job Number

W03181

Job Description

24-20-04

Maintenance Requirement

APU Generator Overhaul

Route

24-20-04

Priority

Item

737-800

Visit Number

441

Job Status

Released

Completion Sub Inventory

Lot Number

Scheduled Job Start Date

20-MAY-2004

Scheduled Job Start Time

Hrs 12 Mins 13

Actual Job Start Date

Actual Job Start Time

Hrs Mins

Organization

San Diego Manufacturing

Department

Outside Processing

Project

441

Project Task

24-20-04

Serial Number

300

Unit Name

VH-TAK

Visit Task

11

Accounting Class

class

Locator

Confirmed Failure

No

Scheduled Job End Date

21-MAY-2004

Scheduled Job End Time

Hrs 16 Mins 13

Actual Job End Date

Actual Job End Time

Hrs Mins

Operations

3. Make any necessary changes and click **Apply**. Click **Cancel** to cancel any changes and return to the previous page.

Editing Job Operations

Prerequisites:

A job with associated operations must exist in the database.

To edit a job operation:

1. Find the job with the operation you want to edit. See [Finding Jobs and Visits](#).
2. Navigate to the Job Operations page. Make any necessary changes to the items displayed.

Figure 12–4 View Job Details - Job Operations page

* Indicates required field

Cancel Revert Apply Defer Go

Job Details

Job Number	W03240	Organization	San Diego Manufacturing
Job Description	apsrouteup	Department	Outside Processing
Maintenance Requirement	fmpapsup	Project	461
Route	apsrouteup	Project Task	apsrouteup
Priority		Serial Number	apsplan100
Item	Radhika Item2 aps p	Unit Name	
Visit Number	461	Visit Task	2
Job Status	Unreleased	Accounting Class	class
Completion Sub Inventory		Locator	
Lot Number		Confirmed Failure	No

* Scheduled Job Start Date	27-MAY-2004	* Scheduled Job End Date	27-MAY-2004
Scheduled Job Start Time	Hrs 07 Mins 00	Scheduled Job End Time	Hrs 07 Mins 00
Actual Job Start Date		Actual Job End Date	
Actual Job Start Time	Hrs Mins	Actual Job End Time	Hrs Mins

Operations

Details Operation QA Results Complete Operation

Previous 1-1 of 1 Next

Select	* Operation Sequence	Operation Code	Operation Description	Actual Start Date	Actual End Date	* Scheduled Start Date	* Scheduled End Date	Department	Operation Status
<input type="radio"/>	10		Default Operation			27-MAY-2004	27-MAY-2004	Outside Prot	Uncomplete

- Click **Apply** to save your changes; click **Cancel** to cancel changes and return to the Job Overview page.

Note: QA Results are entered for operations with associated QA Plans.

Note: You cannot edit the operation code or description if it is already completed or is from a route.

Releasing Jobs to Production

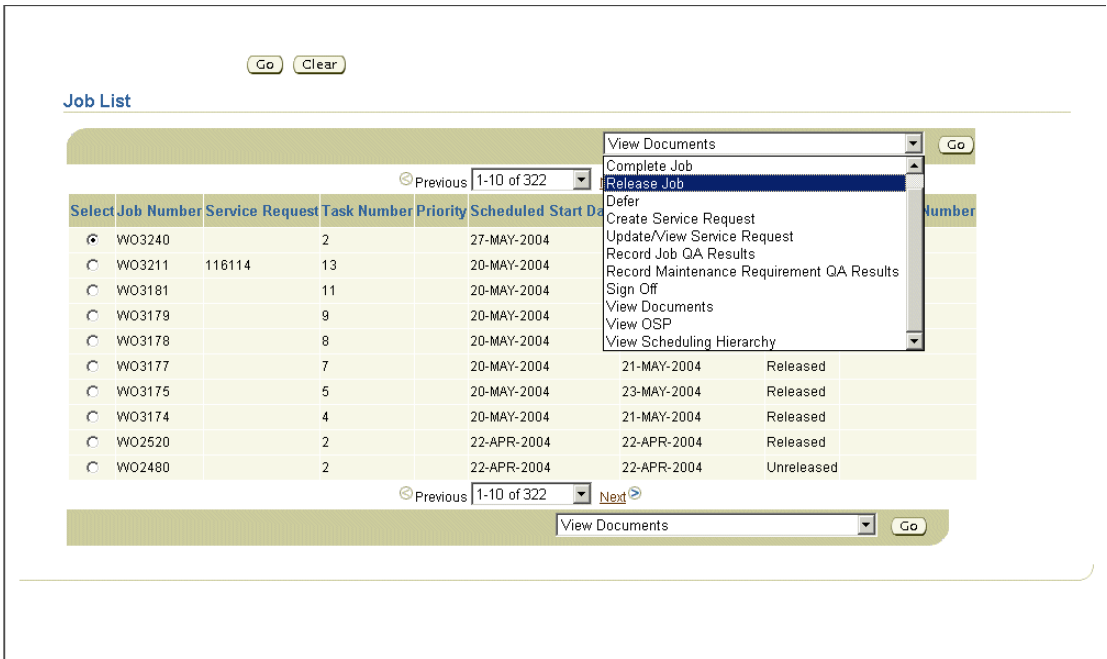
Prerequisites:

A visit or job with a status of released must exist in the database.

To release a job to production:

- 1. Find the job you want to release to production. See [Finding Jobs and Visits](#).
- 2. Select the job, and choose Release Job from the drop-down menu.

Figure 12–5 Release Job Overview page



Editing Material Requirements

Prerequisites:

A visit or job must exist in the database.

To edit material requirements:

- 1. Find the job or operation you want to edit. See [Finding Jobs and Visits](#).
- 2. Select the job, and choose Update Job from the drop-down menu. The Job Operations page appears displaying the relevant information for that job.

3. Select Materials from the left-hand navigation panel. The Update Material Requirements page appears.

Figure 12–6 Update Material Requirements page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Production Planning Outside Processing

Jobs | Resources | **Materials** | Maintenance Requirements

[Operations](#)
Materials
[Resources](#)
[Assignments](#)
[Material Transactions](#)
[Resource Transactions](#)

Update Material Requirements

Job Number	W02400	Organization	San Diego Manufacturing
Job Status	Unreleased	Department	Outside Processing
Job Description	Radhika Third Route	Project	362
Maintenance Requirement	FMP-Dec1	Project Task	Radhika Third R
Route	Radhika Third Route	Serial Number	ctr-sno-1
Priority		Unit Name	Radhika UC -ctr1
Item	R-ITEM1-Trackable	Visit Task	2
Visit Number	362	Locator	
Accounting Class	class	Scheduled Job End Date	22-APR-2004 07:00
Completion Sub Inventory		Actual Job End Date	
Scheduled Job Start Date	22-APR-2004 07:00		
Actual Job Start Date			

Material Requirements

Cancel Revert Apply

Remove Details

Previous 1-3 of 3 Next

Select	* Operation Sequence	* Item	Description	* Required Quantity	Scheduled Quantity	UOM	* Required Date	Scheduled Date	Issued Quantity
<input type="radio"/>	11	R-ITEM1-Trackable	R-ITEM1-Trackable	<input type="text" value="1"/>		Each	22-APR-2004		0
<input type="radio"/>	11	R-ITEM2-Trackable	R-ITEM2-Trackable	<input type="text" value="1"/>		Each	22-APR-2004		0

4. Make any necessary changes to the items displayed in the Material Requirements list. To add materials, click Add More Rows.
5. Click Apply to save your changes; click Cancel to cancel changes and return to the Job Overview page.

See [Updating Material Requirements](#) in Production.

Working With Resource Requirements

See:

- [Viewing Resource Requirements](#)
- [Editing Resource Requirements](#)

Also see [Updating Resource Requirements](#) in Production.

Viewing Resource Requirements

Prerequisites:

A visit or job with associated resources must exist in the database.

To view resource requirements for a job:

1. Find the job or operation you want to view dependencies for. See [Finding Jobs and Visits](#).
2. Select the job, and choose Update Job from the drop-down menu. The Job Operations page appears displaying the relevant information for that job.
3. Select Resources from the left-hand navigation panel. The Resource Requirements page appears.

Figure 12–7 Resource Requirements page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Jobs](#) | [Resources](#) | [Materials](#) | [Maintenance Requirements](#)

[Operations](#)
[Materials](#)
[Resources](#)
[Assignments](#)
[Material Transactions](#)
[Resource Transactions](#)

Resource Requirements

Job Number	W03240	Organization	San Diego Manufacturing
Job Status	Released	Department	Outside Processing
Job Description	apsrouteup		
Maintenance Requirement	fmpapsup	Project	461
Route	apsrouteup	Project Task	apsrouteup
Priority		Serial Number	apsplan100
Item	Radhika Item2 aps p	Unit Name	
Visit Number	461	Visit Task	2
Accounting Class	class		
Completion Sub Inventory		Locator	
Scheduled Job Start Date	27-MAY-2004 07:00	Scheduled Job End Date	27-MAY-2004 07:00
Actual Job Start Date		Actual Job End Date	

Resource Requirement List

[Cancel](#) [Revert](#) [Apply](#)

Select	Operation	Sequence	Resource	Sequence	Resource	Type	Resource	Duration	UOM	Quantity	Start Date	End Date
No records were found matching the given criteria..												
Add More Rows												

[Production Planning](#) | [Outside Processing](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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12-22 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Editing Resource Requirements

Prerequisites:

A visit or job with associated requirements must exist in the database.

To edit resource requirements and view summaries and details:

1. Find the job or operation you want to edit. See [Finding Jobs and Visits](#).
2. Navigate to the Resource Requirements page.
3. Make any necessary changes to the items displayed in the Resource Requirement list. To add requirements, click Add More Rows. Add a resource requirement.

Figure 12–8 Add Resource Requirement - Resource requirement page

Job Number	WO2020	Organization	San Diego Manufacturing
Job Status	Released	Department	P3 Resource Department
Job Description	60B9999		
Maintenance Requirement	PA121 XC Visit	Project	301
Route	60B9999	Project Task	60B9999
Priority		Serial Number	ctr-sno-1000
Item	R-ITEM1-Trackable	Unit Name	radhika nth unit
Visit Number	301	Visit Task	7
Accounting Class	class		
Completion Sub Inventory		Locator	
Scheduled Job Start Date	01-APR-2004 07:00	Scheduled Job End Date	08-APR-2004 11:00
Actual Job Start Date		Actual Job End Date	

[Resource Requirement List](#)

Select a Resource Requirement and ...

Previous
1-6 of 6
Next

Select	Operation Sequence	Resource Sequence	Resource Type	Resource	Duration	UOM	Quantity	Start Date	End Date
<input type="radio"/>	10	10	Machine	SMA_Jacks	2	Each	2	01-APR-2004	08-APR-2004
<input type="radio"/>	10	20	Machine	SMA_Drills	2	Each	1	01-APR-2004	08-APR-2004
<input type="radio"/>	10	30	Person	STR	2	Each	2	01-APR-2004	08-APR-2004
<input type="radio"/>	10	40	Person	A&P	6	Hour	3	01-APR-2004	08-APR-2004
<input type="radio"/>	20	50	Machine	SMA_Jacks	2	Each	2	01-APR-2004	08-APR-2004
<input type="radio"/>	20	60	Machine	SMA_Drills	2	Each	1	01-APR-2004	08-APR-2004
<input type="radio"/>	20	70	Person	MU Tech1	3	Each	1	01-APR-2004	08-APR-2004

4. Click Apply to save your changes; click Cancel to cancel changes and return to the Job Overview page.

Working With Resource Assignments

See:

- [Viewing Resource Assignments](#)
- [Editing Resource Assignments](#)
- Also see [Updating Resource Assignments](#) in Production.

Viewing Resource Assignments

Prerequisites:

A job with associated assignments must exist in the database.

To view a resource assignment:

1. Find the job you want to view assignments for. See [Finding Jobs and Visits](#).
2. Navigate to the Job Operations page. Select Assignments from the left-hand navigation panel. The Resource Assignments page appears.

Figure 12–9 Resource Assignments page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Production Planning Outside Processing

Jobs | Resources | Materials | Maintenance Requirements

Operations
Materials
Resources
Assignments
Material Transactions
Resource Transactions

Resource Assignments

Job Number	WO2020	Organization	San Diego Manufacturing
Job Status	Released	Department	P3 Resource Department
Job Description	60B9999	Project	301
Maintenance Requirement	PA121 XC Visit	Project Task	60B9999
Route	60B9999	Serial Number	ctr-sno-1000
Priority		Unit Name	radhika nth unit
Item	R-ITEM1-Trackable	Visit Task	7
Visit Number	301	Locator	
Accounting Class	class	Scheduled Job End Date	08-APR-2004 11:00
Completion Sub Inventory		Actual Job End Date	
Scheduled Job Start Date	01-APR-2004 07:00		
Actual Job Start Date			

Resource Assignment List

Cancel Revert Apply

Select	Operation Sequence	Resource Sequence	Operation Start Time	Operation End Time	Resource Type	Employee Name	Employee Number	Serial Number	Start Date	End Date
No records were found matching the given criteria.										
Add More Rows										

Production Planning | Outside Processing | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

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3. Make any necessary changes to the items displayed in the Resource Assignment list. To add assignments, click Add More Rows.
4. Click Apply to save your changes; click Cancel to cancel changes and return to the Job Overview page.

Editing Resource Assignments

Prerequisites:

A visit or job must exist in the database.

To edit resource assignments:

1. Find the job with the assignments you want to edit. See [Finding Jobs and Visits](#).

- 2. Navigate to the Resource Assignments page. Make any necessary changes to the items displayed in the Resource Assignment list. To add assignments, click Add More Rows.

Figure 12–10 Add a Resource Assignment - Resource Assignments page

Resource Assignments

Job Number

WO2020

Job Status

Released

Job Description

60B9999

Maintenance Requirement

PA121 XC Visit

Route

60B9999

Priority

Item

R-ITEM1-Trackable

Visit Number

301

Accounting Class

class

Completion Sub Inventory

Scheduled Job Start Date

01-APR-2004 07:00

Actual Job Start Date

Organization

San Diego Manufacturing

Department

P3 Resource Department

Project

301

Project Task

60B9999

Serial Number

ctr-sno-1000

Unit Name

radhika nth unit

Visit Task

7

Locator

Scheduled Job End Date

08-APR-2004 11:00

Actual Job End Date

Resource Assignment List

Cancel

Revert

Apply

Select	Operation Sequence	Resource Sequence	Operation Start Time	Operation End Time	Resource Type	Employee Name	Employee Number	Serial Number	Start Date	End Date
	10		10		01-APR-2004		08-APR-2004			

Add More Rows

- 3. Click Apply to save your changes; click Cancel to cancel changes and return to the Job Overview page.

Working with Production

In the maintenance, repair, and overhaul industry, it is necessary to identify, perform, and track maintenance execution to form a complete history of an unit while maintaining the units condition to ensure service availability and capturing the costs associated with the maintenance execution. While maintaining the unit it is necessary to identify defects, the corrective action steps, material, and resource requirements as well as charging resources, performing material transactions, and maintaining the quality for a job.

This chapter discusses the key features supported by the Oracle Complex Maintenance, Repair, and Overhaul Production module.

See:

- [Creating a Job or Service Request](#)
 - [Push to Production from Visit Work Package](#)
 - [Initiate Service Requests from a Material Transaction](#)
 - [Initiate Service Requests from a Parts Change Transaction](#)
 - [Initiate Service Requests against Existing Jobs](#)
 - [Searching for a Job or Service Request](#)
- [Maintaining a Job or Service Request](#)
 - [Releasing Jobs](#)
 - [Completing Jobs](#)
 - [Deferring Jobs](#)
 - [Entering QA Results for a Job](#)
 - [Signing Off Maintenance Requirements](#)

-
- Scheduling Jobs using the Scheduler Workbench
 - Viewing the Scheduling Hierarchy
 - Updating Existing Service Requests
 - Performing Part Removal/Install
 - Changing the Serial Number of Items Associated with Jobs
 - Viewing the Serial Number Change History
 - Deferring Maintenance Requirements (MR)
 - Updating Job Details
 - Creating Operations on non-route based Jobs
 - Updating Operations
 - Updating Operation Details
 - Completing Operations
 - Entering QA results for an Operation
 - Working with Maintenance Requirements
 - Viewing Material Requirements
 - Updating Material Requirements
 - Updating Material Requirement Details
 - Viewing Employee Assignments
 - Viewing Documents
 - Updating Resource Requirements
 - Updating Resource Requirement Details
 - Updating Resource Assignments
 - Charging Resources
 - Working with Material Transactions
 - Issuing and Returning Parts to a Job
 - Entering QA results for an Material Transaction
 - Quality Collection Plans Setup

What is Production?

Production is an Oracle Complex Maintenance, Repair and Overhaul module designed for the execution of Routine Tasks and Maintenance Requirements associated with a Visit and creation and execution of Non-Routine Tasks for a Visit. The Production module supports the execution of the tasks against an Install Base Tracked Item.

What is a Routine Task?

A Routine task is a job that has been generated from a predefined Route setup in Route Management which may be part of a Maintenance Requirement defined in Fleet Maintenance Program. If defined through a Maintenance Requirement it may have a schedule and due date as defined by Unit Maintenance Plan. The task has been associated with a maintenance visit in Visit Work Package and released to Production, optionally scheduled by Long Term Plan, and optionally has resources scheduled by Production Planning.

What is a Non-Routine Task?

A Non-Routine Task consists of a Service Request, which tracks the defect or problem statement, and a Job that tracks the steps required to resolve the Service Request. It may have additional Routine Routes associated with it in Visit Work Package to support the resolution of the Service Request. A Non-Routine Task is generated in the production environment, associated with a maintenance visit, and optionally has resources scheduled by Production Planning. A Non-Routine job is a dynamically created work definition including operation creation, material requirement definition, and the resource requirement definition required to perform the job.

Key Business Processes

The Production module of Oracle Complex Maintenance, Repair, and Overhaul supports the following business processes:

Search for Routine and Non-Routine Jobs After a Routine Job or Non-Routine Job is created, the Job or Service Request can be selected from the results of a search using the desired filtering elements.

Create Jobs from visit tasks for Scheduled, Unscheduled, and Convenience maintenance

Jobs are created in Production when the tasks are pushed to Production from Visit Work Package or when a Service Request, from Oracle Complex Maintenance, Repair, and Overhaul Production, is created in a Visit where the tasks have been pushed to Production.

Create Service Requests to track reported problems

Service Requests are created when an item has a service difficulty, requiring an action to address the issue. During the Service Request creation a Visit Task is created and a job is created if the Visit's Tasks have been pushed to Production. The Service Request creation will also be generated when an Install Base tracked item is returned or removed in the Unserviceable or MRB condition.

Create Operations to Non-Routine Jobs for work definition and tracking

For Non-Route based jobs the user is allowed to create operations to describe the steps required to correct the service difficulty. For Route based jobs the operation steps are created from the definition in Route Management including the associated material and resource requirements that are valid for the execution organization.

Maintain Jobs

The user maintains the job by adjusting the schedule, the status, completing, deferring, and selecting the actual start and end for a job. In addition, the user can select if the job is confirming the jobs necessity by selecting the confirmed failure flag. When a job is completed it triggers a check to determine if the job is the last as part of a maintenance requirement. If the job was the last job to be completed for a maintenance requirement, the counters are reset as defined by Fleet Maintenance Program and Unit Maintenance Plan is updated to reflect the maintenance requirement is complete.

Maintain Operations

The user maintains the operations by updating the operations, adding, removing, or updating the material and resource requirements, captures costs by Charging Resources, Issuing, and Returning Materials, viewing the resource assignments, recording part changes, and completing the operations.

Maintain Quality

Quality is maintained using the Route setup from Route Management for the Job and Operation compliance and from the profile options for Non-Routine Job and Operation compliance, Job Deferral, MRB part disposition support, and by capturing counter readings at the job completion. The quality results are captured based on the setup storing them in Oracle Quality.

Fields Associated with Production

The following sections provide descriptions of fields appearing on each Production page.

Note: The Search icon beside fields implies the availability of a List of Values to choose from for those field values. To populate these fields, enter a partial search string using the generic substitution meta character%, and click the icon to retrieve and display matching results on a Select <field name> page. Click the relevant record on this page to return this value to the field on your maintenance requirement page.

Fields on the Create Service Request Page

The following fields appear on the Create Service Request Page:

Report Type The default Service Request type setup in the AHL Profile Options.

Report By Type The reporting type related to the Name.

Name The name of the reporting entity defaulted from the AHL Profile Option Default SR Customer Name.

Contact Type The type associated to the Contact.

Contact The entity to contact in reference to the Service Request

Date The date the Service difficulty is reported against.

Status The current status of the Service Request defaulted from the AHL Profile Option Default SR Status.

Severity The Severity of the Service Request defaulted from the AHL Profile Option Default SR Severity and is formed from the common listing defined using the EAM Activity Priority and the Service Request Severities.

Urgency The urgency in which the Service Request needs to be addressed.

Origination Visit The visit associated with the originating Job.

Origination Task The Task number associated with the Job the Service Request is being generated from.

Target Visit The Visit in which the Task will be placed upon creation.

Part Number The part number of the item for which the Service Request will be created.

Instance Number The Install Base Instance Number of the tracked item for which the Service Request will be created.

Serial Number The serial number, if serial controlled, of the tracked item for which the Service Request will be created.

Lot The Lot Number, if Lot controlled, of the tracked item for which the Service Request will be created.

Summary The summary of the service difficulty being reported.

Estimated Duration The estimated hours it will take to resolve the service difficulty defaulted from the AHL Profile Option Default Estimated Duration.

Problem Code The code associated with the problem being reported or resolved.

Resolution Code The code associated with the resolution of the service difficulty.

Fields on the Job Overview Page

The following fields appear on the Job Overview Page:

Organization The organization name.

Department The department name.

Department Class The class of department. Commonly used to distinguish Vendor class department for outside processing.

Item The tracked item for which the job has been created against.

Serial Number Enter the serial number if you want to display the jobs that are for a specific serialized part.

Visit Number The number generated for a visit.

Task Number The number generated for a task within a specific visit.

Unit Name The name used to distinguish a configuration defined in Unit Configuration.

Start Date The scheduled start date from which to begin the search.

Job Number The name generated for a job.

Project The project name associated with the job from Visit Work Package.

Project Task The project task name associated with the visit task and the job.

Accounting Class The maintenance type accounting class name.

Maintenance Requirement Through the associated routes, effectivity and threshold, the requirement defines the maintenance that needs to be performed, what it needs to be performed on, and when it needs to be done

Priority The priority of the job.

Confirmed Failure Used to search for jobs in which the user validated the justified need for the job to be executed.

Job Status The current status of a job.

Service Request The service request incident number for which a job was generated.

End Date The scheduled end date for which you want to limit the job search.

Fields on the Maintenance Requirement Deferral Details Page

The following fields appear on the Maintenance Requirement Deferral Details Page:

Title The title of the maintenance requirement, that you want deferred.

Description Maintenance requirement description.

Visit Number is an alphanumeric value that uniquely identifies the visit definition that you wish to retrieve.

Due date Due date of the maintenance requirement.

Status Seeded job status of the maintenance requirement.

Reasons User-defined reasons, displayed for the user to select.

Remarks Multiple lines field to allow the user to enter additional information related to his/her deferral request.

Approver Notes Multiple lines field to allow the approver to enter approval or rejection information.

Defer To Date The date to which the maintenance requirement is going to be deferred.

Deferral effective on Defaults to the system date, when the deferral is being created.

Counter Name Fleet Maintenance Requirement threshold counter name.

Deferral Type Deferred By counter UOM or Deferred To counter UOM value.

Fields on the Update Service Request Page

The following fields appear on the Update Service Request Page:

Contact Type The type associated to the Contact.

Contact The entity to contact in reference to the Service Request

Status The current status of the Service Request defaulted from the AHL Profile Option Default SR Status.

Urgency The urgency in which the Service Request needs to be addressed.

Problem Code The code associated with the problem being reported or resolved.

Resolution Code The code associated with the resolution of the service difficulty.

Fields on the Configuration Part Changes or Item Part Changes Page

The following fields appear on the Configuration Part Changes or Item Part Changes Pages:

Operation Seq The jobs operation sequence number on which the Remove, Replace, or Install / Add Component is to be performed.

Estimated Duration The time in hours that it is estimated to correct the service difficulty if removing in either the condition associated with unserviceable or MRB parts which generates a Service Request.

Condition The condition of the part being removed.

Subinventory The sub inventory, if desired, to return the part.

Locator The locator within the sub inventory to return the part, required if locator controlled.

Reason The reason code for the part being removed.

Removal Date The date the removal was performed.

Problem Code The code associated with the problem being reported or resolved.

Severity The severity of the service difficulty, if the part is being removed in the unserviceable or MRB condition.

Summary The summary of the service difficulty, if the part is being removed in the unserviceable or MRB condition.

Part Number The part number of the Item being installed.

Instance Number The Install Base Instance Number of the part being installed.

Installation Date The date the part was installed.

Fields on the Serial Number Change Page

The following fields appear on the Serial Number Change Page:

New Serial Number The Serial Number as entered by the user.

Serial Tag A unique identifier for the service provider.

Fields on the Job Operations Page for the Job Details

The following fields appear on the Job Operations Page:

Department The department owning or responsible for the Job.

Job Status The current status for the Job.

Completion Sub Inventory The sub inventory to complete the Item, if the Item is to be issued to the Job.

Locator The locator within the sub inventory to complete the Item, if the Item is under locator control and the Item is to be issued to the Job.

Confirmed Failure The indicator for the job to show if the user has confirmed the justification / necessity for the job.

Scheduled Job Start Date The date for which the job is scheduled to start.

Scheduled Job Start Time The time of day the job is scheduled to start.

Scheduled Job End Date The date for which the job is scheduled to end.

Scheduled Job End Time The time of day the job is scheduled to end.

Actual Job Start Date The date for which the job is scheduled to start. Required to complete or defer the job.

Actual Job Start Time The time of day the job is scheduled to start. Required to complete or defer the job.

Actual Job End Date The date for which the job is scheduled to end. Required to complete or defer the job.

Actual Job End Time The time of day the job is scheduled to end. Required to complete or defer the job.

Fields on the Job Operations Page for the Operations

The following fields appear on the Job Operations Page:

Operation Sequence The jobs operation sequence number. Required on Creation.

Operation Code The standardized code for an operation. Selectable on a non-route based job, if the operation description has not been defined.

Operation Description The description of the work to be performed on an operation.

Actual Start Date The date for which the operation is scheduled to start. Required to complete an operation.

Actual End Date The date for which the operation is scheduled to end. Required to complete an operation.

Scheduled Start Date The date for which the operation is scheduled to start. Required on Creation.

Scheduled End Date The date for which the operation is scheduled to end. Required on Creation.

Department The department in which the operation is to be performed.

Operation Status The current status for the Operation.

Fields on the Operation Detail Page

The following fields appear on the Operation Detail Page:

Operation Sequence The jobs operation sequence number.

Operation Code The standardized code for an operation. Selectable on a non-route based job, if the operation description has not been defined.

Operation Type The type of operation being performed.

Operation Description The description of the work to be performed on an operation.

Actual Start Date The date for which the operation is scheduled to start. Required to complete an operation.

Actual End Date The date for which the operation is scheduled to end. Required to complete an operation.

Scheduled Start Date The date for which the operation is scheduled to start.

Scheduled End Date The date for which the operation is scheduled to end.

Department The department in which the operation is to be performed.

Operation Status The current status for the Operation.

Scheduled Start Time (Hours & Minutes) The time of day the job is scheduled to start.

Scheduled End Time (Hours & Minutes) The time of day the job is scheduled to end.

Actual Start Time (Hours & Minutes) The time of day the job is scheduled to start. Required to complete or defer the job.

Actual End Time (Hours & Minutes) The time of day the job is scheduled to end. Required to complete or defer the job.

Fields on the Update Material Requirements Page

The following fields appear on the Update Material Requirements Page:

Operation Sequence The jobs operation sequence number.

Item The Item Number for the requirement.

Description The Description of the Item defined.

Required Quantity The quantity desired for the requirement.

Scheduled Quantity The quantity scheduled by the Long Term Plan.

UOM The unit of measure for the Item's quantity.

Required Date The date the requirement is expected.

Scheduled Date The date the quantity is scheduled by Long Term Plan.

Issued Quantity The quantity issued to an operation (only for a work order in Released Status).

Fields on the Material Requirement Detail Page

The following fields appear on the Material Requirement Detail Page:

Operation Sequence The jobs operation sequence number.

Operation Code The standardized operation code, if selected.

Item The Item Number for the requirement.

Description The Description of the Item defined.

Required Quantity The quantity desired for the requirement.

Scheduled Quantity The quantity scheduled by the Long Term Plan.

UOM The unit of measure for the Item's quantity.

Required Date The date the requirement is expected.

Scheduled Date The date the quantity is scheduled by Long Term Plan.

Issued quantity Part quantity issued.

Quantity per Assembly Part usage quantity.

Fields on the View Documents Page

The following fields appear on the View Documents Page:

Route Number It is the user-assigned identifier for a maintenance route.

Route Title It refers to the text description of the maintenance route.

Document Number it contains a unique identifier, generated by the organization to identify a maintenance document. If you do not know the document number, enter the generic substitution meta character% in the field, and click on the LOV icon to launch the Select Doc Number page that displays all the document references in the database.

Type represents the major topic such as powerplant, fleet unit, and ground support equipment that is described by the document in question.

Title refers to the title of the maintenance document.

Revision is a field that holds a user-assigned document revision identifier.

Chapter Refers to a specific chapter in the associated document. The value is defined by the user when the association is created.

Section refers to a specific section in the associated document. The value is defined by the user when the association is created.

Note refers to a specific note in the associated document. The value is defined by the user when the association is created.

Figure refers to a specific figure in the associated document. The value is defined by the user when the association is created.

Subject Refers to a specific subject in the associated document. The value is defined by the user when the association is created.

Page refers to a specific page in the associated document. The value is defined by the user when the association is created.

Fields on the Update Resource Requirements Page

The following fields appear on the Update Resource Requirements Page:

Operation Sequence The jobs operation sequence number.

Resource Sequence The sequence number for the resource within an operation.

Resource Type The type of resource requirement.

Resource The resource name within the operations department.

Duration The length of time required.

UOM The unit of measure for the time required.

Quantity The quantity of resources required.

Start Date The start date for the resource.

End Date The end date for the resource.

Fields on the Resource Requirement Detail Page

The following fields appear on the Resource Requirement Detail Page:

Operation Sequence The jobs operation sequence number.

Resource Sequence The sequence number for the resource within an operation.

Resource Type The type of resource requirement.

Resource The resource name within the operations department.

Duration The length of time required.

UOM The unit of measure for the time required.

Quantity The quantity of resources required.

Total Required The Duration times the Quantity.

Applied The duration of the resource charged to date.

Open The duration of the resource difference between the Total Required and the Applied amount.

Charge Type The expected method of charging the resource.

Standard Rate Determines if the resource is to be charged at the standardized rate.

Basis Provides the basis for determining the resource requirement.

Operation Start Time The date for which the operation is scheduled to start.

Operation End Time The date for which the operation is scheduled to end.

Start Date The start date for the resource.

End Date The end date for the resource.

Fields on the Resource Assignments Page

The following fields appear on the Resource Assignments Page:

Operation Sequence The jobs operation sequence number.

Resource Sequence The sequence number for the resource within an operation.

Operation Status The status of the operation.

Operation Start Time The date for which the operation is scheduled to start.

Operation End Time The date for which the operation is scheduled to end.

Resource Type The type of resource requirement.

Employee Number The number assigned to identity the employee.

Employee Name The full name of the employee.

Serial Number The Serial Number used non-person type resources.

Start Date The start date for the assignment.

End Date The end date for the assignment.

Fields on the Perform Resource Transactions Page

The following fields appear on the Perform Resource Transactions Page:

Operation Sequence The jobs operation sequence number.

Resource Sequence The sequence number for the resource within an operation.

Resource The resource name within the operations department.

Department The department within the organization to be charged.

Employee The employee number to be charged.

Serial Number The serial number, if serial controlled, of the tracked item for which the Service Request will be created.

Quantity The quantity of resources to be charged.

UOM The unit of measure for the quantity to be charged.

Activity Not currently supported do not select.

Reason The reason for charging the resource.

Reference User defined reference information.

Fields on the Perform Material Transactions Page for WIP Component Issue

The following fields appear on the Perform Material Transactions Page:

Operation Sequence The jobs operation sequence number.

Item The item number to be transacted.

Description The description of the item to be transacted.

Serial Number The item serial number, if serial controlled, to be transacted.

Lot The item lot number, if lot controlled, to be transacted.

Revision The item revision, if revision controlled, to be transacted.

Open The quantity difference between the material requirement and the transacted quantity.

Required Quantity The quantity to be transacted.

UOM The unit of measure for the quantity to be transacted.

Condition The condition of the part to be transacted.

On Hand The quantity in the sub inventory selected for the item to be transacted.

SubInventory The subinventory for which the item is to be transacted.

Note: The Subinventory status and the items condition must match.

Locator The locator for which the item is to be transacted, if under locator control.

Fields on the Perform Material Transactions Page for WIP Component Return

The following fields appear on the Perform Material Transactions Page:

Operation Sequence The jobs operation sequence number.

Item The item number to be transacted.

Description The description of the item to be transacted.

Serial Number The item serial number, if serial controlled, to be transacted.

Lot The item lot number, if lot controlled, to be transacted.

Revision The item revision, if revision controlled, to be transacted.

Required Quantity The quantity to be transacted.

UOM The unit of measure for the quantity to be transacted.

Condition The condition of the part to be transacted.

On Hand The quantity in the subinventory selected for the item to be transacted.

SubInventory The subinventory for which the item is to be transacted.

Note: The Subinventory status and the items condition must match.

Locator The locator for which the item is to be transacted, if under locator control.

Reason The Reason code for the item is being returned.

Problem Code The code associated with the problem being reported or resolved, if returning a part in the Unserviceable or MRB profile option statuses. The problem code is used in the automated Service Request generation.

QA Results Select to enter quality results, if returning a part to an MRB subinventory.

Summary The service difficulty summary for the item being returned. The summary is used in the automated Service Request generation.

Creating a Job or Service Request

Job creation is a multi-step process. First, a visit is pushed to production in Visit Work Package. Next, material return and parts removal transactions are accomplished in Production. Finally, the service request is manually initiated in Production.

See:

- [Push to Production from Visit Work Package](#)
- [Initiate Service Requests from a Material Transaction](#)
- [Initiate Service Requests from a Parts Change Transaction](#)
- [Initiate Service Requests against Existing Jobs](#)

Also see [Working With Jobs](#) in Production Planning, and [Quality Collection Plans Setup](#).

Push to Production from Visit Work Package

Job creation begins when a visit in Visit Work Package is pushed to production.

Prerequisites:

A visit must exist and be at a planning state where jobs can be pushed to the production.

To push a job to production from Visit Work Package:

1. On the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Planning**.
2. Select the Visit Work Package tab. The Search Visit page appears.

- 3. Enter information in the fields for which you know the value, and then click **Go**.
- 4. Select the relevant visit from the Search Results, and click **Push to Production**.

Figure 13–1 Push To Production - Search Visit page

Search Visit

Item

Unit

Serial Number

Service Request

Organization

Department

Visit Number

Visit Name

Start From Date

Start To Date

Visit Status

Visit Type

Category

Go

Clear

Search Results

Create

Select a Visit and ..

Previous1-10 of 441Next

Select	Visit Number	Visit Name	Item	Unit	Serial Number	Visit Type	Organization	Department	S	D	Remove
<input checked="" type="radio"/>	2	A-Check for N101	MRO-C1600	C-1600, Tail # 101	101	A Check					
<input type="radio"/>	8	C-Check for N101	MRO-C1600	C-1600, Tail # 101	101	C Check			07-MAR-2004	Planning	
<input type="radio"/>	10	test	CMROITEM1		1	A Check	San Diego Manufacturing	Outside Processing	24-JUN-2003	Released	
<input type="radio"/>	11	COPY FROM	MRO-16T9001-		4456555	A Check	San Diego Manufacturing	Outside Processing	02-DEC-2003	Planning	

Cost and Price Information

Cost and Price Information

Projects

Validate

Search Tasks

Maintenance Requirement

Push To Production

Close

- 5. Click **Execution**, then select the Production planning tab. The Job Overview page appears.
 - 6. Enter information in the fields for which you know the value then click **Go**.
 - 7. Select the jobs you want to edit or review.
- See [Visit Work Package](#) for more information.

Initiate Service Requests from a Material Transaction

Prerequisites:

A job must exist in a released, parts hold, or pending QA status. The associated visit must not be Closed. The default Material Status profile options and the profile options related to Service Requests must be configured. Only one operation should exist for the Job.

To initiate a service request from a material transaction:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**.
3. Select the Job number, you want to initiate the request for, and choose Update Job from the drop-down menu. The Job Operations page appears.
4. Select Material Transactions from the left-hand navigation panel. The Perform Material Transactions page appears.

Figure 13–2 Perform Material Transactions page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Jobs | Resources | Materials | Maintenance Requirements

Production Planning Outside Processing

Operations

Materials

Resources

Assignments

Material Transactions

Resource Transactions

Perform Material Transactions

Job NumberW03240

Job StatusReleased

Job Descriptionapsrouteup

Maintenance Requirementfmpapsup

Routeapsrouteup

Priority

ItemRadhika Item2 aps p

Visit Number461

Accounting Classclass

Completion Sub Inventory

Scheduled Job Start Date27-MAY-2004 07:00

Actual Job Start Date

OrganizationSan Diego M

DepartmentOutside Proc

Project461

Project Taskapsrouteup

Serial Numberapsplan100

Unit Name

Visit Task2

Locator

Scheduled Job End Date27-MAY-2004

Actual Job End Date

Transactions

Transaction TypeWIP component issue

Previous1-2 of 2Next

Select	Operation Seq	Item	Description	Condition	SubInventory	Serial Number	Lot	Revision	Loca
<input type="checkbox"/>	10	Radhika Item2 aps p	Radhika Item2 aps p						
		Radhika	Radhika						

- 5. Select Wip Component Return from Transaction type.
- 6. Click **Add More Rows** to add line items for the listing.
- 7. Enter the information required for the Install Base Tracked Item that matches the condition for AHL profile options for the Material Statuses of Unserviceable or MRB. See [Working with Material Transactions](#) and [Updating Material Requirements](#).

Note: Any applicable QA results must be entered prior to applying the transaction and the condition and material status assigned to the subinventory must match.

- 8. Click **Apply** to initiate the Service Request, Visit Task, and corrective action Job Creation. Click **Revert** to cancel the service request.

Initiate Service Requests from a Parts Change Transaction

Prerequisites:

A job must exist in a released, parts hold, or pending QA status. The associated visit must not be Closed. The default Material Status profile options and the profile options related to Service Requests must be configured. Only one operation can exist for the job.

To initiate a service request from a parts change transaction:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**.
3. Select the job from the from the Job List Results. Choose Update Job from the drop-down menu. The Job Operations page appears.
4. Select Perform Part Removal/Install from the drop-down menu and click Go. The Unit Configuration Parts Change page appears, or if the Item Instance is not part of an Unit Configuration, the Item Instance Parts Change page appears.

Figure 13–3 Unit Configuration Part Changes page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#)

Jobs | Resources | Materials | Maintenance Requirements

Production Planning | Outside Processing

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Airframe

#1 Engine

#2 Engine

49-26-93 APU

NLG Assy

MLG Assy (#1)

MLG Assy (#2)

Unit Configuration Part Changes

Job Number	W03181	Organization	San Diego Manufacturing
Job Status	Released	Department	Outside Processing
Job Description	24-20-04		
Maintenance Requirement	APU Generator Overhaul	Project	441
Route	24-20-04	Project Task	24-20-04
Priority		Serial Number	300
Item	737-800	Unit Name	VH-TAK
Visit Number	441	Visit Task	11
Accounting Class	class		
Completion Sub Inventory		Locator	
Scheduled Job Start Date	20-MAY-2004 12:13	Scheduled Job End Date	21-MAY-2004 16:13
Actual Job Start Date		Actual Job End Date	

Configuration Details

Unit Configuration

Master Configuration

* Operation Seq

VH-TAK

737-800

Position

Revision

Airframe

5

Cancel

* Indicates required field

5. Select the item that you want to remove from the left-hand list. Note that the top item in the list cannot be removed.

Figure 13–4 Select item from Configuration Tree - Unit Configuration Part Changes page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration ExecutionProfile Sign Out

Jobs | Resources | Materials | Maintenance Requirements

Production Planning Outside Processing

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Unit Configuration Part Changes

Configuration Tree:

- ✓ Airframe
 - ✓ #1 Engine
 - ✓ #2 Engine
 - ✓ 49-26-93 APU
 - ✓ NLG Assy
 - ✓ MLG Assy (#1)
 - ✓ MLG Assy (#2)
 - ✓ Main Wheel Assy (#1)
 - ✓ **Main Wheel Assy (#2)**

Job Information:

Job Number	W03181	Organization	San Diego Manufacturing
Job Status	Released	Department	Outside Processing
Job Description	24-20-04		
Maintenance Requirement	APU Generator Overhaul	Project	441
Route	24-20-04	Project Task	24-20-04
Priority		Serial Number	300
Item	737-800	Unit Name	VH-TAK
Visit Number	441	Visit Task	11
Accounting Class	class		
Completion Sub Inventory		Locator	
Scheduled Job Start Date	20-MAY-2004 12:13	Scheduled Job End Date	21-MAY-2004 16:13
Actual Job Start Date		Actual Job End Date	

Configuration Details

Unit Configuration: VH-TAK
Master Configuration: 737-800
* Operation Seq:

Removal Details

Item: 277A6000-603
Serial Number: 277AL2
Lot Number:

Instance Number: 109421
Item Revision:

Buttons: Submit QA Results Remove Replace Cancel Revert

Position: Main Wheel Assy (#2)
Revision: 5

- Enter the information required for removal of the Install Base Tracked Item that matches the condition for AHL profile options for the Material Statuses of Unserviceable or MRB. See [Perform a Material Transaction](#).

Note: Any applicable QA results must be entered prior to applying the transaction and the condition and material status assigned to the subinventory must match.

Figure 13–5 Enter Removal Details - Unit Configuration Part Changes page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration ExecutionProfile Sign Out

Jobs | Resources | Materials | Maintenance Requirements

Production PlanningOutside Processing

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Airframe

#1 Engine

#2 Engine

49-26-93 APU

NLG Assy

MLG Assy (#1)

MLG Assy (#2)

Main Wheel Assy (#1)

Main Wheel Assy (#2)

Configuration Details

Unit ConfigurationVH-TAK

Master Configuration737-800

PositionMain Wheel Assy (#2)

Revision5

Submit QA ResultsRemoveReplaceCancelRevert

Operation Seq10

Item277A6000 603

Instance Number109421

Serial Number277AL2

Item Revision

Lot Number

Quantity1

UOMEa

ConditionQuarantine

ReasonCompFail

Removal CodeConvenience

Removal Date

Subinventory

Locator

Problem Code

Severity

Estimated Duration

Summary

Installation Details

Item

Instance Number

Serial Number

Item Revision

7. Click **Remove** to remove the item. Click **Replace** button to replace the part with another. Both actions will also initiate the Service Request, Visit Task, and the corrective action Job Creation.

Initiate Service Requests against Existing Jobs

Prerequisites:

A job with a status of Released, Part Hold, Hold, Pending QA, or Complete must exist in the database. The Service Request Profile Options must be setup. The EAM Activity Priority and Service Request Severities must be configured to match for an available priority.

To create a service request against an existing job:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.

13-26 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

2. Enter information in the fields for which you know the value then click **Go**.
3. Select the job from the from the Job List Results. Choose Create Service Request from the drop-down menu. The Create Service Request page appears.

Figure 13–6 Create Service Request page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Jobs | Resources | Materials | Maintenance Requirements

Production Planning Outside Processing

Create Service Request

* Indicates required field

Cancel Revert Apply

Create Service Request

Report By Type	Defective Product		
* Report Type	Organization	* Name	Business World
* Contact Type	Employee	* Contact	Smith, Mr. Tom
Date		* Status	New
Severity	Medium	Urgency	
Origination Visit	Maintenance Check VH-TAK	Target Visit	Maintenance Check VH-TAK
Origination Task	24-20-04	* Instance Number	109303
Item	737-800	Lot	
Serial Number	300	UOM	Hours
* Summary		Resolution Code	
Estimated Duration			
Problem Code			

4. Enter information in the fields for which you know the value. Click **Apply** to create the Service Request and initiate the visit task and corrective action job creation.

Figure 13–7 Update Service Request page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Jobs](#) | [Resources](#) | [Materials](#) | [Maintenance Requirements](#)

[Production Planning](#) [Outside Processing](#)

Update Service Request

* Indicates required field

Report By Type

Defective Product

Report Type

Organization

* Contact Type

Employee

Date

28-JUN-2004

Severity

Medium

Origination Visit

Maintenance Check VH-TAK

Origination Task

24-20-04

Item

737-800

Serial Number

300

Summary

Test Request

Estimated Duration

1

Problem Code

Incident Number

135514

Name

Business World

* Contact

Smith, Mr. Tom

* Status

New

Urgency

Target Visit

Maintenance Check VH-TAK

Instance Number

109303

Lot

UOM

Hours

Resolution Code

Cancel

Revert

Apply

Searching for a Job or Service Request

Finding a Job or a Service Request related to a job is a basic step in retrieving the jobs to take action against or review jobs that have already been executed.

Prerequisites:

A relevant job must exist in the database.

To search for a job or service request:

- From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
- Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.

Figure 13–8 Job Overview page

Job Overview

Organization	<input type="text"/>		Job Number	<input type="text"/>	
Department	<input type="text"/>		Project	<input type="text"/>	
Department Class	<input type="text"/>		Project Task	<input type="text"/>	
Serial Number	<input type="text"/>		Accounting Class	<input type="text"/>	
Item	<input type="text"/>		Priority	<input type="text"/>	
Visit Number	<input type="text"/>		Confirmed Failure	<input type="text"/>	
Visit Task	<input type="text"/>		Job Status	<input type="text" value="Released"/>	
Unit Name	<input type="text"/>		Service Request	<input type="text"/>	
Maintenance Requirement	<input type="text"/>		End Date	<input type="text"/>	
Start Date	<input type="text"/>				

Job List

Previous Next

Select	Job Number	Service Request	Task Number	Priority	Scheduled Start Date	Scheduled End Date	Status	OSP Order Number
<input type="radio"/>	WO3240		2		27-MAY-2004	27-MAY-2004	Released	
<input type="radio"/>	WO3181		11		20-MAY-2004	21-MAY-2004	Released	

3. Choose one of the following from the drop-down menu to initiate an associated action against the selected job:
 - Release job
 - Complete Job
 - Update Job
 - Defer
 - Update/View Service Request
 - Record Job QA Results
 - Record Maintenance Requirement QA Results
 - Sign Off
 - View Documents
 - View OSP

- View Scheduling Hierarchy
- 4. Select a job and choose Update Job from the drop-down menu. The Job Operation page appears.
- 5. You can select one of the following options from the drop-down menu:
 - Defer
 - Record Maintenance Requirement QA Results
 - Sign Off Maintenance Requirement
 - Perform Part Removal/Install
 - Change Serial Number
 - Create Service Request
 - Update/View Service Request
 - Record Job QA Results
 - Complete Job

Figure 13–9 Job Operations page

Job Operations

* Indicates required field

Cancel Revert Apply Defer Go

Job Details

Job Number **W03240**

Job Description **apsrouteup**

Maintenance Requirement **fmpapsup**

Route **apsrouteup**

Priority

Item **Radhika Item2 aps p**

Visit Number **461**

Job Status **Released**

Completion Sub Inventory

Lot Number

* Scheduled Job Start Date **27-MAY-2004**

Scheduled Job Start Time Hrs **07** Mins **00**

Actual Job Start Date

Actual Job Start Time Hrs Mins

Unit Name

Visit Task **2**

Accounting Class **class**

Locator

Confirmed Failure **No**

* Scheduled Job End Date **27-MAY-2004**

Scheduled Job End Time Hrs **07** Mins **00**

Actual Job End Date

Actual Job End Time Hrs Mins

Operations

Details Operation QA Results Complete Operation

Previous 1-1 of 1 Next

Select	* Operation Sequence	Operation Code	Operation Description	Actual Start Date	Actual End Date	* Scheduled Start Date	* Scheduled End Date	Department	Operation Status
--------	----------------------	----------------	-----------------------	-------------------	-----------------	------------------------	----------------------	------------	------------------

Maintaining a Job or Service Request

Job maintenance involves recording quality information against the job, creating, updating, and viewing service requests against existing jobs.

See:

- [Releasing Jobs](#)
- [Completing Jobs](#)
- [Deferring Jobs](#)
- [Entering QA Results for a Job](#)
- [Signing Off Maintenance Requirements](#)
- [Scheduling Jobs using the Scheduler Workbench](#)
- [Viewing the Scheduling Hierarchy](#)

- [Updating Existing Service Requests](#)
- [Performing Part Removal/Install](#)
- [Changing the Serial Number of Items Associated with Jobs](#)
- [Viewing the Serial Number Change History](#)
- [Deferring Maintenance Requirements \(MR\)](#)
- [Updating Job Details](#)
- [Creating Operations on non-route based Jobs](#)
- [Updating Operations](#)
- [Updating Operation Details](#)
- [Completing Operations](#)
- [Entering QA results for an Operation](#)

Also see [Working With Jobs](#) in Production Planning, and [Quality Collection Plans Setup](#).

Releasing Jobs

Prerequisites:

A job with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database.

To release a job:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
3. Select the job you want to release and choose **Release Job** from the drop-down menu. Optionally, you can navigate to the Job Operations page and update the job status to Released.

Completing Jobs

Prerequisites:

A job with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. Any required QA results must be entered. All tracked parts must be returned or installed and all operations must be complete.

To complete a job:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
3. Select the job that you want to complete and choose **Complete Job** from the drop-down menu. Optionally, you can complete the job in the Job Operations page.

Figure 13–10 Complete Job - Job Overview page

Job Overview

Organization

Department

Department Class

Serial Number

Item

Visit Number

Visit Task

Unit Name

Maintenance Requirement

Start Date

Job Number

Project

Project Task

Accounting Class

Priority

Confirmed Failure

Job Status

Service Request

End Date

Go

Clear

Job List

Complete Job

Go

Previous

1-10 of 171

Next

Go

Select	Job Number	Service Request	Task Number	Priority	Scheduled Start Date	Scheduled End Date	Status	OSP Order Number
<input checked="" type="radio"/>	WO3240		2		27-MAY-2004	27-MAY-2004	Released	
<input type="radio"/>	WO3181		11		20-MAY-2004	21-MAY-2004	Released	
<input type="radio"/>	WO3179		9		20-MAY-2004	20-MAY-2004	Released	

Note: If the job is the final job completed as part of a planned maintenance requirement, the job completion will also complete the maintenance requirement and update the unit's maintenance requirement accomplishment in Unit Maintenance Plan.

Deferring Jobs

Prerequisites:

A job with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. Any required QA results must be entered. All tracked parts must be returned or installed and all operations must be complete.

To defer a job:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
3. Select a job, and choose **Defer** from the drop-down menu. Optionally, you can defer the job from the Job Operations page.

Figure 13–11 Defer Job - Job Operations page

Job Operations

* Indicates required field

Cancel Revert Apply **Defer** Go

Job Details

Job Number	W03240	Organization	San Diego Manufacturing
Job Description	apsrouteup	Department	Outside Processing
Maintenance Requirement	fmpapsup	Project	461
Route	apsrouteup	Project Task	apsrouteup
Priority		Serial Number	apsplan100
Item	Radhika Item2 aps p	Unit Name	
Visit Number	461	Visit Task	2
Job Status	Released	Accounting Class	class
Completion Sub Inventory		Locator	
Lot Number		Confirmed Failure	No
* Scheduled Job Start Date	27-MAY-2004	* Scheduled Job End Date	27-MAY-2004
Scheduled Job Start Time	Hrs 07 Mins 00	Scheduled Job End Time	Hrs 07 Mins 00
Actual Job Start Date		Actual Job End Date	
Actual Job Start Time	Hrs Mins	Actual Job End Time	Hrs Mins

Operations

Details Operation QA Results Complete Operation

Previous 1-1 of 1 Next

Select	* Operation Code	Operation Description	Actual Start Date	Actual End Date	* Scheduled Start Date	* Scheduled End Date	Department	Operation Status

Entering QA Results for a Job

Prerequisites:

A job with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. The Quality Collection plan must be set up and the inspection type associated with the Job Deferral Inspection Type profile option, or

with the route header in Route Management, or to the Non-Routine Job Inspection profile option. See Setup Quality Collection Plans.

To enter QA results for a job:

- 1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
- 2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
- 3. Select the job and choose **Record Job QA Results** from the drop-down menu. The Submit Quality Results page appears. Click Add More Rows. Enter quality results in the fields provided. Optionally, you can update the QA results from the Job Operations page.

Figure 13–12 Submit Quality Results page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Jobs | Resources | Materials | Maintenance Requirements

Production PlanningOutside Processing

Submit Quality Results - CMRO JOB PLAN P3

Job Number **W01722** Job Status **Released**

CancelRevertApply

Quality Results List

* Work Order	* Work Order Status	Maintenance Requirement	* Item	* Item Instance	Lot	Serial	* Mechanic	Inspector	Defect Code
No records were found matching the given criteria..									
<div>Add More Rows</div>									

CancelRevertApply

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Note: QA results fields are custom defined for your installation. However, the base elements required to link the results to the job should not be removed or set as disabled.

Signing Off Maintenance Requirements

When all the jobs for a particular maintenance requirement have been completed, you can sign off the MR. You can associate a quality plan with a maintenance requirement when defining the maintenance requirement in Fleet Maintenance Program. When this maintenance requirement (MR) is executed on the shop floor, you must record the quality information before a maintenance requirement is considered signed off. The MR sign off control is enhanced with an additional level of quality recording. Instead of signing off the maintenance requirement implicitly with the completion of the last job, you can define an explicit maintenance requirement sign off with quality recording. The quality recording on MR level is optional, the same as on route or operation level.

Prerequisites:

All the jobs associated with the MR must be in Complete. All child MRs associated with the MR, must also be signed off.

To sign off maintenance requirements:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
3. To record quality results, select the job, and choose Record Maintenance Requirement QA Results. The Submit Quality Results page appears. Enter quality results. Click Apply.

Figure 13–13 Enter Maintenance Requirement QA Results - Submit Quality Results page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Jobs | Resources | Materials | Maintenance Requirements

Production PlanningOutside Processing

Submit Quality Results - CMRO MR INSPECTION PLAN

Maintenance Requirement **Inspect Aft Cargo Compartment Floor**
Visit **424**
Visit Start Date **20-MAY-2004 10:00**
Status **All Jobs Complete**

Organization **San Diego Manufacturing**
Department **Outside Processing**
Unit **VH-TAK**
Actual End Date **19-MAY-2004 12:10**

Cancel

Revert

Apply

Quality Results List

Previous1-1 of 1Next

* MechanicInspector

10061007

Add More Rows

Previous1-1 of 1Next

Cancel

Revert

Apply

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4. Return to the Job Overview page. To sign off the maintenance requirement associated with the job, select the job, and choose Sign Off from the drop-down menu.

You can also sign off Maintenance Requirements using one of the following options:

- Job Operations UI - From the Job Overview page, select a job, and choose Update Job from the drop-down menu. The Job Operations page appears. Choose Sign Off Maintenance Requirement from the drop-down menu.
- Maintenance Requirement Jobs UI - From the Search Maintenance Requirements page, click View Jobs. Select Sign off.
- Search Maintenance Requirements UI - Search for the MR. From the results table, select the MR that you want to sign off, and click Signoff.

Figure 13–14 Sign Off Maintenance Requirement- Job Overview page

Job Overview

Organization	<input type="text"/>	Job Number	<input type="text"/>
Department	<input type="text"/>	Project	<input type="text"/>
Department Class	<input type="text"/>	Project Task	<input type="text"/>
Serial Number	<input type="text"/>	Accounting Class	<input type="text"/>
Item	<input type="text"/>	Priority	<input type="text"/>
Visit Number	<input type="text"/>	Confirmed Failure	<input type="text"/>
Visit Task	<input type="text"/>	Job Status	<input type="text" value="Complete"/>
Unit Name	<input type="text"/>	Service Request	<input type="text"/>
Maintenance Requirement	<input type="text"/>	End Date	<input type="text"/>
Start Date	<input type="text"/>		

Job List

[Previous](#) 11-20 of 42 [Next](#)

Select	Job Number	Service Request	Task Number	Priority	Scheduled Start Date	Scheduled End Date	Status	OSP Order Number
<input checked="" type="radio"/>	CMRO1820	60284	2		18-MAR-2004	18-MAR-2004	Complete	
<input type="radio"/>	CMRO323		2		11-DEC-2003	12-DEC-2003	Complete	

Scheduling Jobs using the Scheduler Workbench

Before a work order is executed, the planner needs to balance the requirements (resource & materials) with the available supply/capacity, also known as resource leveling. The planner assigns the work orders in such a way that the resources are consumed in a steady rate, thus avoiding the peak-valley situations. The Scheduler Workbench provides a graphical user interface of the Visit's work hierarchy, and enables the planner to schedule work orders and operations, manage dependencies, and assign resources. The scheduling decisions are validated against the applicable maintenance visit's start and end dates, as well as the defined technical dependencies between production jobs.

A large maintenance operation can have multiple visits and thousands of jobs at a single facility. The Scheduler Workbench allows the planner to quickly schedule and reschedule jobs, while viewing the required and available resources, and the job dependencies.

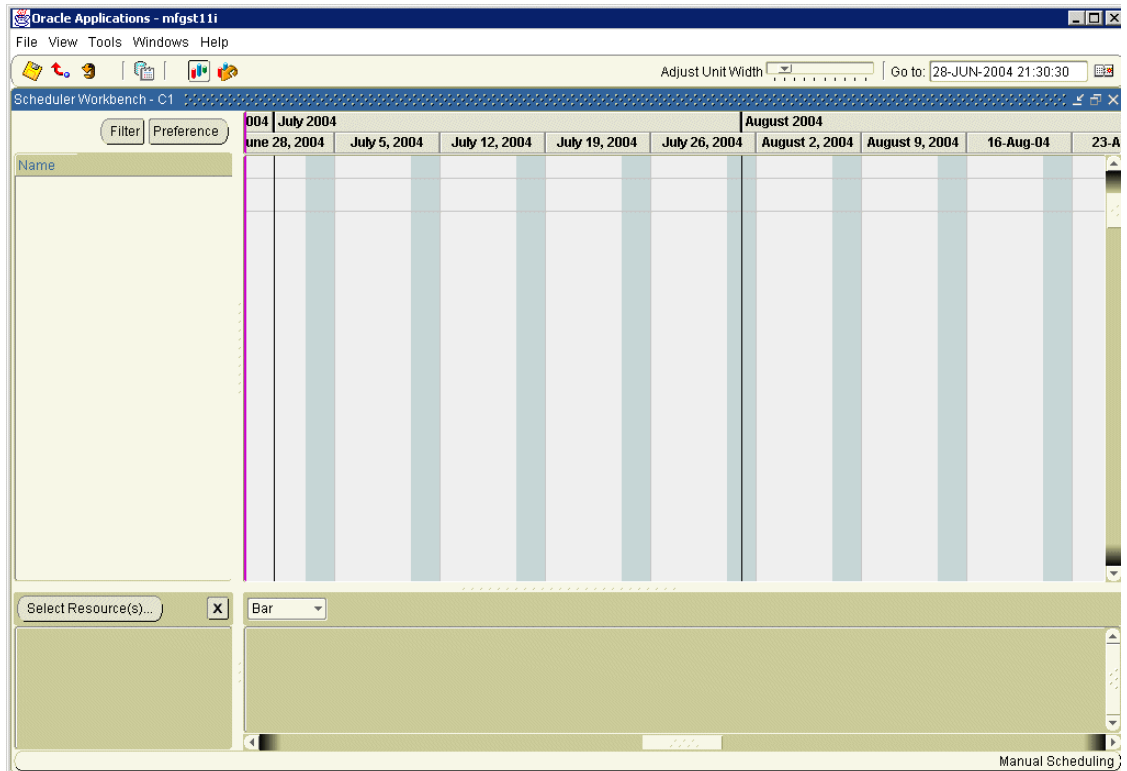
The scheduling hierarchy and the completion dependencies of a visit are pushed to Oracle Work-In-Process (WIP). Completion Dependencies are the technical dependencies between visit tasks in Visit Work Package. For example, Task 3 is executed after Task 1.

Prerequisites

To use Enterprise Asset Management's Scheduler Workbench, jobs must have already been created. After creating a visit in Visit Work Package, associating the applicable maintenance requirements and scheduling the visit to an available organization and department, jobs are created by pushing the visit to production. Non-routine jobs are created manually in Production Planning.

To schedule jobs using the Scheduler Workbench:

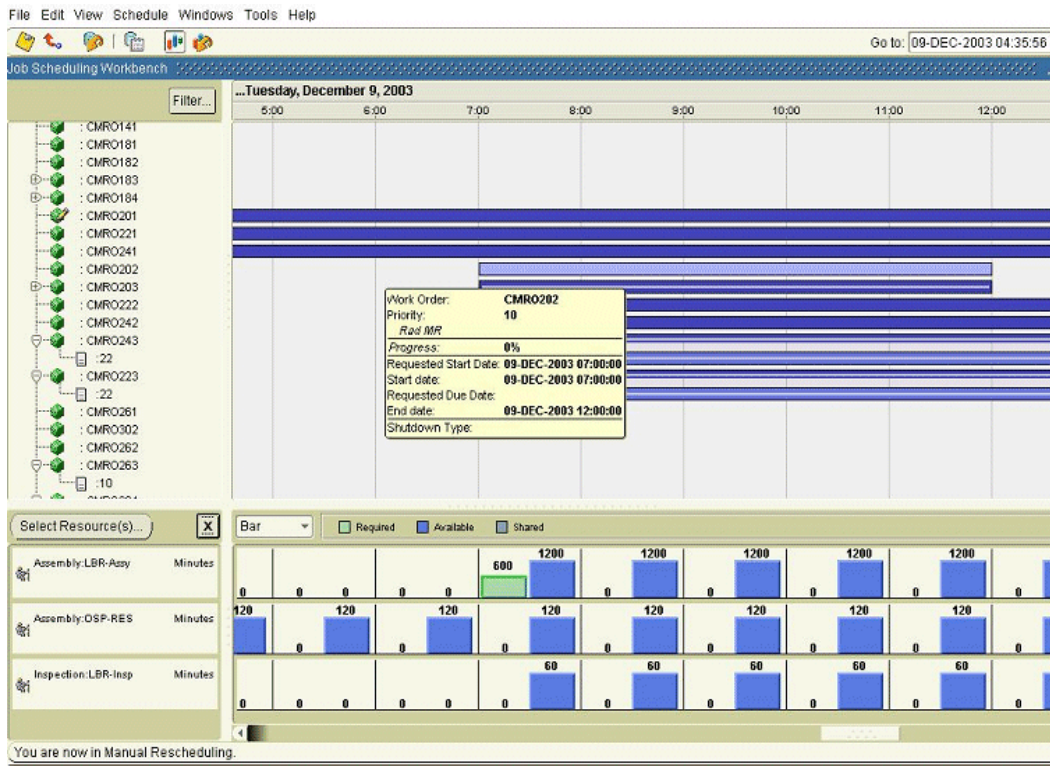
1. Change responsibility to Oracle Enterprise Asset Management. From the Navigator, choose Work Order Planning > Scheduler Workbench. This will launch the Scheduler Workbench.

Figure 13–15 Scheduler Workbench window

2. Select Filter to specify the search criteria for your jobs. The Filter window appears displaying the filter conditions. Enter the filter values, and Click Apply. The workbench is refreshed with the data based on filter conditions. The following filter options are provided:
 - Project/Task Number
 - Date Range
 - Resource Type
 - Part Number/Item Number/Unit Number
 - Department
 - Work Order number

- Work Orders without resource assignments
- Work Order Status

Figure 13–16 View Work Orders - Scheduler Workbench



3. You can do the following in the Scheduler Workbench:
- View jobs - The work order display comprises two panes. On the left pane the work orders/jobs are listed. On the right pane the dates associated with the work orders are displayed in a Gantt Chart. If the work orders have dependency then the work order will have a + symbol next to it. You can expand and collapse the work order tree structure. View the work order dependency from the top node to the bottom node, in the Gantt Chart. You can adjust the display period to minutes, hours, days, weeks, or months.

- Maintain a work order dependency hierarchy - For work orders with dependencies, you can view the dependency in the workbench and manage the work order schedules either through drag and drop operation or manual editing. The work order dependency for CMRO work orders can be defined on the following two levels:
 - An operation cannot be moved beyond the start- and end-date of the work order. The work order cannot be moved beyond the start- and end-date of a visit.
 - The workbench also respects dependencies between work orders. In this case, the forward/backward scheduling of a work order affects its child work orders.

You can schedule and/or reschedule jobs by dragging the job to the desired start time or date. To schedule a job on an earlier date, drag the beginning of the work order to the left. To schedule the work order to a later date, drag the beginning of the work order to the right. Same applies when you move the end of the work order.

Note: If you grab the work order in the middle and move it either to the left or right, then the start and end date of the work order will be changed by the offset, however the duration of the work order will remain the same.

- Assign resources to work orders - While managing the work orders, you can identify the work order operation resource requirements and match it with available resource instances. You can identify available instances of employees and machines from your organization, and have a graphical view of the combined resource load/capacity. You can then assign the employees/machines to the work order operations.
- View Resource load/capacity - The resources view consists of two panes. The left pane shows the list of resources and the right pane shows the load/capacity for each time bucket. The load/capacity can be displayed as bar chart or form. These panes overlap with the work order left/right panes. You can display/hide the resource related panes.

For information on how to use the Scheduler Workbench, refer to the *Oracle Manufacturing Scheduling User's Guide*.

Viewing the Scheduling Hierarchy

You can view the completion dependencies for a job in the View Workorder Scheduling Hierarchy user interface. The selected work order information is displayed as read-only Context.

Prerequisites:

The job record that you want to view the scheduling hierarchy for, must exist in the database.

To view the scheduling hierarchy:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
1. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
2. Select the job, and choose View Scheduling Hierarchy from the drop-down menu. Click Go. The Work Order Scheduling Hierarchy page appears, displaying the job details, and the related work orders.

Figure 13–17 Work Order Scheduling Hierarchy page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Jobs | Resources | Materials | Maintenance Requirements **Production Planning** Outside Processing


Work Order Scheduling Hierarchy

Cancel Revert

Job Number	WO3066	Organization	San Diego Manufacturing
Job Status	Complete	Department	Inspection Department
Job Description	24-20-04		
Maintenance Requirement	APU Generator Overhaul	Project	424
Route	24-20-04	Project Task	24-20-04
Priority		Serial Number	300
Item	28B545-7	Unit Name	
Visit Number	424	Visit Task	11
Accounting Class	class		
Completion Sub Inventory		Locator	
Scheduled Job Start Date	20-MAY-2004 10:00	Scheduled Job End Date	20-MAY-2004 10:00
Actual Job Start Date	19-MAY-2004 12:00	Actual Job End Date	19-MAY-2004 12:10

Related Work Orders

Previous 1-1 of 1 Next

Focus	Job Number	Relationship	Scheduled Job Start Date	Scheduled Job Start Time	Scheduled Job End Date	Scheduled Job End Time	Job Status	Service Request	OSP Order Number
	WO3066		20-MAY-2004	10:00:00	20-MAY-2004	10:00:00	Complete		

Previous 1-1 of 1 Next

- To focus on a work order to view its relationships, clicking the Focus Icon in the Related Work Orders result set.
- To navigate to the Job Operations user interface, click the Job Number link in the Related Work Orders result set.

Updating Existing Service Requests

Prerequisites:

A job must have been initiated by a Service Request Creation and the related Service Request must be open.

To Update an existing Service Request:

- From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.

- 2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
- 3. Select the job, and choose **Update/View Service Request** from the drop-down menu. The Update Service Request page appears.

Figure 13–18 Edit Service Request - Update Service Request page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Jobs | Resources | Materials | Maintenance Requirements

Production PlanningOutside Processing

Update Service Request

* Indicates required field

CancelRevertApply

Update Service Request

Report By Type	Customer Call	Incident Number	60284
Report Type	Organization	Name	Business World
* Contact Type	Employee	* Contact	
Date	06-FEB-2004	* Status	Open
Severity	High	Urgency	Urgent
Origination Visit	Visit0503A	Target Visit	Visit0503A
Origination Task		Instance Number	91822
Item	VG0205	Lot	
Serial Number	SN0206		
Summary	Test CMRO	UOM	Hours
Estimated Duration		Resolution Code	
Problem Code			

CancelRevertApply

- 4. Make any necessary changes and click **Apply**. Click **Revert** to cancel any changes and return to the previous page.

Performing Part Removal/Install

During installations, assemblies are mapped based on the position key, the position reference, sub-configuration, and item. If the position association is undeterminable, the part / sub-assembly is displayed as an extra. You can manually map the hierarchy to the correct positions. If a position reference has been modified in the higher assemblies master configuration, the position reference is automatically updated to reflect the correct installation position. In addition to the structure of the

hierarchy being validated during the installation, the configuration rules are validated, ensuring that the assembly complies with the rules established in master configuration. Maintenance personnel thus have increased visibility into missing and extra items, and/or sub-assemblies.

You can assign the extra items and sub-assemblies to the appropriate sibling positions for which installation is allowed. Identifying parts that need to be installed or removed is easily accomplished through the use of the missing and extra icons. In addition to parts issued to a work order, any installed sibling identified as an extra item, which meets the installation criteria, will appear in the search results for an empty position.

Prerequisites:

A job with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database

To perform part removal and/or install:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
3. Navigate to the Job Operations page. For the selected job, choose Perform Part Removal/Install from the drop-down menu. The Item Part Changes or Unit Configuration Part Changes page appears.
 - If on Configuration, select the sub-configuration to install, remove, or replace.
 - If on Item Parts Change, select the Item to remove, replace or install.

Figure 13–19 View Configuration Tree - Unit Configuration Part Changes page

ORACLE

Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#)

Jobs | Resources | Materials | Maintenance Requirements

Production Planning | Outside Processing

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Airframe

#1 Engine

Unit Configuration Part Changes

Job Number	W01610	Organization	San Diego Manufacturing
Job Status	Released	Department	Outside Processing
Job Description	DRW route 2-3	Project	220
Maintenance Requirement	DRW mr 3	Project Task	DRW route 2-3
Route	DRW route 2-3	Serial Number	101
Priority		Unit Name	DRW unit 1
Item	DRW unit item 3	Visit Task	6
Visit Number	220	Locator	
Accounting Class	EAM	Scheduled Job End Date	17-FEB-2004 13:00
Completion Sub Inventory		Actual Job End Date	
Scheduled Job Start Date	12-FEB-2004 07:00		
Actual Job Start Date			

Configuration Details

Unit Configuration	DRW unit 1	Position	Airframe
Master Configuration	DRW mc 1	Revision	1

* Indicates required field

* Operation Seq

4. Enter the Removal or Installation details.

5. Select the Operation Sequence.

13-48 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 13–20 Remove Item Instance - Unit Configuration Part Changes page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration ExecutionProfile Sign Out

Production Planning Outside Processing

Jobs | Resources | Materials | Maintenance Requirements

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Airframe
#1 Engine
HP Turbine

Configuration Details Submit QA Results Remove Replace Cancel Revert

Unit Configuration **DRW unit 1** Position **HP Turbine**
Master Configuration **DRW mc 1** Revision **1**
* Operation Seq

Removal Details

Item **DRW unit item 3** Instance Number **83529**
Serial Number **101** Item Revision
Lot Number
Quantity **1** UOM **Ea**
* Condition
* Removal Code
Subinventory
Problem Code
Estimated Duration
Summary
* Reason
Removal Date
Locator
Severity

Installation Details

Item
Serial Number
Instance Number
Item Revision

- Make any necessary changes and click **Remove** to remove a part. Click **Install** to add a position.

Figure 13-21 View Missing Item - Unit configuration Part Changes page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution Profile](#) [Sign Out](#)

Jobs | Resources | Materials | Maintenance Requirements

Production Planning

Outside Processing

Airframe

#1 Engine

HP Turbine

Unit Configuration Part Changes

Job Number	WO1610	Organization	San Diego Manufacturing
Job Status	Released	Department	Outside Processing
Job Description	DRW route 2.3	Project	220
Maintenance Requirement	DRW mr 3	Project Task	DRW route 2.3
Route	DRW route 2.3	Serial Number	101
Priority		Unit Name	
Item	DRW unit item 3	Visit Task	6
Visit Number	220		
Accounting Class	EAM		
Completion Sub Inventory		Locator	
Scheduled Job Start Date	12-FEB-2004 07:00	Scheduled Job End Date	17-FEB-2004 13:00
Actual Job Start Date		Actual Job End Date	

Configuration Details

Unit Configuration	DRW unit 1	Position	Airframe
Master Configuration	DRW mc 1	Revision	1
* Operation Seq			

* Indicates required field

7. If full validation is not successful, the configuration tree is displayed. Select the error positions or items and:
- Remove the excess or incorrect unit.
 - Map the item/sub-configuration to the correct position by clearing the current extra position reference, refreshing the UI, then selecting the associated instance from the target position.
 - Assign the missing item.

Apply the necessary changes.

Figure 13-22 Install Missing item - Unit Configuration Part Changes page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out

Jobs | Resources | Materials | Maintenance Requirements

Production Planning Outside Processing

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Airframe
#1 Engine
HP Turbine

Unit Configuration Part Changes

Job Number	W01610	Organization	San Diego Manufacturing
Job Status	Released	Department	Outside Processing
Job Description	DRW route 2-3	Project	220
Maintenance Requirement	DRW mr 3	Project Task	DRW route 2-3
Route	DRW route 2-3	Serial Number	101
Priority		Unit Name	
Item	DRW unit item 3	Visit Task	6
Visit Number	220		
Accounting Class	EAM		
Completion Sub Inventory		Locator	
Scheduled Job Start Date	12-FEB-2004 07:00	Scheduled Job End Date	17-FEB-2004 13:00
Actual Job Start Date		Actual Job End Date	

Configuration Details Install Cancel Revert

Unit Configuration	DRW unit 1	Position	HP Turbine
Master Configuration	DRW mc 1	Revision	1
* Operation Seq	10		

Installation Details

Item	DRW unit item 3	Instance Number	83529
Serial Number	101	Item Revision	

- Click **Revert** to clear any changes. Click **Cancel** to cancel any changes and return to the previous page.

Changing the Serial Number of Items Associated with Jobs

You can change the serial number of a tracked configuration component, in the Serial Number Change UI. This process will update the applicable unit configuration, as well as the Installed Base item instance.

Prerequisites:

At least one job must exist for the item whose serial number has to be changed. Any Maintenance Requirement effectivities must be updated/created manually in the Fleet Maintenance Program module to account for this new serial number and its individual requirements.

To change the Serial Number:

- 1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
- 2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table. Select a job, and navigate to the Job Operations page by choosing Update Job from the drop-down menu. .
- 3. Select Change Serial Number from the drop-down menu. Click Go. The Serial Number Change page appears.

Figure 13-23 Serial Number Change page

ORACLE

Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Jobs | Resources | Materials | Maintenance Requirements

Production Planning | Outside Processing

Serial Number Change

Cancel

View History

Apply

Job Number	W01722	Organization	San Diego Manufacturing
Job Status	Released	Department	Outside Processing
Job Description	task		
Maintenance Requirement		Project	237
Route		Project Task	task
Priority		Serial Number	pst2-2
Item	R-ITEM2-Trackable	Unit Name	
Visit Number	237	Visit Task	1
Accounting Class	EAM		
Completion Sub Inventory		Locator	
Scheduled Job Start Date	13-FEB-2004 07:00	Scheduled Job End Date	02-MAR-2004 11:00
Actual Job Start Date		Actual Job End Date	

* Indicates required field

* New Serial Number

Serial Tag

Temporary

Cancel

View History

Apply

- 4. Enter a number in the New Serial Number field. Optionally, select a Serial Tag from the Serial Tag list of values.
- 5. Click Apply. The new serial number is updated in Installed Base for the work order item instance.

Viewing the Serial Number Change History

You can view all the Serial Number changes, performed on the work order item instance, in the View History UI.

Prerequisites:

The Serial number of the selected item instance must have been changed at least once.

To view the serial number change history:

1. Navigate to the Serial Number Change UI. For information, see [Changing the Serial Number of Items Associated with Jobs](#).
2. Click View History. The View Serial Number Change History page appears, displaying the following information about the serial number changes:
 - Date
 - Old Serial Number
 - Old Serial Tag
 - New Serial Number
 - New Serial Tag

Figure 13–24 Serial Number History page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Jobs | Resources | Materials | Maintenance Requirements

Production PlanningOutside Processing

Serial Number History

Cancel

Job NumberWO1722

Job StatusReleased

Job Descriptiontask

Maintenance Requirement

Route

Priority

ItemR-ITEM2-Trackable

Visit Number237

Accounting ClassEAM

Completion Sub Inventory

Scheduled Job Start Date13-FEB-2004 07:00

Actual Job Start Date

OrganizationSan Diego Manufacturing

DepartmentOutside Processing

Project237

Project Tasktask

Serial Numberpst2-2

Unit Name

Visit Task1

Locator

Scheduled Job End Date02-MAR-2004 11:00

Actual Job End Date

Serial Number Changes

Previous1-10 of 12Next

Date	Old Serial Number	Old Serial Tag	New Serial Number	New Serial Tag
13-FEB-2004	pst2-2	From Inventory	pst2-2	Temporary
13-FEB-2004	pst2-2		pst2-2	Temporary
13-FEB-2004		From Inventory	pst2-2	Temporary
13-FEB-2004		From Inventory		Temporary
13-FEB-2004		From Inventory		Temporary

Deferring Maintenance Requirements (MR)

You can defer routine and/or non-routine maintenance requirements, which cannot be completed during a visit, either due to shortage of material and resource, or because the unit was put back into service for an emergency assignment. You can also defer maintenance requirements belonging to a group MR. The group MR is signed off at the end of the visit, and the deferred MR is carried out on a later date, and accomplished with the group MR on the next group Maintenance Requirement event. Maintenance requirements can be deferred to a future date (hard date when this MR will be performed), and/or they can be based on counter threshold values. A deferred maintenance requirement with a new due date is created in Unit Maintenance Plan.

You can skip a planned maintenance requirement to the next repetitive one, and also push the next due date based on the deferred date

Prerequisites:

The maintenance requirement that you want to defer, must exist in the database. You cannot defer a maintenance requirement in Released status.

To defer a maintenance requirement:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
3. Select the job, which has the associated maintenance requirement that you want to defer, and choose Defer from the drop-down menu. The Job Operations page appears. Choose Defer from the drop-down menu in the Job Operations page. The Maintenance Requirement Deferral Details page appears.
4. Optionally, you can navigate to this page through the Maintenance Requirements sub-tab. Select the Maintenance Requirements sub-tab. The Search Maintenance Requirements page appears. Enter your search criteria, and click Go.

Figure 13–25 Search Maintenance Requirements page

ORACLE

Oracle Complex MRO

HomeEngineeringConfigurationPlanningAdministrationExecutionProfileSign OutHelp

Jobs | Resources | Materials | Maintenance Requirements

Production PlanningOutside Processing

Search Maintenance Requirements

Visit

Organization

Department

Visit Start Date

Go

Clear

Maintenance Requirement

Service Request

Unit

Status

Maintenance Requirement Results

Select Maintenance Requirement and..

DeferSubmit Quality ResultsSignoffView JobsView Relationships

Previous1-10 of 72Next

Select	Maintenance Requirement	Visit	Visit Start Date	Unit	Organization	Department	Status	Actual End Date
<input type="radio"/>	737-800 Maintenance Check	424	20-MAY-2004 10:00	VH-TAK	San Diego Manufacturing	Outside Processing	Released	
<input type="radio"/>	737-800 Maintenance Check	449	10-DEC-2004 00:00	VH-TAK	San Diego Manufacturing	Inspection Department	Released	
<input type="radio"/>	APU Generator Overhaul	424	20-MAY-2004 10:00		San Diego Manufacturing	Outside Processing	All Jobs Complete	19-MAY-2004 12:10
<input type="radio"/>	APU Generator Overhaul	449	10-DEC-2004 00:00		San Diego Manufacturing	Inspection Department	Released	
<input type="radio"/>	DRW_mnr_1	220	12-FEB-2004 00:00	DRW unit 1	San Diego Manufacturing	Outside Processing	Released	
<input type="radio"/>	DRW_mnr_1	197	15-MAR-2004 00:00	DRW unit 1	San Diego Manufacturing	Outside Processing	Released	
<input type="radio"/>	DRW_mnr_1	200	12-APR-2004 00:00	DRW unit 1	San Diego Manufacturing	Outside Processing	Released	

5. From the search results, select the maintenance requirement that you want to defer, and click Defer. The Maintenance Requirement Deferral Details page appears.

Figure 13–26 Maintenance Requirement Deferral Details page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Jobs | Resources | Materials | **Maintenance Requirements** | Production Planning | Outside Processing

Maintenance Requirement Deferral Details

Title **DRW mr 4** Due Date **03-MAY-2004**
 Description Visit Number **54** Status **Unreleased**

Reason

<input type="checkbox"/> Facility	<input type="checkbox"/> Labor
<input type="checkbox"/> Material	<input type="checkbox"/> Other
<input type="checkbox"/> Technical Assistance Required	<input type="checkbox"/> Time Constraint
<input type="checkbox"/> Tool	<input type="checkbox"/> Warranty Claim

Remarks Approver Notes

Schedule

☐ Optional fields are ignored if skipped
☐ Skip Maintenance ☐ Affect Due Date Calculation

Requirement Defer To Defer By Defer To

6. Choose the deferral reasons by checking the corresponding check boxes in the Reasons region. You can select more than one deferral reason. Enter Remarks.
7. To defer the maintenance requirement to a later date, enter a date in the Defer To Date field. Alternatively, select from the Oracle Calendar.
8. Enter a date in the Deferral Effective On field. Alternatively, select from the Oracle Calendar.
9. To defer the maintenance requirement based on counter readings, select Add More Rows, and enter the counter threshold values.
10. Select Counter Name from the LOV. The Unit of Measure is returned based on the selected Counter Name.
11. Choose Defer By or Defer To from the Deferral Type drop-down menu. Enter a counter value.

Note: The system will return an error message if the deferred date or deferred counter is equal or greater than the next due date/due counter for the repetitive maintenance requirement.

- 12. If you select the Affect Due Date Calculation check box, Unit Maintenance Plan uses the new deferred date or counter value, to calculate when repetitive requirements will be due again.
- 13. To remove this instance of the requirement from Unit Maintenance Plan without affecting subsequent forecasted requirements, select the Skip Maintenance check box.

Figure 13–27 Enter Deferral Details - Maintenance Requirement Deferral Details page

Maintenance Requirement Deferral Details

Cancel

Apply

Submit For Approval

View Job Details

Title **DRW mr 4**

Due Date **2004-05-03 00:00:00.0**

Description

Status **Unreleased**

Visit Number **54**

Reason

☐ Facility

☐ Labor

☐ Material

☒ Other

☐ Technical Assistance Required

☒ Time Constraint

☐ Tool

☐ Warranty Claim

Remarks

Deferral required

Approver Notes

Schedule

Optional fields are ignored if skipped

☐ Skip Maintenance

☐ Affect Due Date Calculation

Requirement

Defer To

Date

29-JUN-2004

* Deferral Effective On

28-JUN-2004

Remove

Counter Name

Deferral Type

Counter Value

Unit Of Measure

No records were found matching the given criteria.

Add More Rows

- 14. Click Apply to save the record. Click Cancel to cancel the transaction.
- 15. Select View Job Details to navigate to Job Overview UI, and to view all jobs related to the requested MR for deferral.

Figure 13-28 View Jobs Associated with the MR - Job Overview page

Job Overview

Organization
Department
Department Class
Serial Number
Item
Visit Number
Visit Task
Unit Name
Maintenance Requirement
Start Date

Job Number
Project
Project Task
Accounting Class
Priority
Confirmed Failure
Job Status
Service Request
End Date

Go Clear

Job List

Update Job Go

Previous 1-1 of 1 Next

Select	Job Number	Service Request	Task Number	Priority	Scheduled Start Date	Scheduled End Date	Status	OSP Order Number
<input type="radio"/>	WO2960		2		14-MAY-2004	14-MAY-2004	Unreleased	

Previous 1-1 of 1 Next

16. To submit the deferral for approval, select Submit For Approval. The status changes to Approval Pending.
 - When the Deferral is submitted for approval, all the jobs associated with the MR are put on-hold.
 - On approval, all jobs in Released status, and associated with the MR are completed and all Unreleased jobs are cancelled. A new UMP is created to track the deferred requirement in Unit Maintenance Plan, in case the Deferral is not to skip the MR.
 - If the Deferral is rejected, all associated jobs statuses are reverted to their previous statuses. You can rectify the errors and re-submit for approval.

Note: You cannot submit a Deferral for approval, if a child MR is pending deferral approval.

Updating Job Details

Prerequisites:

A job with any status other than Complete must exist in the database. The WIP Mass Load Concurrent Program must be running.

To Update Job Details:

- 1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
- 2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
- 3. Select the job and choose Update Job from the drop-down menu. The Job Operations page appears.

Figure 13-29 Modify Job Details - Job Operations page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Jobs | Resources | Materials | Maintenance Requirements

Production Planning Outside Processing

Operations

Materials

Resources

Assignments

Material Transactions

Resource Transactions

Job Operations

* Indicates required field

Cancel Revert Apply Defer

Job Details

Job NumberW03179

Job Description53-31-10-20

Maintenance RequirementInspect Air Cargo Compartment Floor

Route53-31-10-20

Priority

Item737-800

Visit Number441

Job StatusReleased

Completion Sub Inventory

Lot Number

* Scheduled Job Start Date20-MAY-2004

Scheduled Job Start TimeHrs12Mins13

Actual Job Start Date

Actual Job Start TimeHrsMins

OrganizationSan Diego Manufacturing

DepartmentInspection Department

Project441

Project Task53-31-10-20

Serial Number300

Unit NameVH-TAK

Visit Task9

Accounting Classclass

Locator

Confirmed FailureNo

* Scheduled Job End Date20-MAY-2004

Scheduled Job End TimeHrs16Mins13

Actual Job End Date

Actual Job End TimeHrsMins

Operations

4. Make the necessary changes and click **Apply**. Click **Revert** to cancel any changes and return to the previous page.

Note: The Job Status list of values comprises a restricted list of statuses based on the current status of the job. You can select from only the next possible statuses to which the job can be updated to. For example, if a job is in the Unreleased Status, the options available will be Released, On Hold, Parts Hold, Pending Deferral Approval, and Cancelled. Similarly, if a job is in the Released status, the options available will be On Hold, Parts Hold, Pending Deferral Approval, Pending QA Approval, Cancelled, and Complete.

Creating Operations for non-route based Jobs

Prerequisites:

A job with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. The WIP Mass Load Concurrent Program must be running.

To create operations for non-route based jobs:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
3. Select the job number and choose Update Job from the drop-down menu. The Job Operations page appears.
4. Click **Add More Rows** in the Operations region. Enter details as required.

Figure 13–30 Create an Operation - Job Operations page

Job Details

Job Number

W03299

Job Description

Defective Product-135516

Maintenance Requirement

Route

Priority

Item

DRW unit item 3

Visit Number

220

Job Status

Unreleased

Completion Sub Inventory

Lot Number

Scheduled Job Start Date

12-FEB-2004

Scheduled Job Start Time

Hrs 07 Mins 00

Actual Job Start Date

Actual Job Start Time

Hrs Mins

Organization

San Diego Manufacturing

Department

Outside Processing

Project

220

Project Task

Defective Produ

Serial Number

101

Unit Name

DRW unit 1

Visit Task

7

Accounting Class

class

Locator

Confirmed Failure

No

Scheduled Job End Date

12-FEB-2004

Scheduled Job End Time

Hrs 07 Mins 00

Actual Job End Date

Actual Job End Time

Hrs Mins

Operations

Details

Operation QA Results

Complete Operation

Previous






1-1 of 1

Next

Select	* Operation Sequence	Operation Code	Operation Description	Actual Start Date	Actual End Date	* Scheduled Start Date	* Scheduled End Date	Department	Operation Status
<input type="radio"/>	10		Default Operation			12-FEB-2004	12-FEB-2004	Outside Proc	Uncomplete
<input type="radio"/>	20	X	DRW			12-FEB-2004	12-FEB-2004	Electrical	

5. Click **Apply**. The record is added to the database.

Figure 13–31 View Operation Association - Job Operations page

Job Details			
Job Number	W03299	Organization	San Diego Manufacturing
Job Description	Defective Product-135516	Department	<input type="text" value="Outside Processing"/> 
Maintenance Requirement		Project	220
Route		Project Task	Defective Produ
Priority		Serial Number	101
Item	DRW unit item 3	Unit Name	DRW unit 1
Visit Number	220	Visit Task	7
Job Status	<input type="text" value="Unreleased"/>	Accounting Class	class
Completion Sub Inventory		Locator	
Lot Number		Confirmed Failure	<input type="text" value="No"/>
* Scheduled Job Start Date	<input type="text" value="12-FEB-2004"/> 	* Scheduled Job End Date	<input type="text" value="12-FEB-2004"/> 
Scheduled Job Start Time	Hrs <input type="text" value="07"/> Mins <input type="text" value="00"/>	Scheduled Job End Time	Hrs <input type="text" value="07"/> Mins <input type="text" value="00"/>
Actual Job Start Date	<input type="text"/> 	Actual Job End Date	<input type="text"/> 
Actual Job Start Time	Hrs <input type="text"/> Mins <input type="text"/>	Actual Job End Time	Hrs <input type="text"/> Mins <input type="text"/>

Updating Operations

Prerequisites:

A job with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. The WIP Mass Load Concurrent Program must be running. The operation must have Uncomplete or Pending QA status.

To Update Operations:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
3. Select the job number and choose Update Job from the drop-down menu. The Job Operations page appears.

4. Make any necessary changes and click **Apply**. Click **Revert** to cancel any changes and return to the previous page.

Updating Operation Details

Prerequisites:

A job with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. The WIP Mass Load Concurrent Program must be running. The operation must have a Uncomplete or Pending QA status.

To update operation details:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
3. Select the job number and choose Update Job from the drop-down menu. The Job Operations page appears.
4. Select the operation that you want to update, and click **Details**. The Operation (Detail) page appears.

Figure 13–32 Operation(Detail) page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Jobs | Resources | Materials | Maintenance Requirements

Production Planning Outside Processing

Operation (Detail)

* Indicates required field

Cancel Revert Apply Complete Operation Operation QA Results

Job Number	W03299	Organization	San Diego Manufacturing
Job Status	Unreleased	Department	Outside Processing
Job Description	Defective Product-135516	Project	220
Maintenance Requirement		Project Task	Defective Produ
Route		Serial Number	101
Priority		Unit Name	DRW unit 1
Item	DRW unit item 3	Visit Task	7
Visit Number	220	Locator	
Accounting Class	class	Scheduled Job End Date	12-FEB-2004 07:00
Completion Sub Inventory		Actual Job End Date	
Scheduled Job Start Date	12-FEB-2004 07:00		
Actual Job Start Date			

Operation Details

Operation Sequence	20	Department	Electrical
Description	DRW	Operation Code	X
Auto Charge	Manual	Operation Type	
		Operation Status	Uncomplete

- Make any necessary changes and click **Apply**. Click **Cancel** to cancel any changes.

Completing Operations

Prerequisites:

A job with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. The WIP Mass Load Concurrent Program must be running. The operation must have a Uncomplete or Pending QA status. The Operation Description, Actual Start Date, and Actual End Date must be complete. The Operation QA Results must be complete, if associated in Route Management or defined in the profile for a non-route based job.

To complete an operation:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
3. Select the job number and choose Update Job from the drop-down menu. The Job Operations page appears.
4. Select the operation that you want to complete, and click **Complete Operation**.

Entering QA results for an Operation

Prerequisites:

A job with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. The Quality Collection plan must be set up and the inspection type associated with the operation in Route Management or associated to the Non-Routine Operation Inspection profile option. See [Setup Quality Collection Plans](#).

To Enter QA results for an Operation:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
3. Select the job number and choose Update Job from the drop-down menu. The Job Operations page appears.
4. To enter quality results, select an operation and click Operation QA Results. The Submit Quality Results page appears.

Figure 13–33 Submit QA Results for an Operation - Submit Quality Results page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Jobs | Resources | Materials | Maintenance Requirements

Production Planning Outside Processing

Submit Quality Results - CMRO OPERATION PLAN P3

Job Number **W01722** Job Status **Released**

Operation Sequence **10** Operation Code

Operation Status **Uncomplete**

Quality Results List

* Mechanic	Inspector
No records were found matching the given criteria..	

Add More Rows

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5. Enter information required for the Quality Collection Plan and click **Apply**. Click **Cancel** to cancel any changes.

Note: QA results fields are custom defined for your installation. However, the base elements required to link the results to the job should not be removed or set as disabled.

Working with Maintenance Requirements

You can search for maintenance requirements associated with jobs and perform all actions related to MRs including deferring, signing off, submitting quality results, viewing relationships and so on through the related maintenance requirements UIs under the Maintenance Requirements secondary tab.

Prerequisites:

The maintenance requirements you want to query and work on must exist in the database.

To work with maintenance requirements:

- 1. Under the Production Planning tab click the Maintenance Requirements secondary tab. The Search Maintenance Requirements page appears. Enter your search criteria and click Go. A list of maintenance requirements will appear in the results table.

Figure 13-34 View All Maintenance Requirements Associated with Jobs - Search Maintenance Requirements page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Jobs | Resources | Materials | Maintenance Requirements

Production PlanningOutside Processing

Search Maintenance Requirements

Visit

Organization

Department

Visit Start Date

GoClear

Maintenance Requirement

Service Request

Unit

Status

Maintenance Requirement Results

Select Maintenance Requirement and..DeferSubmit Quality ResultsSignoffView JobsView Relationships

Previous1-10 of 72Next

Select	Maintenance Requirement	Visit	Visit Start Date	Unit	Organization	Department	Status	Actual End Date
<input type="radio"/>	737-800 Maintenance Check	424	20-MAY-2004 10:00	VH-TAK	San Diego Manufacturing	Outside Processing	Released	
<input type="radio"/>	737-800 Maintenance Check	449	10-DEC-2004 00:00	VH-TAK	San Diego Manufacturing	Inspection Department	Released	
<input type="radio"/>	APU Generator Overhaul	424	20-MAY-2004 10:00		San Diego Manufacturing	Outside Processing	All Jobs Complete	19-MAY-2004 12:10
<input type="radio"/>	APU Generator Overhaul	449	10-DEC-2004 00:00		San Diego Manufacturing	Inspection Department	Released	
<input type="radio"/>	DRW mr 1	220	12-FEB-2004 00:00	DRW unit 1	San Diego Manufacturing	Outside Processing	Released	
<input type="radio"/>	DRW mr 1	197	15-MAR-2004 00:00	DRW unit 1	San Diego Manufacturing	Outside Processing	Released	
<input type="radio"/>	DRW mr 1	200	12-APR-2004 00:00	DRW unit 1	San Diego Manufacturing	Outside Processing	Released	

- 2. You can select a maintenance requirement and do the following:
 - Defer
 - Submit Quality Results

13-68 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

- Sign off
 - View associated jobs
 - View relationships
3. Click the Maintenance Requirement link to navigate to the View Maintenance requirement page from where you can view MR details, associated documents, routes, effectivities, relationships, and effected items.

Figure 13–35 View Details- View Maintenance Requirement page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Production Planning Outside Processing

Jobs | Resources | Materials | Maintenance Requirements

View Maintenance Requirement Cancel

Maintenance Requirement Information

Title	DRW mr 4	Status	Complete	Version 7
Revision Number				
Category	Airframe			
Program Type	Letter Check			
Program Subtype				
Service Type	Off			
Implement Status	Mandatory			
Repetitive	Yes	Show	All	
Whichever Comes	First			
Effective From	18-DEC-2003			
Follows After Accomplishment of				
Billing Item				
Quality Inspection Type				
Visit Category				
Description				
Comments				
Copy Accomplishments	No			
Down Time				HOURS

4. Optionally, select a maintenance requirement and click View Jobs. The Maintenance Requirement Jobs page appears displaying information about the work orders associated with a maintenance requirement. You can do the following :
- Submit quality results and complete work order
 - Navigate to the Update Workorder Operations UI by clicking the Update Icon in the work order result set

- Navigate to the View Service Request UI by clicking the Service Request Hyperlink in the work order result set
- Submit quality results, sign off and defer the maintenance requirement

Figure 13–36 Maintenance Requirement Jobs page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Jobs | Resources | Materials | Maintenance Requirements

Production PlanningOutside Processing

Maintenance Requirement Jobs

Maintenance Requirement DRW mr 4
Visit 198
Visit Start Date 23-FEB-2004 00:00
Status Released

CancelDeferSubmit Maintenance Requirement QA ResultsSignoff

Organization San Diego Manufacturing
Department Outside Processing
Unit DRW unit 3
Actual End Date

Jobs List

Select a Job and ...Submit Job QA ResultsComplete

Previous1-1 of 1Next

Select	Job Number	Description	Service Request	Actual Start Date	Actual End Date	Status	Update
<input type="radio"/>	WO1461	DRW route 2-4				Released	

Previous1-1 of 1Next

Select a Job and ...Submit Job QA ResultsComplete

CancelDeferSubmit Maintenance Requirement QA ResultsSignoff

Viewing Material Requirements

The Required Materials UI provides an overview of all material requirements, across workorders. You can query for a job number and view material requirements for that particular work order. Optionally, you can query for an item and view requirements against that item across all jobs. You can also update the quantity of item required and the date on which it is required. The following information is displayed in this UI:

- Job Number
- Operation Sequence

13-70 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

- Item
- Required Quantity
- Scheduled Quantity
- Unit of Measure(UOM)
- Required Date
- Scheduled Date
- Job Status
- Issue Quantity (for all jobs in Released status)

To view material requirements:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
2. Select the Material tab. The Required Materials page appears.

Figure 13–37 Required Materials page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Jobs | Resources | **Materials** | Maintenance Requirements

Production PlanningOutside Processing

Required Materials

Job Number

Item

Go

Clear

Materials

Revert

Apply

Select	Job Number	Operation Sequence	Item	* Required Quantity	Scheduled Quantity	UOM	* Required Date	Scheduled Date	Job Status	Issue Quantity
No records were found matching the given criteria..										

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- 3. To view material requirements across all work orders, click GO. Material requirements for all jobs and against all items appear in the Materials result table.

Figure 13–38 View Materials List - Required Materials page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Jobs | Resources | **Materials** | Maintenance Requirements

Production Planning | Outside Processing

Required Materials

Job Number Item

Materials

Previous 1-10 of 236 Next

Select	Job Number	Operation Sequence	Item	* Required Quantity	Scheduled Quantity	UOM	* Required Date	Scheduled Date	Job Status	Issue Quantity
<input type="checkbox"/>	WO3240	10	Radhika Item1 aps take2	<input type="text" value="200"/>		Each	<input type="text" value="27-MAY-2004"/>		Released	0
<input type="checkbox"/>	WO3240	10	Radhika Item2 aps p	<input type="text" value="100"/>		Each	<input type="text" value="27-MAY-2004"/>		Released	0
<input type="checkbox"/>	WO3178	10	CMRO Item 2	<input type="text" value="1"/>		Each	<input type="text" value="21-MAY-2004"/>		Released	0
<input type="checkbox"/>	WO3174	10	CMRO Item 2	<input type="text" value="2"/>		Each	<input type="text" value="20-MAY-2004"/>		Released	0
<input type="checkbox"/>	WO3174	10	28B545-7	<input type="text" value="1"/>		Each	<input type="text" value="20-MAY-2004"/>		Released	0
<input type="checkbox"/>	WO2520	10	VG0415	<input type="text" value="5"/>		Each	<input type="text" value="22-APR-2004"/>		Released	0
<input type="checkbox"/>	WO2520	10	VG0430A	<input type="text" value="4"/>		Each	<input type="text" value="22-APR-2004"/>		Released	0
<input type="checkbox"/>	WO2480	11	R-ITEM3-Trackable	<input type="text" value="1"/>		Each	<input type="text" value="22-APR-2004"/>		Unreleased	0
<input type="checkbox"/>	WO2480	11	R-ITEM2-Trackable	<input type="text" value="1"/>		Each	<input type="text" value="22-APR-2004"/>		Unreleased	0

- To view material requirements for a particular job number, enter information in the Job Number field and click Go. All requirements matching your search criterion appear in the Materials result table.
- To view material requirements against a particular item, enter information in the Item field and click Go. All requirements matching your search criterion appear in the Materials result table.
- To update the required quantity and/or the required date for a work order, select the job number and enter information in the corresponding fields. Click Apply to save the changes.
- To navigate to the Job Operations page, click the job number. The Job Operations page appears.

Updating Material Requirements

Prerequisites:

A job with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. The WIP Mass Load Concurrent Program must be running. The operation must have a Uncomplete or Pending QA status.

To update material requirements:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
3. Select the job number and choose Update Job from the drop-down menu. The Job Operations page appears.
4. Select Materials from the left-hand navigation bar. The Update Material Requirement page appears.

Figure 13-39 Update Material Requirements page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution Profile

Sign Out

Help

Jobs | Resources | Materials | Maintenance Requirements

Production Planning

Outside Processing

Operations

Materials

Resources

Assignments

Material Transactions

Resource Transactions

Update Material Requirements

Job Number

W03240

Job Status

Released

Job Description

apsrouteup

Maintenance Requirement

fmpapsup

Route

apsrouteup

Priority

Item

Radhika Item2 aps p

Visit Number

461

Accounting Class

class

Completion Sub Inventory

Scheduled Job Start Date

27-MAY-2004 07:00

Actual Job Start Date

Organization

San Diego Manufacturing

Department

Outside Processing

Project

461

Project Task

apsrouteup

Serial Number

apsplan100

Unit Name

Visit Task

2

Locator

Scheduled Job End Date

27-MAY-2004 07:00

Actual Job End Date

Material Requirements

Cancel

Revert

Apply

Remove

Details

Previous

1-2 of 2

Next

Select	* Operation Sequence	* Item	Description	* Required Quantity	Scheduled Quantity	UOM	* Required Date	Scheduled Date	Issued Quantity
<input type="radio"/>	10	Radhika Item2 aps p	Radhika Item2 aps p	<input type="text" value="100"/>		Each	<input type="text" value="27-MAY-2004"/>		0

5. You can then perform the following:
- Select the Item, Required Quantity, and a Required Date and click **Apply** to save your changes.

■ Select the requirement and click **Remove** to remove the requirement.

■ Click **Add More Rows** to add additional requirements.
6. Click **Cancel** to cancel any changes.

Note: When changing an existing requirement defined in Route Management, the selection is limited to the alternates for the Item.

See [Updating Material Requirement Details](#).

Updating Material Requirement Details

Prerequisites:

A job with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. The WIP Mass Load Concurrent Program must be running. The operation must have a Uncomplete or Pending QA status.

To update material requirement details:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
3. Click the job number. The Job Operations page appears.
4. Select Materials from the left-hand navigation bar. The Update Material Requirement page appears.
5. Select the material requirement that you want to update, and click **Details**. The Material Requirement (Detail) page appears.

Figure 13–40 Material Requirement(Detail) page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Jobs | Resources | Materials | Maintenance Requirements

Production Planning Outside Processing

Material Requirement (Detail)

* Indicates required field

Cancel Revert Apply

Job Number	W03240	Organization	San Diego Manufacturing
Job Status	Released	Department	Outside Processing
Job Description	apsrouteup	Project	461
Maintenance Requirement	fmpapsup	Project Task	apsrouteup
Route	apsrouteup	Serial Number	apsplan100
Priority		Unit Name	
Item	Radhika Item2 aps p	Visit Task	2
Visit Number	461	Locator	
Accounting Class	class	Scheduled Job End Date	27-MAY-2004 07:00
Completion Sub Inventory		Actual Job End Date	
Scheduled Job Start Date	27-MAY-2004 07:00		
Actual Job Start Date			

Material Details

Operation Sequence	10	Operation Code	
Item	Radhika Item2 aps p	Description	Radhika Item2 aps p
* Required Quantity	100	* Required Date	27-MAY-2004
Issued Quantity	0		
UOM	Each		
Scheduled Quantity			

- Make the required changes, and click **Apply**. Click **Cancel** to cancel any changes and return to the previous page.

Note: When changing an existing requirement defined in Route Management, the selection is limited to the alternates for the Item.

Viewing Employee Assignments

For a work order or an associated operation, you can assign employee and machinery to the resource requirement. You can view these employee assignments, and perform all of the production functions applicable to the assignment and associated work order, in the Search Employee Assignments UI. You can search for employee assignments by the employee's name, number, the associated job number, department, and other related criteria.

To view employee assignments:

- 1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
- 2. Select the Resources tab. The Employee Assignments page appears.

Figure 13-41 Employee Assignments page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Jobs | **Resources** | Materials | Maintenance Requirements

Production PlanningOutside Processing

Employee Assignments

Organization

Employee Number

Shift Number

Priority

Start Date

Job Number

Department

Employee Name

Visit Number

Job Status

End Date

Go

Clear

Search Results

Select	Job Number	Operation Sequence	Employee Number	Employee Name	Assignment Start Time	Assignment End Time	Job Status	Operation Status	Remove
No records were found matching the given criteria..									

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- 3. Enter information in the fields for which you know the value and click Go. All assignments matching your search criteria appear in the Results table.

Figure 13-42 View Search Results - Employee Assignments page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Jobs | **Resources** | Materials | Maintenance Requirements

Production Planning Outside Processing

Employee Assignments

Organization Department

Employee Number Employee Name

Shift Number Visit Number

Priority Job Status

Start Date End Date

Job Number

Search Results

Select a Job and ... Update Job

Previous 1-6 of 6 Next

Select	Job Number	Operation Sequence	Employee Number	Employee Name	Assignment Start Time	Assignment End Time	Job Status	Operation Status	Remove
<input type="radio"/>	CMRO1900	11	1327	LN1, FN1	30-MAR-2004	30-MAR-2004	Complete	Complete (1)	<input type="button" value="Remove"/>
<input type="radio"/>	WO1163	11	1328	LN2, FN2	28-JAN-2004	28-JAN-2004	Released	Uncomplete	<input type="button" value="Remove"/>
<input type="radio"/>	WO1920	11	1327	LN1, FN1	01-APR-2004	01-APR-2004	Released	Uncomplete	<input type="button" value="Remove"/>

Baker, Ms.

4. You can select a job and perform the following actions, which are available as selections in a drop down menu:
- Update Job
 - Resource Transactions
 - Perform Parts Change
 - View Documents
 - Complete Job
 - Complete Operation
 - Record Job QA Results
 - Record Operation QA Results
 - Sign Off Maintenance Requirements
 - Record Maintenance Requirement QA Results

- View Resource Transactions
- Create Service Requests

Viewing Documents

Documents may be associated with maintenance requirements, routes, and operations. You can view all the documents pertaining to work orders, work order operations, and material requirements in the View Documents UI.

Prerequisites:

The document references must exist in the database.

To view documents associated with jobs:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table. For field descriptions, see [Fields on the View Documents Page](#).
3. To view documents associated with a job's route, select the job and choose View Documents from the drop-down menu. The View Documents page appears, displaying the job details and the documents defined for the routes associated with the job.

Figure 13-43 View Documents page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Jobs | Resources | Materials | Maintenance Requirements **Production Planning** Outside Processing

View Documents

Job Number	CMR0169	Organization	San Diego Manufacturing
Job Status	Complete	Department	Outside Processing
Job Description	Radhikas second route		
Maintenance Requirement	MR with Radhikas second route	Project	23
Route	Radhikas second route	Project Task	Radhikas second
Priority		Serial Number	1
Item	R-ITEM1-Trackable	Unit Name	Radhika UC
Visit Number	23	Visit Task	2
Accounting Class	EAM		
Completion Sub Inventory		Locator	
Scheduled Job Start Date	02-DEC-2003 07:00	Scheduled Job End Date	04-DEC-2003 13:00
Actual Job Start Date	13-JAN-2004 00:00	Actual Job End Date	15-JAN-2004 00:00

Route Number	Route Title	Document Number	Type	Title	Revision	Chapter	Section	Note	Figure	Subject	Page
No records were found matching the given criteria.											

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- To view documents associated with the work order's operations, click Operation.

Figure 13–44 View Documents Associated with an Operation - View Documents page

ORACLEOracle Complex MRO

HomeEngineeringConfigurationPlanningAdministrationExecutionProfileSign Out Help

JobsResourcesMaterialsMaintenance RequirementsProduction PlanningOutside Processing

View Documents

Job NumberCMRO169

Job StatusComplete

Job DescriptionRadhikas second route

Maintenance RequirementMR with Radhikas second route

RouteRadhikas second route

Priority

ItemR-ITEM1-Trackable

Visit Number23

Accounting ClassEAM

Completion Sub Inventory

Scheduled Job Start Date02-DEC-2003 07:00

Actual Job Start Date13-JAN-2004 00:00

OrganizationSan Diego Manufacturing

DepartmentOutside Processing

Project23

Project TaskRadhikas second

Serial Number1

Unit NameRadhika UC

Visit Task2

Locator

Scheduled Job End Date04-DEC-2003 13:00

Actual Job End Date15-JAN-2004 00:00

RouteCancel

Operation CodeOperation NumberDocument NumberTypeTitleRevisionChapterSectionNoteFigureSubjectPage

No records were found matching the given criteria..

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- 5. To view documents associated with maintenance requirements, select the Maintenance Requirement sub-tab under the Production Planning tab. The Search Maintenance Requirements page appears.
- 6. Enter your search criteria and click Go. The Maintenance Requirements matching your search criteria are displayed in the Maintenance Requirements Results table.
- 7. Click the Maintenance Requirement link to navigate to the View Maintenance Requirement page.

Figure 13-45 View Maintenance Requirement page

ORACLE® Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Jobs | Resources | Materials | Maintenance Requirements

Production Planning Outside Processing

View Maintenance Requirement

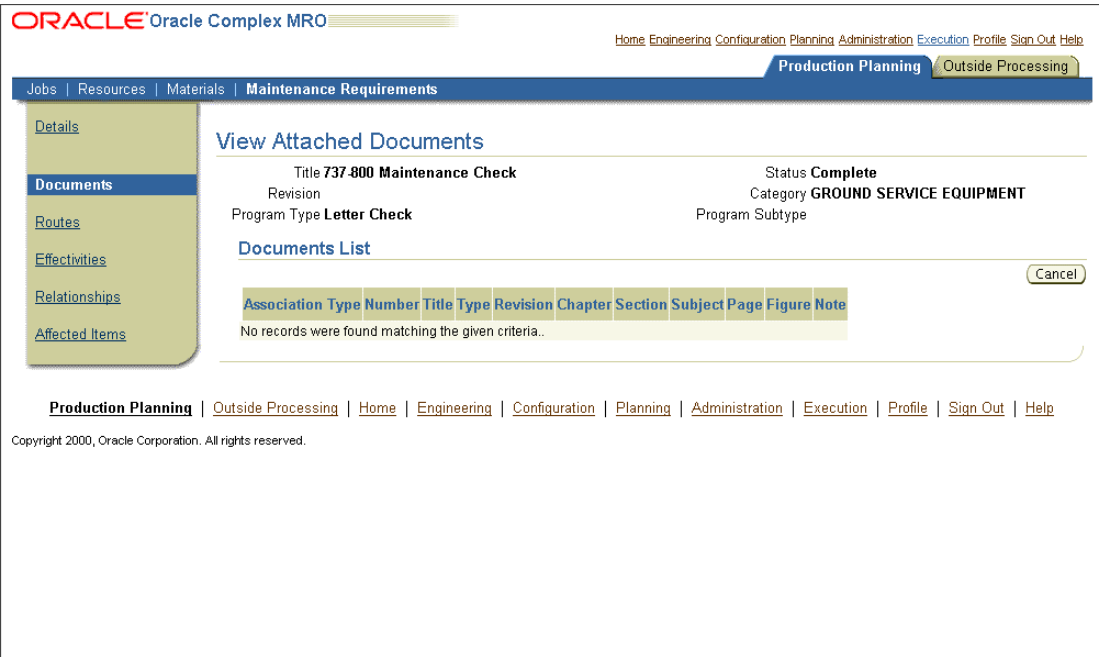
Cancel

Maintenance Requirement Information

Title	737-800 Maintenance Check	Status	Complete	Version 1
Revision Number				
Category	Ground Service Equipment			
Program Type	Letter Check			
Program Subtype				
Service Type	On			
Implement Status	Mandatory			
Repetitive	Yes	Show	All	
Whichever Comes	First			
Effective From	18-MAY-2004			
Follows After Accomplishment of				
Billing Item				
Quality Inspection Type	Maintenance Requirement Signoff			
Visit Category				
Description	737-800 Maintenance Check			
Comments				
Down Time				HOURS

- Click the Documents link in the side navigation menu. The View Attached Documents page appears, displaying the documents associated with the maintenance requirement.

Figure 13–46 View Attached Documents page



Updating Resource Requirements

Prerequisites:

A job with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. The WIP Mass Load Concurrent Program must be running. The operation must have a Uncomplete or Pending QA status.

To update resource requirements:

- 1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
- 2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
- 3. Click the job number. The Job Operations page appears.

4. Select Resources from the left-hand navigation bar. The Resource Requirement page appears.

Figure 13–47 Resource Requirements page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Production Planning Outside Processing

Jobs | Resources | Materials | Maintenance Requirements

Operations
Materials
Resources
Assignments
Material Transactions
Resource Transactions

Resource Requirements

Job Number: **W03739**
Job Status: **Unreleased**
Job Description: **rew**
Maintenance Requirement: **rew**
Route: **rew**
Priority: **rew**
Item: **R3 Item1**
Visit Number: **521**
Accounting Class: **class**
Completion Sub Inventory: **class**
Scheduled Job Start Date: **28-JUN-2004 07:00**
Actual Job Start Date: **28-JUN-2004 00:00**

Organization: **San Diego Manufacturing**
Department: **Outside Processing**
Project: **521**
Project Task: **rew**
Serial Number: **r36**
Unit Name: **1**
Visit Task: **1**
Locator: **1**
Scheduled Job End Date: **28-JUN-2004 17:00**
Actual Job End Date: **28-JUN-2004 00:00**

Resource Requirement List

Cancel Revert Apply

Select a Resource Requirement and ... Details Remove

Previous 1-1 of 1 Next

Select	Operation Sequence	Resource Sequence	Resource Type	Resource	Duration	UOM	Quantity	Start Date	End Date
C	10	10	Person	newres	10	Hour	1	28-JUN-2004	28-JUN-2004

Add More Rows

Previous 1-1 of 1 Next

5. You can then perform the following:
 - Make any necessary changes and click **Apply** to save your changes.
 - Select a requirement and click **Remove** to remove it.
 - Click **Add More Rows** to add additional requirements.
6. Click **Cancel** to cancel any changes.

Note: When changing an existing requirement defined in Route Management, the selection is limited to the alternates for the Item.

See [Updating Resource Requirement Details](#).

Updating Resource Requirement Details

Prerequisites:

A job with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. The WIP Mass Load Concurrent Program must be running. The operation must have a Uncomplete or Pending QA status.

To update the resource requirement details:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
3. Click the job number. The Job Operations page appears.
4. Select Materials from the left-hand navigation bar. The Update Resource Requirement page appears.
5. Select the requirement you want to update and click **Details**. The Resource Requirement Detail page appears.

Figure 13–48 Resource Requirement Detail page

ORACLE[®] Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Jobs | Resources | Materials | Maintenance Requirements

Operations

Materials

Resources

Assignments

Material Transactions

Resource Transactions

Production Planning

Outside Processing

Resource Requirement Detail

Job NumberWO3739

Job StatusUnreleased

Job Descriptionrew

Maintenance RequirementRoute

Priority

ItemR3 Item1

Visit Number521

Accounting Classclass

Completion Sub Inventory

Scheduled Job Start Date28-JUN-2004 07:00

Actual Job Start Date28-JUN-2004 00:00

OrganizationSan Diego Manufacturing

DepartmentOutside Processing

Project521

Project Taskrew

Serial Numberr36

Unit Name

Visit Task1

Locator

Scheduled Job End Date28-JUN-2004 17:00

Actual Job End Date28-JUN-2004 00:00

Cancel

Revert

Apply

* Indicates required field

Requirement Detail Information

Operation Sequence10

* Resource TypePerson

* Duration10

* Quantity1

Applied0

* Charge TypeManual

* BasisItem

Resource Sequence10

* Resourcenewres

UOMHour

Total Required10

Open10

Standard Rate☒ Yes

* Scheduled☒ Yes

6. Make the required changes, and click **Apply**. Click **Cancel** to cancel any changes and return to the previous page.

Note: When changing an existing requirement defined in Route Management, the selection is limited to the alternates for the Item.

Updating Resource Assignments

Prerequisites:

A job with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database.

Working with Production 13-87

To update resource assignments:

- 1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
- 2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
- 3. Click the job number. The Job Operations page appears.
- 4. Select Assignments from the left-hand navigation bar. The Resource Assignments page appears.

Figure 13–49 Resource Assignments page

ORACLEOracle Complex MRO

HomeEngineeringConfigurationPlanningAdministrationExecutionProfileSign OutHelp

Production PlanningOutside Processing

JobsResourcesMaterialsMaintenance Requirements

OperationsMaterialsResourcesAssignmentsMaterial TransactionsResource Transactions

Resource Assignments

Job NumberWO3739

Job StatusUnreleased

Job Descriptionrew

Maintenance RequirementRoute

PriorityR3 Item1

Item521

Visit Numberclass

Accounting ClassCompletion Sub Inventory

Scheduled Job Start Date28-JUN-2004 07:00

Actual Job Start Date28-JUN-2004 00:00

OrganizationSan Diego Manufacturing

DepartmentOutside Processing

Project521

Project Taskrew

Serial Numberr36

Unit Name

Visit Task1

Locator

Scheduled Job End Date28-JUN-2004 17:00

Actual Job End Date28-JUN-2004 00:00

Resource Assignment List

CancelRevertApply

Select	Operation Sequence	Resource	Operation Start Time	Operation End Time	Resource Type	Employee Name	Employee Number	Serial Number	Start Date	End Date
No records were found matching the given criteria..										
Add More Rows										

Production PlanningOutside ProcessingHomeEngineeringConfigurationPlanningAdministrationExecutionProfileSign OutHelp

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- 5. You can then perform the following:
 - Make any necessary changes and click **Apply** to save your changes.
 - Select the assignment and click **Remove** to remove the requirement.
 - Click **Add More Rows** to make new assignments.

6. Click **Cancel** to cancel any changes.

Charging Resources

Prerequisites:

A job with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. The Cost Manager Concurrent Program must be running. The operation must have a Uncomplete or Pending QA status.

To charge resources:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
3. Click the job number. The Job Operations page appears.
4. Select Resources Transactions from the left-hand navigation bar. The Perform Resource Transactions page appears.

Figure 13–50 Perform Resource Transactions page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Jobs

Resources

Materials

Maintenance Requirements

Production Planning

Outside Processing

Operations

Materials

Resources

Assignments

Material Transactions

Resource Transactions

Job Number

Job Status

Job Description

Maintenance Requirement

Route

Priority

Item

Visit Number

Accounting Class

Completion Sub Inventory

Scheduled Job Start Date

Actual Job Start Date

W03739

Unreleased

rew

R3 Item1

521

class

28-JUN-2004 07:00

28-JUN-2004 00:00

Organization

Department

Project

Project Task

Serial Number

Unit Name

Visit Task

Locator

Scheduled Job End Date

Actual Job End Date

San Diego Manufacturing

Outside Processing

521

rew

r36

1

28-JUN-2004 17:00

28-JUN-2004 00:00

View Transactions

Revert

A

Add More Rows

5. You can then perform the following:
- Make any necessary changes and click **Apply** to save your changes.

■ Click **Add More Rows** to add charged resources.

■ Click **Revert** to clear any changes.
6. Click **Cancel** to cancel any changes.
- Working with Material Transactions
- See:
- Issuing and Returning Parts to a Job

■ Entering QA results for an Material Transaction
- 13-90 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Issuing and Returning Parts to a Job

Prerequisites:

A job with a status of Draft, Unreleased, Released, Parts Hold, Hold, or Pending QA status must exist in the database. The operation must have a Uncomplete or Pending QA status. Any applicable QA results must be entered prior to parts return. Material Status profile options for MRB, unserviceable, and serviceable conditions must be setup. Sub inventory material status codes must be set up and associated with any relevant sub inventories.

To issue and return parts to a job:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
3. Click the job number. The Job Operations page appears.
4. Select Material Transactions from the left-hand navigation bar. The Perform Material Transactions page appears.

Figure 13–51 Perform Material Transactions page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Jobs

Resources

Materials

Maintenance Requirements

Production Planning

Outside Processing

Operations

Materials

Resources

Assignments

Material Transactions

Resource Transactions

Job Number

W03177

Job Status

Released

Job Description

53-31-10-00

Maintenance Requirement

Inspect Aft Cargo Compartment Floor

Route

53-31-10-00

Priority

Item

737-800

Visit Number

441

Accounting Class

class

Completion Sub Inventory

Scheduled Job Start Date

20-MAY-2004 16:28

Actual Job Start Date

Organization

San Diego Manufacturing

Department

Inspection Department

Project

441

Project Task

53-31-10-00

Serial Number

300

Unit Name

VH-TAK

Visit Task

7

Locator

Scheduled Job End Date

21-MAY-2004 15:13

Actual Job End Date

Transactions

Transaction Type

WIP component issue

Cancel

Revert

Apply

Select	Operation Seq	Item	Description	Condition	SubInventory	Serial Number	Lot	Revision	Locator	Open	Required Quantity	UOM	On Hand
No records were found matching the given criteria.													
Add More Rows													

5. Select a transaction type: WIP Component Issue or WIP Component Return.

Note: The page will refresh automatically when the Transaction Type is changed.

6. You can then perform the following:
- Make any necessary changes and click **Apply** to save your changes.
 - Click **Add More Rows** to add charged materials.
 - Click **Revert** to clear any changes.
 - Select the eraser to remove a single row.
7. Click **Cancel** to cancel any changes.

Entering QA results for a Material Transaction

Prerequisites:

A job with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. The operation must have a Uncomplete or Pending QA status. The Quality Collection plan must be set up and the inspection type associated to the appropriate MRB Disposition Inspection Type profile option. See [Quality Collection Plans Setup](#).

To enter QA results for an material transaction:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Job Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Job List Results table.
3. Click the job number. The Job Operations page appears.
4. Select Material Transactions from the left-hand navigation bar. The Perform Material Transactions page appears.
5. Select WIP Component Return from Transaction Type.

Figure 13–52 Select Transaction Type - Perform Material Transactions page

ORACLE

Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Jobs | Resources | Materials | Maintenance Requirements

Operations

Materials

Resources

Assignments

Material Transactions

Resource Transactions

Production Planning

Outside Processing

Perform Material Transactions

Job Number

WO3177

Job Status

Released

Job Description

53-31-10-00

Maintenance Requirement

Inspect Aft Cargo Compartment Floor

Route

53-31-10-00

Priority

Item

737-800

Visit Number

441

Accounting Class

class

Completion Sub Inventory

Scheduled Job Start Date

20-MAY-2004 16:28

Actual Job Start Date

Organization

San Diego Manufacturing

Department

Inspection Department

Project

441

Project Task

53-31-10-00

Serial Number

300

Unit Name

VH-TAK

Visit Task

7

Locator

Scheduled Job End Date

21-MAY-2004 15:13

Actual Job End Date

Transactions

Transaction Type

WIP Component Return

Cancel

Revert

Select	Operation Seq	Item	Description	Condition	SubInventory	Serial Number	Lot	Revision	Locator	Required Quantity	UOM	On Hand	Reason	Problem Code
No records were found matching the given criteria.														
<div>Add More Rows</div>														

Note: The page will refresh automatically when the Transaction Type is changed.

6. Enter relevant information.

Figure 13–53 Enter Transaction Details - Perform Material Transactions page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Production Planning Outside Processing

Jobs | Resources | Materials | Maintenance Requirements




Operations
Materials
Resources
Assignments
Material Transactions
Resource Transactions

Perform Material Transactions

Job Number **W03177** Org:
Job Status **Released** De
Job Description **53.31.10.00**
Maintenance Requirement **Inspect Aft Cargo Compartment Floor**
Route **53.31.10.00** Proj
Priority
Item **737.800** Serial
Visit Number **441** U
Accounting Class **class** V
Completion Sub Inventory
Scheduled Job Start Date **20-MAY-2004 16:28** Scheduled Job E
Actual Job Start Date Actual Job E

Transactions

Transaction Type **WIP Component Return**

Select	Operation Seq	Item	Description	Condition	SubInventory	Serial Number	Lot	Revision	Locator
	10	28B545-	Generati	Quaranti	MRB				
									
									

- Click QA Results to return the associated MRB profile option. The Submit Quality Results page appears.

Figure 13–54 Enter Quality Results - Submit Quality Results page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Jobs | Resources | Materials | Maintenance Requirements

Production PlanningOutside Processing

Submit Quality Results - CMRO MRB PLAN

Job Number **W03177**Job Status **Released**

Cancel

Revert

Apply

Quality Results List

* Item	Subinventory
No records were found matching the given criteria..	
<div>Add More Rows</div>	

Cancel

Revert

Apply

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8. Enter any information required by the Quality Collection Plan in the available fields and click **Apply** to save your changes. Click **Revert** to clear the fields; Click **Cancel** to cancel any changes.

Note: QA results fields are custom defined for your installation. However, the base elements required to link the results to the job should not be removed or set as disabled.

Quality Collection Plans Setup

Prerequisites:

Oracle Quality must be installed. Optionally, you may define additional Collection Plan Types, Collection Elements, and Collection Element Values.

To Create a Quality Collection Plan for the Organization:

1. Change responsibility to Oracle Manufacturing and Distribution Manager. From the navigator, choose Setup > Collection Plans. The Collection Plans window appears.

Figure 13–55 *Collection Plans window*

Collection Plans (EM2)

Collection Plan

Description

Effective 29-JUN-2004 -

Plan Type

Views...

Copy Elements... Transactions Specifications...

Quality Collection Elements

Name	Seq	Prompt	Mandatory	Enabled	Read-Only	Displayed
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Values Actions

2. Define the Collection Plan name. Select the Plan Type.
3. Click **Copy Elements**.
4. Select the appropriate plan templates. For example, choose from Template Job Deferral, Template MRB Disposition, Template Op Completion, Template Route Completion, or Template Counter Readings.
5. Set any elements as Mandatory, Enabled, and Displayed.

Note: Do not disable or remove base elements required to associate the collection to the transaction.

Figure 13–56 Define Collection Elements - Collection Plans window

Collection Plans (EM2)

Collection Plan

TEST CMRO PLAN

Views...

Description

Effective

29-JUN-2004

-

Plan Type

Maintenance

Maintenance

[]

Copy Elements...

Transactions

Specifications...

Quality Collection Elements

Name	Seq	Prompt	Mandatory	Enabled	Read-Only	Displayed	
<input checked="" type="checkbox"/> Maintenance WorkOrder	10	Work Order	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Maintenance Job Status	20	Work Order Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Maintenance Requirement	30	Maintenance Requir	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Item	40	Item	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Item Instance	50	Item Instance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Values

Actions

6. Select **Transactions**. The Quality Collection Transactions Form appears.

Figure 13–57 Collection Transactions window

Quality Collection Transactions

Transaction Description	Mandatory	Background	Enabled
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Collection Triggers (all conditions must be met for data collection)

Trigger Name	Condition	From	To

7. From the Transaction Description list of values., choose MRB Disposition, Maintenance Job Deferral, Maintenance Operation Completion, and Maintenance Route Completion. Set any necessary elements as Mandatory, Background, and Enabled.
8. Select Inspection Type for Trigger Name.
9. Select equals (=) for Condition.

Figure 13–58 Enter Transaction Details - Collection Transactions window

Collection Transactions (EM2) - TEST CMRO PLAN

Quality Collection Transactions

Transaction Description	Mandatory	Background	Enabled
MRB Disposition (Advanced Service Online)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintenance Job Deferral (Advanced Service Online)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintenance Operation Completion (Advanced Service Online)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintenance Route Completion (Advanced Service Online)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Collection Triggers (all conditions must be met for data collection)

Trigger Name	Condition	From	To
Inspection Type	equals (=)		

10. Click **Save** to complete.

Note: Steps 7-12 are not required for the counter readings plan.

For information on creating Quality Plans, refer to the *Oracle Quality User's Guide*.

Managing Outside Processing

In the maintenance, repair, and overhaul industry, there will be occasions when a part needs to be serviced outside of the organization. This may be due to lack of resources, skilled/certified personnel or cost considerations. The planner needs to have the flexibility of determining when, where and how the service will be performed at the most cost effective manner. In addition a planner needs to have the ability to Borrow parts from third parties when the same is not available in inventory, as well as Loan a parts to a third parties when it is requested.

This chapter discusses the key functions supported by the Oracle Complex Maintenance, Repair, and Overhaul Outside Processing module and covers the key Outside Processing (OSP) functions supported by the Oracle Complex Maintenance, Repair, and Overhaul Production Planning module. The processes for creating and maintaining OSP work orders and managing the Loan/Borrow of parts are explained.

See:

- [Working With Outside Processing Work Orders](#)
 - [Creating an OSP Work Order](#)
 - [Finding an OSP Work Order](#)
 - [Editing an OSP Work Order](#)
 - [Closing an OSP Work Order](#)
 - [Submitting an OSP Work Order](#)
- [Working With Purchase Orders](#)
 - [Reviewing Purchase Orders](#)
 - [Synchronizing Outside Processing Work Orders with Purchase Orders](#)

- Updating and Approving Purchase Orders
- Shipping and Receiving
 - Shipping Parts
 - Receiving Parts
 - Accepting Supplier Services
- Working With Loan and Borrow Orders
 - Creating a Loan or Borrow Order
 - Finding a Loan or Borrow Order
 - Editing a Loan or Borrow Order
 - Submitting a Loan or Borrow Order
 - Closing a Loan or Borrow Order
 - Initiating Contracts
- Working with Exchange Orders
 - Creating an Exchange Order
 - Editing Exchange Orders
 - Converting Service/Exchange OSP to Exchange/Service OSP

What is an OSP Work Order?

An OSP Work Order is an order that contains the information required to service parts by a third party organization. It contains information about the supplier, the parts that need to be serviced, what services will be performed, and when and where the part will be shipped and received. If parts have to be shipped out to a third party there is a shipment order associated with the OSP Work Order.

What is a Loan or Borrow Order?

A Loan or Borrow Order is used to ship or receive parts to and from outside organizations. Before a Loan or Borrow Order can be created there must be an approved legal contract that documents the terms and conditions of the loan or borrowing arrangement. A Loan Order contains information about the customer and the associated legal contract. A table on the order shows the parts being shipped and when they are shipped and received. A Borrow Order contains

information about the supplier, the associated legal contract, the parts being received, and the dates of receipt and return. Each Loan or Borrow Order has an associated shipment order and available line items to handle the shipping and receiving of parts.

What is an Exchange Order?

An Exchange Order is used to replace an item/part with another similar or dissimilar part from a supplier. The exchange can be of two types; Simple Exchange or Advanced Exchange. In Simple Exchange the servicing organization sends out the item in repair to a supplier and gets an item of similar kind. In Advanced Exchange the supplier sends the replacement item ahead of time. An Exchange Order is created for an existing CMRO job scheduled to a vendor class department. Outside Processing work orders that require an item exchange are identified at the work order header. These Exchange Orders contain information about the parts that will be shipped out and received back from the supplier, including: the inbound and outbound part number and serial numbers, the shipment and return dates, and the costs of item exchange through an interface to the procurement system.

Key Business Processes

The Outside Processing module of Oracle Complex Maintenance, Repair, and Overhaul supports the following business processes:

Assign production jobs for third party service After it is determined that the job will be performed by a third party organization, you can assign the production job to any department with a class of 'Vendor'. This assignment to a outside department can be done either in Long Term Planning or in Production Planning. To be included in an Outside Processing Work Order the job must be assigned to a department with a department class of 'Vendor'.

Assign production jobs to an OSP Work Order After assigning a job to an outside department, create an OSP Work Order and add to it the jobs that the third party organization will perform. You can include or restrict jobs with multiple parts or jobs for a single instance of a part. An OSP Work Order can be issued for one supplier and can have multiple jobs associated with it.

Determine the supplier for outside processing Determine which supplier should perform the service based on the service history of the part, warranties that may be applicable and then pick a supplier from a specified approved vendor list.

Add or remove production jobs to an existing OSP Work Order You can add production jobs to an existing OSP Work Order if the order has not yet been submitted for Purchase Order creation. Or, if a job is not needed you can remove it, provided the order has not been submitted. Once an OSP Work Order is submitted to create a Purchase Order in Oracle Purchasing, any additions or deletions must be performed in the Oracle Purchasing Module.

Determine shipping and receiving logistics Determine how and when the parts will be shipped to the supplier by creating a shipping order against the OSP Work Order. You define the shipment date, receipt date, freight terms and carrier. The shipment of the parts do not occur until the OSP Work Order has been submitted to create a Purchase Order in Oracle Purchasing and the buyer has approved the Purchase Order.

Create and Approve Purchase Orders After required services from a supplier are finalized, 'submit' them to create a Purchase Order. The Purchase Order is created in Oracle Purchasing. The buyer completes the Purchase Order by providing shipping and accounting distribution details. When the Purchase Order is ready to be shared with the Supplier, the buyer approves it in Oracle Purchasing. Upon approval, the Shipment Order is marked as ready for the shipping clerk to pick, pack, and ship the parts. Any deletion or cancellation of Purchase Order line items are reflected in the corresponding OSP Work Order—meaning the production job is no longer associated with the OSP Work Order. It is up to the planner to decide on the disposition of the production job. If the buyer adds new line items to a Purchase Order, the planner must decide if those items have to be included in the OSP Work Order. The Planner also must use a manual process to associate the new Purchase Order line items to existing eligible production jobs.

Shipping & receiving of parts Once the Purchase Order is approved, the shipping clerk can pick, pack and ship the parts. The shipping clerk receives a notification of the Shipment Order number that indicates the parts are ready to be shipped. The Shipping Order provides shipping details such as ship to organization and location, part number, quantity, serial numbers, the location to pick the part from, and any shipping or packing instructions. Every time the part is shipped and received, the current location of the part and ownership is automatically reflected in the Oracle Install Base module. Shipping is taken care of with Oracle Shipping. Receipt of parts after servicing is done with Oracle Purchasing.

Inspect parts after service After receipt of the part that has been serviced by a supplier and received into inventory, the production planner will re-assign to the same production job that initiated the outside processing to an internal department.

The designated technician assigned to this job uses the Production module to complete and document the QA process. This ensures that the service has been performed correctly per maintenance requirement and the part is in good condition.

Acknowledge supplier service In order to pay the supplier for the service provided, the Purchase Order line may specify that the service has to be accepted (Received) without any QA or the service has to be accepted and approved by QA team (Inspected). If the Purchase Order line has 'Receipt required' specified then the technician has to 'Receive' the service in Oracle Purchasing module (three-way matching). If the Purchase Order line has 'Inspection required' specified then the technician has to 'Receive' the service and enter the QA code (four-way matching). It is possible that the buyer may indicate that in the Purchase Order line that the services need not be received, in which case the supplier is paid upon the approval of the Purchase Order.

Close OSP Work Order You can close the OSP Work Order provided that all shipped parts have been received back, the serviced parts are in good condition, all of the production jobs associated with the OSP Work Order are closed, and the Purchase Order is closed. If any one of the conditions fails, the OSP Work Order cannot be closed.

Borrow Parts from a third party organization There are times when parts may be borrowed from a supplier instead of purchased. If you decides to borrow parts (a lease decision) there must be a legally binding contract with the supplier. Contracts are created in Oracle Procurement Contracts. The Borrow Order is created in Outside Processing. Contract terms include financial, warranty and shipment/return terms. Create a borrow order only after the contract approval. In order to receive the parts from the supplier there must be a production job. Shipping parts back requires another production job. A job must be assigned to a department with a class of 'Vendor' to be included in a Borrow Order. Each Borrow Order has an associated Shipment Order which provides any receiving and shipping details.

Loaning Parts to a third party organization Use Oracle Order Management to perform shipping and invoicing for loaning parts in inventory to a third party organization. If the parts must be removed or disassembled; however, the loan process must be done in Oracle Complex Maintenance, Repair, and Overhaul.

There must be an approved contract with the customer before you create a Loan Order. The contract is entered in Oracle Contracts for Service. The Loan Order is entered in Oracle Complex Maintenance, Repair, and Overhaul. If the part needs to be removed from its existing assembly or some other operation on the part is

necessary to make it ready for loan there must be a production job for it before you ship the part. The job must have a department class of 'Vendor'. There must be another production job to receive the loan back. Each Loan Order has an associated Shipment Order which provides the shipping and receiving details for the loaned parts.

Approve Loan or Borrow Orders Submit a Loan or Borrow Order when you are ready to receive or ship the parts. This allows the shipping clerk to pick, pack, ship, or receive the parts. The shipping is done with the Oracle Shipping module; for receipts use the Oracle Purchasing module.

Close Loan or Borrow Order The order can be closed provided that all parts have been shipped or received, and all the production jobs that were part of the Loan or Borrow are closed. The Loan or Borrow Order cannot be closed if any of these conditions are not met.

Perform Item Exchange Replace an item/part with another part from a supplier. Item exchange is an integral part of the production process in most service industries. Most service stations send out specialized components to be repaired at outside repair facilities. The item exchange process speeds up the production process by allowing like parts to be sent and received without waiting for the repair of the originals.

Fields Associated with Outside Processing

The following sections provide descriptions of fields appearing on each Outside Processing page.

Note: The Search icon beside fields implies the availability of a List of Values to choose from for those field values. To populate these fields, enter a partial search string using the generic substitution meta character%, and click the icon to retrieve and display matching results on a Select <field name> page. Click the relevant record on this page to return this value to the field on your maintenance requirement page.

Fields on the Edit OSP Work Order Page

The following fields appear on the Edit OSP Work Order Page:

Order Number Displays the order number.

Order Type Select the type of order from the list provided.

Order Description Enter a brief description of the order.

Vendor Name Select a vendor name from the list of vendors that will perform the service.

Vendor Location Select the location from the list. This will be the ship to location of the supplier.

Single Instance Flag Select the value 'Yes' if you want to ensure that all the services to be performed in this OSP Work Order are against a single instance of a part. If it is set to 'No' then the system will allow you to mix jobs that have different instances of parts.

Buyers Name Select the buyer's name from the list that will be handling the Purchasing activity.

Status This is display only information. Possible values are:

- 'Entered' - the OSP Work Order is still in processing mode; edits to OSP Work Order is allowed.
- 'Submitted' -the OSP Work Order has created a Purchase Order in Oracle Purchasing; no edits allowed. Further edits should be done in Oracle Purchasing.
- 'Submit Failed'-the OSP Work Order has failed to successfully create a Purchase Order in Oracle Purchasing. Edits to OSP Work Order are allowed. Re-submit the OSP Work Order when all edits are completed.
- 'Closed' -the OSP Work Order has been closed and no further activity will be allowed

Fields on the Create Order Page

The following fields appear on the Create Order Page:

Job Number Enter the job number if you want to quickly convert a single production job to an OSP Work Order.

Part Number Enter the Part Number if you want to group all the jobs that are for a specific part number.

Serial Number Enter the serial number if you want to group all the jobs that are for a specific serialized part.

Service Item Number Enter the service item number if you want to group all jobs that have the same service requirements.

Instance Number Enter the instance number if you want to group all the jobs that are for a specific instance of a part.

Visit Type Select the visit type if you want to group all jobs that have the same visit type.

Project Name Select the project name if you want to group all jobs that belong to the same project.

Task Name Select the task name if you want to group all the jobs that have the same task.

Fields on the Search OSP Order Page

The following fields appear on the Search OSP Order Page:

Order Number Displays the order number.

Job Number The number generated for a job.

Part Number The part number of the relevant item.

Description The description of the relevant item.

Project Name Select the project name if you want to group all jobs that belong to the same project.

Serial Number Enter the serial number if you want to group all the jobs that are for a specific serialized part.

Order Type Select the type of order from the list provided.

Task Name Select the task name if you want to group all the jobs that have the same task.

Order Status This is display only information about the order status. Possible values are:

- 'Entered' - the OSP Work Order is still in processing mode; edits to OSP Work Order is allowed.
- 'Submitted' -the OSP Work Order has created a Purchase Order in Oracle Purchasing; no edits allowed. Further edits should be done in Oracle Purchasing.
- 'Submit Failed'-the OSP Work Order has failed to successfully create a Purchase Order in Oracle Purchasing. Edits to OSP Work Order are allowed. Re-submit the OSP Work Order when all edits are completed.
- 'Closed' -the OSP Work Order has been closed and no further activity will be allowed

Vendor Name Select a vendor name from the list of vendors that will perform the service.

Department Departments are a sub group of Organizations. Visits are associated to a Department and all Departments are associated to an Organization. For example, an Organization may be SFO Airport, and a Department may be "Hangar 1." All Departments are defined in the Bill of Materials, associated to the selected Organization and also associated to the user's responsibility can be selected.

Fields on the Search Work Order Page

The following fields appear on the Search Work Order Page:

Job Number The number generated for a job.

Task Name Select the task name if you want to group all the jobs that have the same task.

Serial Number Enter the serial number if you want to group all the jobs that are for a specific serialized part.

Service Item Number Enter the service item number if you want to group all jobs that have the same service requirements.

Part Number The part number of the relevant item.

Department Departments are a sub group of Organizations. Visits are associated to a Department and all Departments are associated to an Organization. For example, an Organization may be SFO Airport, and a Department may be "Hangar 1." All Departments are defined in the Bill of Materials, associated to the selected Organization and also associated to the user's responsibility can be selected.

Project Name Select the project name if you want to group all jobs that belong to the same project.

Instance Number Enter the instance number if you want to group all the jobs that are for a specific instance of a part.

Also appearing on this page under Jobs Search Results are *Job Number, Part Number, Instance Number, Serial Number, Service Item Number, Service Item Description, Department, Suggested Vendor*

Fields on the Create Borrow Order Page

The following fields appear on the Create Borrow Order Page:

Order Number Displays the order number.

Order Type Select the type of order from the list provided.

Description Describe what is being borrowed.

Order Date Enter the date of Ship Order. Defaults to the current date

Order Status This is display only information about the order status. Possible values are:

- 'Entered' - the OSP Work Order is still in processing mode; edits to OSP Work Order is allowed.
- 'Submitted' -the OSP Work Order has created a Purchase Order in Oracle Purchasing; no edits allowed. Further edits should be done in Oracle Purchasing.
- 'Submit Failed'-the OSP Work Order has failed to successfully create a Purchase Order in Oracle Purchasing. Edits to OSP Work Order are allowed. Re-submit the OSP Work Order when all edits are completed.

- 'Closed' -the OSP Work Order has been closed and no further activity will be allowed

Vendor Name Select a vendor name from the list of vendors that will perform the service.

Contract Number Displays the relevant contract number.

Also appearing on this page under OSP Order Lines are *Remove, Line Number, Job Number, Line Status, Part Number, Instance Number, Service Item Quantity, Ship/Received By Date, Project Name, and Task Name.*

Fields on the Create OSP Order Page

The following fields appear on the Create Order Page:

Order Number Displays the order number.

Order Type Select the type of order from the list provided.

Service Description Describe the service being performed.

Vendor Name Select a vendor name from the list of vendors that will perform the service.

Vendor Location Select the vendor location.

Buyer Name Enter the name of the buyer.

Order Status This is display only information about the order status. Possible values are:

- 'Entered' - the OSP Work Order is still in processing mode; edits to OSP Work Order is allowed.
- 'Submitted' -the OSP Work Order has created a Purchase Order in Oracle Purchasing; no edits allowed. Further edits should be done in Oracle Purchasing.
- 'Submit Failed'-the OSP Work Order has failed to successfully create a Purchase Order in Oracle Purchasing. Edits to OSP Work Order are allowed. Re-submit the OSP Work Order when all edits are completed.

- 'Closed' -the OSP Work Order has been closed and no further activity will be allowed

Order Date Enter the date of Ship Order. Defaults to the current date

Also appearing on this page under OSP Order Lines are *Select, Line Number, Job Number, Part Number, Line Type, Line Status, Instance Number, Service Item Number, Service Item Description, Service Item Quantity, UOM, Need By Date, Project Name, and Task Name.*

Fields on the Ship Order Page

The following fields appear on the Ship Order Page:

OSP Order Number Display only field

Order Type Displays OSP Order's type. Display only field

Description OSP Order description. Display only field

Ship Order Number Automatically generated. Display only field.

Ship Order Type Display only field.

Booked Status of the Ship Order. Display only field

Cancelled Status of the Ship Order. Display only field

Order Date Enter the date of Ship Order. Defaults to the current date

The following fields are required to create a Sales Order, but do not have relevance to the Ship Order. Accept the defaulted values.

- Price List
- Payment Terms
- Tax Handling
- Tax Exempt Reason

Tax Handling Indicates how you wish to handle taxes on the parts being shipped. If you want the shipments tax exempted the select a value other than 'Standard' and enter value in the Tax Exempt Reason field. Otherwise select the value 'Standard'.

Vendor Name Select a value from the selection list. Please ensure that the Vendor name is the same as the Vendor name entered in OSP Work Order. If it is different the system will give you a warning but will allow you proceed.

Contact Select a value from the selection list.

Warehouse Select the warehouses from where the part will be shipped out

Shipment Method Enter the shipment method from the selection list

Shipment Priority Enter the shipment priority from the selection list

FOB Enter the Freight On Board terms from the selection list

Freight Carrier Enter the freight carriers name from the selection list

Freight Terms Enter the freight terms from the selection list

Packing and Shipping Instructions Enter the information that the shipping clerk wants to see.

Line Type Select 'Ship Only' if you are shipping a part out. Select 'Receive' if you are expecting a part to be received into inventory.

OSP Line Number Display only field. Shows the associated OSP Line.

Schedule shipment date Enter the date on which the part will be shipped out. This is a required field.

Inventory Organization Enter the Inventory Organization from which the part will be shipped. If the line type is 'Receipt' this will be the receiving Organization. This is a required field.

Sub-Inventory Enter the sub-inventory identifier from which the part will be shipped or received. This is a required field.

Freight On Board This will be automatically populated if you had entered this in the header section.

Shipment Priority This will be automatically populated if you had entered this in the header section.

Freight Carrier This will be automatically populated if you had entered this in the header section.

Freight Terms This will be automatically populated if you had entered this in the header section.

Receive Reason If the line type is 'Receipt' you need to enter the reason for receipt.

Packing Instructions This will be automatically populated if you had entered this in the header section.

Job Number Select the job number from the list of jobs that you have entered in OSP Work Order line/Loan Order line/Borrow Order line.

Fields on the Create Exchange Order Page

The following fields appear on the Create Exchange Order page:

Order Number Displays the order number.

Order Type Displays the order type of exchange for the Exchange work orders.

Vendor Name Select a vendor name from the list of vendors that will perform the service.

Vendor Location Select the location from the list. This will be the ship to location of the supplier.

Single Instance Select the value 'Yes' if you want to ensure that all the services to be performed in this OSP Work Order are against a single instance of a part. If it is set to 'No' then the system will allow you to mix jobs that have different instances of parts.

Buyer Name Name of the buyer.

Order Status This is display only information about the order status. Possible values are:

- 'Entered' - the OSP Work Order is still in processing mode; edits to OSP Work Order is allowed.

- 'Submitted' -the OSP Work Order has created a Purchase Order in Oracle Purchasing; no edits allowed. Further edits should be done in Oracle Purchasing.
- 'Submit Failed'-the OSP Work Order has failed to successfully create a Purchase Order in Oracle Purchasing. Edits to OSP Work Order are allowed. Re-submit the OSP Work Order when all edits are completed.
- 'Closed' -the OSP Work Order has been closed and no further activity will be allowed

Order Date Enter the date of Ship Order. Defaults to the current date.

Job Number The number generated for a job.

Item The tracked item for which the job has been created against.

Line Status The current status for each delivery line.

Instance Number the Install Base Instance Number of the tracked item.

Exchange Instance instance of the item that will be received as part of the exchange.

Service Item Quantity Quantity of the Service Item required.

Working With Outside Processing Work Orders

An Outside Processing Work Order allows you to group together production jobs that have been earmarked for outside servicing. You can base the creation of purchase orders, which describe the services ordered from the supplier and ship orders, which describe the shipping and receiving logistics of the serviceable parts on Outside Processing Work Orders.

While entering the search criteria, use the generic substitution meta character% to represent any string of zero or more characters. Use _ to represent any single character. For example, if the database contains a record with the value "ENGINE" in a field, typing "E%" will return all records where the field value begins with "E".

See:

- [Creating an OSP Work Order](#)
- [Finding an OSP Work Order](#)

- [Editing an OSP Work Order](#)
- [Closing an OSP Work Order](#)
- [Submitting an OSP Work Order](#)

Creating an OSP Order

Prerequisites:

A production job that requires outside processing and is not currently assigned to Outside Processing Work Orders must exist in the database.

To create an OSP Work Order:

1. On the Oracle Complex Maintenance, Repair, and Overhaul Home page, select **Execution**. The Job Overview page of the Production Planning module appears.
2. Select the Outside Processing tab. The Search OSP Order page appears. Click **Create OSP**. The Search Job page appears.

Figure 14–1 Search Job page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview | [Create Instance](#) [Production Planning](#) **[Outside Processing](#)**

Search Job

Job Number Task Name Serial Number
Service Item Item Department
Project Name Instance Number

Jobs Search Results

Select	Job Number	Item	Instance Number	Serial Number	Service Item	Service Item Description	Department	Suggested Vendor
No records were found matching the given criteria.								

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3. Enter information in the fields for which you know the value, then click **Go**. For field descriptions, see [Fields on the Search Work Order Page](#). The lower half of the page displays all of the production jobs matching the search criteria you provided.

Figure 14–2 View Jobs Search Results - Search Job page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview | Create Instance

Production PlanningOutside Processing

Search Job

Job Number

Task Name

Serial Number

Service Item

Item

Department

Project Name

Instance Number

Go

Clear

Jobs Search Results

Select Jobs and...

Create OSP

Create Loan

Create Borrow

Create Exchange

Previous

1-10 of 112

Next

Select	Job Number	Item	Instance Number	Serial Number	Service Item	Service Item Description	Department	Suggested Vendor
<input type="checkbox"/>	CMRO568	DRW unit item 3	83529	101			Outside	
<input type="checkbox"/>	CMRO570	DRW unit item 3	83529	101			Outside	
<input type="checkbox"/>	CMRO572	DRW unit item 3	83529	101			Outside	
<input type="checkbox"/>	CMRO577	DRW unit item 1	83526	101			Outside	
<input type="checkbox"/>	CMRO64	RADITEM1-APS-Trackable	83026	123-trackable			Outside	
<input type="checkbox"/>	CMRO88	RADITEM1-APS-Trackable	83026	123-trackable			Outside	
<input type="checkbox"/>	WO1163	R-ITEM1-Trackable	85653	a3			Outside	
<input type="checkbox"/>	WO1220	R-ITEM1-Trackable	88750	ctr-sno-1000			Outside	

4. Select each job that you want to include in the OSP Work Order, and click Create OSP. The Create OSP Order page appears.

Figure 14–3 Create OSP Order page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out

Production Planning Outside Processing

Overview | Create Instance

Create OSP Order




Order Number Order Type **Service** Description

* Vendor Name * Vendor Location * Single Instance **No**

* Buyer Name Order Status **Entered** Order Date **29 JUN 2004**

OSP Order Lines

Previous 1-3 of 3 Next

Select	Job Number	Item	Line Status	Instance Number	Service Item Quantity
	CMR0572	DRW unit item 3	Entered	83529	1
	CMR0570	DRW unit item 3	Entered	83529	1
	CMR0568	DRW unit item 3	Entered	83529	1

Previous 1-3 of 3 Next

Cancel Apply

Production Planning | **Outside Processing** | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out

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5. In the header, fill in the required fields. Fields marked with asterisks require an entry.
6. For each line item displayed in OSP Order Lines, enter information in the fields for which you know the value.

Note: You must fill in Line Type for any production job line item that requires the creation of a related Purchase Order line item.

Figure 14–4 Enter Header Information - Create OSP Order page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [ExecutionProfile](#) [Sign Out](#)

Overview | Create Instance

Production PlanningOutside Processing

Create OSP Order

Order Number

* Vendor NameAdvanced Network Device

* Buyer NameSmith, Mr. Tom

Order TypeService

* Vendor LocationSANTA CLARA




Order StatusEntered

Description

* Single InstanceNo

Order Date29 JUN 2004

OSP Order Lines

Select	Job Number	Item	Line Status	Instance Number	Service Item Quantity
	CMR0572	DRW unit item 3	Entered	83529	1
	CMR0570	DRW unit item 3	Entered	83529	1
	CMR0568	DRW unit item 3	Entered	83529	1

[Cancel](#) [Apply](#)

[Production Planning](#) | [Outside Processing](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#)

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7. Click **Apply** to create the OSP Work Order. Click **Cancel** to cancel the work order and return to the Search OSP Order page.

Figure 14–5 Edit OSP Order page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration **Execution** Profile Sign Out Help

Production Planning Outside Processing

Overview | Create Instance

Edit OSP Order

Shipments

Confirmation • Order Created

Edit OSP Order

Order Number **10422** Order Type **Service** Description

* Vendor Name Advanced Network Device * Vendor Location SANTA CLARA * Single Instance No

* Buyer Name Smith, Mr. Tom Order Status Entered Order Date 29-JUN-20

OSP Order Lines

Previous 1-3 of 3 Next

Line Number	Job Number	Item	Line Status	Instance Number	Service Item	Quantity	Delete
1	CMRO568	DRW unit item 3	Entered	83529			
2	CMRO570	DRW unit item 3	Entered	83529			
3	CMRO572	DRW unit item 3	Entered	83529			

Previous 1-3 of 3 Next

Cancel Submit

Finding OSP Work Orders

Prerequisites:

The OSP Work Orders you are looking for must exist in the database.

To find an OSP Work Order:

1. On the Oracle Complex Maintenance, Repair, and Overhaul Home page, select **Execution**. The Job Overview page of the Production Planning module appears.
2. Select the Outside Processing tab. The Search OSP Order page appears.

Figure 14–6 Search OSP Order page

ORACLE

Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview

Create Instance

Production Planning

Outside Processing

Search OSP Order

Order Number

Description

Order Type

Order Status

Job Number

Project Name

Task Name

Vendor Name

Item

Serial Number

Has New PO Line(s)

Department

Go

Clear

PO Synch

OSP Order Search Results

Create OSP

Select	Order Number	Description	Date	Order Type	Order Status	PO Number	Shipment Order Number	Delete
No records were found matching the given criteria..								

PO Synch

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3. Enter information in the fields for which you know the value, then click **Go**. The results matching your search criteria appear in the lower half of the page. You can do the following:
- Create a Purchase Order in the Oracle Purchasing module.

Close the OSP Work Order permanently.

Delete the associated Ship Order.

Figure 14–7 View OSP Order Search Results - Search OSP Order page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Production Planning Outside Processing

Overview | Create Instance

Search OSP Order

PO Synch

Order Number Job Number Item

Description Project Name Serial Number

Order Type Task Name Has New PO Line(s)

Order Status Vendor Name Department

Go Clear

OSP Order Search Results

Create OSP

Select OSP Order and... Close Submit Delete Shipment

Previous 1-10 of 36 Next

Select	Order Number	Description	Date	Order Type	Order Status	PO Number	Shipment Order Number	Delete
<input type="radio"/>	10422		29-JUN-2004	Service	Entered			
<input type="radio"/>	10382		11-MAY-2004	Service	Entered		31	
<input type="radio"/>	10365		05-MAY-2004	Exchange	PO Created	30275	32	
<input type="radio"/>	10364		05-MAY-2004	Exchange	Entered			

Note: To remove an OSP Work Order from the database, select the corresponding Delete icon. When the work order is deleted, all jobs formerly associated with that order will be available for any other OSP Work Order.

- Click **PO Synch** to synchronize changes between an OSP Work Order and an Oracle Purchasing Order.

Figure 14–8 Initiate PO Synch - Search OSP Order page

ORACLE

Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Overview | Create Instance

Production Planning

Outside Processing

Confirmation

Purchase Order Synch Completed Successfully

Search OSP Order

PO Synch

Order Number

Job Number

Item

Description

Project Name

Serial Number

Order Type

Task Name

Has New PO Line(s)

Order Status

Vendor Name

Department

Go

Clear

OSP Order Search Results

Create OSP

Select OSP Order and...

Close

Submit

Delete Shipment

Previous

1-10 of 36

Next

Select	Order Number	Description	Date	Order Type	Order Status	PO Number	Shipment Order Number	Delete
<input type="radio"/>	10422	29-JUN-2004 Service	Entered					
<input type="radio"/>	10382	11-MAY-2004 Service	Entered				31	

5. Click **Create OSP** to create a new OSP Work Order. See [Creating an OSP Work Order](#).
6. To view or edit an OSP Work Order, click the Order Number.

Editing an OSP Work Order

Prerequisites:

The OSP Work Order you want to edit must have a status of 'Entered' or 'Submit-failed'. You must have authorization to edit the OSP Work Order.

To edit an OSP Work Order:

1. Retrieve the OSP Work Order you want to edit. See [Finding OSP Work Orders](#).
2. Select the OSP Order to edit, and click the order number. The Edit OSP Work Order page appears.

Figure 14–9 Edit Order Details - Edit OSP Order page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Production Planning Outside Processing

Overview | Create Instance

Edit OSP Order

Shipments

Order Number **10422** Order Type **Service** Description

* Vendor Name * Vendor Location * Single Instance

* Buyer Name Order Status **Entered** Order Date **29 JUN 20**

OSP Order Lines

Previous 1-3 of 3 Next

Line Number	Job Number	Item	Line Status	Instance Number	Service Item Quantity	Delete
1	CMR0568	DRW unit item 3	Entered	83529		
2	CMR0570	DRW unit item 3	Entered	83529		
3	CMR0572	DRW unit item 3	Entered	83529		

Previous 1-3 of 3 Next

Cancel Submit

Production Planning | **Outside Processing** | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

3. Make the required changes, and click **Apply**. Click **Cancel** to discard any changes and return to the Search OSP Order page.
4. Click **Submit** to create a related Purchase Order in Oracle Purchasing.
5. Click **Delete Shipment** to remove the shipping order associated with the current OSP Work Order.
6. Click **Close** to permanently close the current OSP Work Order. This will be successful if:
 - All parts shipped out have been received back.
 - All listed production jobs are closed.
 - The associated Purchase Order is closed.
7. To edit an Order Line, click the Line Number. The Edit OSP Line page appears. You can enter values for Line Type, Service Item Number, Service Item description, UOM, and Need By Date. These values default, if the job has an associated service request.

Figure 14–10 Edit OSP Line page

ORACLE

Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview

Create Instance

Production Planning

Outside Processing

Edit OSP Line

CancelApply

OSP Details

Order Number10422Description

StatusEnteredOrder TypeService

Order Date29-JUN-2004Vendor NameAdvanced Network Devices

Line Number1Line StatusEntered

Need By Date

Job Details

Job NumberCMRO568ItemDRW unit item 3

Instance Number83529Serial Number101

Project Name62Task NameDRW route 2-3

Service Details

Service Item

Service Item Description

Service Item QuantityUOM

Line Type

8. To create a new Order Line, select Create Order Line. The Create OSP Line page appears.

Figure 14–11 Create OSP Line page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Production Planning Outside Processing

Overview | Create Instance

Create OSP Line

Cancel Apply

OSP Details

Order Number	10422	Description	
Status	Entered	Order Type	Service
Order Date	29 JUN 2004	Vendor Name	Advanced Network Devices
Line Number	4	Line Status	Entered
Need By Date	<input type="text"/>		

Job Details

* Job Number	<input type="text"/>	Item	
Instance Number		Serial Number	
Project Name		Task Name	

Service Details

Service Item	<input type="text"/>	Service Item Description	<input type="text"/>
Service Item Quantity	<input type="text"/>	UOM	<input type="text"/>
Line Type	<input type="text"/>		

9. Select the job from the Job Number list of values. Enter the required information. If the selected job's route has a pre-defined service associated with it, the service item number, UOM, and Service Item Description fields will populate with the relevant information.

Figure 14–12 Enter OSP Details - Create OSP Line page

ORACLE

Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Production Planning

Outside Processing

Overview | Create Instance

Create OSP Line

Cancel

Apply

OSP Details

Order Number

10422

Description

Status

Entered

Order Type

Service

Order Date

29-JUN-2004

Vendor Name

Advanced Network Devices

Line Number

4

Line Status

Entered

Need By Date

30-JUN-2004

Job Details

* Job Number

CMRO68

Item

RADITEM1.APS-Trackable

Instance Number

83026

Serial Number

123-trackable

Project Name

16

Task Name

rsfgd

Service Details

Service Item

CMRO Service Item

Service Item Description

CMRO Service Item

Service Item Quantity

1

UOM

DZ

Line Type

Figure 14–13 Save Record - Edit OSP Line page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Production Planning Outside Processing

Overview | Create Instance

Confirmation • New OSP Line Created.

Edit OSP Line

Cancel Apply

OSP Details

Order Number	10422	Description	
Status	Entered	Order Type	Service
Order Date	29-JUN-2004	Vendor Name	Advanced Network Devices
Line Number	4	Line Status	Entered
Need By Date	30-JUN-2004		

Job Details

Job Number	CMR088	Item	RADITEM1-APS-Trackable
Instance Number	83026	Serial Number	123-trackable
Project Name	16	Task Name	rsfgd

Service Details

Service Item	CMRO Service Item	Service Item Description	CMRO Service Item
--------------	-------------------	--------------------------	-------------------

Note: If the 'Single Instance' flag is set to 'Yes' and you associate a job with an instance number that is different from other line items you cannot save the OSP Work Order line.

If you want to physically ship the part associated with the newly created line then you must create a new Ship Order line.

Closing an OSP Work Order

If no further activity will be done to an OSP Work Order, you can close it. You cannot work on the order again once it is closed.

While entering the search criteria, use the generic substitution meta character % to represent any string of zero or more characters. Use _ to represent any single character. For example, if the database contains a record with the value "ENGINE" in a field, typing "E%" will return all records where the field value begins with "E".

Prerequisites:

All shipped parts must be received from the supplier. All parts must be in good condition and the inspector has approved the performed service. The associated Purchase Order and all associated jobs must be closed.

To close an OSP Work Order:

- 1. Retrieve the OSP Work Order that you want to close. See [Finding OSP Work Orders](#).
- 2. Select the OSP Order, and click Close. The Close button is also available in the Edit OSP Order page. If all prerequisites are met, the OSP Work Order will be closed.

Figure 14–14 Close OSP Order - Search OSP Order page

ORACLEOracle Complex MRO

HomeEngineeringConfigurationPlanningAdministrationExecutionProfileSign OutHelp

Production PlanningOutside Processing

OverviewCreate Instance

Search OSP Order

PO Synch

Order Number

Job Number

Item

Description

Project Name

Serial Number

Order Type

Task Name

Has New PO Line(s)

Order Status

PO Created

Vendor Name

Department

Go

Clear

OSP Order Search Results

Create OSP

Select OSP Order and...CloseSubmitDelete Shipment

Previous1-10 of 11Next

Select	Order Number	Description	Date	Order Type	Order Status	PO Number	Shipment Order Number	Delete
<input checked="" type="radio"/>	10365		05-MAY-2004	Exchange	PO Created	30275	32	
<input type="radio"/>	10323	test	13-FEB-2004	Exchange	PO Created	30206	80192	
<input type="radio"/>	10302	test	11-FEB-2004	Exchange	PO Created	30193	80186	
<input type="radio"/>	10243	test exch - 185	06-FEB-2004	Exchange	PO Created	30185	80176	

Submitting an OSP Work Order

Create a purchase order in Oracle Purchasing for an OSP Work Order.

Prerequisites:

The OSP Work Order must have a status of Entered or Submit-failed.

To submit an OSP Work Order:

- 1. Retrieve the OSP Work Order you want to submit. See [Finding OSP Work Orders](#).
- 2. Select the OSP Work Order, and click **Submit**. This will create a Purchase Order in Oracle Purchasing.

Figure 14–15 Submit OSP Order - Search OSP order page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview | Create Instance

Production PlanningOutside Processing

Confirmation • Order Submitted

Search OSP Order

Order Number

Description

Order Type

Order Status

Job Number

Project Name

Task Name

Vendor Name

Item

Serial Number

Has New PO Line(s)

Department

PO Sync

Go

Clear

OSP Order Search Results

Create OSP

Select OSP Order and...CloseSubmitDelete Shipment

Previous

11-20 of 36

Next

Select	Order Number	Description	Date	Order Type	Order Status	PO Number	Shipment Order Number	Delete
<input checked="" type="radio"/>	10344	05-MAY-2004 Exchange	Submitted					
<input type="radio"/>	10343	05-MAY-2004 Service	Entered					

Working With Purchase Orders

While entering the search criteria, use the generic substitution meta character% to represent any string of zero or more characters. Use _ to represent any single character. For example, if the database contains a record with the value “ENGINE” in a field, typing “E%” will return all records where the field value begins with “E”.

See:

- [Reviewing Purchase Orders](#)
- [Synchronizing Outside Processing Work Orders with Purchase Orders](#)
- [Updating and Approving Purchase Orders](#)

Reviewing Purchase Orders

Prerequisites:

There must be a complete, submitted OSP Work Order in the database. An associated purchase from Oracle Purchasing with an Entered status must be in the database.

To review a purchase order:

1. Retrieve the OSP Work Order that you want to review. See [Finding OSP Work Orders](#).
2. Navigate to the Edit OSP Work Order page for the selected work order.

Figure 14–16 Modify OSP Order - Edit Exchange Order page

ORACLE[®] Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Production Planning](#) [Outside Processing](#)

[Overview](#) | [Create Instance](#)

[Edit OSP Order](#)
[PO Details](#)
[Shipments](#)

Edit Exchange Order

Order Number10344

Vendor NameAllied Manufacturing

Buyer NameSmith, Mr. Tom

Order TypeExchange

Vendor LocationSAN JOSE-PM

Order StatusPO Created

Description

Single InstanceNo

Order Date05-MAY-2004

Cancel

Close

Convert

Apply

OSP Order Lines

Previous

1-1 of 1

Next

Line Number	Job Number	Item	Line Status	Instance Number	Exchange Instance	Service Item	Quantity
1	CMR01821	VG0318	PO Created	100018	100000		1

Previous

1-1 of 1

Next

Cancel

Close

Convert

Apply

[Production Planning](#) | [Outside Processing](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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3. Click **PO Details** on the left-hand navigation panel. The Purchase Order Details page appears, displaying summary information about the related OSP Work Order. Below this is the Purchase Order information and the line item details.

Managing Outside Processing 14-33

Figure 14–17 Purchase Order Details page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

[Production Planning](#) [Outside Processing](#)

[Overview](#) | [Create Instance](#)

[Edit OSP Order](#)
[PO Details](#)
[Shipments](#)

Purchase Order Details

Cancel

OSP Order Header

Order Number10344

Order Date05-MAY-2004

Description

Order TypeExchange

StatusPO Created

Shipment Number

Purchase Order Header

PO Number30357

Revision0

Date29-JUN-2004

Amount0.01

CurrencyANY

BuyerSmith, Mr. Tom

Vendor NameAllied Manufacturing

Vendor LocationSAN JOSE-PM

Closure StatusOpen

CancelledNo

Approval StatusNever Approved

Purchase Order Lines

Select Line and view ...

PO ShipmentsReceipts

Previous1-1 of 1Next

Select	Line	Item	Item	Instance Number	Item Description	Qty Ordered	Qty Received	UOM	Unit Price	Project Name	Task Name	Job Number
C	1	CMRO Service Item	VG0318	100018	CMRO Service Item	1	0	Dozen	0.01	278	test	CMRO1821

Previous1-1 of 1Next

4. Select a line item to view associated shipping or receiving details for that item.

Note:

A list of errors will appear if the Purchase Order was not successfully created. Edit the relevant OSP Work Order to fix any errors, then submit the Purchase Order again.

5. Click **PO Shipment** to view the Purchase Order Shipments.

14-34 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 14–18 View Purchase Order Shipments page

ORACLE® Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview | Create Instance

Production Planning | Outside Processing

View Purchase Order Shipments

Cancel

Purchase Order Header

PO Number 30357 Date 29-JUN-2004 Currency ANY Amount 0.01
Vendor Name Allied Manufacturing Vendor Site SAN JOSE-PM Status Open

Purchase Order Line

Line Number 1 Item CMRO Service Item Description CMRO Service Item
Quantity 1 UOM Dozen

Shipment Line Details

Select a Shipment Line and...

Accounting Distributions

Previous

 1-1 of 1

Next

Select	Shipment Number	Need By Date	Promised Date	Quantity Ordered	Quantity Received	Quantity Accepted	Quantity Billed	UOM	Ship To Organization	Ship To Location
<input checked="" type="radio"/>	1	30-JUN-2004		1	0	0	0	Dozen	San Diego Manufacturing	P3- San Diego

Previous

 1-1 of 1

Next

Select a Shipment Line and...

Accounting Distributions

Cancel

- 6. Select a shipment number and click **Accounting Distributions** to view accounting distributions associated with the Purchase Order Shipment.

Figure 14–19 View Purchase Accounting Distributions page

ORACLE

Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview

Create Instance

Production Planning

Outside Processing

View Purchase Accounting Distributions

Cancel

Purchase Order Shipment

PO Number

30357

Quantity Ordered

1

UOM

Promised Date

PO Line Number

1

Quantity Received

0

Ship To Location

P3- San Diego

Need By Date

30-JUN-2004

Shipment Number

1

Quantity Accepted

0

Ship To Organization

San Diego Manufacturing

Accounting Distributions

Line Number	Charge Account	Ordered Quantity	Amount Billed	Quantity Billed	Project Name	Task Name	WIP Number
No records were found matching the given criteria..							

Cancel

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- 7. Click **Receipts** in the Purchase Order Details page to view receipts associated with the Purchase Order line item. To view QA results for the receipt, select a receipt and click **QA Result**.

Figure 14-20 View Receipts page

ORACLE

Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview

Create Instance

Production Planning

Outside Processing

View Receipts

Cancel

Purchase Order Header

PO Number

30357

Date

29-JUN-2004

Currency

ANY

Amount

0.01

Vendor Name

Allied Manufacturing

Vendor Site

SAN JOSE-PM

Status

Open

Purchase Order Line

Line Number

1

Item

CMRO Service Item

Description

CMRO Service Item

Quantity

1

UOM

Dozen

Receipt Details

Select	Receipt Number	Receipt Date	Shipment Number	Quantity	UOM	Sub Inventory	Receipt Exception	QC Grade
No records were found matching the given criteria..								

Cancel

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Note: There may be a delay between the submission and actual creation of a Purchase Order in Oracle Purchasing. If you notice that the submission request has a Pending status for a long time, notify your system administrator. Review submission status on the Concurrent Requests page.

Synchronizing Outside Processing Work Orders with Purchase Orders

A buyer may add additional Purchase Order Lines manually after a Purchase Order has been created in Oracle Purchasing through a Submit action in OSP Work Order. If you decide that the newly added Purchase Order Lines should be reflected in the source OSP Work Order then you must assign the new Purchase Order Lines to existing production jobs.

While entering the search criteria, use the generic substitution meta character% to represent any string of zero or more characters. Use _ to represent any single

character. For example, if the database contains a record with the value "ENGINE" in a field, typing "E%" will return all records where the field value begins with "E".

Prerequisites:

A completed OSP Work Order must exist in the database with an associated Purchase Order that has relevant line items created by the buyer.

To synchronize an OSP Work Order with a Purchase Order:

1. Retrieve the OSP Work Order you want to synchronize. See [Finding OSP Work Orders](#).
2. Click the OSP Order Number to navigate to the Edit OSP Work order page. Click **PO Details** on the left-hand navigation panel.
3. The Purchase Order Details page appears, displaying summary information about the related OSP Work Order. Below this is the Purchase Order information and the line item details. If there are line items without job numbers, the items need to be added to the current OSP Work Order. Select a job number and click **Apply**.
4. A list of jobs appear with the following conditions:

If the Purchase Order line has a service item number:

- List of jobs that have same service item number associated with job's route.
- List of jobs that have no service item number associated with job's route.

If the Purchase Order line does not have a service item number then you will see a list of jobs that have no service item number associated with job's route.

Note: If the selected OSP Work Order has 'Single Instance' flag set to 'Yes', then all jobs associated with the new Purchase Order line must have the same Instance number as other OSP Order Lines.

5. Click **Apply** to save your edits. Click **Cancel** to discard any changes and return to the Search OSP Order page.

Updating and Approving Purchase Orders

While entering the search criteria, use the generic substitution meta character% to represent any string of zero or more characters. Use _ to represent any single

character. For example, if the database contains a record with the value "ENGINE" in a field, typing "E%" will return all records where the field value begins with "E".

Prerequisites:

A completed OSP Work Order must be submitted in the database. An associated purchase order with an Entered status is in Oracle Purchasing. Additionally, you must have buyer privileges and access to Oracle Purchasing to make these changes.

To update or approve a Purchase Order:

1. Retrieve the OSP Work Order associated with the purchase order that you want to approve or update. See [Finding OSP Work Orders](#).
2. Click the order number. The Edit OSP Work Order page appears. Click **PO Details** on the left-hand navigation panel.
3. The Purchase Order Details page appears, displaying summary information about the related OSP Work Order. Note the Purchase Order number.

Figure 14–21 View Purchase Order Details - Purchase Order Details page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Production Planning

Outside Processing

Overview | Create Instance

Edit OSP Order

PO Details

Shipments

Purchase Order Details

Cancel

OSP Order Header

Order Number10140Order Date20-JAN-2004Descriptiontest exchOrder TypeExchangeStatusPO CreatedShipment Number80139

Purchase Order Header

PO Number30110Revision0Date20-JAN-2004Amount10CurrencyANYBuyerSmith, Mr. TomVendor NameAllied ManufacturingVendor LocationSAN JOSE-PMClosure StatusOpenCancelledNoApproval StatusNever Approved

Purchase Order Lines

Select Line and view ...PO ShipmentsReceipts

Previous1-1 of 1Next

Select	Line	Item	Item	Instance Number	Item Description	Qty Ordered	Qty Received	UOM	Unit Price	Project Name	Task Name	Job Number
C	1	CMRO Service Item	R-ITEM1-Trackable-noatp	85670	CMRO Service Item	1	0	Each	10	97	task	WO951

Previous1-1 of 1Next

4. Change to the Purchasing responsibility assigned to you. Navigate to Purchase Orders > Purchase Orders. The Purchase Orders window appears.

Figure 14-22 Purchase Orders window

Purchase Orders (Vision Project Mfg) - [New]

PO, Rev	0	Type	Standard Purchase Order	Created	29-JUN-2004 23:50:42
Supplier		Site		Contact	
Ship-To	P3- San Diego	Bill-To	PM- HQ Location (LA)	Currency	ANY
Buyer	Smith, Mr. Tom	Status	Incomplete	Total	0.00
Description					
P-Card					

Lines Price Reference Reference Documents More Agreement Temporary Labor

Num	Type	Item	Rev	Job	Category	Description	UOM	Quantity	Price

Item

Catalog... Currency... Terms Shipments Approve...

5. Query for the Purchase Order number. The form is populated with the purchase order details. Make changes if required.

Figure 14–23 View Lines Details - Line Tab (Purchase Orders window)

PO, Rev

30110

0

Type

Standard Purchase Order

Created

20-JAN-2004 09:38:03

Supplier

Allied Manufacturing

Site

SAN JOSE-PM

Contact

Ship-To

P2- Los Angeles

Bill-To

PM- HQ Location (LA)

Currency

ANY

Buyer

Smith, Mr. Tom

Status

Incomplete

Total

10.00

[]

Description

AHL OSP Order 10140 - test exch

P-Card

Lines

Price Reference

Reference Documents

More

Agreement

Temporary Labor

Num	Type	Item	Rev	Job	Category	Description	UOM	Quantity	Price	
1	Services	CMRO Service Item			MISC.MISC...	CMRO Service Item	Each	1	10	

Item

CMRO Service Item

CMRO Service Item

Catalog...

Currency...

Terms

Shipments

Approve...

- 6. Click Approve to initiate the order approval process. The Approve Document appears.

Figure 14-24 Approve Document window

Approve Document (Vision Project Mfg) - 30110

Approval Details Additional Options

Encumbrance

☐ Reserve ☐ Unreserve Unreserve Date

☐ Use GL Override ☐ Use Document GL Date to Unreserve Accounting Date

Approval

☒ Submit for Approval Forward From

☐ Forward Approval Path

Forward To

Note

Change

Summary

Transmission Methods

☐ Print ☐ XML

☐ Fax FAX Number ☐ EDI

☐ E-Mail E-Mail Address

OK Cancel

- Click Ok. The Purchase order is submitted for approval, and its status changes to Approved.

For more information on using Oracle Purchasing, see *Oracle Purchasing User's Guide, Release 11i*.

Shipping and Receiving

While entering the search criteria, use the generic substitution meta character % to represent any string of zero or more characters. Use _ to represent any single character. For example, if the database contains a record with the value "ENGINE" in a field, typing "E%" will return all records where the field value begins with "E".

See:

- [Shipping Parts](#)
- [Receiving Parts](#)
- [Accepting Supplier Services](#)

Shipping Parts

Create a Ship Order for OSP Work Orders that involve parts that need to be shipped for outside service. An OSP Work Order can have only one associated Ship Order.

Prerequisites:

An OSP Work Order with a status other than Closed must exist in the database.

To create a Ship Order:

1. Retrieve the OSP Work Order associated to the items you want to ship. See [Finding OSP Work Orders](#).
2. Click the relevant order number from the OSP Order Search Results. The Edit OSP Work Order page appears. Click **Shipments** on the left-hand navigation panel.
3. The Create Shipment Header page appears. Enter the required information and click **Apply**.

Figure 14–25 Edit Shipment Header page

ORACLE® Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview | Create Instance

Edit OSP Order

Shipments

Edit Shipment Header

OSPO Order Number10382

Shipment Order Number31

BookedNo

* Price ListPricing Test CMRO 0114

* Tax ExemptStandard

Tax Exempt Reason

* Vendor NameAT&T Universal Card

* LocationJacksonville (PJM)

* WarehouseCMRO Org

Shipment Priority

Freight TermsPrepaid

Packing Instructions

Shipping Instructions

Order TypeService

Shipment Order TypeP-Mixed

CancelledNo

* Payment Terms20/80

Tax Exempt Number

Vendor Number1005

ContactPeterson, Jane Ms.

Shipment Method

FOBDestination

Description

Order Date11-MAY-2004

OpenYes

Cancel

Apply

Shipment Lines

To delete a Ship Order:

- 1. Retrieve the OSP Work Order associated to the ship order you want to delete. See [Finding OSP Work Orders](#).
- 2. Select the OSP Work Order from the results table, and click **Delete Shipment**.

Figure 14–26 Delete Shipment - Search OSP Order page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Overview

Create Instance

Production Planning

Outside Processing

Search OSP Order

PO Synch

Order Number

Job Number

Item

Description

Project Name

Serial Number

Order Type

Task Name

Has New PO Line(s)

Order Status

Vendor Name

Department

Go

Clear

OSP Order Search Results

Create OSP

Select OSP Order and...

Close

Submit

Delete Shipment

Previous

1-10 of 36

Next

Select	Order Number	Description	Date	Order Type	Order Status	PO Number	Shipment Order Number	Delete
<input type="radio"/>	10422		29-JUN-2004	Service	Entered			
<input type="radio"/>	10382		11-MAY-2004	Service	Entered		31	
<input checked="" type="radio"/>	10365		05-MAY-2004	Exchange	PO Created	30275	32	
<input type="radio"/>	10364		05-MAY-2004	Exchange	Entered			

Note: This action cannot be undone. All associated ship line items will be deleted with the ship order. You cannot delete a ship order if parts related to the order have already shipped.

To create a Ship Order line:

- 1. Retrieve the OSP Work Order associated to the ship order you want to delete. See [Finding OSP Work Orders](#).
- 2. Navigate to the Edit OSP Work Order page. Click **Shipments** on the left-hand navigation panel. The OSP Work Order page appears.

Figure 14-27 View Shipment Header Information - Edit Shipment Header page

Edit OSP Order

Shipments

Edit Shipment Header

Cancel

Apply

OSP Order Number10242

Shipment Order Number80175

BookedNo

* Price ListProject Manufacturing

* Tax ExemptStandard

Tax Exempt Reason

* Vendor NameAT&T Universal Card

* LocationJacksonville (PJM)

* WarehouseSan Diego Manufacturing

Shipment Priority

Freight TermsPrepaid

Packing Instructions

Shipping Instructions

Order TypeExchange

Shipment Order TypeP-Mixed

CancelledNo

* Payment TermsIMMEDIATE

Tax Exempt Number

Vendor Number1005

ContactPeterson, Jane Ms.

Shipment Method

FOBDestination

Descriptiontest ex

Order Date06-FEB-2004

OpenYes

Shipment Lines

Create Shipment Line

Remove	Line Number	Line Type	Item	Instance Number	Serial Number	Quantity	UOM	Scheduled Shipment Date	Booked
No records were found matching the given criteria..									

3. Click **Create Shipment Line**. The Create Shipment Line page appears.

Figure 14–28 Create Shipment Line page

ORACLE

Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Production PlanningOutside Processing

Overview | Create Instance

Create Shipment Line

OSP Order Number10242

Line TypeP-Return (Receipt)

Job Number

Scheduled Shipment Date

Inventory Organization

FOBDestination

Freight TermsPrepaid

Receive Reason

Packing Instructions

Sub-Inventory

Shipment Priority

CancelApply

CancelApply

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- 4. Fill in the fields for the new shipment line. For field descriptions, see [Fields on the Ship Order Page](#)
- 5. Select the job number using the Search icon. The job numbers listed are from the OSP Order line items.

Figure 14–29 Enter Shipment Line Details - Create Shipment Line page

ORACLE[®] Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview | Create Instance

Production PlanningOutside Processing

Create Shipment Line

OSP Order Number10242

Line TypeP-Standard (Line Invoicing)

Job NumberWO1399

ItemR-ITEM1-Trackable

Shipment Quantity1

Project Name184

Instance Number83846

Scheduled Shipment Date17-FEB-2006

Inventory OrganizationSan Diego Manufacturing

FOB Destination

Freight TermsPrepaid

Receive Reason

Packing Instructions

Serial Numberctr-sno-1

Shipment UOMEa

Task Nametask

Exchange Instance91735

Sub-Inventory

Shipment Priority

Cancel

Apply

Cancel

Apply

6. Click **Apply** to save your edits. Click **Cancel** to discard any changes and return to the Ship Order page.

To edit and/or delete a Ship Order line:

1. Retrieve the OSP Work Order associated to the ship order you want to delete. See [Finding OSP Work Orders](#).
2. Navigate to the Edit OSP Work Order page. Click **Shipments** on the left-hand navigation panel.
3. In the Edit Shipment Header page, click the Line Number for the shipment line that you want to edit. The Edit Shipment Line page appears.

Figure 14–30 Edit Shipment Line page

ORACLE

Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview

Create Instance

Production Planning

Outside Processing

Edit Shipment Line

OSP Order Number 10202

* Line Type P-Standard (Line Invoicing)

Item R-ITEM1-Trackable

Shipment Quantity 1

Project Name

Instance Number 85652

* Scheduled Shipment Date 06-JAN-2006

* Inventory Organization San Diego Manufacturing

FOB Destination

Freight Terms Prepaid

Receive Reason

Packing Instructions

Serial Number a2

Shipment UOM Ea

Task Name

Exchange Instance

Sub-Inventory

Shipment Priority

Cancel

Apply

Associated Jobs

Previous

1-1 of 1

Next

Job Number

WO1199

- 4. Make changes to the shipment line as required, and click Apply.
- 5. To delete a shipment line, select the Remove check box corresponding to the line number, in the Edit Shipment Header page.

Note:

Delete cannot be undone. When you select the 'Delete' trash can, the item on that line is removed from the database immediately. You cannot delete a line item if associated parts have already been shipped.

- 6. Click **Apply** to save your edits. Click **Cancel** to discard any changes and return to the Ship Order page.

Receiving Parts

Parts are received in Oracle Purchasing using a sales order return line.

While entering the search criteria, use the generic substitution meta character% to represent any string of zero or more characters. Use _ to represent any single character. For example, if the database contains a record with the value "ENGINE" in a field, typing "E%" will return all records where the field value begins with "E".

Prerequisites:

The received part must be part of an OSP Work Order, Loan Order, or Borrow Order. There must be a booked sales order with relevant Return lines in Oracle Purchasing.

To receive a part:

1. Select the available responsibility in Oracle Purchasing.
2. Navigate to the Receiving page and enter the sales order number.
3. Select the Return line item you want to receive into inventory.
4. Enter the available receipt information and save it in the database.
5. If there is a quality plan for this part, complete the QA plan.

For details on how to receive parts with Oracle Purchasing, see [Oracle Purchasing User's Guide Release 11i](#).

Accepting Supplier Services

A Purchase Order may specify that supplier performed services must be acknowledged before payment. In such cases, receive the service using Oracle Purchasing.

While entering the search criteria, use the generic substitution meta character% to represent any string of zero or more characters. Use _ to represent any single character. For example, if the database contains a record with the value "ENGINE" in a field, typing "E%" will return all records where the field value begins with "E".

Prerequisites:

The part must be received from the supplier in good condition and must be associated to an OSP Work Order. The inspector must approve of the service performed on the part. There must be an approved Purchase Order associated to the OSP Work Order and the relevant purchase order line item must be marked as Receipt Required.

To accept a service:

1. Select the available responsibility in Oracle Purchasing.
2. Navigate to the Receiving page.
3. Select the purchase order line item you want to receive into inventory.
4. Enter the available receipt information and save it in the database.

For details on how to receive parts with Oracle Purchasing, see [Oracle Purchasing User's Guide Release 11i](#).

Working with Loan and Borrow Orders

During the material-planning phase of a job the planner (either in Long Term Plan or in Production Plan) may decide that it would be better to 'Borrow' a part from a supplier than buy it outright. The decision may be based on expediency of job execution or cost considerations. Similarly the planner may receive a request to 'Loan' a part to a customer that is part of an existing assembly. In the case of 'Borrow' process the planner needs to have an install job that should receive the part from supplier, inspect it and install into an assembly. In the case of 'Loan' the planner needs to have a removal job that will remove the part, inspect and make it ready for shipping. Both the install job and remove job should have a department with a department class 'Vendor'. In order create a Loan/Borrow Order there should exists an approved legal contract between the parties to handle the financial transactions, since the Loan/Borrow handles the physical shipments/receipts of the parts.

While entering the search criteria, use the generic substitution meta character% to represent any string of zero or more characters. Use _ to represent any single character. For example, if the database contains a record with the value "ENGINE" in a field, typing "E%" will return all records where the field value begins with "E".

See:

- [Creating a Loan or Borrow Order](#)
- [Finding a Loan or Borrow Order](#)
- [Editing a Loan or Borrow Order](#)
- [Submitting a Loan or Borrow Order](#)
- [Closing a Loan or Borrow Order](#)
- [Initiating Contracts](#)

Creating a Loan or Borrow Order

Prerequisites:

A Production job that requires outside processing and is not associated to an OSP Work Order must exist in the database. There must be an approved contract to loan or borrow parts.

To create a loan or borrow Order:

1. On the Oracle Complex Maintenance, Repair, and Overhaul Home page, select **Execution**. The Job Overview page of the Production Planning module appears.
2. Select the Outside Processing tab. The Search OSP Order page appears.
3. Click **Create OSP** under the OSP Order Search Results header. The Search Work Order page appears. Enter your search criteria in the fields and click **Go**. The Search results appear in the lower half of the page. Click **Clear** if you want to clear all fields and start the search over.

Figure 14–31 Search Job Records - Search Job page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview | Create Instance

Production PlanningOutside Processing

Search Job

Job Number

Task Name

Serial Number

Service Item

Item

Department

Project Name

Instance Number

Go

Clear

Jobs Search Results

Select Jobs and...

Create OSPCreate LoanCreate BorrowCreate Exchange

Previous

1-10 of 108

Next

Select	Job Number	Item	Instance Number	Serial Number	Service Item	Service Item Description	Department	Suggested Vendor
<input type="checkbox"/>	CMR0577	DRW unit item 1	83526	101			Outside	
<input type="checkbox"/>	CMR064	RADITEM1-APS-Trackable	83026	123-trackable			Outside	
<input type="checkbox"/>	WO1163	R-ITEM1-Trackable	85653	a3			Outside	
<input type="checkbox"/>	WO1220	R-ITEM1-Trackable	88750	ctr-sno-1000			Outside	
<input type="checkbox"/>	WO1222	R-ITEM2-Trackable	88751	ctr-sno-1001			Outside	
<input type="checkbox"/>	WO1259	R-ITEM1-Trackable	85652	a2			Outside	
<input type="checkbox"/>	WO1321	R-ITEM1-Trackable	83087	11			Outside	
<input type="checkbox"/>	WO1340	R-ITEM1-Trackable	83846	ctr-sno-1			Outside	

4. Under Job Search Results, select each production job you want to include in the Loan or Borrow Order.

5. Click **Create Loan** to create a loan order; click **Create Borrow** to create a borrow order. The Create Loan or the Create Borrow page appears.

Figure 14–32 Create Loan Order page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration ExecutionProfile Sign Out

Production Planning Outside Processing

Overview | Create Instance

Create Loan Order

Order Number Order Type **Loan** Description

* Company Name Order Date **30-JUN-2004** Order Status **Entered**

* Contract Number

Cancel Apply

OSP Order Lines

Previous 1-1 of 1 Next

Select	Job Number	Item	Line Status	Instance Number	Service Item Quantity
	CMR0577	DRW unit item 1	Entered	83526	1

Previous 1-1 of 1 Next

Cancel Apply

Production Planning | **Outside Processing** | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out

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- Fill in the fields as needed. Fields marked with an asterisk require an entry. Fields for the OSP line items that automatically fill in cannot be modified on this page.
- Click **Apply** to create the loan or borrow. Click **Cancel** to discard any changes and return to the Search OSP Order page.

Finding a Loan or Borrow Order

Prerequisites:

The Loan or Borrow orders you are looking for must exist in the database.

To find a loan or borrow order:

- On the Oracle Complex Maintenance, Repair, and Overhaul Home page, select **Execution**. The Job Overview page of the Production Planning module appears.

2. Select the Outside Processing tab. The Search OSP Order page appears.
3. Enter your search criteria in the fields and click **Go**. If you are looking for a specific entry, enter the order number and select Loan or Borrow from Order Type. Click **Clear** if you want to clear all fields and start the search over.

Editing a Loan or Borrow Order

Prerequisites:

The loan or borrow order you want to edit must have an Entered status.

To edit a loan or borrow order:

1. Retrieve the loan or borrow order you want to edit. See [Finding a Loan or Borrow Order](#).
2. Click the order number you want to edit from the OSP Order Search results.
3. The Edit Loan Order page appears.
 - Click **Add More Rows** to add additional line items to the order. Select the trash can next to any line item you want to delete
 - Click **Submit** to ship or receive parts for this order.
 - Click **Delete Shipment** to remove the associated Shipment Order.
4. Click **Apply** to create the loan or borrow. Click **Cancel** to discard any changes and return to the Search OSP Order page.

Note: Delete cannot be undone. When you select the 'Delete' trash can, the item on that line is removed from the database immediately.

Submitting a Loan or Borrow Order

Prerequisites:

The loan or borrow order you want to submit must have an Entered status.

To submit a loan or borrow order:

1. Retrieve the loan or borrow order you want to submit. See [Finding a Loan or Borrow Order](#).

2. Select the order you want to submit from the OSP Order Search results.
3. Click **Submit**. Once you click submit, you cannot undo this operation.

Closing a Loan or Borrow Order

Prerequisites:

All associated jobs must be closed, and all of the associated parts must have a shipped or received status.

To close a loan or borrow order:

1. Retrieve the loan or borrow order you want to close. See [Finding a Loan or Borrow Order](#).
2. Select the order you want to close from the OSP Order Search results.
3. Click **Close**. The Loan or Borrow order's status changes to Closed.

Initiating Contracts

An approved contract must exist with the pertinent third parties before parts are borrowed or shipped to them for service. Contracts associated with Loan Orders are maintained by the Oracle Service Contracts module. Contracts associated with Borrow Orders are maintained by Oracle Contracts for Procurement.

For details on how to enter and maintain contracts in Oracle Service Contracts please refer to *Oracle Service Contracts Concepts and Procedures Release 11.5.8*.

For details on how to enter and maintain contracts in Oracle Service Contracts please refer to *Oracle Contracts for Procurement Concepts and Procedures Release 11.5.x*.

Working with Exchange Orders

During the production planning or execution process, the planner may decide to replace an item/part with another similar or dissimilar part from a supplier. The servicing organization may ship out the item first (simple exchange) and then receive the exchange item or may receive the exchange item from the supplier first (advanced exchange) and then ship the item out. Exchange Orders are created for each item being shipped, and contains information about the parts that will be shipped out and received back from the supplier, the shipment and return dates, and the costs of item exchange through an interface to the procurement system.

An exchange instance must be created in Install Base, and associated to an order line before an item can be received in exchange.

An exchange order can be converted into a service order and vice versa so long as the return shipment has not occurred.

See:

- Creating an Exchange Order
- Editing Exchange Orders
- Converting an Exchange OSP to a Service OSP

Creating an Exchange Order

Prerequisites:

A production job that requires outside processing and is not currently assigned to Outside Processing Work Orders must exist in the database.

To create an exchange order:

1. On the Oracle Complex Maintenance, Repair, and Overhaul Home page, select **Execution**. The Job Overview page of the Production Planning module appears.
2. Select the Outside Processing tab. The Search OSP Order page appears.
3. Click **Create OSP** under the OSP Order Search Results header. The Search Work Order page appears.
4. Enter your search criteria in the fields and click **Go**. The production jobs matching your search criteria are displayed. Click **Clear** if you want to clear all fields and start the search over.
5. Under Job Search Results, select the production job you want to include in the Exchange Order. Click Create Exchange. The Create Exchange Order page appears.

Figure 14–33 Create Exchange Order page

ORACLE[®] Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [ExecutionProfile](#) [Sign Out](#)

Overview | Create Instance

Production PlanningOutside Processing

Create Exchange Order

Order Number

* Vendor Name

* Buyer Name

Order Type

Exchange

* Vendor Location

Order Status

Entered

Description

* Single Instance

Order Date

No

30 JUN 2004

Cancel

Apply

OSP Order Lines

Select	Job Number	Item	Line	Status	Instance Number	Exchange Instance	Service Item	Quantity
No records were found matching the given criteria..								

Cancel

Apply

Production Planning | Outside Processing | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out

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6. Enter information in the fields for which you know the value. For field descriptions, see [Fields on the Create Exchange Order Page](#).

Figure 14–34 Enter Exchange Order Header Details - Create Exchange Order page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [ExecutionProfile](#) [Sign Out](#)

Overview | Create Instance

Production PlanningOutside Processing

Create Exchange Order

Order Number

* Vendor NameAdvanced Network Device

* Buyer NameSmith, Mr. Tom

Order TypeExchange

* Vendor LocationSANTA CLARA

Order StatusEntered

Description

* Single InstanceNo

Order Date30 JUN-2004

Cancel

Apply

OSP Order Lines

Select	Job Number	Item	Line	Status	Instance Number	Exchange Instance	Service Item	Quantity
No records were found matching the given criteria..								

Cancel

Apply

[Production Planning](#) | [Outside Processing](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#)

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7. Click Apply to save the records. The Edit Exchange order page appears.

Figure 14–35 Edit Exchange Order page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview | Create Instance

Production PlanningOutside Processing

Edit OSP Order

Shipments

Confirmation • Order Created

Edit Exchange Order

CancelSubmit

Order Number10482Order TypeExchangeDescription

* Vendor NameAdvanced Network Device* Vendor LocationSANTA CLARA* Single InstanceNo

* Buyer NameSmith, Mr. TomOrder StatusEnteredOrder Date30-JUN-21

OSP Order Lines

Line NumberJob NumberItemLine StatusInstance NumberExchange InstanceService ItemQuantityDelete

No records were found matching the given criteria.

CancelSubmit

[Production Planning](#) | [Outside Processing](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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8. Click Shipments in the side navigation menu. Enter information in the fields for which you know the value. For field descriptions, see [Fields on the Ship Order Page](#).

Managing Outside Processing 14-61

Figure 14–36 Enter Shipment Information - Create Shipment Header page

ORACLE

Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview | Create Instance

Production Planning

Outside Processing

Edit OSP Order

Shipments

Create Shipment Header

OSP Order Number10482

Shipment Order TypeMixed

* Price ListPricing Test CMRO 0114

* Tax ExemptStandard

Tax Exempt Reason

* Vendor NameAT&T Universal Card

* LocationJacksonville (PJM)

* WarehouseLos Angeles Manufacturin

Shipment Priority

Freight Terms

Packing Instructions

Shipping Instructions

Order TypeExchange

Order Date

* Payment TermsKH-down

Tax Exempt Number

Vendor Number1005

Contact

Shipment Method

FOB

Description

Cancel

Apply

- 9. Click Apply to save the information. Navigate to the Edit OSP Order page to define Order Lines.
- 10. Click Create Order Line. The Create OSP Line page appears.

Figure 14-37 Create Order Line - Create OSP Line page

ORACLE[®] Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview | Create Instance

Production Planning | Outside Processing

Create OSP Line

CancelApply

OSP Details

Order Number10482Description

StatusEnteredOrder TypeExchange

Order Date30-JUN-2004Vendor NameAdvanced Network Devices

Line Number1Line StatusEntered

Need By Date

Job Details

* Job Number

Item

Instance NumberSerial Number

Project NameTask Name

Service Details

Service Item

Service Item Description

Service Item QuantityUOM

Line Type

11. Enter the following information:
- Need by date
 - Service Details - In this region, the user can select the service to be purchased corresponding to the exchange transaction. In an Exchange order, the OSP line may be associated with any service item (subject to the some restrictions like the item should not be an inventory item, should be purchasable etc. already used for a service item) even if the associated job has a different service item
 - Exchange Details - In this region, the user picks an exchange instance that the supplier would be sending in place of the job's existing instance. For an Exchange order, the user should have picked an exchange instance before he can create a return shipment line. The Exchange Item is the item that will be exchanged.

Figure 14–38 Enter Service and Exchange Details - Create OSP Line page

Create OSP Line

CancelApply

OSP Details

Order Number10482

StatusEntered

Order Date30-JUN-2004

Line Number1

Need By Date07-JUL-2004

Description

Order TypeExchange

Vendor NameAdvanced Network Devices

Line StatusEntered

Job Details

Job NumberWO1259

Instance Number85652

Project Name173

ItemR-ITEM1-Trackable

Serial Numbera2

Task Namettt

Service Details

Service Item

Service Item Description

Service Item Quantity1

UOM

Line Type

Exchange Details

Exchange ItemR-ITEM1-Trackable

Exchange Instance101301

Note: Multiple items may be exchanged with a supplier using a single Exchange Order (multiple lines).

12. Click Apply to save the record.

Figure 14–39 Save OSP Details - Edit OSP Line page

ORACLE Oracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview | Create Instance

Production Planning | Outside Processing

Confirmation

New OSP Line Created.

Edit OSP Line

Cancel Apply

OSP Details

Order Number10482

StatusEntered

Order Date30-JUN-2004

Line Number1

Need By Date07-JUL-2004

Description

Order TypeExchange

Vendor NameAdvanced Network Devices

Line StatusEntered

Job Details

Job NumberW01259

Instance Number85652

Project Name173

ItemR-ITEM1-Trackable

Serial Numbera2

Task Namett

Service Details

Service Item

Service Item Description

Editing Exchange Orders

Prerequisite:

Exchange orders must exist in the database

To edit an exchange order:

- 1. On the Oracle Complex Maintenance, Repair, and Overhaul Home page, select **Execution**. The Job Overview page of the Production Planning module appears.
- 2. Select the Outside Processing tab. The Search OSP Order page appears.
- 3. Enter information in the fields for which you know the value. The Order type should be Exchange. Click Go. The exchange orders matching your search criteria appear in the OSP Order Search Results table.
- 4. Click the Order Number link. The Edit Exchange Order page appears.

Figure 14–40 Modify Exchange Order - Edit Exchange Order page

ORACLEOracle Complex MRO

HomeEngineeringConfigurationPlanningAdministrationExecutionProfileSign OutHelp

Production PlanningOutside Processing

Overview | Create Instance

Edit OSP Order

Shipments

Edit Exchange Order

Cancel

Submit

Delete Shipment

Order Number10423

Order TypeExchange

Descriptiontest

* Vendor NameAdvanced Network Device

* Vendor LocationSANTA CLARA

* Single InstanceNo

* Buyer NameSmith, Mr. Tom

Order StatusEntered

Order Date03-JUN

OSP Order Lines

Previous1-1 of 1Next

Line Number	Job Number	Item	Line Status	Instance Number	Exchange Instance	Service Item	Quantity	Delete
1	W03319	R-ITEM1-Trackable	Entered	83088	116765	1		

Previous1-1 of 1Next

Cancel

Submit

Delete Shipment

Production Planning | Outside Processing | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

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- 5. Make the necessary changes and click Apply to save the record. Click Cancel to discard any changes and return to the Search OSP order page.
- 6. Select the work order and click Submit to create a related Purchase Order in Oracle purchasing. You can view the PO details by selecting the corresponding icon in the Edit OSP Order page.
- 7. Click Delete Shipment to remove the shipping order associated with the current OSP Work order.
- 8. Click Close to permanently close the current OSP Work Order. This will be successful if:
 - The item requested in exchange has been received.
 - All listed production jobs are closed.
 - The associated Purchase Order is closed.

Converting Service/Exchange OSP to Exchange/Service OSP

You can change an Exchange order to a Service Order and vice versa if the return shipment has not occurred.

Prerequisites

- If the Exchange Order is in the Closed state, conversion will not be possible
- If there is a return shipment line with the received quantity greater than zero, conversion cannot be done

To convert an OSP order:

1. On the Oracle Complex Maintenance, Repair, and Overhaul Home page, select **Execution**. The Job Overview page of the Production Planning module appears.
2. Select the Outside Processing tab. The Search OSP Order page appears.
3. Enter information in the fields for which you know the value. The OSP orders matching your search criteria are displayed.
4. Click the Order Number link to navigate to the Edit OSP Order page.

Figure 14–41 Edit Order - Edit OSP Order page

ORACLEOracle Complex MRO

[Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#) [Help](#)

Overview | Create Instance

Edit OSP Order

Shipments

Production Planning

Outside Processing

Cancel

Submit

Delete Shipment

Order Number10382

Order TypeService

Description

* Vendor NameAdvanced Network Device

* Vendor LocationNEW LOC

* Single InstanceNo

* Buyer NameSmith, Mr. Tom

Order StatusEntered

Order Date11-MAY-

Edit OSP Order

OSP Order Lines

Previous1-1 of 1Next

Line Number	Job Number	Item	Line Status	Instance Number	Service Item	Quantity	Delete
1	WO1106	R-ITEM1-Trackable	Entered	84806			

Previous1-1 of 1Next

Cancel

Submit

Delete Shipment

[Production Planning](#) | [Outside Processing](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#) | [Help](#)

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- 5. Click the Convert button. You will get a notification that all return shipment lines will be deleted. Select Yes to continue. You will get a notification that the order had been converted.

14-68 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Figure 14-42 Convert OSP Order - Edit Exchange Order page

ORACLE

Oracle Complex MRO

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Production Planning

Outside Processing

Overview

Create Instance

Edit OSP Order

Shipments

Confirmation

Order Converted

Order Updated

Edit Exchange Order

Cancel

Submit

Delete Shipment

Order Number

10382

Order Type

Exchange

Description

Vendor Name

Advanced Network Device

Vendor Location

NEW LOC

Single Instance

No

Buyer Name

Smith, Mr. Tom

Order Status

Entered

Order Date

11-MAY-2

OSP Order Lines

Previous

1-1 of 1

Next

Line Number	Job Number	Item	Line Status	Instance Number	Exchange Instance	Service Item	Quantity	Delete
1	WO1106	R-ITEM1-Trackable	Entered	84806				

Previous

1-1 of 1

Next

Cancel

Submit

Delete Shipment

Production Planning

Outside Processing

Home

Engineering

Configuration

Planning

Administration

Execution

Profile

Sign Out

Help

Windows and Navigation Paths

Windows and Navigation Paths

This appendix provides the navigation paths for the user interfaces(UI) in Oracle Complex Maintenance, Repair, and Overhaul(CMRO). Some of the pages can be accessed using buttons and/or links in various UIs. The following table provides only one of the navigational paths that you may use to view these pages.

The various entities in the UIs are represented as follows:

- Brackets surrounding an entity in a path indicates a button selection. For example, [Create] represents the Create button that you must choose.
- Braces surrounding an entity indicates a drop-down menu option. For example, {Close} indicates that you must choose Close from the drop-down menu.
- Tabs, Secondary tabs, Links, and Icons are mentioned within brackets for the related entity. For example, Engineering (tab), Overview (secondary tab), and so on.
- 'Select Record' indicates that you must select a specific record from the search results list before proceeding to the next action.

Note: For all navigation paths where the responsibility is not specified, it is Oracle Complex Maintenance, Repair, and Overhaul by default. For windows that you access using different responsibilities, the specific responsibility is mentioned in the navigation path.

Default Navigation Paths for Standard Application Windows

Table A–1 Windows and Navigation Paths

Window Name	Navigation Path
Search Maintenance Requirements	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab)
Create Maintenance Requirements	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab) > [Create]
Update Maintenance Requirement	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab) > select record > click Title (link)
Update Attached Routes	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab) > select record > click Title (link) > Routes (link)
Update Attached Documents	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab) > select record > click Title (link) > Documents (link)
Route Dependencies	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab) > select record > click Title (link) > Routes (link) > Dependency (icon)
Update Attached Actions	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab) > select record > click Title (link) > Actions (link)
Update Effectivity	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab) > select record > click Title (link) > Effectivities
Update Effectivity Details	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab) > select record > click Title (link) > Effectivities > Effectivity Details (icon)
Update Interval Threshold	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab) > select record > click Title (link) > Effectivities > Interval Threshold (icon)
Maintenance Requirement Relationships	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab) > select record > click Title (link) > Relationships
View Affected Items	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab) > select record > click Title (link) > Affected Items (link)
Search Operation	Engineering (link) > Route Management (tab) > Operations (secondary tab)

Table A–1 Windows and Navigation Paths

Window Name	Navigation Path
Create Operation	Engineering (link) > Route Management (tab) > Operations (secondary tab) > [Create]
Create Route	Engineering (link) > Route Management (tab) > Routes (secondary tab) > [Create]
Search Route	Engineering (link) > Route Management (tab) > Routes (secondary tab)
Update Route	Engineering (link) > Route Management (tab) > Routes (secondary tab) > select record > click Route Number (link)
Edit Operation	Engineering (link) > Route Management (tab) > Operations (secondary tab) > select record > click Operation (link)
Attach Reference Documents (for an Operation)	Engineering (link) > Route Management (tab) > Operations (secondary tab) > select record > click Operation (link) > Reference Documents (link)
Attach Reference Documents (for a route)	Engineering (link) > Route Management (tab) > Routes (secondary tab) > select record > click Route Number (link) > Reference Documents (link)
Define Resource Requirements (for an operation)	Engineering (link) > Route Management (tab) > Operations (secondary tab) > select record > click Operation (link) > Resource Requirements (link)
Define Resource Requirements (for a route)	Engineering (link) > Route Management (tab) > Routes (secondary tab) > select record > click Route Number (link) > Resource Requirements (link)
Update Costing Parameters (for an operation)	Engineering (link) > Route Management (tab) > Operations (secondary tab) > select record > click Operation (link) > Resource Requirements > Costing Parameters (icon)
Update Costing Parameters (for a route)	Engineering (link) > Route Management (tab) > Routes (secondary tab) > select record > click Route Number (link) > Resource Requirements > Costing Parameters (icon)
Define Material Requirements (for an operation)	Engineering (link) > Route Management (tab) > Operations (secondary tab) > select record > click Operation (link) > Material Requirements (link)
Define Material Requirements (for a route)	Engineering (link) > Route Management (tab) > Routes (secondary tab) > select record > click Route Number (link) > Material Requirements (link)

Table A-1 Windows and Navigation Paths

Window Name	Navigation Path
Associate Operations	Engineering (link) > Route Management (tab) > Routes (secondary tab) > select record > click Route Number (link) > Associate Operations (link)
Associate Major Zone To Item Type	Engineering (link) > Route Management (tab) > Major Zones (secondary tab)
Associate Sub Zone To Item Type	Engineering (link) > Route Management (tab) > Sub Zones (secondary tab)
Search Resources	Engineering (link) > Route Management (tab) > Resources (secondary tab)
Create Resources	Engineering (link) > Route Management (tab) > Resources (secondary tab) > [Create]
Search BOM Resource	Engineering (link) > Route Management (tab) > Resources (secondary tab) > [Create] > [Attach]
Update Resources	Engineering (link) > Route Management (tab) > Resources (secondary tab) > select record > click Resource (link)
Search Item Compositions	Engineering (link) > Route Management (tab) > Item Compositions (secondary tab)
Create Composition List	Engineering (link) > Route Management (tab) > Item Compositions (secondary tab) > Create
Update Composition List	Engineering (link) > Route Management (tab) > Item Compositions (secondary tab) > select record > click Item (link)
Define Disposition Associations	Engineering (link) > Route Management (tab) > Routes (secondary tab) > select record > click Route Number (link) > Disposition Associations
Disposition List Details	Engineering (link) > Route Management (tab) > Routes (secondary tab) > select record > click Route Number (link) > Disposition Associations > Disposition Details (icon)
Composition Selection	Engineering (link) > Route Management (tab) > Routes (secondary tab) > select record > click Route Number (link) > Disposition Associations > Disposition Details (icon) > [Select from Composition]
Search Document	Engineering (link) > Document Index (tab)
Create Document	Engineering (link) > Document Index (tab) > [Create]

Table A–1 Windows and Navigation Paths

Window Name	Navigation Path
Associate Document Sub Type To Document Type	Engineering (link) > Document Index (tab) > Associate type (secondary tab)
Edit Document	Engineering (link) > Document Index (tab) > Search (secondary tab) > select record > click Document Num (link)
Edit Subscription Information	Engineering (link) > Document Index (tab) > Search (secondary tab) > select record > click Document Num (link) > Subscription
Supplier Information	Engineering (link) > Document Index (tab) > Search (secondary tab) > select record > click Document Num (link) > Supplier
Distribution Information	Engineering (link) > Document Index (tab) > Search (secondary tab) > select record > click Document Num (link) > Distribution
Create New Revision	Engineering (link) > Document Index (tab) > Search (secondary tab) > select record > [Create New Revision]
Edit Revision	Engineering (link) > Document Index (tab) > Search (secondary tab) > select record > [Edit Revision]
Electronic File Upload	Engineering (link) > Document Index (tab) > Search (secondary tab) > select record > [Upload]
Search Master configuration	Configuration (link) > Master Configuration (tab) > Overview (secondary tab)
Create Master Configuration	Configuration (link) > Master Configuration (tab) > Overview (secondary tab) > Create
Edit Master Configuration	Configuration (link) > Master Configuration (tab) > Overview (secondary tab) > select record > click Name (link)
Edit Rules	Configuration (link) > Master Configuration (tab) > Overview (secondary tab) > select record > click Name (link) > {Rules}
Create Rule	Configuration (link) > Master Configuration (tab) > Overview (secondary tab) > select record > click Name (link) > {Rules} > [Create Rule]
Edit Document Associations	Configuration (link) > Master Configuration (tab) > Overview (secondary tab) > select record > click Name (link) > {Documents}
Search Alternate Items	Configuration (link) > Master Configuration (tab) > Alternate Parts (secondary tab)

Table A-1 Windows and Navigation Paths

Window Name	Navigation Path
Add Alternates	Configuration (link) > Master Configuration (tab) > Alternate Parts (secondary tab) > [Create]
Edit Alternates	Configuration (link) > Master Configuration (tab) > Alternate Parts (secondary tab) > select record > click Group Name (link)
Edit Associated Positions	Configuration (link) > Master Configuration (tab) > Alternate Parts (secondary tab) > select record > {View Positions} > [Go]
Search Unit Configuration	Configuration (link) > Unit Configuration (tab) > Search Unit (secondary tab)
Create Unit Configuration	Configuration (link) > Unit Configuration (tab) > Create From Master (secondary tab) > [Create Unit configuration]
Edit Unit Configuration	Configuration (link) > Unit Configuration (tab) > Search Unit (secondary tab) > select record > Edit (icon)
View Item Instance Utilization	Configuration (link) > Unit Configuration (tab) > Search Unit (secondary tab) > select record > Edit (icon) > [View Utilization]
Unit Configuration Validation Results	Configuration (link) > Unit Configuration (tab) > Search Unit (secondary tab) > select record > [Validate]
Migrate Unit Configuration	Configuration (link) > Unit Configuration (tab) > Search Unit (secondary tab) > select record > [Migrate]
Search Product Classification	Configuration (link) > Product Classification (tab)
Create Product Classification	Configuration (link) > Product Classification (tab) > [Create]
Copy Product Classification	Configuration (link) > Product Classification (tab) > [Copy]
Update Attached Documents (for a product classification)	Configuration (link) > Product Classification (tab) > select record > Tree (icon) > Documents (link)
Edit Product Classification	Configuration (link) > Product Classification (tab) > select record > Tree (icon)
Update Attached Units	Configuration (link) > Product Classification (tab) > select record > Tree (icon) > Units/Items (link)
View Maintenance Requirement (for a product classification)	Configuration (link) > Product Classification (tab) > select record > Tree (icon) > Maintenance Requirements

Table A–1 Windows and Navigation Paths

Window Name	Navigation Path
Search Unit Maintenance Plan	Planning (link) > Unit Maintenance Plan (tab) > Overview (secondary tab)
View Maintenance Requirement Detail & History	Planning (link) > Unit Maintenance Plan (tab) > Overview (secondary tab) > select record > {View Details & History}
Group Maintenance Requirement	Planning (link) > Unit Maintenance Plan (tab) > Overview (secondary tab) > select record > {View Group MR} > [Go]
Initialize Maintenance Requirement	Planning (link) > Unit Maintenance Plan (tab) > Overview (secondary tab) > select record > {Initialize MR} > [Go]
View Maintenance Requirement (for an Unit Maintenance Plan)	Planning (link) > Unit Maintenance Plan (tab) > Overview (secondary tab) > select record > {View MR Details} > [Go]
Unit Maintenance Plan - View Threshold	Planning (link) > Unit Maintenance Plan (tab) > Overview (secondary tab) > select record > {View Threshold} > [Go]
Search Item	Planning (link) > Unit Maintenance Plan (tab) > Utilization Forecast (secondary tab)
Update Item Utilization Forecast	Planning (link) > Unit Maintenance Plan (tab) > Utilization Forecast (secondary tab) > select record > [Utilization Forecast]
Service Request	Oracle Customer Support (responsibility): Service Request > Create Service Requests
Search Visit	Planning (link) > Visit Work Package (tab)
Create Visit	Planning (link) > Visit Work Package (tab) > [Create]
Visit Errors	Planning (link) > Visit Work Package (tab) > select record > {Validate} > [Go]
Visit Cost and Price	Planning (link) > Visit Work Package (tab) > select record > {Cost and Price Information} > [Go]
Search Maintenance Requirements (for a visit)	Planning (link) > Visit Work Package (tab) > select record > {Maintenance Requirements} > [Go]
Search Visit Task	Planning (link) > Visit Work Package (tab) > select record > {Search Tasks} > [Go]
Cost Structure	Planning (link) > Visit Work Package (tab) > select record > Cost structure (icon)
Update Visit	Planning (link) > Visit Work Package (tab) > select record > Visit number (link)

Table A–1 Windows and Navigation Paths

Window Name	Navigation Path
Create Unassociated Task	Planning (link) > Visit Work Package (tab) > select record > Visit number (link) > Visit Tasks (link) > [Create Unassociated Task]
Create Planned Task	Planning (link) > Visit Work Package (tab) > select record > Visit number (link) > Visit Tasks (link) > [Create Planned Task] > select unit maintenance plan > {Associate to Visit} > [Go]
Create Unplanned Task	Planning (link) > Visit Work Package (tab) > select record > {Search Task} > Create Unplanned Task > select maintenance requirement > [Associate to Visit]
Update Task Header	Planning (link) > Visit Work Package (tab) > select record > {Search Tasks} > [Go] > select task > Task Number (link)
Task Hierarchy	Planning (link) > Visit Work Package (tab) > select record > {Search Tasks} > [Go] > select task > Task Number (link) > Hierarchy
Task Cost and Price	Planning (link) > Visit Work Package (tab) > select record > {Search Tasks} > [Go] > select task > Cost/Price (icon)
Maintenance Requirement Cost and Price	Planning (link) > Visit Work Package (tab) > select record > {Cost and Price Information} > [Go] > Maintenance Requirements (link) > select requirement > Cost/Price (icon)
Items without Price	Planning (link) > Visit Work Package (tab) > select record > {Cost and Price Information} > [Go] > Maintenance Requirements (link) > select requirement > Cost/Price (icon) > [Items Without Price]
Search Department Shift	Administration (link) > Department Shift (tab)
Create Department Shift	Administration (link) > Department Shift (tab) > [Create]
Search Visits	Planning (link) > Long Term Planning (tab) > Visits (secondary tab)
Schedule Visit	Planning (link) > Long Term Planning (tab) > Visits (secondary tab) > select record > [Plan Visit]
Scheduled Visits	Planning (link) > Long Term Planning (tab) > Visits (secondary tab) > select record > [Plan Visit] > Scheduled Visits (link)
Visit Details	Planning (link) > Long Term Planning (tab) > Visits (secondary tab) > select record > [Plan Visit] > Scheduled Visits (link) > View (icon)
Demand Plans	Oracle Demand Planning System Administrator (responsibility): Demand Plans

Table A–1 Windows and Navigation Paths

Window Name	Navigation Path
Supply Chain Plan Names	Oracle Advanced Supply Chain Planner (responsibility): Supply Chain Plans > Names
Planning Data Collection	Oracle Advanced Supply Chain Planner (responsibility): Collections > Oracle Systems > Standard Collections
Scheduled Materials	Planning (link) > Long Term Planning (tab) > Visits (secondary tab) > select record > [Plan Visit] > Scheduled Materials (link)
Material Availability	Planning (link) > Long Term Planning (tab) > Visits (secondary tab) > select record > [Plan Visit] > Material Availability
Search Spaces	Administration (link) > Spaces (tab)
Add Space	Administration (link) > Spaces (tab) > [Create]
Edit Space	Administration (link) > Spaces (tab) > Space (link)
Search Availability Restrictions	Administration (link) > Space Unavailability (tab)
Add Availability Restriction	Administration (link) > Space Unavailability (tab) > [Create]
Edit Availability Restriction	Administration (link) > Space Unavailability (tab) > select record > Space (link)
Simulation Plans	Planning (link) > Long Term Planning (tab) > Simulations (secondary tab)
View Simulation Plan	Planning (link) > Long Term Planning (tab) > Simulations (secondary tab) > select record > [View Plan]
Copy to a New Plan	Planning (link) > Long Term Planning (tab) > Simulations (secondary tab) > select record > [View Plan] > select record > [Copy To a New Plan]
Resource Leveling	Planning (link) > Long Term Planning (tab) > Resource Leveling
Job Overview	Execution (link) > Production Planning (tab) > Jobs (secondary tab)
Job Operations	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go]
Update Material Requirements	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go] > Materials (link)
Resource Requirements	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go] > Resources (link)

Table A–1 Windows and Navigation Paths

Window Name	Navigation Path
Resource Assignments	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go] > Assignments (link)
Perform Material Transactions	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go] > Material Transactions
Unit Configuration Parts Change/Item Instance Parts Change	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go] > {Perform Part Removal/Install} > [Go]
Create Service Request (in the Execution module)	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Create Service Request} > [Go]
Submit Quality Results (for a job)	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Record Job QA Results} > [Go]
Scheduler Workbench	Oracle Enterprise Asset Management (responsibility): Work Order Planning > Scheduler Workbench
Work Order Scheduling Hierarchy	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {View Scheduling Hierarchy} > [Go]
Update Service Request (in the Execution module)	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update/View Service Request} > [Go]
Serial Number Change	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go] > {Change Serial Number} > [Go]
Serial Number History	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go] > {Change Serial Number} > [Go] > [View History]
Search Maintenance Requirements (in the Execution module)	Execution (link) > Production Planning (tab) > Maintenance Requirements (secondary tab)
Maintenance Requirement Deferral Details	Execution (link) > Production Planning (tab) > Maintenance Requirements (secondary tab) > select record > [Defer]
Operation (Detail)	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go] > select operation record > [Details]
Required Materials	Execution (link) > Production Planning (tab) > Materials (secondary tab)

Table A–1 Windows and Navigation Paths

Window Name	Navigation Path
Material Requirement (Detail)	Execution (link) > Production Panning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go] > Materials (link) > select requirement > [Details]
View Documents	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {View Documents} > [Go]
View Maintenance Requirement	Execution (link) > Production Planning (tab) > Maintenance Requirements (secondary tab) > select record > Maintenance Requirement (link)
Resource Requirement Detail	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go] > Resources (link) > select requirement > [Details]
Perform Resource Transactions	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go] > Resource Transactions (link)
Collection Plans	Oracle Manufacturing and Distribution Manager (responsibility): Quality > Setup > Collection Plans
Collection Transactions	Oracle Manufacturing and Distribution Manager (responsibility): Quality > Setup > Collection Plans > [Transactions]
Search OSP Order	Execution (link) > Outside Processing (tab)
Create OSP Order	Execution (link) > Outside Processing (tab) > {Create OSP} > select job record > [Create OSP]
Edit OSP Order	Execution (link) > Outside Processing (tab) > select record > Order Number (link)
Edit OSP Line	Execution (link) > Outside Processing (tab) > select record > Order Number (link) > Line Number (link)
Create OSP Line	Execution (link) > Outside Processing (tab) > select record > Order Number (link) > [Create Order Line]
Purchase Order Details	Execution (link) > Outside Processing (tab) > select record > Order Number (link) > PO Details
View Purchase Order Shipments	Execution (link) > Outside Processing (tab) > select record > Order Number (link) > PO Details > select line item > [PO Shipments]

Table A-1 Windows and Navigation Paths

Window Name	Navigation Path
View Purchase Accounting Distributions	Execution (link) > Outside Processing (tab) > select record > Order Number (link) > PO Details > select line item > [PO Shipments] > select Shipment Number > [Accounting Distributions]
View Receipts	Execution (link) > Outside Processing (tab) > select record > Order Number (link) > PO Details > select line item > [Receipts]
Purchase Orders	Oracle Manufacturing and Distribution Manager (responsibility): Purchasing > Purchase Orders > Purchase Orders
Approve Document	Oracle Manufacturing and Distribution Manager (responsibility): Purchasing > Purchase Orders > Purchase Orders > [Approve]
Edit Shipment Header	Execution (link) > Outside Processing (tab) > select record > Order Number (link) > Shipments (link)
Create Shipment Line	Execution (link) > Outside Processing (tab) > select record > Order Number (link) > Shipments (link) > [Create Shipment Line]
Edit Shipment Line	Execution (link) > Outside Processing (tab) > select record > Order Number (link) > Shipments (link) > select record > Line Number (link)
Create Loan Order	Execution (link) > Outside Processing (tab) > {Create OSP} > select job record > [Create Loan]
Create Exchange Order	Execution (link) > Outside Processing (tab) > {Create OSP} > select job record > [Create Exchange]
Edit Exchange Order	Execution (link) > Outside Processing (tab) > select record > order number (link)

Index

A

Alternate Parts
 associated with a position, 5-68
Alternate parts information
 adding, 5-45
 creating revisions, 5-56
 editing, 5-50
 fields, 5-43
 finding, 5-49
Alternate parts/items information
 managing, 5-42
Associate Zone to Product Types
 fields, 3-68

B

BOM Resources
 associating, 3-83
Borrow or loan orders, 14-2, 14-52
 closing, 14-57
 creating, 14-53
 editing, 14-56
 finding, 14-55
 initiating contracts, 14-57
 submitting, 14-56

C

CMRO resources
 creating, 3-76
 editing, 3-81
 finding, 3-74
Complex Maintenance, Repair, and Overhaul

 resources
 creating, 3-76
 editing, 3-81
 finding, 3-74
Component Locations
 in fleet units, 3-67
Composition list
 creating, 3-88
 editing, 3-95
 fields, 3-87
 viewing, 3-101
Costing Parameters
 defining, 3-44
Create Position
 fields, 5-13

D

Department Shift Records
 finding, 11-6
 retrieving, 11-9
Disposition list
 approving, 3-122
 creating, 3-102
 editing, 3-122
 fields, 3-101
Document References
 creating, 4-4
 editing, 4-13
 fields, 4-3
 finding, 4-11
Document Revision records
 creating, 4-27
 editing, 4-31

- fields, 4-26
- Document Types
 - associating sub types, 4-6
- Documents
 - attaching to maintenance requirements, 2-26
 - distribution, 4-22
 - subscription information, 4-15
 - supplier information, 4-19
 - uploading electronic documents, 4-33

E

- Effectivities
 - defining, 2-43
- Effectivity Details
 - in maintenance requirements, 2-47
- Electronic documents
 - uploading, 4-33
- Employee Assignments
 - viewing, 13-77
- Exchange Order
 - converting, 14-67
 - creating, 14-58
 - editing, 14-65

F

- Fields
 - in Maintenance Requirement Records, 2-5
 - in operation records, 3-4
- Fleet Units
 - defining component locations, 3-67

G

- Group Maintenance Requirements
 - viewing in Unit Maintenance Plan, 8-18

I

- Intervals
 - defining, 2-50

J

- Jobs

- completing, 13-33
- creating requests, 13-19
- deferring, 13-34
- job details, updating, 13-60
- maintenance, 13-31
- Material requirement details
 - updating, 13-76
- Material requirements
 - updating, 13-74
- Material transactions
 - entering QA results, 13-93
 - issuing or returning parts, 13-91
- non-route based, creating operations, 13-61
- Operations
 - completing, 13-65
 - QA results, 13-66
- part changes
 - performing, 13-47
- push visits to production, 13-19
- QA results, 13-35
- releasing to production, 13-32
- Service requests
 - against existing jobs, 13-26
 - from material transactions, 13-21
 - from parts change transactions, 13-23
 - updating existing, 13-45
- undating operation details, 13-64
- undating operations, 13-63

L

- Loan or borrow orders, 14-2, 14-52
 - closing, 14-57
 - creating, 14-53
 - editing, 14-56
 - finding, 14-55
 - initiating contracts, 14-57
 - submitting, 14-56
- Long Term Plan
 - creating simulation plans, 10-41
 - deleting simulation plans, 10-43
 - primary simulation plans, 10-48
 - simulation plans, 10-38
 - simulation plans, adding visits, 10-44
 - simulation plans, deleting visits, 10-47

- viewing simulation plans, 10-39
- Long Term Planning
 - assessing work schedules, 10-11
 - fields, 10-3
- Maintenance Spaces, 11-11
 - creating, 11-13
 - deleting, 11-17
 - editing, 11-16
 - setting as unavailable, 11-20
- scheduled visits, 10-9
- space's unavailable period, deleting, 11-24
- space's unavailable period, editing, 11-23
- unavailable maintenance spaces, 11-19
- unscheduled visits, 10-9

M

- Maintenance Requirement Records
 - creating, 2-16
 - documents, attaching, 2-26
 - fields, 2-5
 - finding, 2-21
 - updating, 2-59
- Maintenance Requirement Thresholds
 - viewing, 8-23
- Maintenance Requirements
 - Defining
 - effectivities, 2-43
 - effectivity details, 2-47
 - intervals and thresholds, 2-50
 - relationships, 2-53
 - due dates, calculating, 8-15
 - initializing, 8-19
 - Program Types, 2-70
 - revisions, 2-67
 - viewing affected items, 2-63
 - viewing details, 2-69
- Maintenance requirements
 - details and history viewing, 8-16
- Maintenance Route Records
 - creating, 3-14
 - editing, 3-66
 - fields, 3-12
 - finding, 3-21
- Maintenance Routes

- associating operations, 3-58
- Maintenance Spaces
 - creating, 11-13
 - deleting, 11-17
 - editing, 11-16
 - finding, 11-11
 - setting unavailable, 11-20
 - unavailable period, deleting, 11-24
 - unavailable period, editing, 11-23
 - unavailable periods, 11-19
- Maintenance Visit Records
 - creating, 9-15
 - retrieving, 9-24
- Maintenance Visits
 - associating tasks, 9-29
 - preparing for production planning, 9-20
- Master Configuration Records
 - approving, 5-62
 - closing, 5-70
 - creating, 5-6
 - creating rules, 5-32
 - editing, 5-57
 - fields, 5-4
 - finding, 5-10, 6-4
 - Positions, 5-14
 - reopening, 5-72
 - viewing, 5-63
 - working with, 5-4
- Material Requirements
 - defining, 3-50
- Material Requirements Overview
 - viewing, 13-70
- Material Transactions
 - initiating service requests from, 13-21

N

- Nodes
 - adding, 7-17
 - associating documents, 7-25
 - editing, 7-20
 - removing, 7-22
 - viewing, 7-24

O

Operation Records

- creating, 3-5
- editing, 3-63
- fields, 3-4
- finding, 3-18

OSP Work Orders, 14-2

Outside Processing

- fields, 14-6

Outside Processing Work Orders, 14-15

- closing, 14-29
- creating, 14-16
- editing, 14-24
- finding, 14-21
- submitting, 14-30

Overview

- Product Classification, 7-2

Overview

- Document Index, 4-2
- Fleet Maintenance, 2-2
- Long Term Plan, 10-2
- Master Configuration, 5-2
- Production, 13-3
- Route Management, 3-2
- Unit Configuration, 6-2
- Unit Maintenance Plan, 8-2
- Visit Work Package, 9-2

P

Part Utilization Forecasts

- finding, 8-24
- updating, 8-26

Parts Change Transactions

- initiating service requests from, 13-23

Parts Information

- creating, updating, 6-34

Position Details

- viewing, 5-65

Position Ratios

- associated with a position, 5-66
- editing, 5-38

Positions

- adding existing configurations, 5-18

- associated with alternate parts group, 5-69

- associating item groups, 5-23

- associating sub-configuration, 5-25

- documents, attaching, 5-39

- documents, viewing alternate parts, 5-68

- documents, viewing attached, 5-67

- in a master configuration, 5-14

- working with, 5-13

Product Classification

- attaching parts, 7-28

- checking, 7-33

- copying, 7-12

- creating, 7-9

- editing, 7-14

- fields, 7-4

- finding, 7-6

- launching approvals, 7-35

- maintenance requirements, viewing

- associated, 7-32

Product Classification Utilization Forecast

- finding, 8-29

Product Types

- associating major zones, 3-69

- associating sub zones, 3-71

Production

- changing serial number, 13-51

- charging resources, 13-89

- fields, 13-5

- finding jobs, 13-28

- finding service requests, 13-28

- job creation, 13-19

- job details, updating, 13-60

Jobs

- completing, 13-33

- deferring, 13-34

- maintenance, 13-31

- non-route based, creating operations, 13-61

- QA results, 13-35

- releasing, 13-32

- scheduling using the Scheduler

- Workbench, 13-39

- viewing the scheduling hierarchy, 13-44

Maintenance Requirement

- deferring, 13-54

- signing off, 13-37

- Material requirement details
 - updating, 13-76
- Material requirements
 - updating, 13-74
 - viewing, 13-70
- Material transactions
 - entering QA results, 13-93
 - issuing or returning parts, 13-91
- Operations
 - completing, 13-65
 - QA results, 13-66
- part changes, performing, 13-47
- push to production, 13-19
- Quality Collection Plans, 13-96
- resource assignments, updating, 13-87
- resource requirement details, updating, 13-86
- resource requirements, updating, 13-84
- Service requests, 13-19
 - against existing jobs, 13-26
 - from material transactions, 13-21
 - from parts change transactions, 13-23
 - updating existing, 13-45
- undating operation details, 13-64
- undating operations, 13-63
- viewing associated documents, 13-80
- viewing employee assignments, 13-77
- viewing serial number change history, 13-53
- Production Planning
 - editing Job Operations, 12-18
 - editing material requirements, 12-20
 - editing resource assignments, 12-25
 - editing resource requirements, 12-23
 - finding jobs and visits, 12-15
 - releasing jobs, 12-19
 - viewing job and operation dependencies, 12-17
 - viewing resource assignments, 12-24
 - viewing resource requirements, 12-22
- Program Types
 - associating to sub types in maintenance requirements, 2-70
- Purchase Orders, 14-31
 - reviewing, 14-32
 - synchronizing, 14-37
 - updating and approving, 14-38

Q

Quality Collection Plans, 13-96

R

Reference Documents

- Defining, 3-26

Resource Requirements

- defining, 3-35

Route Management

- fields, 3-4

Rules

- creating, 5-30

- fields, 5-31

S

Shipping and Receiving, 14-43

- accepting supplier services, 14-51

- creating ship orders, 14-44

- receiving parts, 14-50

Simulation Plans

- adding visits, 10-44

- creating, 10-41

- deleting, 10-43

- deleting a visit, 10-47

- managing, 10-38

- setting as primary, 10-48

- viewing, 10-39

Subscription information, 4-15

Supplier information, 4-19

T

Tasks

- associating item serial numbers, 9-48

- associating service requests, 9-48

- non-routine, 13-3

- routine, 13-3

Thresholds

- defining, 2-50

U

Unit Configuration

- creating, 6-7
 - migrating, 6-22
- Unit Configuration Positions
 - assigning alternate parts, 6-33
 - assigning parts, 6-11
- Unit Configuration Records
 - approving, 6-31
 - creating, 6-4
 - editing, 6-27
 - finding, 6-19
 - validating, 6-21
 - viewing alternate parts, 6-32
- Unit Configuration Utilization Forecast
 - finding and updating, 8-31
- Unit Maintenance Requirement Details
 - viewing, 8-21
- Unit Maintenance Plan
 - associating maintenance requirements, 8-12
 - details and history viewing, 8-16
 - fields, 8-3
 - group maintenance requirements, viewing, 8-18
 - initializing maintenance requirements, 8-19
 - maintenance requirements, viewing, 8-21
 - non-routine service request, associating
 - maintenance requirements, 8-36
 - non-routine service request, creating, 8-34
 - non-routine service request, viewing, 8-38
 - part utilization forecasts, 8-24
 - part utilization forecasts, updating, 8-26
 - product classification utilization forecasts, 8-29
 - service request, entering, 8-33
 - thresholds, viewing, 8-23
 - Unit configuration utilization forecasts, 8-31
- Unit Maintenance Plan Records
 - finding, 8-9
- Utilization Forecasts
 - viewing, 7-31

V

- Visit Records
 - updating, 9-37
- Visit Task Records
 - retrieving existing, 9-34
- Visit Tasks

- creating undated, 9-44
 - defining heirarchy, 9-56
 - unassociated with routes, 9-51
 - updating headers, 9-54
- Visit Work Package
 - fields, 9-5
 - push to production, 13-19
- Visits
 - adding to simulation plans, 10-44
 - assigning spaces, 10-21
 - cost information, viewing, 9-66
 - costing, 9-64
 - creating imminent tasks, 9-38
 - defining cost structure, 9-62
 - department shift records, finding, 11-6
 - department shift records, retrieving, 11-9
 - finding scheduled and unscheduled in long term
 - planning, 10-9
 - material availability, checking, 10-35
 - material schedule, checking, 10-32
 - price information, viewing, 9-72
 - pricing, 9-69
 - pushing to production, 9-21
 - scheduled visit details, viewing, 10-20
 - scheduling, 10-14
 - unscheduling, 10-20
 - viewing maintenance requirements, 9-58

W

- Working, 5-1