

# **Oracle® Enterprise Asset Management**

User's Guide

Release 11*i*

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# Preface

## Intended Audience

Welcome to Release 11i of the *Oracle Enterprise Asset Management User's Guide*.

See Related Documents on page xiv for more Oracle Applications product information.

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## Structure

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- 3 eAM Work Management

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## Related Documents

### **Oracle Assets User's Guide**

This guide defines an asset, describes key information Oracle Assets stores for each asset, and explains how to define them. The concepts and tasks related to maintaining and retiring assets are detailed, and information regarding depreciation, depreciation projections, what-if depreciation, and the depreciation transaction archive purge feature is discussed. Asset accounting, tax accounting features, and capital budgeting are described in detail.

### **Oracle Bills of Material User's Guide**

This guide describes how to create various bills of material to maximize efficiency, improve quality, and lower costs for the most sophisticated manufacturing and/or maintenance environments. By detailing integrated product structure and processes, flexible product and process definition, and configuration management, this guide enables you to manage product details within and across multiple sites.

### **Oracle Cost Management User's Guide**

This guide contains information about setting up Oracle Cost Management, as well as other integrated applications. The guide explains how to define, view, and purge item cost information, and the processes common to both standard and average costing. Standard, Average, FIFO, and project manufacturing costing methods are detailed, including how transactions are costed. Flow manufacturing, periodic costing, and period close functions are all discussed in detail.

### **Oracle Enterprise Asset Management Implementation Guide**

This guide discusses the major business flows within Enterprise Asset Management (eAM), how to set up eAM, APIs, and user interfaces.

### **Oracle Human Resources User's Guide**

This user's guide explains the setup procedures you need to perform in order to successfully implement Oracle HRMS in your enterprise.

#### **Oracle Internet Procurement Implementation Guide**

Use this guide for further direction on enabling internal users to independently order items from both internal and external catalogs.

#### **Oracle Inventory User's Guide**

This guide describes how to define items and item information, perform receiving and inventory transactions, maintain cost control, plan items, perform cycle counting and physical inventories, and set up Oracle Inventory.

#### **Oracle Work In Process User's Guide**

This guide describes how Oracle Work in Process provides a complete production management system. Specifically, this guide describes how discrete, repetitive, assemble-to-order, project, flow, and mixed manufacturing environments are supported.

## **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 an Oracle Applications form 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.





# Part 1

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**Welcome to Enterprise Asset Management**



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# Oracle Enterprise Asset Management Overview

This chapter covers the following topics:

- Introduction
- Overview of Oracle Enterprise Asset Management
- Asset Management
- eAM Work Management
- Integration with Other Oracle Application Products

## Introduction

Oracle Enterprise Asset Management (eAM) is part of Oracle's 11i E-Business Suite and addresses the comprehensive and routine asset maintenance requirements of asset intensive organizations. Using eAM, organizations can efficiently maintain both assets, such as vehicles, cranes and HVAC systems, as well as rotatable inventory items, such as motors and engines. To measure performance and optimize maintenance operations, all maintenance costs and work history are tracked at the asset level.

This chapter contains the following topics:

- Overview of Oracle Enterprise Asset Management, page 1-1
- Asset Management, page 1-2
- eAM Work Management, page 1-3
- Integration with Other Oracle Application Products, page 1-4
- Required Products, page 1-4
- Optional Products, page 1-4

## Overview of Oracle Enterprise Asset Management

Oracle Enterprise Asset Management (eAM) is a part of Oracle's E-Business Suite, providing organizations with the tools to create and implement maintenance procedures for both assets and rebuildable inventory items. Maintenance procedures are an integral part of an organization's complete asset lifecycle management strategy, enabling an organization to optimize asset utilization. eAM enables users to optimally plan and schedule maintenance activities with minimal disruption to an organization's operations or production. Importantly, it improves resource

efficiency, enhances maintenance quality, tracks work history, and records all maintenance costs.

Oracle eAM tracks the performance of assets (including rebuildable, inventory items) using meters, quality plans, and condition monitoring systems. By effectively monitoring an asset's operating condition, effective preventive maintenance strategies can be implemented. In addition to creating preventive maintenance schedules, users can create alternative maintenance strategies for seasonal or production capacity changes.

eAM's comprehensive maintenance functionality supports asset lifecycle strategies for asset intensive industries, including Metals/Mining, Manufacturing, Pulp/Paper, Petrochemicals, Facilities, and Education. eAM eliminates the need for spreadsheets and disparate data repositories, by enabling companies to manage reactive, planned, preventive maintenance, and adopt a centralized, proactive strategy for managing asset maintenance across an enterprise.

eAM enables an organization to do the following:

- Create a preventive maintenance strategy
- Maximize resource availability, including both equipment and labor
- Optimize scheduling and resource efficiency
- Integrate with Oracle's E-Business Suite for enterprise-wide solutions

The following topics are included in this section:

- Asset Management, page 1-2
- eAM Work Management, page 1-3

## Asset Management

eAM eliminates the need for point solutions that offer a limited, "flat" view of an asset by expanding the visibility and ownership of an asset throughout an entire organization. Different entities may describe an asset in several ways:

- fixed asset to an accounting department
- leased asset to facilities management
- piece of production equipment to operations
- inventory item to materials management
- maintainable asset to mechanical engineers

eAM incorporates the above views of an asset through a single entity. An asset is an entity for which users can report problems. Assets can be cooling towers, cranes, buses, buildings, conveyors, or anything that needs work. eAM provides the flexibility to address the many types of assets through the definition of the following:

- asset groups and attributes
- asset links to an enterprise
- asset costs and work history
- asset activities and meters

By first establishing Asset Groups, you can define assets and asset characteristics that can be inherited by the assets belonging to that group. Detailed information, such

as nameplate data, engineering specifications, property detail, and other searchable characteristics are defined with asset attribute elements and values. Asset Groups also define a default master bill of materials (BOM) for assets. This BOM can be edited for specific assets. Virtual assets can be designed to create a network of assets or routings. This combines several assets to a single work activity.

Oracle eAM enables you to quickly identify plants and facilities using an Asset Navigator (See: Defining Asset Numbers, page 2-47). You can view details of an asset, such as cost, hierarchical (parent/child) information, and launch transactions. You can also view current or historical configurations, and work details of an asset. As rotatable, inventory items of an asset are removed from and reinstalled into an asset, the asset genealogy and parent/child meter readings are recorded automatically. Attributes, such as cost history, bills of material, and document attachments can be associated with a specific asset.

## **Asset Hierarchies**

You can focus on an asset hierarchy, or a set of parent/child relationships of an asset. You can view all associated asset information such as asset details, bill of material, work orders, maintenance activities, quality plans, maintenance costs, contract services, and work order history. You can view cost information for one asset, or view rolled-up costs of its children assets.

## **Related Topics**

Defining Asset Numbers, page 2-47

Obtaining Asset Number Information, page 18-3

Viewing Asset Number Information, page 18-6

Viewing Capital Asset and Rebuildable Inventory Work Orders, page 18-46

## **eAM Work Management**

Preventive and Predictive Maintenance strategies are supported by eAM. Preventive Maintenance can be based on Day or Runtime intervals, as well as a specific list of dates, for both assets and inventory items. Organizations that practice Predictive Maintenance can monitor and scrutinize maintenance work history and performance trends with quality plans. They can also study asset conditions by monitoring systems. By combining these strategies, an organization can establish a maintenance strategy that ensures minimal downtime. Oracle Enterprise Asset Management enables you to monitor reliability and predict the need for maintenance in the future. You can identify any breach of performance defined by engineering and immediately alert maintenance, monitor conditions of an asset, collect meter readings, forecast the frequency at which preventive maintenance should be performed, and establish Run to Failure schedules and forecasts, based on predicted failures.

Oracle eAM enables operations and maintenance staff to create work requests to report any problems with an asset. To avoid duplicate work orders for the same issue, you can review any outstanding work requests that are currently assigned to an asset.

A supervisor can approve, place on hold, or reject a work request. An approved work request can be linked to a work order. The status of a work request is then updated when it is linked to a work order.

## Related Topics

Obtaining Work Request Information, page 16-2

Creating and Updating Work Requests, page 16-6

Work Orders, page 18-24

## Integration with Other Oracle Application Products

Oracle Enterprise Asset Management is part of the Oracle E-Business suite, and directly integrates with Oracle Manufacturing, Oracle Purchasing, Oracle Property Management, Oracle Quality, Oracle Inventory, Oracle Human Resources, Oracle Financials, Oracle Fixed Assets, and Oracle Projects. This enables you to strategically monitor resource and cost planning throughout the enterprise. Improvement programs can be enforced and reviewed to ensure compliance with industry standards by tracking problems through to resolution.

A well-planned maintenance environment depends on the ability of key personnel to view available inventory items, equipment, and skilled personnel. Because eAM is an enterprise solution, you can view the resource availability for assets that are used by operations and coordinate maintenance work to minimize operation disruption. Most importantly, Oracle eAM is designed for the maintenance user who performs the work. Using Oracle's Maintenance User, trades people and supervisors with minimum training can easily perform their work.

## Required Products

To implement Enterprise Asset Management, you must have the following required products installed:

- Oracle Inventory
- Oracle Bills of Material
- Oracle Human Resources
- Oracle Cost Management
- Oracle Manufacturing Scheduling
- Oracle Quality
- Oracle Work In Process

## Optional Products

To implement Enterprise Asset Management, the following products are not required; however, they are useful in the overall robust eAM solution:

- Oracle Master Scheduling/MRP
- Oracle Property Management
- Oracle Financials
- Oracle Fixed Assets
- Oracle iProcurement
- Oracle Projects

- Oracle Project Manufacturing
- Oracle Purchasing
- Oracle Order Management
- Oracle Time and Labor





# Part 2

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## Enterprise Asset Management Administration

The Enterprise Asset Management Administration role contains people who are generally responsible for entering information, often for other maintenance employees. Information entered may include Work Order resource transactions, Work Order completion details, and Time and Labor hours. This person might have limited maintenance knowledge and is generally responsible for supporting the maintenance department by handling information entry.

This part contains the following chapter:

- Chapter 2, "Setting Up", page 2-1

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## Setting Up

This chapter covers the following topics:

- Before You Begin
- Oracle Enterprise Asset Management Setup Overview
- Organization Setup
- Setting Up Organizations
- Enabling Organizations for Enterprise Asset Management
- Defining eAM Parameters
- General eAM Setup
- Setting Up Areas
- Defining Departments and Resources
- Defining Department Approvers
- Defining Miscellaneous Documents
- Defining Lookups
- Activity Types
- Activity Causes
- Activity Sources
- Asset Activity Priorities
- Cost Category Codes
- Criticality Codes
- Asset Import Scope Codes
- Asset Import Statuses
- Contact Preferences
- Work Request Statuses
- Work Request Types
- Work Order and Work Request Priority Codes
- Work Order Reconciliation Codes
- Work Order Types

- Asset Setup
- Setting Up Category Codes
- Defining Asset Groups
- Defining Activities
- Activity Association Templates
- Setting Up Attributes
- Defining Asset Documents
- Defining Asset Numbers
- Defining Asset Routes
- Setting Up Asset Bills of Material
- Using the Activity Workbench
- Defining Activities
- Navigating the Activity Workbench
- Defining Maintenance Routes
- Setting Up Maintenance Bills of Material
- Associating Asset Numbers with Activities
- Creating Activity Templates
- Rebuildable Item Setup
- Defining Rebuildable Items
- Defining Rebuildable Serial Numbers
- Rebuildable Item/Activity Association
- Defining Rebuildable Bills of Material
- Non-Stock Direct Item Setup
- Preventive Maintenance Setup
- Defining Meter Templates
- Defining Meters
- Associating Meter Templates with Asset Groups
- Associating Meters with Asset Numbers
- Defining Set Names
- Defining a Preventive Maintenance Template
- Entering Preventive Maintenance Schedule Definitions
- eAM Planning and Scheduling
- Defining a Master Demand Schedule Name
- Defining a Material Requirements Plan Name
- Defining Plan Options

- Quality Integration Setup
- Creating Collection Elements
- Creating eAM Quality Collection Plans
- Creating eAM Quality Collection Plans for a Supplier
- Outside Processing Integration Setup
- Setting Up Outside Service Processing
- Setting Up Direct Items
- Cost Management Integration Setup
- Setting Up Cost Categories
- Setting Up Purchase Order Category Associations for Direct Items
- Setting Up eAM Cost Management
- Setting Up Zero Cost Rebuild Item Issue
- Process and Discrete Manufacturing Integration Setup
- Organization Setup
- Associating Assets with Production Equipment
- Project Manufacturing Integration Setup
- Project Definition
- Property Manager Integration Setup
- Setting Up eAM Prerequisites
- Executing the Export Process
- Executing the Asset Number Interface
- Service Integration Setup
- Creating Maintenance Service Request Types
- Enabling Service Requests for Assets and Rebuildables
- Enabling eAM Specific Fields
- Oracle Time and Labor Integration Setup
- Defining Persons as Users
- Creating Eligibility Criteria
- Work Order Billing Setup
- Setting Up Parameters
- Setting up Costs for the Cost Plus Billing Basis
- Setting up Prices for the Price List Billing Basis
- Service Attribute Setup
- Setting Up Billable Material
- Setting Up a Billable Resource

- Setting Up a Billable Activity

## Before You Begin

As you plan your implementation of Oracle Enterprise Asset Management (eAM), Oracle recommends that you consider the implementation issues discussed in this section. By carefully planning your implementation, you can save time and reduce errors.

## Overview of Setting Up

This section contains a checklist that includes each task to complete the implementation of Oracle Enterprise Asset Management. It lists the steps required to implement Oracle Enterprise Asset Management, along with advanced implementation topics for you to consider. The setup checklist is organized into several subsections.

When installing Oracle Enterprise Asset Management, the installation process automatically creates five responsibilities: Oracle Enterprise Asset Management, Maintenance User Workbench, Maintenance Super User, Self-Service Work Requests, and Self Service Time and Expenses. The Oracle Enterprise Asset Management is a super user responsibility. It includes the necessary functions to set up and implement Oracle Enterprise Asset Management.

Before setting up Oracle Enterprise Asset Management, set up the users and assign their appropriate responsibilities for the implementation.

## Related Product Setup Steps

Oracle Enterprise Asset Management setup includes various setup steps within Oracle Applications products. These steps are discussed in detail in the Overview of Setting Up sections of the respective Oracle Product users guides.

## Setting Up Underlying Oracle Applications Technology

The Implementation Wizard guides you through the entire Oracle Applications setup, including system administration. However, if you do not use the Implementation Wizard, you need to complete several other setup steps, including:

- Performing system-wide setup tasks, such as configuring concurrent managers and printers
- Managing data security, which includes setting up responsibilities to enable access to a specific set of business data and complete a specific set of transactions, and assigning individual users to one or more of these responsibilities
- Setting up Oracle Workflow

**Note:** If you plan to use Work Requests for reporting maintenance problems in Oracle Enterprise Asset Management, and those Work Requests need approval by a maintenance department user, then you should set up Oracle Workflow.

## Oracle Enterprise Asset Management Setup Overview

Oracle Enterprise Asset Management (eAM) may have unique setups for each organization, including parameters, user defined lookups, and attributes. During the implementation process, the implementation team should discuss system and user

options for Enterprise Asset Management. Users implementing Enterprise Asset Management should also have determined the structure of their organizations and user access via the Oracle System Administrator responsibility. This chapter covers the following topics:

- Organization Setup, page 2-5
- General Enterprise Asset Management Setup, page 2-11
- Defining Lookups, page 2-17
- Asset Setup, page 2-33
- Using the Activity Workbench, page 2-56
- Rebuildable Item Setup, page 2-77
- Non-Stock Direct Item Setup, page 2-83
- Preventive Maintenance Setup, page 4-1
- eAM Planning and Scheduling, page 2-104
- Quality Integration Setup, page 2-110
- Outside Processing Integration Setup, page 2-119
- Cost Management Integration Setup, page 2-127
- Process and Discrete Manufacturing Integration Setup, page 2-135
- Project Manufacturing Integration Setup, page 2-138
- Property Manager Integration Setup, page 2-142
- Service Integration Setup, page 2-145
- Oracle Time and Labor Integration Setup, page 2-149
- Work Order Billing Setup, page 2-153

## Organization Setup

Organization setup is required before you can set up any additional Enterprise Asset Management information. Tasks include:

- Setting Up Organizations, page 2-5
- Enabling Organizations for Enterprise Asset Management, page 2-6
- Defining eAM Parameters, page 2-8

## Setting Up Organizations

A valid organization is a requirement for Enterprise Asset Management setup. Decisions are made during implementation as to which organization(s) are enabled for Enterprise Asset Management. If the decided upon organization(s) already exists, you can skip this section and proceed to Enabling Organizations for Enterprise Asset Management, page 2-6.

### To set up Organizations:

1. Navigate to the Organization window.

## Organization

The screenshot shows the 'Organization' form with the following data:

Field	Value
Name	EAM
Type	
Dates From	10-JUN-2003
Dates To	
Location	FPJ IDC
Internal or External	Internal
Location Address	fpj idc.....United States....
Internal Address	

**Organization Classifications**

Name	Enabled
HR Organization	<input checked="" type="checkbox"/>
Inventory Organization	<input checked="" type="checkbox"/>
Project Manufacturing Organization	<input checked="" type="checkbox"/>

Others

2. Enter an organization Name, for example Seattle Maintenance.
3. Select an organization Type. For information on Type, Dates region fields, Location, Internal or External, Location Address, and Internal Address fields, See: Creating an Organization, *Oracle Human Resources User's Guide*.
4. Save your work. A valid Location must be set up before you can save (See: Creating an Organization, *Oracle Human Resources User's Guide*).
5. In the Organization Classifications region, establish this organization as an Inventory Organization. Select Inventory Organization from the Name list of values.

**Note:** An eAM organization must be classified as an Inventory Organization. You can classify an eAM as other product organizations, as well.

6. Save your work.

## Related Topics

Creating an Organization, *Oracle Human Resources User's Guide*

## Enabling Organizations for Enterprise Asset Management

Before you begin implementing Enterprise Asset Management (eAM), decide which organizations are eAM enabled. A valid organization must exist before you can enable the organization for Enterprise Asset Management (See: Setting Up Organizations, page 2-5).

### To define an Enterprise Asset Management enabled organization:

You can create a new Enterprise Asset Management enabled organization, or convert an existing organization to an Enterprise Asset Management enabled organization. Oracle



recommends that you keep Enterprise Asset Management organizations separate from production organizations. Enterprise Asset Management parameters are on the Inventory Parameters tab, within the Organization Parameters window.

1. Navigate to the Organization Parameters window.

### Organization Parameters

The screenshot shows the 'Organization Parameters (EAM)' window. The 'Inventory Parameters' tab is selected. The fields are as follows:

- Organization Code: EAM
- Item Master Organization: Vision Operations
- Calendar: Vision01
- Process Enabled: ☐
- Process Organization:
- Demand Class:
- Move Order Timeout Period: Days
- Move Order Timeout Action: Approve automatically
- Locator Control: Determined at Subinventory le...
- Allow Negative Balances: ☒
- WMS Enabled: ☐
- Quality Skipping Inspection Control: ☐
- EAM Enabled: ☒
- EAM Organization: EAM
- Capacity section:
  - Load Weight:
  - Volume:
  - UOM:
  - UOM:

2. Enter a valid organization code. For information on how to create an organization, See: Setting Up Organizations, page 2-5.
3. Select the EAM Enabled check box to enable Enterprise Asset Management for this organization. You cannot clear this check box after Enterprise Asset Management items or Enterprise Asset Management parameters are defined in the current organization.
4. If Enterprise Asset Management is enabled for the current organization, the EAM Organization value defaults and is disabled; the current organization code defaults.

For organizations that are not Enterprise Asset Management enabled, you can populate the EAM Organization field with an Enterprise Asset Management enabled organization code. The designated eAM organization maintains equipment items for the designated production organization. For example, if the current organization is a production organization, this is how you would identify a maintenance organization

that is associated with the production organization (See: Overview of the Process and Discrete Manufacturing Integration, page 10-1). You can update this field, if asset equipment association does not exist in this organization.

5. Save your work.

## Related Topics

Organization Parameters Window, *Oracle Inventory User's Guide*

## Defining eAM Parameters

After you have established an Enterprise Asset Management enabled organization, set up specific Enterprise Asset Management parameters that determine organization level defaults for individual transactions. Set up information, such as Asset Number defaults, Cost defaults, Work Request information, and Work Order defaults.

### **To define Enterprise Asset Management parameters:**

1. Navigate to the Enterprise Asset Management Parameters window.

## Enterprise Asset Management Parameters

**Enterprise Asset Management Parameters (EAM)**

**Asset Number Defaults**

☒ Asset Number Auto Generation

**Cost Defaults**

Cost Element **Material** Cost Category **Maintenance**

**Preventive Maintenance**

☒ Implement From Horizon Start Date

**Work Request**

☒ Auto Approve ☒ Extended Log

☒ Default Asset from Employee Location ☒ Asset Number Mandatory

**Work Order Defaults**

WIP Accounting Class **EAMWAC** **EAM WIP Accounting Class**

Work Order Prefix **WO**

Default Department **Def\_dep**

☒ Enable Material Issue Requests ☐ Invoice Billable Items Only

☐ Value Rebuildables At Zero Cost ☐ Auto Firm on Release

**Account Defaults**

Maintenance Offset **01-580-7740-0000-000**

2. Optionally indicate whether this organization has system generated Asset Numbers within individual Asset Groups. See: Defining Asset Groups, page 2-36. You can specify the starting serial number within the Organization Parameters window and/or the Master Item window, when defining Asset Groups. If the starting serial number is defined for the Asset Group, this definition overwrites the starting serial number within the Organization Parameters.
3. The Cost Defaults region represents default cost information for future Work Orders, without defined cost elements within the Work Order.  
  
Select an Enterprise Asset Management Cost Element to indicate how to capture cost overheads and any miscellaneous resource costs. Valid values are Equipment, Labor, and Material. See: Overview of eAM Cost Management, page 6-1.
4. Select a Cost Category to use as the default for departments that do not have a cost category defined. Department costs are then posted to the appropriate cost elements. Valid values are Maintenance, Operations, Contract, and any other values that you might have added within the extensible lookup table. See: Overview of eAM Cost Management, page 6-1.

5. In the Preventive Maintenance region, optionally select the Implement From Horizon Start Date check box to bypass past due Work Order suggestions when executing the Preventive Maintenance process. If this check box is selected, suggested Work orders, from the Horizon Start Date forward, are executed.
6. Indicate whether Work Requests are automatically approved upon creation, or if every user, with the responsibility assigned to the asset's current owning department, receives a notification via Workflow (See: *Oracle Applications 11i Workflow* and *Defining Department Approvers*, page 2-16). This notification appears within self service, within the responsibility you use to log in.

If the Auto Approve check box is selected, Work Requests are created with an Awaiting Work Order status. If the check box is not selected, Work Requests are created with an Open status.

**Note:** A Work Request status must be Awaiting Work Order before you can associate it with a Work Order. The Awaiting Work Order status indicates that the Work Request is approved.

7. Optionally select the Default Asset from Employee Location check box to indicate the default asset information when creating a Work Request. If this check box is selected, the Asset Number information defaults as the Location number exported from Property Manager. Oracle Property Manager is a separate product.
8. If you choose the Extended Log check box, the system keeps an audit trail of records when defining or updating Work Requests.
9. Optionally select the Asset Number Mandatory check box to indicate that the Asset Number field is mandatory when creating a Work Request.
10. Select the WIP Accounting Class default to ensure that Work Orders generated within Enterprise Asset Management have an established account code structure assigned, to accept charges incurred by that Work Order. The WIP accounting class codes available are of type, Maintenance. If a Maintenance type WIP accounting class does not exist, you can define a new one (See: *Defining WIP Accounting Classes*, *Oracle Work in Process User's Guide*).

**Note:** Cost Management handles maintenance Work Orders as non-standard expense jobs.

11. Optionally enter a Work Order Prefix. A prefix enables your organization to identify routine Work Orders.
12. Optionally select a Default Department. Oracle recommends that you select a default department. This department defaults to maintenance Work Orders as they are entered. If a department does not exist on a Work Order, you cannot release it.
13. Indicate whether Material Issue Requests are enabled. If this check box is selected, the Enable Material Issue Requests check box on eAM Work Orders defaults as selected.
14. Within the Work Order Defaults region, select the Value Rebuildables at Zero Cost to indicate that rebuildable components charge at zero cost (See: *Setting Up Zero Cost Rebuild Item Issue*, page 2-134). If this check box is selected, rebuildable items issued out of the subinventory expense account are issued at zero cost.
15. Indicate whether only billable items are invoiceable.

If the Invoice Billable Items Only check box is selected, only billable items can invoice; however, the item needs to be invoiceable (Invoiceable Item and Invoice Enabled check boxes selected within the Master Item window. See: Invoicing Attribute Group, *Oracle Inventory User's Guide*) and the Billing Type check box needs to be selected (See: Work Order Billing Setup, page 2-153).

If the Invoice Billable Items Only check box is not selected, any item can be invoiced if it is invoiceable within the Master Item window (Invoiceable Item and Invoice Enabled check boxes selected within the Master Item window. See: Invoicing Attribute Group, *Oracle Inventory User's Guide*).

16. If you select the Auto Firm on Release check box, the dates on the Work Order cannot automatically reschedule.
17. Within the Account Defaults region, select a Maintenance Offset account. You can create or break a Parent/Child (hierarchy) relationship that exists between an Asset Number and a Rebuildable Serial Number, manually using the Configuration History page. This account records what is sent to Inventory when a Rebuildable is removed from an Asset, and then transferred into Inventory.

For example, if the relationship is broken, the Asset or Rebuildable is sent to either Scrap or Inventory. If the Rebuildable is sent to Inventory, the accounting is as follows:

Debit Inventory

Credit Maintenance Offset

18. Save your work.

## General eAM Setup

General Enterprise Asset Management Setup tasks include the following:

- Setting Up Areas, page 2-11
- Defining Departments and Resources, page 2-12
- Defining Department Approvers, page 2-16
- Defining Miscellaneous Documents, page 2-17

## Setting Up Areas

Use Areas to logically sort assets by the zones in which they reside. Areas divide the maintenance plant or facility into zones, which help to track and account for assets. Areas are later associated with assets.

### To set up Areas:

1. Navigate to the Area window.

## Area

The screenshot shows a window titled 'Area (EAM)' with a table of areas. The table has three main columns: 'Area', 'Description', and 'Effective Dates' (which is further divided into 'From' and 'To'). The 'Area' column contains alphanumeric codes, the 'Description' column contains text descriptions, and the 'Effective Dates' column shows dates. The 'To' column is currently empty for all entries.

Area	Description	Effective Dates
		From To
abcdefghijklmnopqrstuvwxyz	21 characters	25-JUN-2004
Blue	Testing Area	11-JUN-2003
025	Milling	08-DEC-2003
abcdefghijklmnopqrstuvwxyz	This is a long description for checking th	30-JAN-2004
BR-Area	Asset Area	13-MAY-2004
10A	Shipping	11-MAR-2004
GEN	General Site Area	11-MAR-2004
20A	Clarification	11-MAR-2004
30A	Powerhouse	11-MAR-2004
40A	Mill	11-MAR-2004

2. Using the Add icon on the tool bar, add an Area.
3. Enter a Description for this location.
4. The Effective From Date defaults as the system date, but you can optionally update it. Optionally select an Effective To Date to indicate an expiration of the Area.
5. Save your work.

## Defining Departments and Resources

A department represents a crew within your organization. A crew may include people, machines, or suppliers. Departments are also used to collect costs, apply overhead, and compare load to capacity. Assign a department to each operation of a routing and assign resources that are available for that department. The department assigned to each operation of a routing also becomes the assigned department of the corresponding operation within the Work Order, assuming the Work Order is using the routing.

Resources are defined before departments. For information on defining resources, See: *Defining a Resource, Oracle Bills of Material User's Guide*. When you define a department, you specify available resources. A resource represents a craft. You can enter multiple resources for each department. For each resource, you can specify the shifts that the resource is available. For each resource shift, you can specify capacity modifications that change the available hours per day, units per day, or workdays.

### To define departments (crews) and resources (crafts):

1. Navigate to the Departments window.

## Departments

Departments (EAM)

Department	CA-Maint
Description	Maintenance Dept
Cost Category	Maintenance
Class	
Location	San Diego, CA 060000073
Project Expenditure Org	
Inactive On	

[ ]

Rates Resurces

2. Enter the Department name, unique to the Organization.
3. Optionally select a department Class (See: Creating Department Classes, *Oracle Bills of Material User's Guide*).
4. Select a Location. Enter a location for a department if it is the receiving department following outside processing (See: Overview of eAM Contractor Services, page 8-1 and Outside Processing, *Oracle Work in Process User's Guide*).
5. Enter a Project Expenditure Organization.
6. Optionally enter an Inactive On date on which you can no longer assign this department to routing operations.

For instructions on all remaining fields, See: Defining a Department, *Oracle Bills of Material User's Guide (Bills of Material, Routings, Departments)*.

7. Choose Resources to add resources or crafts to the current department.

## Resources

**Owned**

Main Planning

Resource	Description	Available 24 Hours	Share	UOM	Units	Check CTP	Group	Schedule by Instance
C-Resource	Resource for Calibration	<input checked="" type="checkbox"/>	<input type="checkbox"/>	HR	2	<input type="checkbox"/>		<input type="checkbox"/>
Common		<input checked="" type="checkbox"/>	<input type="checkbox"/>	HR	1	<input type="checkbox"/>		<input type="checkbox"/>
Inspector	INSPECTOR	<input checked="" type="checkbox"/>	<input type="checkbox"/>	HR	1	<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"/>

Instances Tolerance Fences Shifts

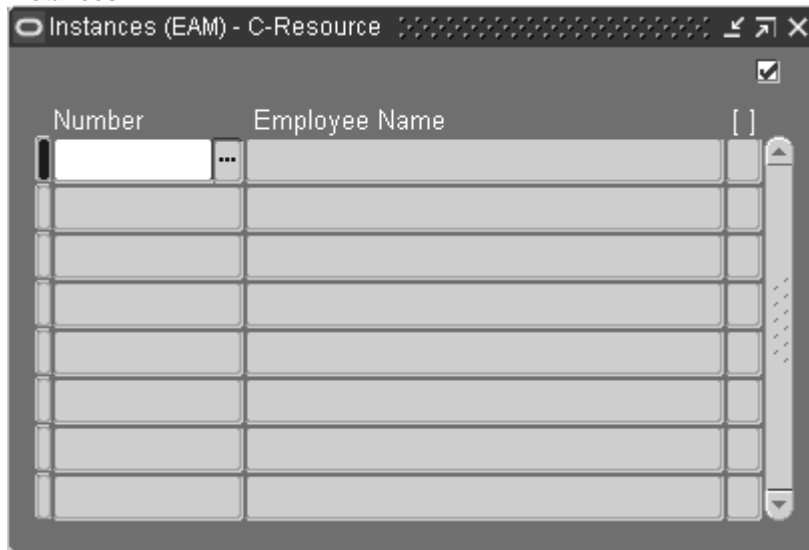
**Borrowed**

Resource	Description	Owning Department	UOM	Units	Check CTP	Group
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	

8. Enter the Resource to assign to the current department.
9. Optionally, for owned resources, indicate whether the resource is available 24 hours per day. You cannot assign shifts to a resource that is available 24 hours per day.
10. For owned resources, indicate whether this department can share the resource and capacity with other departments.
11. Enter the number of capacity Units (resource units) available for this department, for example, the number of machines for a machine resource.  
  
Each resource can assign to any number of departments; multiple resources can assign to each department.
12. Optionally select the Check CTP check box to indicate that this resource is used in a Capable to Promise (CTP) check (See: *Capable to Promise, Oracle Master Scheduling/MRP and Supply Chain Planning User's Guide*).
13. Optionally enter a resource Group for the resource in this department.
14. Optionally select the Schedule by Instance check box to indicate whether the department resource should be scheduled at the instance level (specific employee name or piece of equipment).
15. For borrowed resources, enter the Owning Department.
16. Select the Planning tab. Optionally enter an Exception Set. The exception sets that you assign help to identify capacity problems (See: *Planning Exception Sets, Oracle Capacity User's Guide*).
17. Choose Instances to add employees or equipment to the current resource. An instance is a specific employee name or piece of equipment. See: *People and Assignments, Implementing Oracle HRMS*.



### Instances

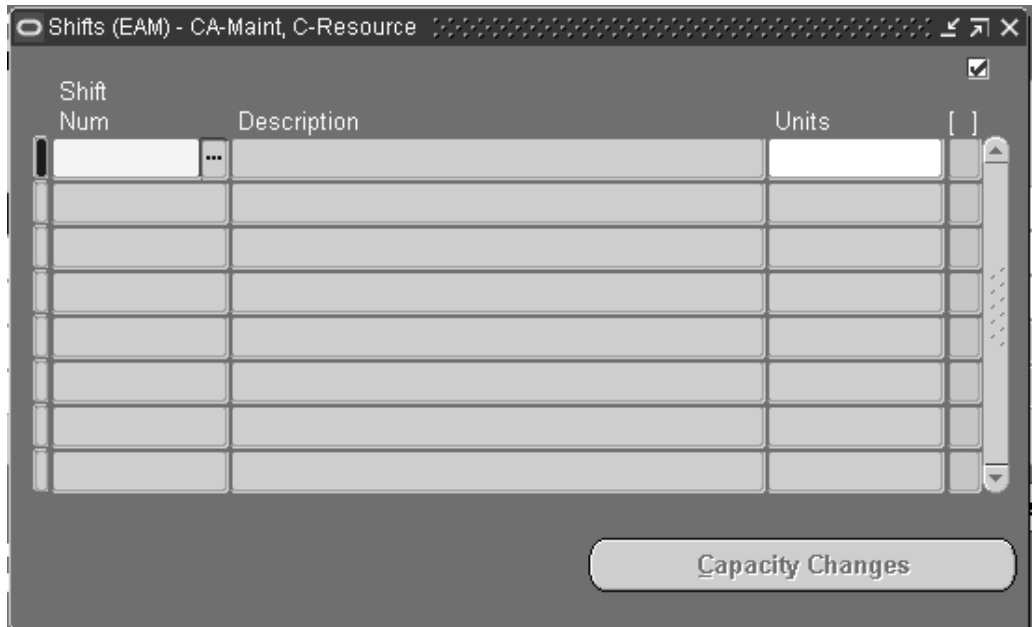


The screenshot shows a software window titled "Instances (EAM) - C-Resource". It contains a table with two columns: "Number" and "Employee Name". The "Number" column has a dropdown arrow on its right side. The table has eight rows, all of which are currently empty. A vertical scrollbar is located on the right side of the table.

Number	Employee Name

18. Choose Shifts for owned resources that are not available 24 hours per day. This enables you to assign and update shift information for the resource and define capacity changes for a shift.

### Shifts



The screenshot shows a software window titled "Shifts (EAM) - CA-Maint, C-Resource". It contains a table with three columns: "Shift Num", "Description", and "Units". The "Shift Num" column has a dropdown arrow on its right side. The table has eight rows, all of which are currently empty. A vertical scrollbar is located on the right side of the table. At the bottom right of the window, there is a button labeled "Capacity Changes".

Shift Num	Description	Units

Capacity Changes

1. Select a Shift Number.  
The shifts available are those assigned to the workday calendar and assigned to the current organization.
2. Choose Capacity Changes to define capacity changes for a shift.

For more information, See: Assigning Resources to a Department, *Oracle Bills of Material User's Guide (Bills of Material, Routings, Departments)*.

## Defining Department Approvers

With a responsibility assigned to the current asset's owing department, you can set up department approvers so that Work Request notifications are sent to each approver, via Oracle Workflow (See: Defining Departments and Resources, page 2-12 and Defining Asset Numbers, page 2-47, and *Oracle Applications 11i Workflow*). Approvers can view these notifications on the Enterprise Asset Management Self Service Maintenance Home Page (See: Home, page 18-1). Everyone who receives the notification can access the Work Request to change its status, or add additional information to the Work Request log. After one user approves the Work Request, the notification is removed from the users' notification lists, and the Work Request status transitions from Open to Awaiting Work Order.

A Work Request can be rejected. If an approver rejects a Work Request, the notification is removed from that approver's notification list. You can re-assign a notification to another user for approval or additional information; for example, the originator might need to provide additional information on the Work Request.

### To define Department Approvers:

1. Navigate to the Department Approvers window.
2. Select a Responsibility Name. A department is assigned to one responsibility.

#### Department Approvers

Department	Description	Primary Approver
Dep11		
categtst	dept for 3 xn categ test	
LS Dep 2	Operations Dept	
LS Dep 1	Maint Dept	LS00
TST-DEPT	Test Department	MFG
cap-dep3	caps department for testing	TEST

3. In the Departments region, select a Department. You can select an unlimited number of departments.
4. Optionally select a Primary Approver for the department from the Name list of values. The list of values contains all users within the current responsibility. If the Primary Approver is not specified, the notification is sent to all users with the particular responsibility.

5. Save your work.

## Related Topics

Work Requests, page 16-1

Home, page 18-1

## Defining Miscellaneous Documents

You can create text and files, such as spreadsheets, graphics, and OLE objects. You can attach these documents to a maintenance Work Order, asset, or operation.

### To define miscellaneous documents:

1. Navigate to the Miscellaneous Documents window.

**Miscellaneous Documents**

Category: **Miscellaneous** Description:

**Source**

Data Type: **File**

File:

**Usage**

☐ Standard ☐ Template ☒ One-Time

**Security**

Type: **Organization** Owner: **EAM** ☐ Share

**Effective Dates**

From:  To:

Magnification: **100%** ☒

2. Select a Data Type. Valid values are File, Short Text, and Web Page.
3. If the Data Type is File, attach the appropriate file. If the Data Type is Web Page, enter the relevant URL. If the Data Type is Short Text, insert the text in the Text field.

For information on all fields, See: Working With Attachments, *Oracle Applications User's Guide*.

## Defining Lookups

Lookup codes must be decided upon and defined during the implementation process. Lookup codes fall within three categories: extensible, user defined, or system defined. If a lookup code is extensible, the existing lookup codes cannot be modified, but

you can add new codes to the table. If lookup codes are user defined, all codes may be modified. If lookup codes are system defined, the existing codes cannot be modified, and new codes cannot be added to the table.

You need to define Asset Lookups, Work Request Lookups, and Work Order Lookups.

This section includes the following topics:

- Activity Types, page 2-18
- Activity Causes, page 2-19
- Activity Sources, page 2-20
- Asset Activity Priorities, page 2-21
- Cost Category Codes, page 2-22
- Criticality Codes, page 2-23
- Asset Import Scope Codes, page 2-24
- Asset Import Statuses, page 2-25
- Contact Preferences, page 2-26
- Work Request Statuses, page 2-27
- Work Request Types, page 2-28
- Work Order and Work Request Priority Codes, page 2-29
- Work Order Reconciliation Codes, page 2-30
- Work Order Types, page 2-31

## Activity Types

Activity Types are used to describe the type of maintenance work that is performed on an asset (See: *Defining Activities*, page 2-37). For example, Inspections, Lubrications, Overhauls, Calibration, and Repetitive work. Activity Types are extensible (See: *Defining Lookups*, page 2-17).

### To define activity types:

1. Navigate to the Oracle Manufacturing Lookups window.

## Oracle Manufacturing Lookups

Oracle Manufacturing Lookups

Type:

Meaning:

Application:

Description:

Access Level:

☐ User

☐ Extensible

☐ System

Code	Meaning	Description	Tag	Effective Dates	Enabled
				From To	
1	Maintenance	Maintenance		26-JUN-2000	<input checked="" type="checkbox"/>
2	Replacement	Replacement		26-JUN-2000	<input checked="" type="checkbox"/>
3	Inspection	Inspection		25-JUN-2001	<input checked="" type="checkbox"/>
4	Lubrication	Lubrication		25-JUN-2001	<input checked="" type="checkbox"/>
5	Repetitive	Repetitive		25-JUN-2001	<input checked="" type="checkbox"/>
6	Rebuild	Rebuild Spare		25-JUN-2001	<input checked="" type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

2. Select the flashlight Find icon.
3. Select MTL\_EAM\_ACTIVITY\_TYPE from the Type list of values.
4. Enter a numeric Code. Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

**Warning:** Do not use alpha codes. Entering alpha codes causes database errors in the application.

5. Enter the Meaning of the code, for example, Lubrication.
6. Enter a Description for the code.
7. Optionally enter a Tag to categorize lookup values. This field is for information purposes.
8. The Effective From Date defaults as the system date, but you can update this. Optionally enter a Effective To Date to indicate an expiration of the code.
9. Select the Enabled check box to enable this code for Enterprise Asset Management.
10. Save your work.

## Activity Causes

Activity Cause codes are reasons for an asset failure. For example, Preventive, Normal Wear, Rework, and Breakdown. This information enables you to understand the dynamics that affect an asset's ability to perform. They establish critical data that is used for reporting and analysis of asset failure causes and the frequency of such conditions. Asset Cause Codes are referenced when setting up an Activity (See: Defining Activities, page 2-37). Activity Cause codes are extensible (See: Defining Lookups, page 2-17).

### To define activity cause codes:

1. Navigate to the Oracle Manufacturing Lookups window.

#### Activity Cause Codes

The screenshot shows the 'Oracle Manufacturing Lookups' window. The form fields are as follows:

Field	Value
Type	MTL_EAM_ACTIVITY_CAUSE
Meaning	Activity Cause
Application	Oracle Inventory
Description	Asset Activity Cause

The 'Access Level' section has three radio buttons: ☒ User, ☐ Extensible, and ☐ System.

The table below lists the activity cause codes:

Code	Meaning	Description	Tag	From	To	Enabled
1	Breakdown	Breakdown		26-JUN-2000		<input checked="" type="checkbox"/>
2	Preventive	Preventive		26-JUN-2000		<input checked="" type="checkbox"/>
3	Modification	Modification		15-JUN-2001		<input checked="" type="checkbox"/>
4	Non-Equipment Work	Non-Equipment Work		15-JUN-2001		<input checked="" type="checkbox"/>
5	Normal Wear	Normal Wear		25-JUN-2001		<input checked="" type="checkbox"/>
6	Vandalism	Vandalism		25-JUN-2001		<input checked="" type="checkbox"/>
7	Rework	Rework		25-JUN-2001		<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

2. Select MTL\_EAM\_ACTIVITY\_CAUSE from the Type list of values.
3. Enter a numeric Code. Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

**Warning:** Do not use alpha codes. Entering alpha codes causes database errors in the application.

4. Enter the Meaning of the code, for example, Breakdown.
5. Enter a Description for the code.
6. Optionally enter a Tag to categorize lookup values. This field is for information purposes.
7. The Effective From Date defaults as the system date, but you can update this. Optionally enter a Effective To Date to indicate an expiration of the code.
8. Select the Enabled check box to enable this code for Enterprise Asset Management.
9. Save your work.

## Activity Sources

Activity Source codes are reasons activities are executed. For example, Warranty Compliance, OSHA Compliance, or Military Specification Requirements. Activity Source Codes are referenced when setting up an Activity (See: Defining Activities, page 2-37). Activity Source codes are extensible (See: Defining Lookups, page 2-17).

## To define activity source codes:

1. Navigate to the Oracle Manufacturing Lookups window.

### Activity Source Codes

The screenshot shows the 'Oracle Manufacturing Lookups' window. At the top, there are fields for 'Type' (MTL\_EAM\_ACTIVITY\_SOURCE), 'Meaning' (Activity Source), 'Application' (Oracle Inventory), and 'Description' (Asset Activity Source). To the right, there is an 'Access Level' section with radio buttons for 'User' (selected), 'Extensible', and 'System'. Below these fields is a table with columns: Code, Meaning, Description, Tag, Effective Dates (From, To), and Enabled. The table contains seven rows of data, each with a numeric code and corresponding meaning and description. The 'Enabled' column has checkboxes, all of which are checked.

Code	Meaning	Description	Tag	From	To	Enabled
1	One	One		22-MAR-2004		<input checked="" type="checkbox"/>
2	Two	Two		22-MAR-2004		<input checked="" type="checkbox"/>
3	REWORK	Rework		31-MAR-2004		<input checked="" type="checkbox"/>
4	STANDARD ACTIVIT	Standard Activity		31-MAR-2004		<input checked="" type="checkbox"/>
5	FAILURE	Failure		31-MAR-2004		<input checked="" type="checkbox"/>
6	CAPITAL TASK	Capital task		31-MAR-2004		<input checked="" type="checkbox"/>
7	NORMAL	Normal Wear		31-MAR-2004		<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

2. Select MTL\_EAM\_ACTIVITY\_SOURCE from the Type list of values.
3. Enter a numeric Code. Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

**Warning:** Do not use alpha codes. Entering of alpha codes causes database errors in the application.

4. Enter the Meaning of the code, for example, Breakdown.
5. Enter a Description for the code.
6. Optionally enter a Tag to categorize lookup values. This field is for information purposes.
7. The Effective From Date defaults as the system date, but you can update this. Optionally enter a Effective To Date to indicate an expiration of the code.
8. Select the Enabled check box to enable this code for Enterprise Asset Management.
9. Save your work.

## Asset Activity Priorities

Activity Priority codes indicate Asset Activity priority levels, for example, Low, Medium, and High. Activity Priorities are extensible (See: Defining Lookups, page 2-17).

### To define activity priorities:

1. Navigate to the Oracle Manufacturing Lookups window.

#### Activity Priorities

Code	Meaning	Description	Tag	From	To	Enabled
1	High	High Priority		09-OCT-2002		<input checked="" type="checkbox"/>
2	Medium	Medium Priority		09-OCT-2002		<input checked="" type="checkbox"/>
3	Low	Low Priority		09-OCT-2002		<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

2. Select WIP\_EAM\_ACTIVITY\_PRIORITY from the Type list of values.
3. Enter a numeric Code. Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

**Warning:** Do not use alpha codes. Entering of alpha codes causes database errors in the application.

4. Enter the Meaning of the code, for example, High.
5. Enter a Description.
6. Optionally enter a Tag to categorize lookup values. This field is for information purposes.
7. The Effective From Date defaults as the system date, but you can update this. Optionally enter a Effective To Date to indicate an expiration of the code.
8. Select the Enabled check box to enable this code for Enterprise Asset Management.
9. Save your work.

## Cost Category Codes

Cost Category codes are used as the default for departments that do not have a cost category defined. Department costs are then posted to the appropriate cost elements. Valid values are Maintenance, Operations, Contract, and any other values that you might add within this extensible lookup table. See: Overview of eAM Cost Management, page 6-1.



## To define cost category codes:

1. Navigate to the Oracle Manufacturing Lookups window.

### Cost Category Codes

Code	Meaning	Description	Tag	From	To	Enabled
1	Maintenance	Maintenance				<input checked="" type="checkbox"/>
2	Operations	Operations				<input checked="" type="checkbox"/>
3	Contract	Contract				<input checked="" type="checkbox"/>
4	Safety	Safety		11-JUN-2003		<input checked="" type="checkbox"/>
5	Engg	Engg		11-JUN-2003		<input checked="" type="checkbox"/>
6	Admin	Admin		11-JUN-2003		<input checked="" type="checkbox"/>
7	Office	Office Maintenance		22-JAN-2004	03-MAY-2004	<input checked="" type="checkbox"/>
8	Stores	Stores Maintenance		22-JAN-2004		<input checked="" type="checkbox"/>
9	Caps	caps category		19-APR-2004		<input checked="" type="checkbox"/>

2. Select BOM\_EAM\_COST\_CATEGORY from the Type list of values.
3. Enter a numeric Code. Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

**Warning:** Do not use alpha codes. Entering alpha codes causes database errors in the application.

4. Enter the Meaning of the code, for example, High.
5. Enter a Description for the code.
6. Optionally enter a Tag to categorize lookup values. This field is for information purposes.
7. The Effective From Date defaults as the system date, but you can update this. Optionally enter a Effective To Date to indicate an expiration of the code.
8. Select the Enabled check box to enable this code for Enterprise Asset Management.
9. Save your work.

## Criticality Codes

Criticality Codes suggest the importance of an asset to an organization. For example, High and Low. An asset that has a direct impact on production or that is difficult to replace may be considered a critical asset. Asset criticality helps you to determine the urgency of requested work. Asset Criticality Codes are referenced when defining an asset (See: Defining Asset Numbers, page 2-47). Asset Criticality Codes are extensible (See: Defining Lookups, page 2-17).

### To define asset criticality codes:

1. Navigate to the Oracle Manufacturing Lookups window.

#### Asset Criticality Codes

Code	Meaning	Description	Tag	From	To	Enabled
1	High	High		26-JUN-2000		<input checked="" type="checkbox"/>
2	Medium	Medium		26-JUN-2000		<input checked="" type="checkbox"/>
3	Normal	Normal		26-JUN-2000		<input checked="" type="checkbox"/>
4	Low	Low		26-JUN-2000		<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

2. Select MTL\_EAM\_ASSET\_CRITICALITY from the Type list of values.
3. Enter a numeric Code. Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

**Warning:** Do not use alpha codes. Entering alpha codes causes database errors in the application.

4. Enter the Meaning of the code, for example, High.
5. Enter a Description for the code.
6. Optionally enter a Tag to categorize lookup values. This field is for information purposes.
7. The Effective From Date defaults as the system date, but you can update this. Optionally enter a Effective To Date to indicate an expiration of the code.
8. Select the Enabled check box to enable this code for Enterprise Asset Management.
9. Save your work.

## Asset Import Scope Codes

The eAM Asset Number Open Interface enables you to import Asset Numbers into eAM, using a batch process. You can optionally import Asset Number attributes. You can create new Asset Numbers and attributes, or update existing Asset Numbers and attributes. See: eAM Asset Number Open Interface, *Oracle Enterprise Asset Management Implementation Guide*. Define the process' parameter scope codes. Asset Import Scope Codes are user defined (See: Defining Lookups, page 2-17).

## To define asset import scope codes:

1. Navigate to the Oracle Manufacturing Lookups window.

**Asset Import Scope Codes**

Oracle Manufacturing Lookups

Type:

Meaning:

Application:

Description:

Access Level:  
☐ User  
☒ Extensible  
☐ System

Effective Dates

Code	Meaning	Description	Tag	From	To	Enabled
0	With Attributes			22-APR-2004		<input checked="" type="checkbox"/>
1	Without Attribute			17-OCT-2003		<input checked="" type="checkbox"/>
2	Only Attributes			17-OCT-2003		<input checked="" 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"/>

2. Select EAM\_ASSET\_IMPORT\_SCOPE from the Type list of values.
3. Enter a numeric Code. Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

**Warning:** Do not use alpha codes. Entering alpha codes causes database errors in the application.

4. Enter the Meaning, for example, With Attributes.
5. Enter a Description.
6. Optionally enter a Tag to categorize lookup values. This field is for information purposes.
7. The Effective From Date defaults as the system date, but you can update this. Optionally enter a Effective To Date to indicate an expiration of the code.
8. Select the Enabled check box to enable this code for Enterprise Asset Management.
9. Save your work.

## Asset Import Statuses

The eAM Asset Number Open Interface enables you to import Asset Numbers into eAM, using a batch process. You can optionally import Asset Number attributes. You can create new Asset Numbers and attributes, or update existing Asset Numbers and attributes. See: eAM Asset Number Open Interface, *Oracle Enterprise Asset Management Implementation Guide*. Define the process' import statuses. Asset Import Statuses are user defined (See: Defining Lookups, page 2-17).

### To define asset import scope codes:

1. Navigate to the Oracle Manufacturing Lookups window.

#### Asset Import Statuses

The screenshot shows the 'Oracle Manufacturing Lookups' window with the title 'Asset Import Statuses'. The window contains several input fields and a table.

**Input Fields:**

- Type: EAM\_ASSET\_IMPORT\_STATUS
- Meaning: EAM\_ASSET\_IMPORT\_STATUS
- Application: Oracle Enterprise Asset Management
- Description: (empty)
- Access Level: ☐ User, ☒ Extensible, ☐ System

**Table:**

Code	Meaning	Description	Tag	From	To	Effective Dates	Enabled
0	Pending			17-OCT-2003			<input checked="" type="checkbox"/>
1	Running			17-OCT-2003			<input checked="" type="checkbox"/>
2	Error			17-OCT-2003			<input checked="" type="checkbox"/>
3	Success			17-OCT-2003			<input checked="" 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"/>

2. Select EAM\_ASSET\_IMPORT\_STATUS from the Type list of values.
3. Enter a numeric Code. Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

**Warning:** Do not use alpha codes. Entering alpha codes causes database errors in the application.

4. Enter the Meaning, for example, Success.
5. Enter a Description.
6. Optionally enter a Tag to categorize lookup values. This field is for information purposes.
7. The Effective From Date defaults as the system date, but you can update this. Optionally enter a Effective To Date to indicate an expiration of the code.
8. Select the Enabled check box to enable this code for Enterprise Asset Management.
9. Save your work.

## Contact Preferences

You can set up Contact Preferences. Contact Preferences are extensible (See: Defining Lookups, page 2-17).

### To define contact preferences codes:

1. Navigate to the Oracle Manufacturing Lookups window.

[illegible]

2. Select WIP\_EAM\_CONTACT\_PREFERENCE from the Type list of values.
3. Enter a numeric Code. Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

4. Enter the Meaning of the code.
5. Enter a Description.
6. The Effective From Date defaults as the system date, but you can update this. Optionally enter a Effective To Date to indicate an expiration of the code.
7. Select the Enabled check box to enable this code for Enterprise Asset Management.
8. Save your work.

Work Request Approval is the process of changing a Work Request status from Open to Awaiting Work Order. Maintenance Work Orders are linked to Work Requests with a status of Awaiting Work Order. When defining the Enterprise Asset Management parameters (See: Defining eAM Parameters, page 2-8), if the Auto Approve check box is selected, Work Requests are created with an automatic status of Awaiting Work Order, for that organization. If the check box is not selected, Work Requests are created with a status of Open; any user who receives the notification (See: Defining Department Approvers, page 2-16) can change the Work Request status to Awaiting Work Order. A plant or facility might need to include additional statuses. Currently, the workflow cannot be customized to work with user-defined Work Request statuses. Work Request Approval statuses are extensible (See: Defining Lookups, page 2-17).

### To define Work Request statuses:

1. Navigate to the Oracle Manufacturing Lookups window.

#### Work Request Statuses

Code	Meaning	Description	Tag	From	To	Enabled
1	Open	Open				<input checked="" type="checkbox"/>
2	Additional Information	Additional Information				<input checked="" type="checkbox"/>
3	Awaiting Work Order	Awaiting Work Order				<input checked="" type="checkbox"/>
4	On Work Order	On Work Order				<input checked="" type="checkbox"/>
5	Rejected	Rejected				<input checked="" type="checkbox"/>
6	Complete	Complete				<input checked="" type="checkbox"/>
7	check twice	review required		30-JAN-2004		<input checked="" type="checkbox"/>
8	direct	pass		30-JAN-2004		<input type="checkbox"/>

2. Select WIP\_EAM\_WORK\_REQ\_STATUS from the Type list of values.
3. Optionally add additional Codes to the pre-existing list of codes. The codes that are pre-existing cannot be deleted, however their Meanings can be modified.

**Warning:** Do not use alpha codes. Entering alpha codes causes database errors in the application.

4. Enter the Meaning of the code, for example, Open.
5. Enter a Description for the code.
6. Optionally enter a Tag to categorize lookup values. This field is for information purposes.
7. Optionally enter Effective From and To Dates to indicate an expiration of the code.
8. Select the Enabled check box to enable this code for Enterprise Asset Management.
9. Save your work.

## Work Request Types

Work Request Types describe and categorize Work Requests. For example, Manual, System, Routine, Capital, and Furniture. Work Request Types are extensible (See: Defining Lookups, page 2-17).

### To define a Work Request type:

1. Navigate to the Oracle Manufacturing Lookups window.

## Work Request Types

Oracle Manufacturing Lookups

Type:

Meaning:

Application:

Description:

Access Level:  
☒ User  
☐ Extensible  
☐ System

Effective Dates: From To Enabled

Code	Meaning	Description	Tag	From	To	Enabled
10	Routine	Routine Work Request		25-SEP-2002		<input checked="" type="checkbox"/>
20	Preventative	Preventative Maintenance		25-SEP-2002		<input checked="" type="checkbox"/>
30	Emergency	Emergency Work Request		25-SEP-2002		<input checked="" type="checkbox"/>
40	Low Priority	Low Priority Work Request		25-SEP-2002		<input checked="" type="checkbox"/>
50	Med Priority	Medium Priority Work Request		25-SEP-2002		<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

2. Select WIP\_EAM\_WORK\_REQ\_TYPE from the Type list of values.
3. Enter a numeric Code. Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

**Warning:** Do not use alpha codes. Entering alpha codes causes database errors in the application.

4. Enter the Meaning of the code, for example, Manual.
5. Enter a Description for the code.
6. Optionally enter a Tag to categorize lookup values. This field is for information purposes.
7. The Effective From Date defaults as the system date, but you can update this. Optionally enter a Effective To Date to indicate an expiration of the code.
8. Select the Enabled check box to enable this code for Enterprise Asset Management.
9. Save your work.

## Work Order and Work Request Priority Codes

Work Order Priority Codes contribute to the organization and execution of Work Orders. For example, High, Medium, and Low, or 1,2, and 3, respectively. Typically, a priority is assigned by the people entering Work Requests and Work Orders. The planner or supervisor compares this priority to the asset criticality (See: Asset Criticality Codes, page 2-23). These codes are entered when creating Activity associations, Work Orders, and Work Requests. Typically, a priority is assigned by the person that enters the Work Request and its related Work Order. Priority specified during Activity association becomes the Work Order priority when a Work Order is created, using the Activity

Association (See: Routine Work Orders, page 3-3 and Work Requests, page 16-1). Work Order Priority Codes are extensible (See: Defining Lookups, page 2-17).

### To create Work Order priority codes:

1. Navigate to the Oracle Manufacturing Lookups window.

**Priority Codes**

Oracle Manufacturing Lookups

Type:

Meaning:

Application:

Description:

Access Level:  
☒ User  
☐ Extensible  
☐ System

Effective Dates: From To

Code	Meaning	Description	Tag	From	To	Enabled
1	High	High Priority		09-OCT-2002		<input checked="" type="checkbox"/>
2	Medium	Medium Priority		09-OCT-2002		<input checked="" type="checkbox"/>
3	Low	Low Priority		09-OCT-2002		<input checked="" 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"/>

2. Select WIP\_EAM\_ACTIVITY\_PRIORITY from the Type list of values.
3. Optionally add additional Codes to the pre-existing list of codes. The codes that are pre-existing cannot be deleted, however their Meanings can be modified.

**Warning:** Do not use alpha codes. Entering alpha codes causes database errors in the application.

4. Enter the Meaning of the code, for example, High.
5. Enter a Description for the code.
6. Optionally enter a Tag to categorize lookup values. This field is for information purposes.
7. The Effective From Date defaults as the system date, but you can update this. Optionally enter a Effective To Date to indicate an expiration of the code.
8. Select the Enabled check box to enable this code for Enterprise Asset Management.
9. Save your work.

## Work Order Reconciliation Codes

Reconciliation Codes detail how Work Orders and operations were completed. These codes usually fall within two categories: Completed as Planned or Partial Completion. You can further define the condition within these two types of completion



statuses. These codes enable you to evaluate Work Orders by percentage completed or delayed, and if they were delayed, the reason for the delay. Reconciliation Codes are extensible (See: Defining Lookups, page 2-17).

### To define Work Order reconciliation codes:

1. Navigate to the window.

**Work Order Reconciliation Codes**

Oracle Manufacturing Lookups

Type: **WIP\_EAM\_RECONCILIATION\_CODE**

Meaning: **EAM Reconciliation Code**

Application: **Oracle Work in Process**

Description:

Access Level:

☒ User

☐ Extensible

☐ System

Effective Dates

Code	Meaning	Description	Tag	From	To	Enabled
10	Fixed Completely	Fixed Completeley		25-SEP-2002		<input checked="" type="checkbox"/>
20	Partial Repair	Partially Fixed		25-SEP-2002		<input checked="" type="checkbox"/>
30	Mfg Service Call	Contact Manufacturer		25-SEP-2002		<input checked="" type="checkbox"/>
40	Scrap	Scrap asset - not feasa		25-SEP-2002		<input checked="" type="checkbox"/>
50	Rewrk	Rewrk		01-MAY-2004		<input checked="" type="checkbox"/>
60	Incomplete	Incomplete		01-MAY-2004		<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

2. Select WIP\_EAM\_RECONCILIATION\_CODE from the Type list of values.
3. Enter a numeric Code. Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

**Warning:** Do not use alpha codes. Entering alpha codes causes database errors in the application.

4. Enter the Meaning of the code, for example, Fixed Completely.
5. Enter a Description for the code.
6. Optionally enter a Tag to categorize lookup values. This field is for information purposes.
7. The Effective From Date defaults as the system date, but you can update this. Optionally enter a Effective To Date to indicate an expiration of the code.
8. Select the Enabled check box to enable this code for Enterprise Asset Management.
9. Save your work.

## Work Order Types

Work Order Types enable you to differentiate Work Orders. For example, Routine, and Rebuild. Maintenance management can use this information to sort and monitor work

Work Order Types are created manually or automatically. For example, Rebuildable Work Orders are created automatically or manually (See: Rebuild Work Orders, page 3-9). Preventive Maintenance Work Orders are created automatically, based on meter readings (See: Preventive Maintenance Work Orders, page 3-8).

### To define Work Order types:

- [illegible]

- Warning:** Do not use alpha codes. Entering alpha codes causes database errors in the application.

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## Asset Setup

Asset Setup includes the following tasks:

- Setting Up Category Codes, page 2-33
- Defining Asset Groups, page 2-36
- Defining Activities, page 2-37
- Activity Association Templates, page 2-42
- Setting Up Attribute Groups, page 2-43
- Defining Asset Documents, page 2-46
- Defining Asset Numbers, page 2-47
- Defining Asset Routes, page 2-53
- Setting Up Asset Bills of Material, page 2-54

## Setting Up Category Codes

Category codes are used as naming conventions for assets by creating classes and subclasses. They are user defined, and used to logically group assets, simplifying the search for Asset Numbers.

For example, Cranes are classified by several different types, such as Overhead Cranes, Jib Cranes, and Mobile Cranes. You can query using the class CRANE, which displays all assets defined as Cranes within that organization. If you enter CRANES.JIB, the system would then narrow the results to just those assets defined as Jib Cranes. With both queries, you can identify assets based on familiar names, rather than numbers.

Category codes are first defined, then added to the Enterprise Asset Management Category Set. After they belong to this category set, they are associated with Asset Groups, which tie to individual assets. See also: Defining Categories and Defining Category Sets, *Oracle Inventory User's Guide*.

### **To set up category codes:**

1. Navigate to the Find Categories window. You can find existing category codes, or create new ones.
2. Choose New.

## Categories

Structure Name	Category	Description	Enabled	Inactive On	Enabled for iProcurement	Viewable by Supplier
Asset Management	AH.Corp	AH.Corp	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Asset Management	BLDG100.Room100	Building 100 room 100	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Asset Management	Dock.Doors	Warehouse Dock Doors	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Asset Management	Dock.Lift Plates	Warehouse Dock Lift Plates	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Asset Management	EAM.EAM	New EAM Category Code	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Asset Management	EAM.FPJ	eam fpj category	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Asset Management	Electrical.Light Fixtures	Lighting Fixtures	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Asset Management	Electrical.Panels	Electrical Panels	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Asset Management	Electrical.Sound	Sound system components	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Asset Management	Elevator.Frieght	Frieght Elevators	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>

3. Select the Asset Management category to create a new Class.Subclass from the Structure Name list of values.
4. Enter in a new Category, for example TRUCK.FRKLFT.
5. Add a long Description for this category.
6. Optionally select the Enabled check box to indicate that this category is enabled.
7. Optionally enter an Inactive On date.
8. Optionally select the Enabled for iProcurement check box to indicate that this category is enabled for iProcurement.
9. Optionally select the Viewable by Supplier check box to indicate that this category is viewed by the Supplier.
10. Save your work.

### To set up category sets:

To associate Category Codes (TRUCK.FRKLFT) with an Asset Group, first define the item category relationship using the Category Sets menu option.

1. Navigate to the Category Sets window.

### Category Sets

**Name** Enterprise Asset Management

**Description** Enterprise Asset Management Category Set

**Flex Structure** Asset Management

**Controlled At** Master Level

**Default Category** Maintenance Supply.Supply

☒ Allow Multiple Item Category Assignments

☒ Enforce List of Valid Categories

**Category**

- AH.Corp
- BLDG100.Room100
- Dock.Doors
- Dock.Lift Plates
- EAM.EAM
- Electrical.Light Fixtures
- Electrical.Panels

Category People Assign

2. Select the flashlight icon from the tools menu, then select Enterprise Asset Management.
3. A description defaults; you can optionally change it.
4. Select Asset Management from the Flex Structure list of values.
5. Indicate the Controlled At level. Valid values are Master Level, and Organization Level.
6. Enter a Default Category code for the Category Set.
7. If you select Allow Multiple Item Category Assignments, you can define a series of categories, such as Crane.Jib, and Crane.Overhead, that are associated to a single Asset Group.
8. If you select Enforce List of Valid Categories, you are preventing users from entering incorrect categories that are not associated with the Asset Group associated with the asset being created.
9. Enter the Category Codes that you want to associate with this category set.
10. Select Assign to display a table enabling you to associate the categories with an Asset Group.

11. Save your work.

## Defining Asset Groups

During implementation, Asset Group (Asset Group or Rebuildable Item) names should be established. Asset Groups represent groups of assets that are virtually identical. Generally, an Asset Group is defined for each Manufacturer and Model Number combination (Make, Model, and Year). Examples include Acme Model 123 Pump and Ford F150 2002 Truck.

**Note:** If you have assets in your organization that are virtually identical (for example, the same manufacturer and model), consider creating a Asset Group for those assets.

### To set up asset groups:

1. Navigate to the Asset Group (Master Item) window. The Master Item window is used to create Asset Groups, Activities, and Rebuildable Items.

**Master Item**

Master Item (V1)

Organization **V1** Vision Operations

Item **Fork Lifts**

Description **Fork Lift Asset Group** [ ... ]

Display Attributes  
☒ Master ☐ Org ☐ All

Main Inventory Bills ... Asset... Costing Purch... Recei... Physi... Gener... MPS/M... Lead ...

Asset Item Type **Asset Group**

**Asset Activity Properties**

Activity Type

Activity Cause

Activity Source

Shutdown Type

☐ Activity Notification Required

2. Enter the Asset Group name in the Item field.
3. Enter a Description for this Asset Group, up to 240 characters.
4. Use the @Asset Group template to quickly apply attribute values, and to ensure that the appropriate attributes are applied.
  1. Select TOOLS from the Tools menu, and then select COPY FROM.
  2. Select the @Asset Group template.

**Note:** You can create Asset Groups using the template described above, or you can copy an Asset Group from an existing Asset Group (See: Defining Items, *Oracle Inventory User's Guide*).

3. The following table presents the necessary attribute values that are applied automatically to the Asset Group, when using the template:

***Asset Group Attributes***

Attribute	Value
User Item Type	Asset Group
Item Status	Active
Inventory Item	Enabled
Transactable	Disabled
Serial Number Generation	Predefined
Effectivity Control	Model/Unit Number
EAM Item Type	Asset Group

5. Access the Inventory Tab. In the Serial region, select Predefined for the Generation value.
6. Define a Starting Prefix and Starting Number for this Asset Group. If Serial Generation is set at Item Level for the Organization, the system defaults the prefix, along with the starting number sequence, when a new Asset Number is created for this Asset Group.
7. Optionally select the paperclip Attachments icon to attach relevant documents, such as drawings, standard procedures, and reference guides, to this Asset Group. You can attach file, URL, and text attachments.
8. Save your work.

**To associate asset groups with multiple organizations:**

1. From the Master Item window, select TOOLS from the Tools menu.
2. Select Organization Assignment.
3. Enter additional organizations in the available table.
4. After saving your work, you can create Assets for this Asset Group.

## Defining Activities

Activities provide you with a standard template of jobs, which are applied to Work Orders, such as Routine or Preventive Maintenance. After these Activity Templates are created, they are associated with one or more Asset Numbers or Rebuildables (See: Activity Association Templates, page 2-42 and Rebuildable Item/Activity Association, page 2-80). They are also associated to a maintenance BOM (See: Setting Up Activity Bills of Material, page 2-71) and activity routing (See: Defining Asset Routes, page 2-68), containing the materials and resources needed for operations, respectively. When Work Orders are created for assets associated to the

Activity, the material and resources associated with the current Activity automatically copy to the Work Orders created.

There are three methods you can use to create an Activity. You can create an Activity within the Master Activity (Master Item) window, create Activities from the Activity Workbench, and create Activities from within a Maintenance Work Order.

### To set up Activities within the Master Activity window:

1. Navigate to the Activity (Master Item) window. The Master Item window is used to create Asset Groups, Activities, and rebuildable.

**Master Item**

Master Item (V1)

Organization: V1 Vision Operations

Item: Safety Inspection

Description: Safety Inspection [ ... ]

Display Attributes: ☒ Master ☐ Org ☐ All

Main Inventory Bills ... Asset... Costing Purch... Recei... Physi... Gener... MPS/M... Lead ...

Asset Item Type: Asset Activity

**Asset Activity Properties**

Activity Type: Maintenance

Activity Cause: Preventive

Activity Source: NORMAL

Shutdown Type: Required

☐ Activity Notification Required

2. Enter the name of the Activity in the Item field.
3. Enter a Description for this Activity, up to 240 characters.
4. Use the @Activity template to quickly apply attribute values, and to ensure that the appropriate attributes are applied.
  1. Select TOOLS from the Tools menu, and then select COPY FROM.
  2. Select the @Activity template.

**Note:** You can create Activities using the template described above, or you can copy an Activity from an existing Activity (See: Defining Items, *Oracle Inventory User's Guide*).

The following table presents the necessary attribute values that are applied automatically to the Activity, when using the template:



### **Activity Attributes**

<b>Attribute</b>	<b>Value</b>
User Item Type	Activity
Item Status	Active
Inventory Item	Enabled
EAM Item Type	Activity

5. Select the Asset Management tab.

In the Activity Property region, optionally enter an Activity Type to indicate the type of maintenance for this Activity. It is used when defining a Work Order. It should remain generic, and should not describe the job in detail. For example, Inspection, Overhaul, Lubrication, Repair, Servicing, or Cleaning.

6. Optionally select an Activity Cause to specify what situation caused this work to generate. For example, Breakdown, Vandalism, Normal Wear, or Settings.
7. Optionally select an Activity Source. Activity Source codes are reasons activities are executed. For example, Warranty Compliance, OSHA Compliance, or Military Specification Requirements. See: Activity Sources, page 2-20.
8. Optionally select a Shutdown Type. This indicates whether a shutdown is necessary to perform this maintenance activity. For example Required, and Not Required. This field is for information purposes.
9. Optionally select an Activity Notification Required value to indicate whether the asset requiring work is mobile, and should be brought into the shop for repairs. This field is for information purposes.
10. Optionally select the paperclip Attachments icon to attach relevant documents, such as drawings, standard procedures, and reference guides, to this Activity. You can attach file, URL, and text attachments.
11. Save your work. After saving your work, this Activity can associate with an asset (See: Activity Association Templates, page 2-42).

### **To associate Activities to multiple organizations:**

1. From the Master Item window, select TOOLS from the Tools menu.
2. Select Organization Assignment.
3. Enter additional organizations in the available window.
4. Save your work.

**Note:** Multiple Work Orders (See: eAM Work Orders, page 3-2) associated with the same Activity cannot be at a Released status, at the same time (See: eAM Work Order Statuses, page 3-16).

### **To associate Assets with Activities:**

After you have defined Asset Groups (See: Defining Asset Groups, page 2-36), Assets (See: Defining Asset Numbers, page 2-47), and Activities, you can associate the Activities

with assets and/or rebuildables. However, you can streamline the creation of Activities and associations using an Activity Association Template (See: Activity Association , page 2-42 Templates). Assets are associated with Activities before entering the Activity into a Preventive Maintenance Schedule.

**Note:** The Activity Workbench is generally used to streamline your Activity setups, including Asset Number/Activity associations (See: Using the Activity Workbench, page 2-56). Also, you can streamline the creation of Activity associations using an Activity Association Template. For example, when you create an Asset Group, and then Asset Numbers within that group, you do not need to utilize the Association window to associate those Asset Numbers with an Activity. If you create an Activity Association Template, the Activity that you associate with the current Asset Number's Asset Group automatically determines the Activity that is associated with the current Asset Number (See: Activity Association Templates, page 2-42).

1. Navigate to the Activity Association window.

#### Activity Association

Asset Type	Asset Group	Asset Number	Priority	Effective Dates		
				From	To	
Capital	Hero Ranger	R1	[Icon]			
			[Icon]			
			[Icon]			
			[Icon]			
			[Icon]			
			[Icon]			
			[Icon]			
			[Icon]			

2. Select an Activity.
3. Within the Main tab, select Asset or Rebuildable from the Item Type list of values. This field works directly with the Asset Group and Asset Item fields. If Asset is selected, the Asset Group refers to the Asset Group, and the Asset Number refers to the Asset Number. If Rebuildable is selected, the Asset Group refers to the Rebuildable Item, and the Asset Number refers to the specific serial numbers for the current Rebuildable Item.
4. Select an Asset Group. If Asset is populated in the Item Type field, Asset Groups are available.

5. Select an Asset Number. Asset Numbers associated with the previously selected Asset Group are available. Asset Numbers are always serial controlled. If you had selected a Non-serialized Rebuildable in the Asset Group field, then an Asset Number value is not required.
6. Optionally select a Priority Code. This field is for information purposes.
7. Optionally enter Effective Dates. If the Effective From field is left blank, it defaults to the system date. If the Effective To field is left blank, it defaults to NULL.
8. Within the Activity tab, the Activity Cause defaults from the Activity definition (See: Defining Activities, page 2-37), specifying what situation caused this work to generate. For example, Breakdown, Vandalism, Normal Wear, or Settings. Optionally you can select an Activity Cause.
9. The Activity Type defaults from the Activity definition (See: Defining Activities, page 2-37). This code indicates the type of maintenance activity to perform for this Activity. It is used when defining a job or a standard job. This code should remain generic, and should not describe the job in detail. For example, Inspection, Overhaul, Lubrication, Repair, Servicing, or Cleaning. Optionally you can select an Activity Type.
10. Optionally select the Tagging Required check box to indicate whether tag out procedures are required. The Area may need securing for operations required for carrying out a Work Order. Tags are generally printed and placed on an asset, warning the plant that the asset is shutdown, and should not be started. This check box helps the planner isolate those jobs that require a tagout. This is for information.
11. The Owning Department responsible for this activity or asset defaults from the Asset Number definition (See: Defining Asset Numbers, page 2-47). Optionally you can select an Owning Department. This is normally a Planner or Supervisor.
12. Optionally select a Shutdown Type. This indicates whether a shutdown is necessary to perform this maintenance activity. For example Required, and Not Required. This field is for information purposes. This value defaults from the Master Activity information that was created within the Master Item window. See: Defining Activities, page 2-37.
13. Optionally select a WIP Accounting Class. You can update the value that defaults from the Enterprise Asset Management Parameters information, for the current organization. See: Defining eAM Parameters, page 2-8.
14. Optionally select an Activity Source. Activity Source codes are reasons activities are executed. For example, Warranty Compliance, OSHA Compliance, or Military Specification Requirements. See: Activity Sources, page 2-20. This value defaults from the Master Activity information that was created within the Master Item window. See: Defining Activities, page 2-37.
15. Save your work.

## Related Topics

Defining Activities, page 2-57

Using the Activity Workbench, page 2-56

Rebuildable/Activity Association, page 2-80

## Activity Association Templates

Activities provide you with a standard template of jobs, which are applied to Work Orders, such as Routine or Preventive Maintenance. After these Activity Templates are created, they are associated with one or more Asset Numbers or Rebuildables (See: Activity Association Templates, page 2-42 and Rebuildable Item/ Activity Association, page 2-80). They are also associated to a maintenance BOM (See: Setting Up Activity Bills of Material, page 2-71) and activity routing (See: Defining Asset Routes, page 2-68), containing the materials and resources needed for operations, respectively. When Work Orders are created for assets associated to the Activity, the material and resources associated with the current Activity automatically copy to the Work Orders created.

You can streamline the creation of Activity associations using an Activity Association Template. For example, when you create an Asset Group, and then Asset Numbers within that group, you do not need to utilize the Association window to associate those Asset Numbers with an Activity. If you create an Activity Association Template, the Activity that you associate with the current Asset Number's Asset Group automatically determines the Activity that is associated with the current Asset Number.

**Note:** The Activity Workbench is generally used to streamline your Activity setups, including Activity Association Templates (See: Using the Activity Workbench, page 2-56).

### To create activity templates:

1. Navigate to the Activity Association Template window.

#### Activity Association Template

Asset Type	Asset Group	Priority	Effective Dates		[ ]
			From	To	
Capital	Fork Lifts	Medium	20-OCT-2004		

2. Select a valid Activity. The Activity needs to already have been created within the Master Item window.

3. Within the Main tab, select an Item Type of Asset or Rebuildable.
4. Select an Asset Group. After this record is saved, this Asset Group is associated with the current Activity. Every Asset Number created within the current Asset Group is automatically associated with the current Activity.
5. Optionally select a Priority code. This value defaults from the Master Activity information created within the Master Item window.
6. Optionally enter Effectivity Dates for this Activity Template.
7. Within the Activity tab, optionally select an Activity Cause. This value specifies what situation caused this work to generate. For example, Breakdown, Vandalism, Normal Wear, or Settings. This value defaults from the Master Activity information created within the Master Item window. See: Defining Activities, page 2-37.
8. Optionally select an Activity Type to indicate the type of maintenance for this Activity. It is used when defining a Work Order. It should remain generic, and should not describe the job in detail. For example, Inspection, Overhaul, Lubrication, Repair, Servicing, or Cleaning. This value defaults from the Master Activity information created within the Master Item window. See: Defining Activities, page 2-37.
9. Optionally select the Tagging Required check box to indicate whether tag out procedures are required. The Area might need to be secured for operations required for carrying out a Work Order. Tags are generally printed and placed on an asset, warning the plant that the asset is shutdown, and should not be started. This check box helps the planner isolate those jobs that require a tagout. This is for information.
10. Optionally select an Owning Department. This value defaults from the Enterprise Asset Management Parameters information for the current organization. See: Defining eAM Parameters, page 2-8.
11. Optionally select a Shutdown Type to indicate whether a shutdown is necessary to perform this maintenance activity. For example Required, and Not Required. This field is for information purposes. This value defaults from the Master Activity information that was created within the Master Item window. See: Defining Activities, page 2-37.
12. Optionally select a WIP Accounting Class. This value defaults from the Enterprise Asset Management Parameters information for the current organization. See: Defining eAM Parameters, page 2-8.
13. Optionally select an Activity Source. Activity Source codes are reasons activities are executed. For example, Warranty Compliance, OSHA Compliance, or Military Specification Requirements. See: Activity Sources, page 2-20. This value defaults from the Master Activity information that was created within the Master Item window. See: Defining Activities, page 2-37.
14. Save your work.

## Setting Up Attributes

You can define common characteristics data specific to Asset Groups, such as Facility Information, Engineering Specifications, Regulation Requirements, Horsepower, Voltage, and Square Footage, by creating Attribute Groups using descriptive flexfields. After the Attribute Group is created, you can then assign it to an Asset Group. This enables you to

define additional characteristics data when defining an asset associated with the Asset Group. This provides extensive query capabilities. Attribute groups are descriptive flexfields, defined by segments and values.

For example, you can define an Attribute Group, Front Loader Nameplate data. This group can then be associated with the CARS Asset Group. When defining an asset within the CARS Asset Group, you can optionally utilize the attributes to specify nameplate data (specified data such as make, year, and model) for the asset. This creates a simplified way of entering specified data (See: Defining Asset Numbers, page 2-47) related to a specific Asset Group.

### To set up attributes:

1. Navigate to the Descriptive Flexfield Segments window.

#### **Descriptive Flexfield Segments**

Application: **Oracle Inventory** Title: **Asset Attributes**

☒ Freeze Flexfield Definition Segment Separator: **Period ( . )**

**Context Field**

Prompt: **Context Value** ☐ Required

Value Set:  ☒ Displayed

Default Value:

Reference Field:

**Context Field Values**

Code	Name	Description	Enabled
Global Data Elements	Global Data Elements	Global Data Element Context	<input checked="" type="checkbox"/>
Alto Car Info	Alto Car Info	Alto Car Info	<input checked="" type="checkbox"/>
Assembly System	Assembly System Data	Assembly System	<input checked="" type="checkbox"/>
Bicycle Info	Bicycle Info	Bicycle Info	<input checked="" type="checkbox"/>
Blender/Mixer Data	Blender/Mixer Data	Blender/Mixer Data	<input checked="" type="checkbox"/>
Date	Date	Date	<input checked="" type="checkbox"/>

**Compile** **Segments**

2. Select the flashlight icon from the tool bar, and then select the Oracle Inventory Application with the Title, Asset Attributes.
3. Unfreeze the Flexfield Definition by deselecting the Freeze Flexfield Definition check box.
4. In the Context Field Values region, select a row, then click the New icon. A blank row is added for you to create an attribute group.
5. Enter the attribute group name in the Code field.
6. Optionally enter a Description for this attribute group.
7. Select Segments to add attributes to the attribute group you just created.

## Segments Summary

Number	Name	Window Prompt	Column	Value Set	Displayed	Enabled
1	Make	Make	C_ATTRIBUTE16	30 Characters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Batch/Continuous	Batch/Continuous	C_ATTRIBUTE17	30 Characters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	Mixer Type	Mixer Type	C_ATTRIBUTE18	30 Characters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	Mounting	Mounting	C_ATTRIBUTE19	30 Characters	<input checked="" type="checkbox"/>	<input checked="" 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"/>
					<input type="checkbox"/>	<input type="checkbox"/>

Value Set    New    Open

8. Enter a Number to sequence the data.
9. Define the Name of the specific attribute. The Window Prompt defaults to this name.
10. Select a Column value.
11. Select a Value Set, or Optionally choose Value Set to create a new one.
12. If the Displayed check box is selected, this attribute appears for you when defining data for an asset within the Asset Group (for example, CARS) associated with the attribute group (for example, NAMEPLATE) that this attribute (for example, Make) resides in.
13. Optionally select the Enabled check box to enable the attribute for availability when defining assets (See: Defining Asset Numbers, page 2-47).
14. Save your work, and return to the Descriptive Flexfield Segments window.
15. Select the Freeze Flexfield Definition check box. Failure to do this prevents you from querying the segments from the Attribute window.
16. Save your work.

### To associate the Attribute Group with an Asset Group:

1. Navigate to the Attributes Assignment window.

In the below example, any asset created within the CARS Asset Group has the NAMEPLATE attribute group available as an option for data entry.

## Attributes Assignment

Attribute Group Code	Attribute Group Name	Description	Enabled
Fork Lift Classifications	Fork Lift Classifications	Fork Lift Data	<input checked="" type="checkbox"/>
Warranty Data	Warranty Data	Warranty Data	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

2. Select an Asset Group. See: Defining Asset Groups.

3. Select an Attribute Group Code.

You can have an unlimited number of Attribute Groups associated with an Asset Group.

4. Save your work.

## Defining Asset Documents

You can attach existing documents to an asset, and create text to associate with an asset. You can attach text, URLs, or files, such as spreadsheets, graphics, and OLE objects. When creating a Work Order for an asset with attachments, the asset's attachments attach to the Work Order for that asset. For this to function, the appropriate attachment category, Asset Attachments (1), must associate with the attachment function, EAMWOMDF (See: Working With Attachments, *Oracle Applications User's Guide*).

### To define asset documents:

1. Navigate to the EAM Asset Documents window.



## EAM Asset Documents

The screenshot shows the 'EAM Asset Documents' window. At the top, there is a title bar with the text 'EAM Asset Documents'. Below the title bar, the window is divided into several sections. The 'Category' field is set to 'Asset Attachments'. The 'Description' field is empty. The 'Source' section contains 'Data Type' (empty) and 'File' (empty). The 'Usage' section has three radio buttons: 'Standard' (selected), 'Template', and 'One-Time'. The 'Security' section includes 'Type' (set to 'Organization'), 'Owner' (set to 'Seattle Maintenance'), and a 'Share' checkbox (unchecked). The 'Effective Dates' section has 'From' and 'To' fields, both empty. The 'Magnification' field is set to '100%' with a checkmark. The main area of the window is a large empty text field.

2. Select a Data Type.
3. If the Data Type is File, attach the appropriate File. If the Data Type is Web Page, enter the relevant URL. If the Data Type is Short Text, insert the text in the text field.

For information on all fields, See: *Working With Attachments, Oracle Applications User's Guide*.

## Defining Asset Numbers

Enterprise Asset Management provides three methods in which you can enter a new asset. You can create them individually, by copying information from an existing asset, utilize the multiple asset entry method, or use the Import Asset Number interface (See: *Oracle Manufacturing APIs and Open Interfaces Manual*).

You must first set up an Asset Group, before defining Asset Numbers. See: *Defining Asset Groups*, page 2-36.

### To define assets individually:

1. Navigate to the Define Asset Number window.

## Define Asset Number

Define Asset Number (EM1)

Asset Type: **Capital**

Asset Group: **Fork Lifts**

Asset Number: **FLB2020**

Asset Category: **ForkLift.Battery**

Fork Lift Asset Group

Fork Lift Battery Fork Lift 2020

Fork Lift Battery

Main Production Others

Owning Department: **W-Maint**

Criticality: **Normal**

WIP Accounting Class: **MaintWAC**

Area: **Warehouse**

☒ Maintainable

☒ Active

Parent

Asset Type: **Capital**

Asset Number: **FL2020**

Asset Group: **Fork Lifts**

Attributes Resource Usage Associate Activity

2. Select an Asset Group. This Asset Group is associated with this asset.

**Note:** After an Asset Group is associated with an asset and then saved, it cannot be changed.

3. Enter an Asset Number if you do not have them automatically generated, or accept or modify the default, if you have automatic generation enabled (See: Defining eAM Parameters, page 2-8).

After an asset is saved, it cannot be deleted. The asset can be deactivated if there are no open Work Orders or Work Requests for the asset, and if the asset is not part of an asset hierarchy.

4. Optionally enter an Asset Description, up to 240 characters.
5. Optionally associate this asset to an Asset Category. This is the Class and Subclass code, such as CRANE.OVERHEAD or BUILDING.FLOOR. See: Setting Up Category Codes and Sets, page 2-33.
6. Within the Main tab, optionally select an Owning Department for this asset to represent the crew responsible for the asset. Notifications, regarding Work Requests, are sent to the Primary Approver of the Work Request's associated asset's current owning department (See: Defining Department Approvers, page 2-16 and Defining Asset Numbers, page 2-47).
7. Optionally select a Criticality code to indicate the importance of the asset to the organization. This field is for information purposes.
8. Optionally select a WIP Accounting Class to identify the Expense cost elements associated with the work performed, such as materials, labor, and resources.

9. Optionally enter the Area where this asset resides. This is a user defined listing of logical areas of work. For example, North Plant, East Wing, or Area 1 (See: Setting Up Areas, page 2-11).
10. Indicate whether this asset is maintainable. If the Maintainable check box is selected, you can create Work Requests and Work Orders for this asset.

For example, you can create an asset for cost-tracking purposes. We may want to see the cost for all top level assets in an asset hierarchy, but we do not want to maintain those assets. In this situation, do not select this check box.

**Note:** After Work Orders are created for this asset, you cannot clear this check box unless those Work Orders are at Complete, Canceled or Closed statuses.

11. Optionally select the Active check box to indicate that the asset is functioning, for example, maintenance Work Orders can be created for this asset. This check box change when you activate or deactivate an asset from the Tools menu.
12. Within the Parent region, optionally select a parent Asset Number to establish asset hierarchy information. Work Order costs roll up through the Parent/Child hierarchies defined, and can roll up to any level within an asset hierarchy. This enables you to review all cost associated with an asset or asset hierarchal view.
13. In the Production Equipment region, optionally select a Production Organization. The list of values displays the production inventory organizations maintained by the current asset's organization. See: Enabling Organizations for Enterprise Asset Management, page 2-6for information on designating eAM organizations to maintain equipment items for designated production organizations.
14. Select an Equipment Item. This is mandatory if you populated the Production Organization field. Items that were defined with an equipment template (See: Item Templates, *Oracle Inventory User's Guide* ), or with the Equipment item attribute enabled (See: Physical Attributes, *Oracle Inventory User's Guide* ), are available.
15. Enter an Equipment Serial Number. This is mandatory if you populated the Production Organization field. This is the specific name of the component within the Equipment Type, defined above.
16. Select the Others tab to optionally enter the Fixed Asset region information, if Oracle Fixed Assets is installed. This is Enterprise Asset Management's integration with Fixed Assets. Enter a Category, which is a grouping of fixed assets, defined within Oracle Fixed Assets. This category is tied to a set of books, and must be the same set of books that is assigned to the current Enterprise Asset Management organization. See: Setting Up Asset Categories, *Oracle Fixed Assets User's Guide*.
17. Optionally enter the Number if Oracle Fixed Assets is installed. This represents a fixed Asset Number that belongs to a fixed asset category, associated with the asset.
18. The Property Management fields, Location Name and Location Code, default from a Property Manager export process (Export Locations to Enterprise Asset Management), if Oracle Property Management is installed. These fields are disabled. These values cannot be changed.

**Note:** Before the above information is passed from Property Manager into Enterprise Asset Management, Asset Groups need to first be established. See: Defining Asset Groups, page 2-36.

19. Optionally choose Location Details to view or update Property Manager field information.
20. Optionally select Attributes to enter attribute values for the asset (See: Setting Up Attributes, page 2-43).

Existing, enabled Attribute Groups appear (See: Setting Up Attributes, page 2-43). These Attribute Groups are optional. You do not need to enter values for all existing Attribute Groups. From this window, you cannot generate Attribute Groups.

#### **Asset Attributes**

The screenshot shows the 'Asset Attributes (EM1)' window. It contains the following fields and sections:

- Asset Group:** Fork Lifts
- Asset Number:** FLB2020
- Fork Lift Asset Group:** Fork Lift Battery Fork Lift 2020
- Attribute Values:** A section with a table-like structure.
  - Attribute Group:** Fork Lift Classifications
  - Attribute Values:** (Empty field)
- Asset Attributes (EM1) - Detail View:** A sub-window showing details for 'Fork Lift Classifications'.
  - Context Value:** Fork Lift Classifications
  - Make:** (Empty field)
  - Model:** (Empty field)
  - Max Wiegth Capacity:** (Empty field)
  - Max Reach Hieght:** (Empty field)
- Buttons:** OK, Cancel, Clear, Help

21. You can choose Resource Usage if the fields in the Production Equipment region are populated. This enables you to view production Work Orders using the equipment that corresponds with this Asset Number as a resource.

### Resource Usage

**Resource Usage**

**Production Equipment**

Production Org: **M1** Item: **cap-eqpt1**  
Serial Number: **cap-eqp001**

**Resources**

Resource	Description	UOM	Resource Group	Department	Owning Department
<b>cap-eqres</b>	<b>casp</b>	<b>HR</b>		<b>ASSEMBLY</b>	<b>ASSEMBLY</b>

**Work Order**

Work Order	Scheduled Start Date	Scheduled Completion Date	Status	Entity Type
<b>cap-djob</b>	<b>30-MAR-2004 18:00:00</b>	<b>26-OCT-2006 01:16:00</b>	<b>Released</b>	<b>Discrete job</b>

Ok

22. Optionally select Associate Activity to directly associate this Asset with an Activity. See: Activity Association Templates, page 2-42.

### Activity Association

**Activity Association (EM1)**

Asset Group: **Fork Lifts** Fork Lift Asset Group  
Asset Number: **FLB2020** Fork Lift Battery Fork Lift 2020

Main Activity

— Effective Dates —

Activity	Description	Priority	From	To	[ ]
<b>Change Fork Lift Batterie</b>	<b>Change the battery in elect</b>		<b>21-OCT-2004</b>		

Cancel Ok

23. Optionally enter file, URL, or text attachments to this asset by choosing the paperclip Attachments icon. You can then choose Document Catalog to add asset specific documents. See: Defining Asset Documents, page 2-46.
24. Save your work.

### **To copy assets from existing assets:**

You can copy asset information from existing assets. When using this method, everything copies to the new asset, including attributes and attachments. Equipment Serial Numbers are not copied. You are prompted to enter the Equipment Serial Number, when saving.

1. Navigate to the Define Asset Number window.
2. Select an Asset Group. This Asset Group is associated with this asset.
3. Enter an Asset Number if you do not have them automatically generated, or accept or modify the default, if you have automatic generation enabled (See: Defining eAM Parameters, page 2-8). After an asset has been saved, it cannot be deleted. The asset can be deactivated if there are no open Work Orders or Work Requests for the asset, and if the asset is not part of an asset hierarchy.
4. Optionally enter an Asset Description, up to 240 characters.
5. From the Tools menu within the Tool bar, select Copy Asset Number from.
6. Select the desired Asset.
7. Optionally associate this Asset to an Asset Category. This is the Class and Subclass code, such as CRANE.OVERHEAD, or BUILDING.FLOOR. See: Setting Up Category Codes and Sets, page 2-33.
8. Select an Owning Department for this asset. E-mail notifications, regarding Work Requests, are sent to the Primary Approver of the Work Request's associated asset's owning department (See: Defining Department Approvers, page 2-16 and Defining Asset Numbers, page 2-47).
9. Save your work.

### **To deactivate an asset:**

1. Navigate to the Define Asset Number window.
2. Select the flashlight Find icon to display the Find Asset Number window.
3. Select an Asset Number to deactivate.
4. From the Tools menu, select De-Activate Asset Number.
5. Save your work.

### **To activate an asset:**

1. Navigate to the Define Asset Number window.
2. Select the flashlight Find icon to display the Find Asset Number window.
3. Select a Deactivated Asset Number to activate.
4. From the Tools menu, select Re-Activate Asset Number.
5. Save your work.

## Defining Asset Routes

You might need to perform an Activity on multiple Asset Numbers. To eliminate the possibility of creating multiple Work Orders for the same Activity, you can define Asset Routes. You can define a Preventive Maintenance schedule for your Asset Route to specify when an Activity should be scheduled for the Asset Route. You can define day interval rules for Asset Routes.

### To define asset routes:

1. Navigate to the Define Asset Route window.

**Define Asset Route**  
Define Asset Route (EM1)

Asset Type: **Capital**  
Asset Group: **Fork Lifts**    Fork Lift Asset Group: **Fork Lift Asset Group**  
Asset Number: **FL32**  
Asset Category:   
[ ]

Main    Production    Others

Owning Department:   
Criticality:   
WIP Accounting Class:   
Area:   
☒ Maintainable  
☒ Active

**Parent**  
Asset Type: **Capital**  
Asset Number:   
Asset Group:   
[ ]

Asset Route    Attributes    Resource Usage    Associate Activity

2. Select an Asset Group.
3. Enter the name of the Asset Route in the Asset Number field.
4. Optionally associate this Asset Route to an Asset Category. This is the Class and Subclass code, such as CRANE.OVERHEAD or BUILDING.FLOOR. See: Setting Up Category Codes and Sets, page 2-33.
5. Within the Main tab, optionally select an Owning Department for this Asset Route. This represents the crew responsible for the asset. Notifications, regarding Work Requests, are sent to the Primary Approver of the Work Request's associated asset's current owning department (See: Defining Department Approvers, page 2-16 and Defining Asset Numbers, page 2-47).
6. Optionally select a Criticality code to indicate the importance of the Asset Route to the organization. This field is for information purposes.
7. Optionally select a WIP Accounting Class to identify the Expense cost elements associated with the work performed, such as materials, labor, and resources.

8. Optionally enter the Area where this Asset Route resides. This is a user defined listing of logical areas of work. For example, North Plant, East Wing, or Area 1 (See: Setting Up Areas, page 2-11).
9. Indicate whether this Asset Route is maintainable. If the Maintainable check box is selected, you can create Work Requests and Work Orders for this Asset Route.
10. Choose Asset Route to display the Asset Route window.

**Asset Route**

Asset List (EM1)

Asset Group **Fork Lifts** Fork Lift Asset Group

Asset Number **FL32**

— Associated Asset Numbers —

Asset Group		Asset Number	Effective Dates		
			From	To	[ ]
<input checked="" type="checkbox"/>	Fork Lifts	FL1010	11-SEP-2004	...	
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

11. In the Associated Asset Numbers region, select an Asset Group.
12. Select an Asset Number. Asset Numbers associated with the previously selected Asset Group are available.  
You can associate an unlimited number of Asset Numbers.
13. Optionally enter Effective Dates. If the Effective Date From field is left blank, the system date defaults.
14. Save your work.

**Note:** Asset Numbers can associate with Asset Routes. An Asset Route cannot associate with another Asset Route.

## Setting Up Asset Bills of Material

You can identify and select the required items that make up an asset. A bill of material (BOM) is used to list all items and components that make up a particular asset, and is defined for each Asset Group. The items defined on an asset BOM are standard inventory components (See: Defining Items, *Oracle Inventory User's Guide*).

**Note:** Even if you are not using Project Manufacturing applications, Project Parameters are defined for your eAM enabled



organization to successfully create Asset Groups. This is required because an Asset BOM is of type Model/Unit Effective and this BOM type is currently allowed if PJM organization parameters are set up for the eAM enabled organization to which the Asset Group has been assigned. To define Project Parameters, open the Project Parameters window using Project Manufacturing Super User responsibility and without entering any data in the window, save the record. If you plan to use Project Manufacturing, see: Project Manufacturing Integration Setup, page 2-138 for information on defining Project Parameters.

### To set up an Asset BOM:

1. Navigate to the Bills of Material window.

#### **Bills of Material**

The screenshot shows the 'Bills of Material (EM1)' window. The 'Item' field is 'Fork Lifts' and the 'Fork Lift Asset Group' is selected. The 'UOM' is 'Ea'. The 'Revision' is '0' and the 'Date' is '21-OCT-2004 07:16:27'. The 'Display' dropdown is set to 'Future and Current' and the 'Implemented Only' checkbox is checked. The 'Main' tab is active, showing a table of components.

Item Seq	Operation Seq	Component	Item Description	Revision	UOM	Quantity
10	1	Motor - Electric Fork	Electric Fork Lift Motor	0	Ea	1
20	1	Motor - Propane Fork	Propane Fork Lift Motor	0	Ea	1
30	1	Battery - Electric Fork	Power Battery For Electric Fork Li	0	Ea	1
40	1	Battery - Propane Fo	Battery (electrical systems) for Pro	0	Ea	1
50	1	Fuel Tank - Propane	Fuel Tanks for Propane Fork Lifts	0	Ea	1

At the bottom of the window, there are buttons for 'Substitutes', 'Designators', 'Operations', 'Bill Details', and 'Revision'.

2. Select an Asset Group from the Item list of values.
3. Within the Main tab, the Item Sequence and an Operation Sequence values default.
4. Enter the inventory Component to make up the Asset Number.
5. Enter the Quantity of that component necessary for the asset.
6. Select the Serial Effectivity tab.

## Bills of Material

Item Seq	Operation Seq	Component	From	To	Disabled
10	1	Motor - Electric Fork	FL1010	FL1040	<input type="checkbox"/>
20	1	Motor - Propane Fork	FL2010	FLB2040	<input type="checkbox"/>
30	1	Battery - Electric Fork	FL1010	FL1040	<input type="checkbox"/>
40	1	Battery - Propane Fork	FL2010	FL2040	<input type="checkbox"/>
50	1	Fuel Tank - Propane	FL2010	FL2040	<input type="checkbox"/>

7. Select the Asset Number (Asset Numbers are always serialized) that the inventory items are associated with, in the From and To fields. Asset Numbers associated with the current Asset Group are available.

If the Component is installed in all Asset Numbers within the Asset Group, enter 0 in the From field, and leave the To field blank.

8. Save your work.

For information on all remaining fields, See: *Creating a Bill of Material, Oracle Bills of Material User's Guide*.

## Using the Activity Workbench

You can use a central workbench to manage your organization's Activity functions. Using the Activity Workbench, you can view, create (See: *Defining Activities*, page 2-37), query, and manage all of your Activities. From this central workbench, you can view, create, and update Maintenance Routes, Maintenance Bills of Material, Preventive Maintenance Schedules, and Suppressions associated with your Activities. You can create various copy functions within a single Activity, across multiple Activities, as well as between Work Orders and Activities or asset activity associations. You can view or update Last Service for the asset activity association, as well as view cost estimates for the Activity. These copy functions save time and standardize processes across your organization.

This section includes the following topics:

- *Defining Activities*, page 2-57
- *Navigating the Activity Workbench*, page 2-60
- *Defining Maintenance Routes*, page 2-68

- Setting Up Maintenance Bills of Material, page 2-71
- Associating Asset Numbers with Activities, page 2-74
- Creating Activity Templates, page 2-75

## Defining Activities

There are three methods you can use to create an Activity. You can create an Activity within the Master Activity (Master Item) window, create Activities from the Activity Workbench, and create Activities from within a Maintenance Work Order.

### To set up Activities using the Activity Workbench:

1. Navigate to the Activity Workbench window.
2. Choose Launch.

#### Activity Associations

Asset Type	Asset Group	Asset Number	Activity	Description
Capital	Buildings	Building1	gs-act1	gs act

Preventive Maintenance   Suppression   Last Service

**Activity**

Activity:    Description:

New   Routing   BOM   Cost Estimate

3. To create an Activity, choose New.

## Create Activity

The screenshot shows the 'Create Activity (EM1)' window with the following fields and values:

- Activity Name:** Oil Change
- Description:** Oil Change
- Template:** @Activity
- Activity Properties:**
  - Activity Type:** (empty)
  - Shutdown Type:** (empty)
  - Activity Cause:** (empty)
  - Activity Source:** (empty)
  - Activity Notification:** ☐
- Copy Options:**
  - Copy From:** Activity
  - Activity Region:**
    - Activity:** 3000 Mile Truck Maint
    - BOM:** ☒
    - Routing:** ☒
    - Association:** All
  - Work Order Region:**
    - Work Order:** (empty)
    - Operation:** All
    - Material:** All
    - Resource:** All
    - Association:** All

4. Enter an Activity Name.
5. Enter an Activity Description.
6. Choose an activity Template. This automatically links the properties associated with an Activity. The @Activity template is created for you. You can create your own Activity Templates, as well.
7. Within the Activity Properties region, optionally select an Activity Type (See: Activity Types, page 2-18). The value defaults from the Template properties above.
8. Within the Activity Properties region, optionally select an Shutdown Type. The Shutdown Type is user defined, and indicates whether an Activity shutdown is required. For example, the Shutdown Type can refer to whether the Asset Activity association shutdown is required before the Activity is performed. The value defaults from the Template properties above. This field is for information purposes.
9. Within the Activity Properties region, optionally select an Activity Cause (See: Activity Causes, page 2-19). The value defaults from the Template properties above.
10. Within the Activity Properties region, optionally select an Activity Source (See: Activity Sources, page 2-20). The value defaults from the Template properties above.
11. The Activity Notification check box is informational until a future release.
12. You can optionally create an Activity by copying it from another Activity or a Work Order. Within the Copy Options region, select the entity to copy information from. Valid values are Activity and Work Order. If you select Activity, the values within the Activity region are relevant, and the values within the Work Order region are irrelevant. If you select Work Order, the values within the Work Order region are relevant, and the values within the Activity region are irrelevant.

13. Within the Activity region, if Activity is populated in the Copy From field, optionally select an Activity name. This is the Activity that you are copying from.
14. Within the Activity region, if Activity is populated in the Copy From field, optionally select the BOM check box to indicate that the Maintenance Bill of Material, associated with the current Activity within the Activity region, copies to the new Activity Name.  
  
For example, in the screen shot above, the Maintenance Bill of Material, associated with the 3000 Mile Truck Maint, copies to Oil Change.
15. Within the Activity region, if Activity is populated in the Copy From field, optionally select the Routing check box to indicate that routings, associated with the current Activity within the Activity region, copies to the new Activity Name.  
  
For example, in the screen shot above, routings that are associated with the 3000 Mile Truck Maint copy to Oil Change.
16. Within the Activity region, if Activity is populated in the Copy From field, select All or None from the Association list of values.
  - *All*: All Asset and Rebuildable associations, associated with the current Activity within the Activity region, copy to the new Activity.
  - *None*: No Asset and Rebuildable associations, associated with the current Activity within the Activity region, copy to the new Activity.
17. Within the Work Order region, if Work Order is populated in the Copy From field, select an existing maintenance Work Order.
18. Within the Work Order region, if Work Order is populated in the Copy From field, select All or None from the Operation list of values.
  - *All*: All operations associated with the current Work Order, populated in the Work Order field, copy to the new Activity.
  - *None*: No operations associated with the current Work Order, populated in the Work Order field, copy to the new Activity.
19. Within the Work Order region, if Work Order is populated in the Copy From field, select All, Issued, or None from the Material list of values.
  - *All*: All material associated with the current Work Order, populated in the Work Order field, copies to the new Activity.
  - *Issued*: Material issued to the current Work Order, populated in the Work Order field, copies to the new Activity.
  - *None*: No material associated with the current Work Order, populated in the Work Order field, copies to the new Activity.
20. Within the Work Order region, if Work Order is populated in the Copy From field, select All, Issued, or None from the Resource list of values.
  - *All*: All resources associated with the current Work Order copy to the new Activity.
  - *Issued*: Resources issued to the current Work Order copy to the new Activity.
  - *None*: No resources associated with the current Work Order copy to the new Activity.
21. Within the Work Order region, if Work Order is populated in the Copy From field, select None, Current, or All from the Association list of values.

- *None*: No Assets and Rebuildables, associated with the current Work Order, associate with the new Activity.
  - *Current*: An Asset and/or Rebuildable, associated with the current Work Order, associates with the new Activity.
  - *All*: All Assets and/or Rebuildables, associated with the current Work Order's Activity, associate with the new Activity.
22. Save your work. After saving, the new Activity is automatically assigned to the current organization.

## Related Topics

Defining Activities, page 2-57

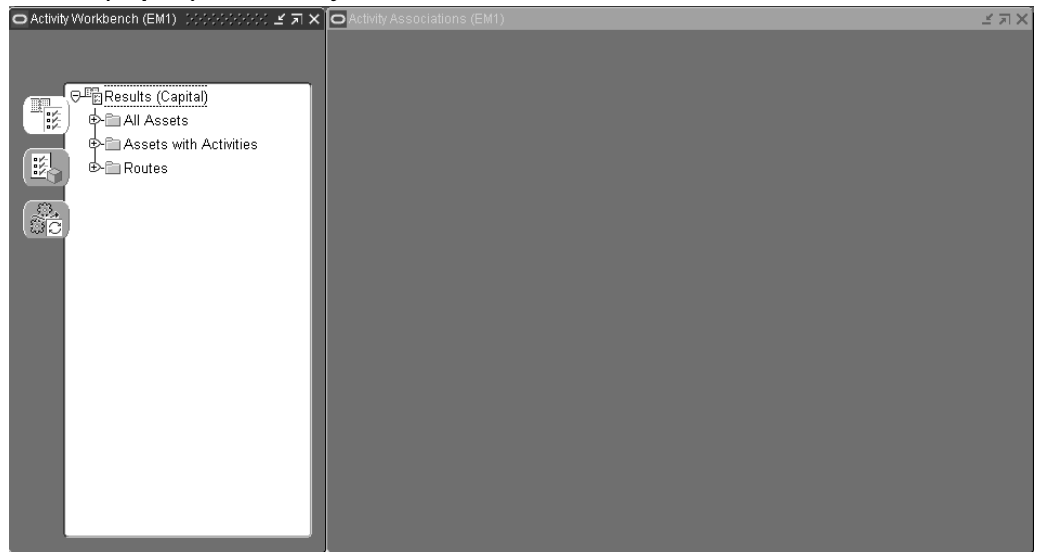
## Navigating the Activity Workbench

The Activity Workbench enables you to manage all of your organization's Activity functions. Before launching the Activity Workbench, you can narrow your data selection; the Activity Workbench provides a query capability as you enter the Activity Workbench. The top portion of the window enables you to query by Asset Type, Asset Number, Asset Group, Area, Asset Category, Owning Department, and provides you the choice of including children assets within asset hierarchies. The bottom portion of the window enables you to query by Activity, Activity Type, Activity Source, Shutdown Type, and Activity Cause. You can also select data that is between specified Effective dates.

### To navigate the Activity Workbench:

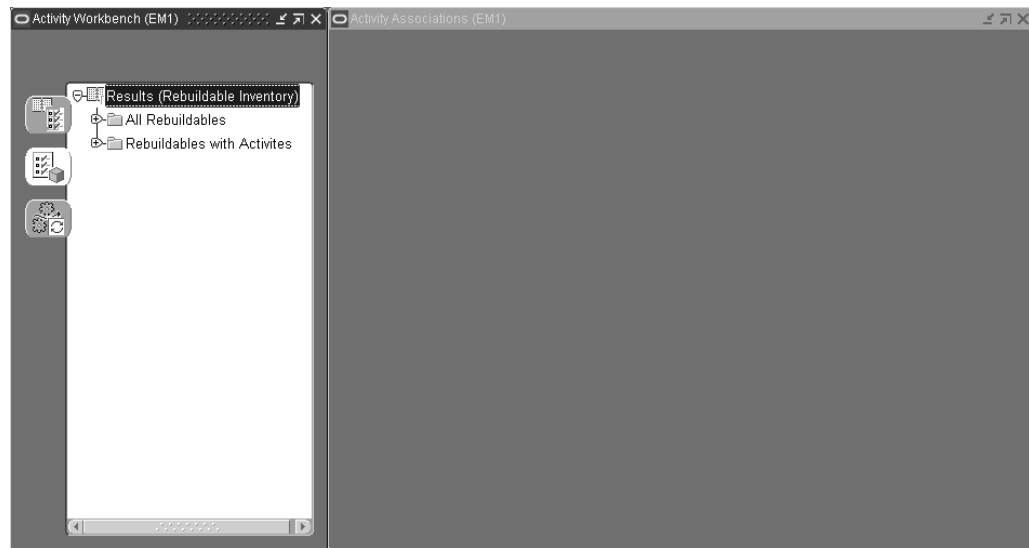
1. Navigate to the Activity Workbench window.
2. Optionally narrow your data selection by selecting criteria within the Activity Workbench window. If you make selections, you can view those selections after you launch the Activity Workbench.
3. Choose Launch.
4. Optionally select the Results (Capital) tab.

### Results (Capital) tab, Activity Workbench



5. Optionally expand the Results (Capital) folder.
  1. Optionally expand the All Assets folder to display all Asset Numbers, based on your chosen selection criteria. You can select an asset and view related Activity information within the corresponding Activity Associations window. Within the corresponding Activity Associations window, you can associate Activities with the current asset.
  2. Optionally expand the Assets with Activities folder to display all Asset Numbers that are currently associated with one or more Activities, based on your chosen selection criteria. You can select an asset and view its related Activity information within the corresponding Activity Associations window. Within the corresponding Activity Associations window, you can view, create, or update preventive maintenance schedule definitions, create or update Suppression definitions, view or update last service information, view the parts list, and view or update the maintenance routing.
  3. Optionally expand the Routes folder to display all Asset Routes that are currently associated with one or more Activities, based on your chosen selection criteria. You can select an Asset Route and view related Activity information within the corresponding Activity Associations window.
6. Optionally select the Results (Rebuildable Inventory) tab.

### **Results (Rebuildable Inventory) tab, Activity Workbench**



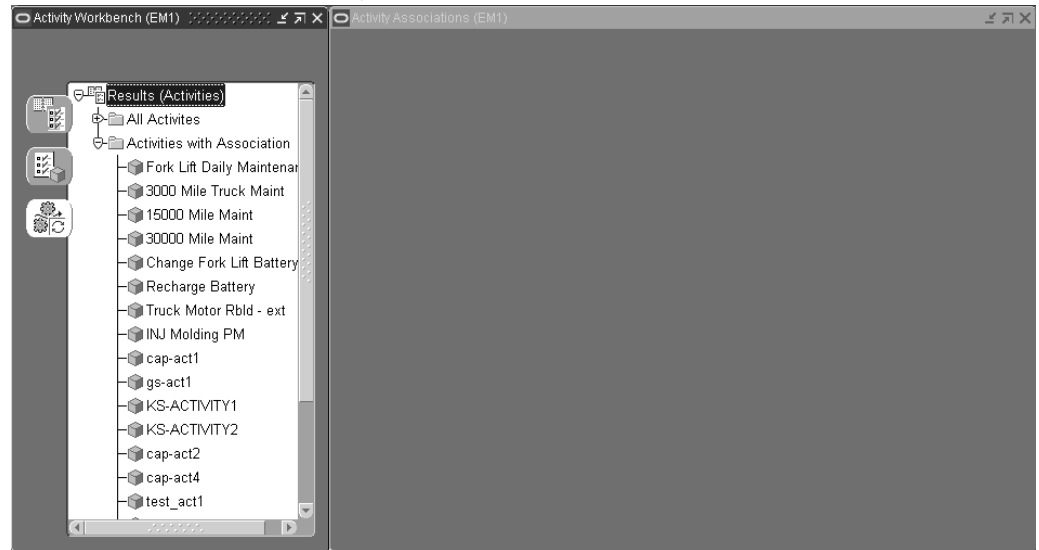
7. Optionally expand the Results (Rebuildable Inventory) folder.
8. Optionally expand the All Rebuildables folder.
  1. Optionally expand the Serialized folder to display all Rebuildable Serial Numbers, based on your chosen selection criteria, within the Activity Workbench window. You can select a Rebuildable Serial Number and view related Activity information within the corresponding Activity Associations window. Within the corresponding Activity Associations window, you can associate Activities to the current Rebuildable Serial Number.
  2. Optionally expand the Non-serialized folder to display all Non-serialized Rebuildables, based on your chosen selection criteria, within the Activity Workbench window. You can select a Non-serialized Rebuildable and view related Activity information within the corresponding Activity Associations window. Within the corresponding Activity Associations window, you can associate Activities to the current Serialized Non-rebuildable.
9. Optionally select the Rebuildables with Activities folder.
  1. Optionally expand the Serialized with Activities folder to display all Rebuildable Serial Numbers that are currently associated with one or more Activities, based on your chosen selection criteria, within the Activity Workbench window. You can select a Rebuildable Serial Number and view related Activity information within the corresponding Activity Associations window. Within the corresponding Activity Associations window, you can create or update preventive maintenance schedule definitions, create or update Suppression definitions, view or update last service information, view the parts list, view or update the maintenance routing, and view cost estimations for a Rebuildable Serial Number and Activity combination.
  2. Optionally expand the Non-serialized with Activities folder to display all Non-serialized Rebuildables that are currently associated with one or more Activities, based on your chosen selection criteria, within the Activity Workbench window. You can select a Non-serialized Rebuildable and view related Activity information within the corresponding Activity Associations



window. Within the corresponding Activity Associations window, you can create or update preventive maintenance schedule definitions, create or update Suppression definitions, view or update last service information, view the parts list, view or update the maintenance routing, and view cost estimations for a Rebuildable Serial Number and Activity combination.

10. Optionally select the Results (Activities) tab.

#### **Results (Activities) tab, Activity Workbench**



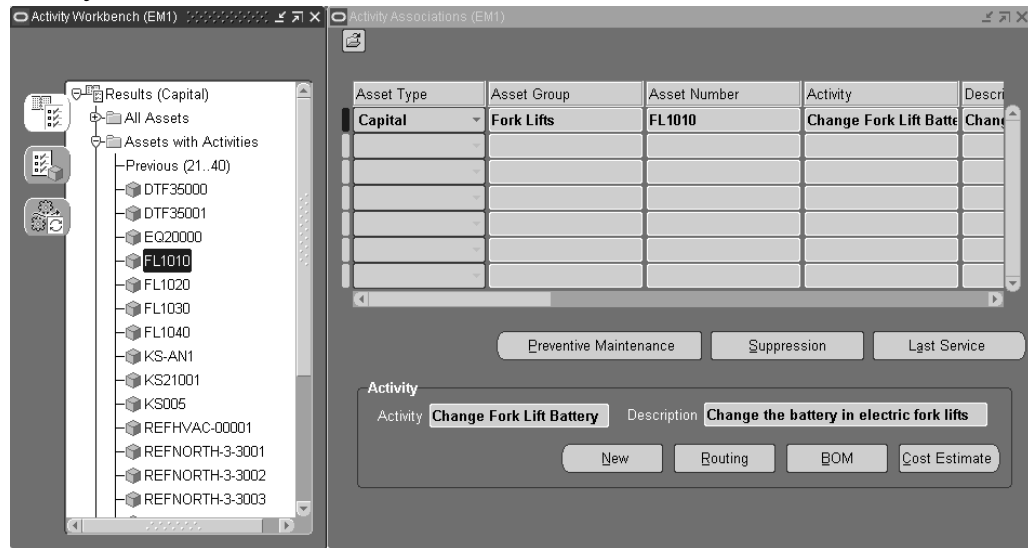
11. Optionally expand the All Activities folder to display all valid Activities, based on your chosen selection criteria, within the Activity Workbench window. You can select an Activity and view its related Activity information within the corresponding Activity Associations window, if an association exists. You can associate an Asset Number with the current, selected Activity using the corresponding Activity Associations window. You can select an Activity within the Activity Workbench pane, and then view its related information within the corresponding Activity Associations window. For a selected Activity, you can create a new Activity, create or update its associated Maintenance Routing, create or update the associated Maintenance BOM, and view cost estimations.
12. Optionally expand the Activities with Association folder to display all Activities that are associated with an Asset Number, based on your chosen selection criteria, within the Activity Workbench window. You can select an Activity within the Activity Workbench pane, and then view its related information within the corresponding Activity Associations window. For a selected Activity, you can create a new Activity, create or update its associated Maintenance Routing, create or update the associated Maintenance BOM, and view cost estimations.

#### **To create or update a PM schedule definition:**

You can view, create or update a Preventive Maintenance (PM) Schedule definition for Activity/Asset Number and Activity/Asset Route combinations.

1. Within the Activity Workbench pane, select any one of the three tabs: Results (Capital), Results (Rebuildable Inventory), or Results (Activities).

## Activity Workbench



2. If you selected Results (Capital), expand either the Assets with Activities or Routes folders, then select an Asset Number or Route, respectively. You cannot create or update a PM Schedule definition for an Asset Number that is not associated with an Activity.

If you selected Results (Rebuildable Inventory), expand the Rebuildables with Activities folder, expand either the Serialized with Activities or Non-serialized with Activities folder, then select a Serialized or Non-serialized Rebuildable, respectively. You cannot create or update a PM Schedule definition for an Asset Number that is not associated with an Activity.

If you selected Results (Activities), expand the Activities with Association folder, then select an Activity.

3. Choose Preventive Maintenance. The PM Schedules window displays all PM Schedule definitions for the current Activity/Asset Number or Activity/Asset Route combination.
  1. Optionally choose New to create a new PM Schedule definition.
  2. Optionally choose Last Service Information to create or update Last Service Information.
  3. Optionally choose Suppression to create or update a suppression definition, associated with the current Activity/Asset Number or Activity/Asset Route combination.
  4. Optionally select a PM Schedule definition, and then choose Open to view its details.

### PM Schedules

Name	Asset Number	Asset Group	Activity	Default	Set Name	PM Type
PM22	FL1010	Fork Lifts	Change Fork Lif	<input checked="" type="checkbox"/>	MAIN	Rule Based
				<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"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		
				<input type="checkbox"/>		

New Last Service Info Suppression Open

4. Close the window.
5. Save your work.

#### To create or update an activity suppression:

You can view, create, or update suppression definitions for Activity/Asset Number and Activity/Asset Route combinations.

1. Within the Activity Workbench pane, select any one of the three tabs: Results (Assets), Results (Rebuildables), or Results (Activities).
2. If you selected Results (Assets), expand either the Assets with Activities or Routes folders, then select the Asset Number or Route, respectively. You cannot create or update a suppression definition for a Asset Number that is not associated with an Activity.

If you selected Results (Rebuildables), expand the Rebuildables with Activities folder, expand either the Serialized with Activities or Non-serialized with Activities folder, then select a Serialized or Non-serialized Rebuildable, respectively. You cannot create or update a suppression definition for a Asset Number that is not associated with an Activity.

If you selected Results (Activities), expand the Activities with Association folder, then select an Activity.

3. Choose Suppression.

### Suppression

The screenshot shows a window titled "Suppression (EM1)". It contains several input fields and a table.

Asset Type	Capital	
Asset Number	FL1010	Fork Lift 1010
Asset Group	Fork Lifts	Fork Lift Asset Group
Activity	Change Fork Lift Batterie	Change the battery in electric fork lifts

There is a checkbox with a checkmark to the right of the activity row.

Suppressed Activity	Description

4. Add or update the Suppression Activity associated with the current Activity.
5. Save your work.

#### To view or update last service information:

You can view or update last service information for Activity/Asset Number and Activity/Asset Route combinations.

1. Within the Activity Workbench pane, select any one of the three tabs: Results (Assets), Results (Rebuildables), or Results (Activities).
2. If you selected Results (Assets), expand either the Assets with Activities or Routes folders, then select the Asset Number or Route, respectively.

If you selected Results (Rebuildables), expand the Rebuildables with Activities folder, then expand either the Serialized with Activities or Non-serialized with Activities folder, and finally select a Serialized or Non-serialized Rebuildable, respectively.

If you selected Results (Activities), expand the Activities with Association folder, then select an Activity.

3. Choose Last Service to view or update last service information.

### Last Service Information

Item Type	Asset	
Asset Number	FL1010	Fork Lift 1010
Asset Group	Fork Lifts	Fork Lift Asset Group
Activity	Change Fork Lift Batterie	Change the battery in electric fork lifts

Last Service Information	
Last Service Start Date	01-APR-2004 21:55:06
Last Service End Date	01-APR-2004 22:56:06

Meter Name	Usage Rate	UOM	Description	Last Service Reading
FL1010 Hour Meter	8	HR	Fork Lift 1010 Usage Hour	3000

4. Save your work.

### To view estimated cost information:

You can view estimated cost information for an Activity. Estimating Activity costs is often necessary for planning and budgeting purposes.

1. Within the Activity Workbench pane, select any one of the three tabs: Results (Assets), Results (Rebuildables), or Results (Activities).
2. If you selected Results (Assets), expand either the Assets with Activities or Routes folders, then select the Asset Number or Route, respectively.

If you selected Results (Rebuildables), expand the Rebuildables with Activities folder, then expand either the Serialized with Activities or Non-serialized with Activities folder, and finally select a Serialized or Non-serialized Rebuildable, respectively.

If you selected Results (Activities), expand the Activities with Association folder, then select an Activity.

3. Choose Cost Estimate to view the Activity's cost estimation information.

### Activity Cost

The screenshot shows a window titled "Activity Cost". Inside, there are two input fields: "Activity" with the value "Change Fork Lift Batterie" and "Description" with the value "Change the battery in electric". Below these is a section titled "Estimated Activity Cost" containing a table.

Cost Category	Total	Equipment	Labor	Material
Maintenance	17.50	7.50	10.00	0.00
Engg	0.00	0.00	0.00	0.00
Stores	0.00	0.00	0.00	0.00
Activity Total	17.50	7.50	10.00	0.00

## Related Topics

- Preventive Maintenance Setup, page 4-1
- eAM Cost Estimation, page 6-2

## Defining Maintenance Routes

Operations are the instructions or tasks to perform a repair. Because each operation is associated with a department, each operation contains assigned resources, for example, trades people, outside service providers, and equipment (See: Defining Departments and Resources, page 2-12). A Maintenance Route is the set of operations or jobs necessary to perform an Activity. When a Work Order is created for an Activity, the Maintenance Route corresponding to the Activity explodes to the Work Order (See: Defining Activities, page 2-37); all operations specified in the Maintenance Route are copied to the Work Order as its operations.

Maintenance Routes are not Asset Routes. For information on Asset Routes, See: Defining Asset Routes, page 2-53.

Enterprise Asset Management operations differ from manufacturing operations because manufacturing operations are performed sequentially, whereas eAM operations are not performed sequentially. In Enterprise Asset Management, operations may not be sequential. You can specify that one operation is dependent on another. Also, it is possible that two unrelated operations can happen concurrently. One operation can depend on multiple operations. Multiple operations can depend on one operation. The dependency may not be totally connected.

### To define a maintenance route:

1. Navigate to the Activity Workbench window.
2. Choose Launch.

## Activity Workbench

3. Within the Activity Workbench pane, select the Activity for which you wish to create the Routing.
4. Choose Routing.

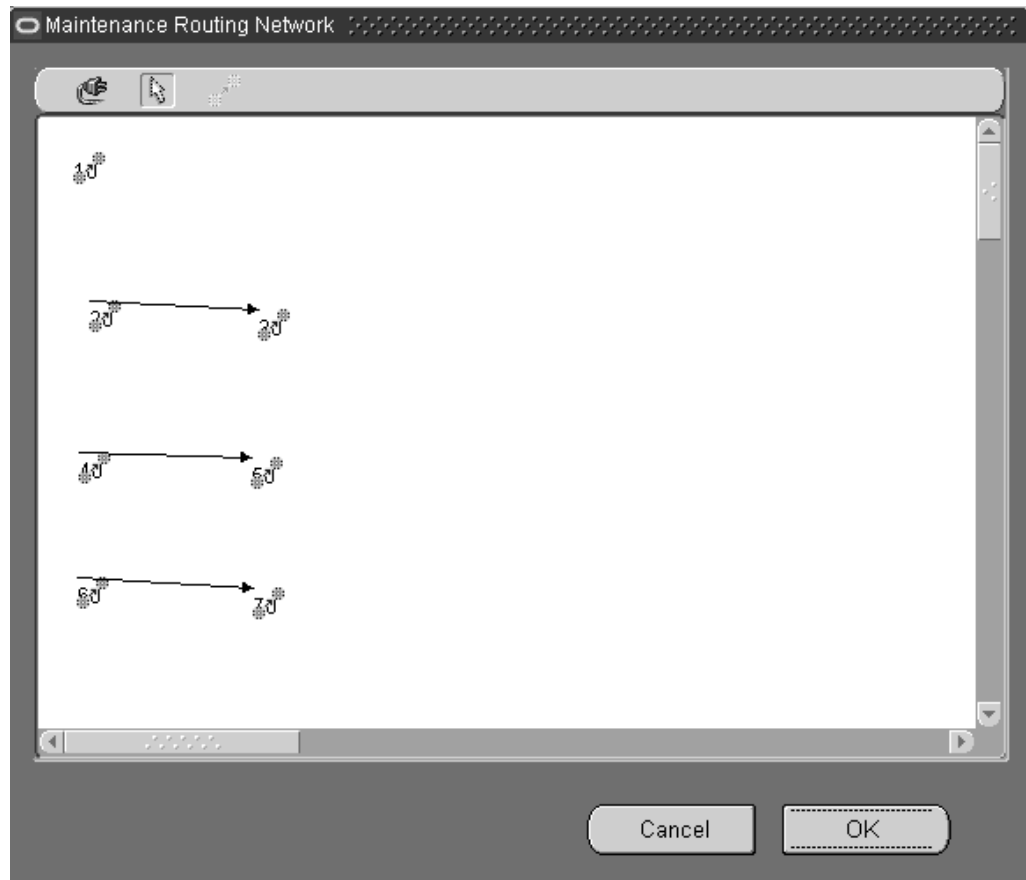
## Routings

5. Select an Activity from the Item list of values.

6. Within the Main tab, enter an operation Sequence, or let the system automatically generate it for you, according to your profile setup (See: Item and Operation Sequence, *Oracle Bills of Material User's Guide*).
7. To copy or reference standard operations into a routing, use the operation Code list of values. You can define a new standard operation by selecting Standard Operations from the Tools menu.

If you use a standard operation code, the operation information for that code is copied into the current operation. You can then update that information as desired (See: Creating a Standard Operation, *Oracle Bills of Material User's Guide*).
8. Select a Department where the operation is performed.
9. Select the Referenced check box to indicate that any changes to standard operations are reflected in the routing. If the standard operation is selected, this check box is selected by default.
10. The Effective date defaults to the system date, but you can optionally change this (See: Effective Date Fields, *Oracle Bills of Material User's Guide*).
11. Optionally enter a Disabled date to indicate the current operation's expiration.
12. Select the Description tab. Enter a Description for the current operation.
13. Optionally choose Routing Network to view the operation dependencies for the current asset route.

#### **Maintenance Routing Network**





You can schedule operations to execute in parallel, sequence, or through dependent steps. In the screen shot above, for example, Operations 20, 30, 40, and 50 are dependent on Operation 10, since there is a line connecting the operations. These operations also run in parallel to each other. The operation numbers identify the sequence that they are performed (See: Preparing Work Order Operations, page 3-21).

14. Optionally select an operation, then choose Operation Resources to view the resources associated with the current department attached to this operation (See: Defining Departments and Resources, page 2-12). Optionally you can modify the resources listed (See: Assigning Operation Resources, *Oracle Bills of Material User's Guide*).

### Operation Resources

Seq	Resource	UOM	Basis	Usage	Inverse
10	FliftMech	HR	Item	.05	20
20	FKTK	HR	Item	1	1

15. Save your work.

For information on all remaining fields, See: Creating a Routing, *Oracle Bills of Material User's Guide*

For information on defining Activities using the Activity Workbench, See: Defining Activities, page 2-37.

## Setting Up Maintenance Bills of Material

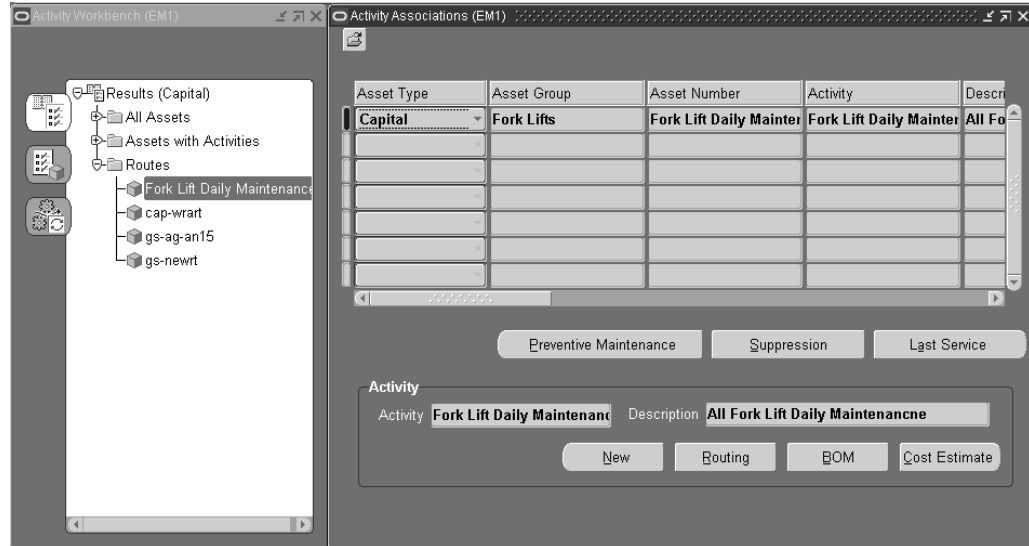
You can identify and select the required items used by an Activity. A bill of material (BOM) is used to list all inventoried or Direct Items needed to perform a particular Activity, and is defined for each Activity. For example, you might have an Activity titled, Fork Lift Daily Maintenance. The items necessary to perform this Activity include water, fork lift lubrication oil, filled propane tanks, and shop rags. As Maintenance BOMs are created, they are associated to an Activity (See: Defining Activities, page 2-37).

When a Work Order is created for an Activity, the Maintenance BOM corresponding to the Activity explodes to the Work Order (See: Defining Activities, page 2-37); all components specified in the Maintenance BOM are copied to the Work Order as material requirements.

### To set up a maintenance BOM:

1. Navigate to the Activity Workbench window.
2. Choose Launch.

#### Activity Workbench



3. Within the Activity Workbench pane, select the Activity for which you wish to define the Bill of Material.
4. Choose BOM.

## Bills of Material

Item: Fork Lift Daily Maintainer All Fork Lift Daily Maintenance UOM: Ea

Alternate: Revision: 0 Date: 09-SEP-2004 04:28:19

Display: Future and Current ☒ Implemented Only

Main Date Effic... Unit Effic... ECO Compose... Material ... Order Ma... Purchasing Shipping Comments

Item Seq	Operation Seq	Component	Item Description	Revision	UOM	Quantity
10	1	Water	Water for Fork Lift Battery	0	GAL	5
20	1	Fork Lift Lubrication	Lubrication for Masts	0	Ea	5
30	1	Filled Propane Tank	Fuel for Propane Fork Lifts	0	Ea	4
40	1	Shop Rags	Shop Rags for Clean up	0	Ea	5

Substitutes Designators Operations Bill Details Revision

5. Select an Activity from the Item field list of values.
6. Select the Main tab. The Item Sequence defaults.
7. Enter the Operation Sequence that this Component (material item necessary for the operation sequence, NOT rebuildable item) is needed for (See: Defining Maintenance Routes, page 2-68).
8. Enter necessary Components and their Quantities that are required to perform the Activity. You can enter an unlimited number of inventory and non-inventory, direct items.

**Note:** The Purchasing tab is enabled for Maintenance and Asset Bills of Material, and contains attributes specific to non-stockable, inventory items.

**Note:** This is referring to the material items necessary for the Activity.

9. Optionally select the Auto Request Material check box to indicate that Requisition/Purchase Orders are created automatically, for the current component or Direct Item, when the Work Order is released.
10. Optionally select the Date Effectivity tab to specify effectivity dates per component.
11. Save your work.

For information on all remaining fields, See: Creating a Bill of Material, *Oracle Bills of Material User's Guide*

For information on defining Activities using the Activity Workbench, See: Defining Activities, page 2-37.

## Associating Asset Numbers with Activities

After you have defined Asset Groups (See: Defining Asset Groups, page 2-36), Asset Numbers (See: Defining Asset Numbers, page 2-47 and Defining Rebuildable Serial Numbers, page 2-79, and Activities (See: Defining Activities, page 2-37), you can associate the Activities with assets and/or rebuildables. However, you can streamline the creation of Activities and associations using an Activity Association Template (See: Activity Association Templates, page 2-42). Assets are associated with Activities before entering the Activity into a Preventive Maintenance Schedule (See: Entering PM Scheduling Definitions).

**Note:** You can streamline the creation of Activity associations using an Activity Association Template. For example, when you create an Asset Group, and then Asset Numbers within that group, you do not need to utilize the Association window to associate those Asset Numbers with an Activity. If you create an Activity Association Template, the Activity that you associate with the current Asset Number's Asset Group automatically determines the Activity that is associated with the current Asset Number (See: Activity Association Templates, page 2-42).

### To associate Asset Numbers (capital or rebuildable inventory) with Activities using the Activity Workbench:

1. Navigate to the Activity Workbench window.

#### Activity Workbench

Activity Workbench (EM1)

Asset Type: **Capital**

Asset Number:

Asset Group:

Area:

Asset Category:

Owning Department:

☐ Include Children

**Activity**

Activity:

Activity Type:

Activity Source:

Shutdown Type:

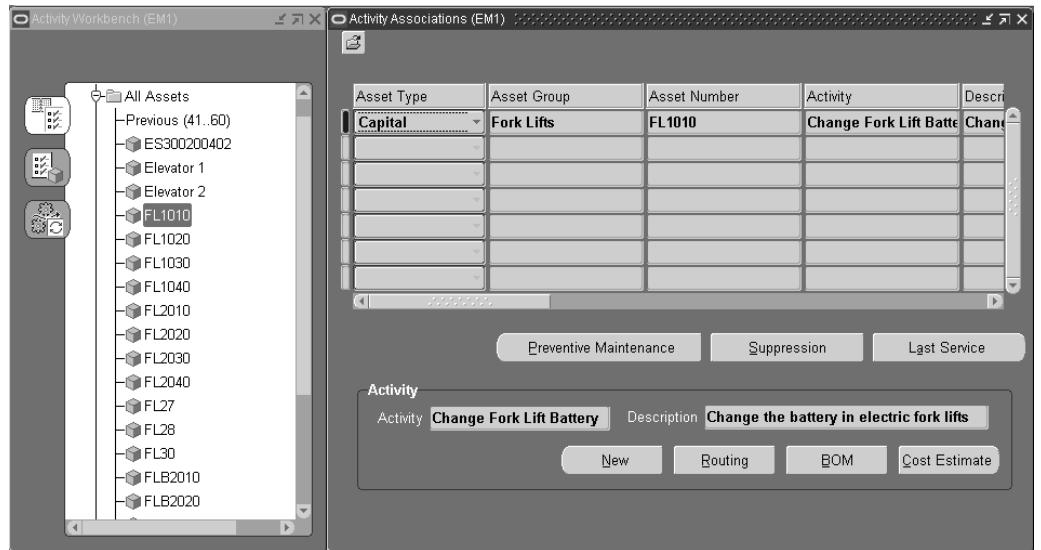
Activity Cause:

Effective From: **08-SEP-2004**

Effective To:

2. Select Asset or Rebuildable from the Item Type list of values. The item type determines the type of Asset Number you are associating with the Activity.
3. Optionally narrow your data selection by selecting the Asset Number you intend to associate with an Activity.
4. Optionally narrow your data selection by selecting and Activity.
5. Choose Launch.

## Activity Workbench and Activity Associations



6. Depending on the Item Type chosen while performing step 2, select the corresponding tab within the Activity Workbench pane. For example, if you selected an Item Type of Asset, select the Results (Assets) tab. If you selected an Item Type of Rebuildable, select the Results (Rebuildables) tab.
7. Expand the All Assets (within the Results (Assets) tab) or All Rebuildables (within the Results (Rebuildables) tab) folder. If you specified an Asset Number while performing step 3, that Asset Number appears.
8. Select an Asset Number by highlighting it. The Activity Associations window appears. If the Asset Number is already associated with one or more Activities, those rows display within the window.
9. Select the next available row and then select an Asset Group.
10. Select an Asset Number. Asset Numbers associated with the previously selected Asset Group are available. Asset Numbers are always serial controlled. If you had selected a Non-serialized Rebuildable in the Asset Group field, then the Asset Number field is not required.
11. Select an Activity.
12. Save your work.

## Related Topics

Defining Activities, page 2-37

## Creating Activity Templates

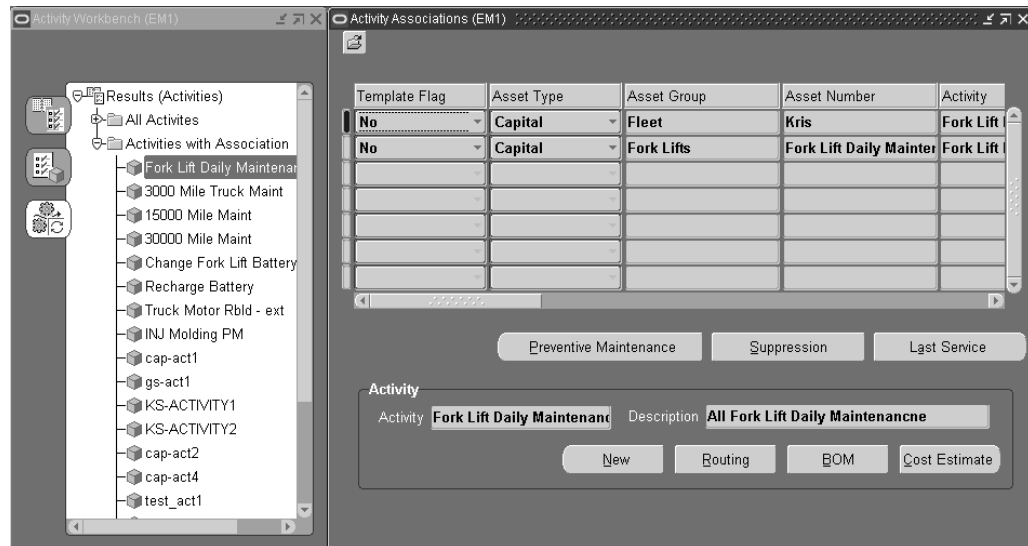
You can streamline the creation of Activity associations using an Activity Association Template. For example, when you create an Asset Group, and then Asset Numbers within that group, you do not need to utilize the Association window to associate those Asset Numbers with an Activity. If you create an Activity Association Template, the Activity that you associate with the current Asset Number's Asset Group automatically determines the Activity that is associated with the current Asset Number.

While creating an Asset Activity association within the Activity Workbench, you also have the option of creating an Activity Template at the same time.

### To create and Activity Template:

1. Navigate to the Activity Workbench window.
2. Choose Launch.

#### Activity Associations



3. Select the Results (Activities) tab.
4. Optionally expand the All Activities folder to display all valid Activities, based on your chosen selection criteria, within the Activity Workbench window. You can select an Activity and view its related Activity information within the corresponding Activity Associations window, if an association exists. You can associate an Asset Number with the current, selected Activity using the corresponding Activity Associations window. You can select an Activity within the Activity Workbench pane, and then view its related information within the corresponding Activity Associations window. For a selected Activity, you can create a new Activity, create or update its associated Maintenance Routing, create or update the associated Maintenance BOM, and view cost estimations.
5. Optionally expand the Activities with Association folder to display all Activities that are associated with an Asset Number, based on your chosen selection criteria, within the Activity Workbench window. You can select an Activity within the Activity Workbench pane, and then view its related information within the corresponding Activity Associations window. For a selected Activity, you can create a new Activity, create or update its associated Maintenance Routing, create or update the associated Maintenance BOM, and view cost estimations.
6. Select Yes from the Template Flag list of values to indicate that this Activity and asset association is also an Activity Association Template. If you select No, an asset and Activity association is created.
7. For information on all remaining fields within the Activity Associations window, See: Associating Asset Numbers with Activities, page 2-74.

8. Save your work.

## Related Topics

Activity Association Templates, page 2-42

## Rebuildable Item Setup

Rebuildable Item Setup tasks include:

- Defining Rebuildable Items, page 2-77
- Defining Rebuildable Serial Numbers, page 2-79
- Rebuildable Item/ Activity Association, page 2-80
- Defining Rebuildable Bills of Material, page 2-82

## Defining Rebuildable Items

Items that are installed, removed, and refurbished are referred to as Rebuildable Items. Examples of Rebuildable Items include motors, control boxes, and computer boards. Rebuildable Items might need to be removed or refurbished while a parent Asset is maintained. Rebuildable Items are inventory items; you have the option to serialize them.

### To set up rebuild items:

1. Navigate to the Rebuild Item (Master Item) window. The Master Item window is used to create Asset Groups, Activities, and Rebuildable Items.

**Master Item**

Master Item (V1)

Organization: **V1** Vision Operations

Item: **Fork Lift Battery**

Description: **Batteries used for electric Fork Lifts** [ ... ]

Display Attributes: ☒ Master ☐ Org ☐ All

Main Inventory Bills ... Asset... Costing Purch... Recei... Physi... Gener... MPS/M... Lead ...

Asset Item Type: **Rebuildable**

**Asset Activity Properties**

Activity Type:

Activity Cause:

Activity Source:

Shutdown Type:

☐ Activity Notification Required

2. Enter the Rebuildable Item name in the Item field.

3. Enter a Description for this Rebuildable Item, up to 240 characters.
4. Use the @Rebuildable template to quickly apply attribute values, and to ensure that the appropriate attributes are applied.
  1. Select TOOLS from the Tools menu, and then select COPY FROM.
  2. Select the @Rebuildable template.

**Note:** You can create Rebuildable Items using the template described above, or you can copy a Rebuildable Item from an existing Rebuildable Item (See: *Defining Items, Oracle Inventory User's Guide*).

The following table presents the necessary attribute values that are applied automatically to the Activity, when using the template:

***Rebuildable Item Attributes***

Attribute	Value
User Item Type	Rebuildable
Item Status	Active
Inventory Item	Enabled
Transactable	Enabled
EAM Item Type	Rebuildable

5. Optionally select the paperclip Attachments icon to attach relevant documents, such as drawings, standard procedures, and reference guides, to this Rebuildable Item. You can attach file, URL, and text attachments.
6. Optionally select the Inventory tab to define a Non-Serialized Rebuildable Item. Within the Generation field, select No Control. If you wish to define a Rebuildable Serial Number, select one of the other options available, based on your business needs. Valid values include No Control, Predefined, At Receipt, and At Sales Order Issue.
7. Save your work.

**To associate rebuildable items to multiple organizations:**

1. From the Master Item window, select TOOLS from the Tools menu.
2. Select Organization Assignment.
3. Enter additional organizations in the available window.
4. Save your work. After saving your work, this Rebuildable Item can associate with an Activity (See: *Rebuildable Item/ Activity Association*, page 2-80).

## Related Topics

*Defining Items, Oracle Inventory User's Guide*



## Defining Rebuildable Serial Numbers

### To set up rebuildable serial numbers individually:

1. Navigate to the Define Rebuildable Serial Number window.

**Define Rebuildable Serial Numbers**

Define Rebuildable Serial Number (EM1)

Asset Type	Rebuildable Inventory	
Asset Group	Fork Lift Battery	Batteries used for electric Fork Lifts
Asset Number	Battery1000	

[ ]

Main Production Others

Owning Department		Area	
Criticality			
WIP Accounting Class			

Parent

Asset Type	Capital	
Asset Number	FL1010	
Asset Group	Fork Lifts	

Revision

Current Status

Subinventory

Locator

Instantiate

Attributes

Associate Activity

2. Select an Asset Group. This is the Asset Group (Rebuildable Item) you are associating with the Rebuildable Serial Number you are currently creating.  
**Note:** After an Asset Group (Rebuildable Item) is associated with a Rebuildable Serial Number and then saved, you cannot change it.
3. Enter an Asset Number (Rebuildable Serial Number) if you do not have them automatically generated. Accept or modify the default Asset Number, if you have automatic generation enabled (See: Defining eAM Parameters, page 2-8).
4. Optionally enter a description for the Rebuildable Serial Number of up to 240 characters.
5. Within the Main tab, optionally select an Owning Department for this Rebuildable Serial Number. This represents the crew responsible for the Rebuildable Serial Number. Notifications, regarding Work Requests, are sent to the Primary Approver of the Work Request's associated Asset Number's current owning department (See: Defining Department Approvers, page 2-16 and Defining Asset Numbers, page 2-47).
6. Optionally enter the Area where this Asset Number resides. This is a user defined listing of logical areas of work. For example, North Plant, East Wing, or Area 1 (See: Setting Up Areas, page 2-11).

7. Optionally select a Criticality code to indicate the importance of the Asset Number to the organization. This field is for information purposes.
8. Optionally select a WIP Accounting Class to identify the Expense cost elements associated with the work performed, such as materials, labor, and resources.
9. You can optionally associate the current Rebuildable Serial Number with a parent capital asset or parent rebuildable.
  1. Select an Asset Type. Valid values are Capital and Rebuildable Inventory.
  2. If you selected a Capital Asset Type, optionally select a parent Asset Number. If you previously selected a Rebuildable Inventory Asset Type, optionally select a Rebuildable Serial Number from the Asset Number list of values.
  3. If you selected a Capital Asset Type, optionally select a parent Asset Group. If you previously selected a Rebuildable Inventory Asset Type, optionally select a Rebuildable Item from the Asset Group list of values.
10. Save your work. Notice that the Current Status is Defined but not used.

**To establish a rebuildable serial number in Inventory:**

1. To add this item to a Subinventory, select a Subinventory. If the selected Subinventory has a Locator, you must also enter a Locator.
2. Choose Instantiate to automatically activate a Miscellaneous Receipt process. This process creates inventory for the Asset Number (Rebuildable Serial Number), in the selected Subinventory and Locator.

**Note:** As part of the Instantiate process, if Preventive Maintenance, Activity, and/or Meter Templates are associated with the current Rebuildable Item, an association instance is automatically created for the current Asset Number (Rebuildable Serial Number) and that Activity, and/or Meter and Preventive Maintenance Schedule, respectively.

The Instantiate process is a one-time-process. After the process is successful, the Current Status of the Asset Number changes to Resides in stores, and the Instantiate option is disabled.

3. Optionally choose Associate Activity to associate the current Rebuildable Serial Number to an Activity.

## Related Topics

Associating Asset Numbers with Activities, page 2-74

Defining Subinventories, *Oracle Inventory User's Guide*

Defining Stock Locators, *Oracle Inventory User's Guide*

## Rebuildable Item/Activity Association

After you have defined Rebuildable Items (See: Defining Rebuildable Items, page 2-77) and Activities (See: Defining Activities, page 2-37), you can associate Activities to the Rebuildable Items. For example, you may have a Rebuild Engine Activity, and an Engine Rebuildable Item. After you create a Rebuild Work Order (See: Rebuild

Work Orders, page 3-9) for the engine, the associated Rebuild Engine Activity attaches its associated maintenance BOM (material) and maintenance routing (resources) to the Work Order (See: Defining Maintenance Routes, page 2-68 and Setting Up Maintenance Bills of Material, page 2-71).

**Note:** Activity association for Rebuildable Serial Numbers are streamlined by using Activity Association Templates. If an Activity Template is defined for a Rebuildable Item, the activity association automatically creates when a new Serial Number is created for that Item, within the maintenance organization.

## To associate Rebuildable Items with Activities:

1. Navigate to the Activity Association window.

### Activity Association

Activity Association (EM1)

Activity: **Change Fork Lift Battery**  
Description: **Change the battery in electric fork lifts**

— Associations —

Main | Work Order Defaults

Asset Type	Asset Group	Asset Number	Priority	— Effective Dates —	
				From	To
Capital	Fork Lifts	FL1010		31-OCT-2002	
Capital	Fork Lifts	FL1020		31-OCT-2002	
Capital	Fork Lifts	FL1030		31-OCT-2002	
Capital	Fork Lifts	FL1040		31-OCT-2002	
Rebuildable Inve...	Fork Lift Batterie	Battery1000		10-SEP-2004	

2. Select an Activity.
3. Within the Main tab, select Rebuildable from the Item Type list of values.
4. Select a Rebuildable Item from the Asset Group list of values.
5. If the Rebuildable Item is serial number controlled (See: Defining Rebuildable Items, page 2-77), select a Rebuildable Serial Number from the Asset Number list of values.
6. Optionally select a Priority Code. This field is for information purposes.
7. Optionally enter Effective Dates. If the Effective From field is left blank, the system date defaults. If the Effective To field is left blank, it defaults as NULL.
8. Within the Activity tab, the Activity Cause defaults from the Activity definition (See: Defining Activities, page 2-37), specifying what situation caused this work to generate. For example, Breakdown, Vandalism, Normal Wear, or Settings. Optionally you can select an Activity Cause.

9. The Activity Type defaults from the Activity definition (See: Defining Activities, page 2-37). This code indicates the type of maintenance activity needed to perform for this Activity. It is used when defining a job or a standard job. It should remain generic, and should not describe the job in detail. For example, Inspection, Overhaul, Lubrication, Repair, Servicing or Cleaning. Optionally select an Activity Type.
10. Optionally select the Tagging Required check box to indicate whether tag out procedures are required.
11. The Owning Department field is used when associating Asset Numbers to Activities (See: Activity Association Templates, page 2-42).
12. Save your work.

## Defining Rebuildable Bills of Material

You can identify and select the required items that make up a Rebuildable Serial Number. A bill of material (BOM) is used to list all items and components that make up a particular asset or rebuildable, and is defined for each Rebuildable Item. The items defined on a Rebuildable BOM are standard inventory components and/or non-inventory, direct items (See: Defining Items, *Oracle Inventory User's Guide*).

**Note:** If you are not using Project Manufacturing applications, Project Parameters are defined for your eAM enabled organization to successfully create Rebuildable Items. This is required because a Rebuildable BOM is of type Model/Unit Effective and this BOM type is currently allowed if PJM organization parameters are set up for the eAM enabled organization to which the Rebuildable Item has been assigned. To define Project Parameters, open the Project Parameters window using Project Manufacturing Super User responsibility and without entering any data in the window, save the record. If you plan to use Project Manufacturing, see: Project Manufacturing Integration Setup, page 2-138 for information on defining Project Parameters.

### To set up a rebuildable BOM:

1. Navigate to the Bills of Material window.

## Bills of Material

Item: **Heater** Heater - Electric UOM: **Ea**

Alternate:

Revision: **0** Date: **11-SEP-2004 03:58:53**

Display: **Future and Current** ☒ Implemented Only

Main | Date Effe... | Unit Efec... | ECO | Compone... | Material ... | Order Ma... | Purchasing | Shipping | Comments

Item Seq	Operation Seq	Component	Item Description	Revision	UOM	Quantity
10	1	Mounting Clips	Mounting Clips for Frymaster H50	0	Ea	1
20	1	Power Cord	Power Cord Assy for Frymaster H5	0	Ea	1

Substitutes | Designators | Operations | Bill Details | Revision

2. Select a Rebuildable Item from the Item list of values.
3. Within the Main tab, the Item Sequence and Operation Sequence values default.
4. Enter the inventory or non-inventory Component to make up the Rebuildable Serial Number.
5. Enter the Quantity of that component necessary for the Rebuildable Serial Number.
6. Save your work.

## Related Topics

Creating a Bill of Material, *Oracle Bills of Material User's Guide*

## Non-Stock Direct Item Setup

Non-Stock Direct Items can represent items that are not stocked in inventory, such as services that are purchased from a supplier. Non-Stock Direct Items are not stocked in inventory; they are defined in the Item Master as an inventory item, Purchased, Purchasable, and the Stockable check box cleared. See: Purchasing Attribute Group, *Oracle Inventory User's Guide*. These items are contrived as "one off", bought directly from a vendor for a specific Work Order and Operation. These items are delivered directly to the Shop Floor for maintenance Work Order execution.

You can add Non-Stock and Description Based Direct Items to Maintenance Bills of Material, as well as add them directly to the material requirements for an existing Work Order (See: Defining Direct Item Material Requirements, page 3-29).

To set up Non-Stock Direct Items, access the Master Item window within Oracle Inventory, and apply the @Non Stocked Item template. See: Defining Items, *Oracle*

*Inventory User's Guide.* Description Based Direct Items are not set up within Oracle Inventory.

If direct items exist on a Bill of Material, they default as material requirements when creating a Work Order for that asset; however, you can add additional direct item material requirements to an existing Work Order.

### To set up a Non-Stock Direct Item:

1. Navigate to the Master Item window.

**Master Item**  
Master Item (V1)

Organization: **V1** Vision Operations  
Item: **Non-Stock Item**  
Description: **Non-Stock Direct Item** [ ]

Display Attributes  
• Master • Org ○ All

Main Inventory Bills ... Asset... Costing Purch... Recei... Physi... Gener... MPS/M... Lead ...

☐ Purchased ☐ Purchasable ☐ Use Approved Supplier  
☒ Allow Description Update RFQ Required **No**  
☐ Outside Processing Item Taxable **No**  
Unit Type **Copy From** Invoice Matching Receipt Required **Yes**

Receipt  
Template **@Non-Stocked Item** Non-Stocked Item Template(eAM)  
Item  
Clear Cancel Apply Done

Encum  
Asset Category  
Change Organization  
+ Manufacturing  
Open

2. Enter the non-stock direct Item name.
3. Enter a Description.
4. From the Tools menu, select Copy From.
5. Select the @Non-Stocked Item Template.
6. Choose Apply.
7. Choose Done.
8. Save your work. The Stockable check box is clear and the Purchased and Purchasable check boxes are selected.

## Related Topics

Defining Rebuildable Bills of Material, page 2-82

Setting Up Maintenance Bills of Material, page 2-71

Setting Up Asset Bills of Material, page 2-54

## Preventive Maintenance Setup

eAM can generate Work Orders automatically based on meter readings, runtime and/or calendar days. An example of meter-based preventive maintenance is your car's oil changes. Most car manufacturers recommend that you change your engine oil every 3,000 miles or six months, whichever comes first.

To set up the above scenario, you would first define your car's odometer as a meter. Next, you would associate that meter to an asset (your car), using the Asset Meter Association window. After you have associated the meter to the asset, you can associate the Maintenance Activity (oil change) that should occur, based on the meters you have defined. This is done via Preventive Maintenance Scheduling.

This section includes the following topics:

- Project and Task Setup, page 2-85
- Defining Meter Templates, page 2-85
- Defining Meters, page 2-87
- Associating Meter Templates with Asset Groups, page 2-88
- Associating Meters with Asset Numbers, page 2-89
- Defining Set Names, page 2-90
- Defining a Preventive Maintenance Template, page 2-91
- Entering Preventive Maintenance Schedule Definitions, page 2-96

## Project and Task Setup

Work Orders can associate with a Project, Task or Seiban number, at the time of implementing PM suggestions to Work Orders. The Forecast Work Order window is customizable.

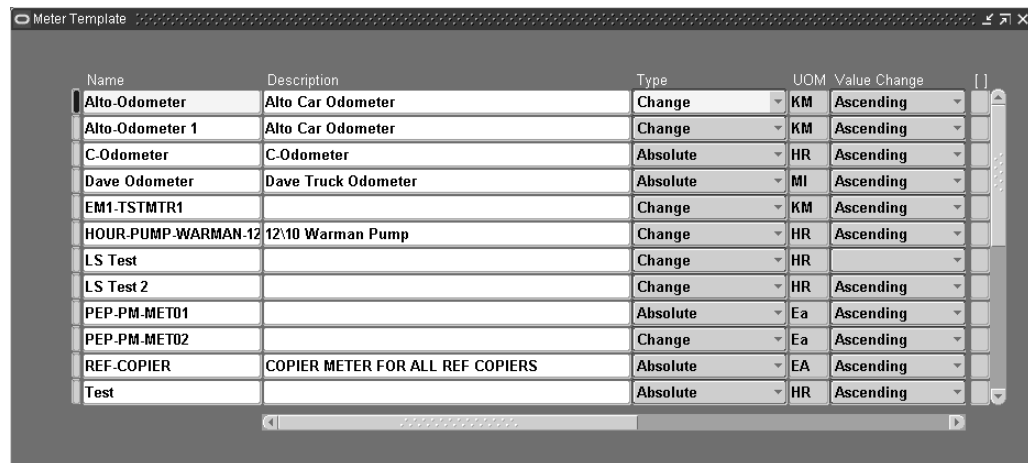
## Defining Meter Templates

There are two ways to create meters. You can create them within the Meter Definition window, or create them first using a Meter Template window, and then next instantiating them when defining an asset. If you create Meters using the Meter Definition window (See: Defining Meters, page 2-87), associate that meter definition with individual Asset Numbers manually. If you utilize the Meter Template definition functionality, you can associate that Meter Template with Asset Groups. After the association is created, when an Asset Number (Asset Numbers or Rebuildable Serial Numbers) is created within that Asset Group (Asset Group or Rebuildable Item), the system automatically creates a new instance of the meter, associated with the specific Asset Number. This enables you to streamline your meter setup. However, the meters are not created retroactively; it applies to Asset Numbers created after the Meter Template was created.

### To define Meter Templates:

1. Navigate to the Meter Template window.

## Meter Template



Name	Description	Type	UOM	Value Change	
Alto-Odometer	Alto Car Odometer	Change	KM	Ascending	<input type="checkbox"/>
Alto-Odometer 1	Alto Car Odometer	Change	KM	Ascending	<input type="checkbox"/>
C-Odometer	C-Odometer	Absolute	HR	Ascending	<input type="checkbox"/>
Dave Odometer	Dave Truck Odometer	Absolute	MI	Ascending	<input type="checkbox"/>
EM1-TSTMTR1		Change	KM	Ascending	<input type="checkbox"/>
HOUR.PUMP-WARMAN-12	12/10 Warman Pump	Change	HR	Ascending	<input type="checkbox"/>
LS Test		Change	HR		<input type="checkbox"/>
LS Test 2		Change	HR	Ascending	<input type="checkbox"/>
PEP-PM-MET01		Absolute	Ea	Ascending	<input type="checkbox"/>
PEP-PM-MET02		Change	Ea	Ascending	<input type="checkbox"/>
REF-COPIER	COPIER METER FOR ALL REF COPIERS	Absolute	EA	Ascending	<input type="checkbox"/>
Test		Absolute	HR	Ascending	<input type="checkbox"/>

2. Enter a unique meter template Name.
3. Enter the Description of the Meter Template.
4. Select the meter Type.

When entering meter readings for the current meter, if the meter is an Absolute type, the Value column is enabled. If the meter is a Change type, the Change column is enabled.

5. Select a unit of measure (UOM). After the meter is created, this field is disabled.
6. Select whether the meter readings is Ascending, Descending, or Fluctuating. If you choose blank from the drop down list, the meter reading can fluctuate. A fluctuating meter reading is one that can go up and down, for example, a temperature gauge. As production units pass through meters, meter readings increment. Another example of an ascending meter is a car odometer. Some liquid dispensers start full and record decreasing readings as material is used.

**Note:** If the meter is fluctuating, it is not used in Preventive Maintenance scheduling.

7. If you select the Used in Scheduling check box, the meter is used in Preventive Maintenance Scheduling. If there are any scheduling rules associated with this meter, you cannot clear this check box. If this is a fluctuating meter, this check box is disabled. If the Used in Scheduling check box is selected, the Usage Rate (per day) and Use Past Reading fields become mandatory.
8. Enter a usage Rate (per day). This field works in conjunction with the Use Past Readings field to provide daily meter usage estimates, based on historical readings. It supplies the system benchmark data that is used to set the occurrence of scheduled PMs. Rate per day is referred to in the absence of a sufficient value in the Use Past Reading field.

This field is mandatory if you have selected the Used in Scheduling check box.

9. Enter a value for the number of past readings. This value designates how many readings prior the scheduler should go to for calculating the usage rate. If there is an insufficient number of readings (for example four, instead of the required five), the system continues the calculation based on the usage Rate per day.



This field is mandatory if you have selected the Used in Scheduling check box.

**Note:** If you enter a value of 1, the system perpetually calculates at the usage Rate per day.

10. Select the meter effectivity dates. If left blank, the meter is effective all of the time. You can disable a meter effective on a specific date by selecting a To date.
11. Save your work.

## Defining Meters

Alternatively, you can create Meters using the Meter Definition window. Manually associate the meter definition with individual Asset Numbers. If you utilize the Meter Template definition functionality, you can associate that Meter Template with Asset Groups (See: Defining Meter Templates, page 2-85).

### To define a meter within the Meter Definition window:

1. Navigate to the Meter window.

**Meter**

Name	Description	Type	UOM	Value Change	
AB Crane 1 Hour Meter	AB Crane 1 Hour Meter	Absolute	HR	Ascending	
AB-Meter-ASC1	Ankur Ascending Meter	Absolute	DAY	Ascending	
AN Asset	An asset .hour meter	Absolute	HR	Ascending	
AVR2-Meter	Cahnge Meter	Change	HR	Ascending	
AVR2-ch-mtr	Alex Change Meter	Change	HR	Ascending	
Alto-Odometer-1602	Alto Car Odometer	Change	KM	Ascending	
Alto-Odometer-1981	Alto Car Odometer	Change	KM	Ascending	
Alto-Odometer-2001	Alto Car Odometer	Change	KM	Ascending	
Alto-Odometer-2021	Alto Car Odometer	Change	KM	Ascending	
Alto-Odometer-2023	Alto Car Odometer	Change	KM	Ascending	
Alto-Odometer-2129	Alto Car Odometer	Change	KM	Ascending	
Alto-Odometer-2141	Alto Car Odometer	Change	KM	Ascending	

2. Enter a unique meter Name.
3. Enter a Description for this meter.
4. Select the meter Type.

When entering meter readings for the current meter, if the meter is an Absolute type, the Value column is enabled. If the meter is a Change type, the Change column is enabled.

5. Select a unit of measure (UOM), associated with this meter. After the meter is created, this field is disabled.
6. Select whether the meter readings are Ascending, Descending, Fluctuating, or Change Meter. If you choose blank from the drop down list, the meter reading can fluctuate. A fluctuating meter reading is one that can go up and down, for example, a temperature gauge. As production units pass through meters, meter readings increment. Another example of an ascending meter is a car odometer. Some

liquid dispensers start full and record decreasing readings as material is used. A Change Meter is used to measure incremental changes in meter readings. The incremental amount is added to the current meter reading. After meter readings are entered for a Change Meter, you cannot change the type to Absolute.

**Note:** Fluctuating meters are not used in Preventive Maintenance scheduling.

After the meter is created, this field is disabled.

7. If you select the Used in Scheduling check box, the meter is used in Preventive Maintenance Scheduling. If there are any scheduling rules associated with this meter, you cannot clear this check box. If this is a fluctuating meter, this check box is disabled. If the Used in Scheduling check box is selected, the Usage Rate (per day) and Use Past Reading fields become mandatory.
8. Enter a usage Rate (per day). This field works in conjunction with the Use Past Readings field to provide daily meter usage estimates, based on historical readings. It supplies the system benchmark data that is used to set the occurrence of scheduled PMs. Rate per day is referred to in the absence of a sufficient value in the Use Past Reading field.

This field is mandatory if you have selected the Used in Scheduling check box.

9. Enter a value for the number of past readings. This value designates how many readings prior the scheduler should go to for calculating the usage rate. If there is an insufficient number of readings (for example four, instead of the required five), the system continues the calculation based on the usage Rate per day entered.

This field is mandatory if you have selected the Used in Scheduling check box.

**Note:** If you enter a value of 1, the system perpetually calculates at the usage Rate per day.

10. Enter an Initial Reading. This is automatically used as the first meter reading entered, or each new instance of the meter that is created and associated to a Asset Number via the Meter Template.
11. Select the meter effectivity dates. If left blank, the meter is effective all of the time, after it is created. If you select a future date, the meter is disabled until that date. You can disable a meter effective on a specific date by selecting a To date.
12. Save your work.

## Associating Meter Templates with Asset Groups

If you utilize the Meter Template definition functionality (See: Defining Meter Templates, page 2-85), you can associate that Meter Template with Asset Groups. After you create the association, when a new Asset Number (Asset Numbers or Rebuildable Serial Numbers) is created within that Asset Group (Asset Group or Rebuildable Item) a new instance of the corresponding meter is automatically created. This enables you to streamline your Meter setup.

### To associate Meter Templates with Asset Groups:

1. Navigate to the Meter Template Association window.

### Meter Template Association

Name	Description	Type	UOM	Value
Alto-Odometer	Alto Car Odometer	Change	KM	Ascen

2. Select an Item Type. Valid values are Asset or Rebuildable.
3. Select an Asset Item (Asset Group or Rebuildable Item).
4. Optionally choose Find to query existing Meter Template/ Asset Group relationships.
5. Within the Meter Template region, select a meter template Name.
6. Save your work. After saving, every Asset Number defined as part of the current Asset Group automatically associates with the Meter Template; you do not need to create this association manually.

### Related Topics

Entering Meter Readings, page 4-2

## Associating Meters with Asset Numbers

Meter Association creates the relationship between the meter definition and the Asset Number.

#### To associate meters with Asset Numbers:

1. Navigate to the Meter Association window.

### Meter Association

Asset Type: Capital

Asset Number: FL1020 Fork Lift 1020

Asset Group: Fork Lifts Find

Meters

Name	Description	Type	UOM	Value
FL1020 Hour Meter	Fork Lift 1020 Usage Hour Meter	Absolute	HR	Ascen

2. For optimal performance, select an Asset Group (Asset Group or Rebuildable Item) before selecting an Asset Number. Asset Numbers, associated with the selected Asset Group, are available.

You can optionally select an Asset Number first to trigger the Asset Group to default.

3. Choose Find to view all Meters associated with the current Asset Number (Asset Number or Rebuildable Serial Number).
4. In the Meters region, you can associate existing, defined meters with the current asset.

To associate existing meters with the current Asset Number, select a meter Name.

5. Select the meter Type.

When entering meter readings for the current meter, if the meter is an Absolute type, the Value column is enabled. If the meter is a Change type, the Change column is enabled.

6. Save your work.

## Defining Set Names

A PM schedule for an Activity and an Asset Number or Asset Group must uniquely belong to a Set Name. Multiple PM Schedules for the same Asset Number or Asset Group and Activity combination are created across Sets. However, out of those PM Schedules, one can be identified as the Default and used for generating Work Orders. Other PM Schedules in other Sets can be used for simulation purposes. Every Set Name has an end date. Every PM schedule that belongs to the Set Name must have its effective-to date before the end date of the PM Schedule's Set Name. Before assigning a Set Name to a PM schedule, you need to define Set Names within the Set Name Definition window. If you do not want to create Set Names, you can assign PM schedules to set, MAIN; it already exists.

### To define Set Names:

1. Navigate to the Set Name window.

**Set Name**

Set Name	End Date	Description
NVS SET1		NVS SET1
PEP-SET		
PM SET1		PM Set 1
REF MAIN		
REF METER		
Winter PM Set		
Summer PM Set		
High Usage PM Set		

Templates Schedules Set Default

2. Enter the name of the Set Name.
3. Optionally enter an End Date. Every PM schedule that belongs to the Set Name must have its effective-to date before the End Date of the PM Schedule's Set Name. If you leave this field blank, the current Set Name does not expire.
4. Optionally enter a Description for this Set Name.
5. Optionally choose Templates to add, change, delete, or view Preventive Maintenance Schedule Templates, associated with the current Set Name (See: Preventive Maintenance Schedule Templates).
6. Optionally choose Schedules to create PM Schedule Definitions, associated with the current Set Name (See: Defining a Preventive Maintenance Template, page 2-91).
7. Optionally choose Set Default to identify all schedules within this set as Default. PM Schedules identified as Default automatically generates Work Orders, by the PM Scheduler process. PM schedules that are not identified as Default can generate Work Order suggestions, by the PM Scheduler process. The generated suggestions cannot be converted into Work Orders. You can create an unlimited number of Set Names within this window.
8. Save your work.

## Defining a Preventive Maintenance Template

An Activity and Asset Number combination can be associated with Runtime, Day Interval Rules, or a list of dates, defining when an Activity should be scheduled for an Asset, Serialized and Non-Serialized Rebuildables, or an Asset Route. Day Interval rules and List of Dates rules are supported for Non-Serialized Rebuildables and Asset Routes. The Preventive Maintenance (PM) Scheduler process creates suggested Work

Order dates based on these rules. A planner can then view these forecasted Work Orders, and generate them as necessary.

There are two ways to create PM schedule definitions for Rebuildable Serial Numbers and Assets. You can create them individually within the Preventive Maintenance Schedules window (See: Entering Preventive Maintenance Schedule Definitions, page 2-96), or streamline the process of creating them using a PM Template. A PM Template is a schedule, defined for an Asset Group (Asset Group or Rebuildable Item)/Activity association. If you utilize the PM Template functionality, a new PM Schedule is automatically created for a newly created Asset Number (asset or rebuildable) for the Asset Group. All PM Template attributes are copied over to the PM Schedule for the Instance. You can optionally modify the values of the PM Instances created.

Before a PM Template can be created, the following prerequisites need to already exist:

- Meter Template Definition (See: Defining Meter Templates, page 2-85)  
A Meter Template definition is required if the PM Template is based on Runtime Rule
- Activity Definition (See: Defining Activities, page 2-37)
- Meter Template Association (See: Associating Meter Templates with Asset Groups, page 2-88)  
A Meter Template Association is required if the PM Template is based on Runtime Rules.
- Activity Association Template (See: Activity Association Templates, page 2-42)

#### **To create a PM Template:**

1. Navigate to the Find Preventive Maintenance Schedules window. This window enables you to enter information to narrow your search for query mode. To define a new PM Template, choose New.
2. Enter a PM Template name in the Schedule Name field.
3. Select an Asset Type. Valid values are Capital and Rebuildable Inventory. If Capital is selected, the Asset Group fields refer to the Asset Group. If you select Rebuildable Inventory, the Asset Group fields refer to the Rebuildable Item.
4. Enter a Set Name. A PM schedule for an Activity and Asset Group must uniquely belong to a Set Name (See: Defining Set Names, page 2-90). Every Set Name has an end date. Every PM schedule that belongs to the Set Name must have its Effective To date before the end date of the PM Set Name. Before assigning a Set Name to a PM schedule, define Set Names within the Set Name Definition window. If you do not want to create Set Names, you can assign PM schedules to set, MAIN; it already exists.
5. Select an Asset Group.
6. Select an Activity. Activities associated with Asset Groups are eligible for defining a Schedule Template.
7. Select a Schedule Type. Valid values are Rule Based and List Dates. If you select Rule Based, the Day Interval Rules and Runtime Rules tabs are enabled to enter information. If you select List Dates, you can define information within the List Dates tab.

8. Optionally select the Automatic Instantiation check box. If this check box is selected, a new instance of the current PM schedule template is created for each new Asset (Asset Number or Rebuildable Serial Number).
9. The Effective dates default from the current Activity association, if they exist. Optionally select or update the Effective From and Effective To dates.
10. Optionally enter a Lead Time In Days.

Lead time in a Preventive Maintenance Schedule is different than lead time associated with Work Order creation. The Preventive Maintenance process suggests Work Orders to be created or scheduled, starting from the last service day of the Asset to the cutoff day you specified while running the process. If a Lead Time In Days is specified, the Preventive Maintenance process predicts work for those extra days beyond the cutoff date. This provides the maintenance department advanced visibility for maintenance work that is typically predicted in the next planning process. The maintenance department can prepare for such work in the current planning period.

11. Optionally enter a Tolerance In Days to indicate a minimum interval in days that suggested Work Orders' dates are spaced from each other.
12. In the Scheduling Options region, indicate how the PM Scheduler process calculates Work Order dates. The *Use Last Service* field works in conjunction with the *to suggest Next Service* field. The date field indicates the Last Service date
  - *Actual Start Date to Start Date*: The PM Scheduler process uses the Last Service Actual Start Date, and calculates scheduled start dates. This is a forward scheduling method.
  - *Actual Start Date to End Date*: The PM Scheduler process uses the Last Service Actual Start Date, and calculates the scheduled end dates. This is a backward scheduling method.
  - *Actual End Date to Start Date*: The PM Scheduler process uses the Last Service Actual End Date, and calculates the scheduled start dates. This is a forward scheduling method.
  - *Actual End Date to End Date*: The PM Scheduler process uses the Last Service Actual End Date, and schedules the scheduled end dates. This is a backward scheduling method.
  - *Scheduled Start Date to Start Date*: The PM Scheduler process uses the Last Service Scheduled Start Date, and calculates scheduled start dates. This is a forward scheduling method.
  - *Scheduled Start Date to End Date*: The PM Scheduler process uses the Last Service Scheduled Start Date, and calculates the scheduled end dates. This is a backward scheduling method.
  - *Scheduled End Date to Start Date*: The PM Scheduler process uses the Last Service Scheduled End Date, and calculates the scheduled start dates. This is a forward scheduling method.
  - *Scheduled End Date to End Date*: The PM Scheduler process uses the Last Service Scheduled End Date, and schedules the scheduled end dates. This is a backward scheduling method.
13. In the Multiple Rules region, indicate how the predicted due dates are determined for multiple rules.

- *First*: The due date is set to the first due date of all rules.
- *Last*: The due date is set to the last due date of all rules.

For example, below is a Runtime Rule that includes two meters, Meter1 and Meter2.

***Schedule Based On Example***

Interval	Effective From	Effective To	Meter
100	0	10,000	Meter1
50	0	2,500	Meter2

If you specify First Due Date in the Scheduling Based On region of the PM Template, between the two meters, the first meter that hits the due reading triggers the service. In this case, if Meter1's reading reaches the interval of 100 first, the service happens before Meter2's reading reaches its interval of 50. Conversely, you can choose Last Due Date in the Scheduling Based On region. In this case, even if Meter1 reaches its due reading, the service is not scheduled until Meter2 has also reached its due reading.

This region is disabled if the current PM schedule definition's Scheduling Type field is populated with List Dates.

- Optionally select the Reschedule Manual Work Orders check box. If this check box is selected, non-firm, unreleased manual work orders are considered during PM scheduling.
- If the Run To Failure check box is selected, the Preventive Maintenance Scheduler does not automatically schedule Asset Numbers within this Asset Group and Activity association, although you can create manual Work Orders. This is relevant for Asset Numbers that cost more to maintain than the Asset Number itself. You might also check this box for forecasting and budgeting reasons. For example, your asset is a conveyor belt. It is common in maintenance environments to let this asset wear out completely before replacing it. You estimated that the life of this asset is 18 months, and have set up a schedule for a replacement Work Order every 18 months. In reality, you found that the belts have ended up wearing out every 12 months, affecting your cost budget.

You may select this check box and clear it later. For example, you might associate an Asset Number to an Activity, but maybe you cannot currently maintain or schedule this Asset Number. You may have future plans to maintain this Asset Number.

If this check box is selected, PMs created as a copy of this PM Template generate Work Orders for the corresponding asset in the Maintenance Workbench (See: Using the Maintenance Workbench, page 3-51).

- Optionally select the Default check box to indicate that the current PM schedule definition generates Work Orders. If this check box is not selected, Work Order suggestions will not generate. You can have only one Default PM for an Asset Item/Activity combination.
- Optionally enter Effective From and To dates to specify the rule's expiration.
- Enter an Interval In Days. For example, if you enter the number three, a Work Order suggestion is created every three days.



You can optionally create variable Day Interval Rules. For example, you would like Work Order suggestions created every three days in January, and every four days in February. The window below illustrates this example:

19. Within the Runtime Rules tab, optionally select a Meter Name to indicate that Preventive Maintenance scheduling is based on a Runtime Rule. If you have previously set up a Day Interval Rule, you can base the scheduling on a Runtime Rule, as well. Meter Templates associated with this Asset Group (See: Associating Meter Templates with Asset Groups, page 2-88), and with the Used in Scheduling check box selected in the meter template definition, are available.

For example, trucks of a specific Make and Model need to be scheduled for an oil change every 30 days, or every 1000 miles.

#### ***Day Interval Rule***

<b>Field</b>	<b>Value</b>
Last Service Start/End Date	December 26, 2001
Interval In Days	30

#### ***Runtime Rule***

<b>Field</b>	<b>Value</b>
Last Service Reading	3000
Interval	1000
Latest Meter Reading	3100 (found within meter reading history)
Latest Meter Reading Date	January 1, 2002 (this can be found via meter reading history)
Usage Rate	25 miles per day (calculated as the total of the meter readings value changes, divided by the total of the meter reading date intervals)

If the Runtime Rule is taken into account, the next due date is February 6, 2002 (January 1 2002 +  $[(3000 + 1000 - 3100)/25 = \text{January 1, 2002}] + 36$  days), and every 40 days after that. This is calculated as the interval (1000 miles) divided by the usage rate (25 miles per day).

The PM Scheduler process compares the above suggested dates from the runtime interval rule, to those of the day interval rule: Base Date of December 26, 2001 + every 30 days.

The Work Orders ultimately created by the PM Scheduler process are those of the earliest or latest dates, depending on how the Schedule Based On region is populated. If you selected First Due, the earliest suggestion is used for Work Order creation. The opposite is also true.

20. The Interval and UOM fields work together. For example, for every 2000 miles, this Asset Number needs an oil change.

The UOM defaults from the Meter Template definition of the current Meter Template.

You can optionally create multiple Runtime Rules. For example, from zero to 10,000 miles, you would like your asset serviced every 3,000 miles. From 10,000 to 50,000 miles, you would like your asset serviced every 2,000 miles.

21. Optionally enter the Last Service Reading in the Last Service Information window. This field is also automatically updated with the meter reading information recorded at Work Order completion (See: Work Order Completion, page 3-41).

**Note:** The Preventive Maintenance Scheduler (See: Generating Work Orders, page 4-5) automatically calculates the meter usage rate, based on historical data, which is then used to predict the next meter due date. Refer to the example below.

22. If you populated List Dates within the Schedule Type field, select the List Dates tab to define the specific due dates that Work Orders should transpire.

For example, you want asset, Car1, serviced on May 1 and November 1 every year for the next three years. In this case, you would create a List Dates type schedule definition, and list all the due dates within this tab. The PM Scheduler process creates suggested Work Order dates on those specified dates.

23. Save your work.

## Entering Preventive Maintenance Schedule Definitions

Schedule definitions are implemented to create scheduled Work Orders, based on Day Interval Rules, and/or Runtime Rules. Schedules can also be based on a list of specific dates by using List Date rules. List Date rule based PM schedules cannot have Runtime or Day interval rules. Runtime or Day Interval Rule based PM schedules cannot have List Date rules. You can create a Preventive Maintenance Schedule Definition on an Asset Group (Non-serialized Rebuildable)/Activity combination, Asset Number/Activity combination, or an Asset Route/Activity combination.

If a meter is entered in a runtime interval rule, the following prerequisites must exist before creating a Preventive Maintenance Schedule:

- Meter Definition (See: Defining Meters, page 2-87)  
A Meter definition is required if the PM schedule is based on Runtime Rules.
- Activity Definition (See: Defining Activities, page 2-37)
- Meter/Asset Association (See: Associating Meters with Asset Numbers, page 2-89)  
A Meter/Asset Association is required if the PM schedule is based on Runtime Rules.
- Asset Group (Non-Serialized Rebuildable) or Asset Number/Activity Association (See: Associating Asset Numbers with Activities, page 2-74)

### To define a Preventive Maintenance schedule for an asset number:

1. Navigate to the Find Preventive Maintenance Schedules window. This window enables you to enter information to narrow your search for query mode. To define a new schedule, choose New.
2. Enter a Schedule Name.

3. Select an Asset Type. Valid values are Capital and Rebuildable Inventory. If Capital is selected, the Asset Number and Asset Group fields refer to the Asset Number and Asset Group, respectively. If Rebuildable Inventory is selected, the Asset Number and Asset Group fields refer to the Rebuildable Serial Number and Rebuildable Item, respectively. If a Non-Serialized Rebuildable Item is entered in the Asset Group field, the Asset Number field is not required.
4. Enter a Set Name. A PM schedule for an Activity and an Asset Number or Asset Group must uniquely belong to a Set Name (See: Defining Set Names, page 2-90). Every Set Name has an end date. Every PM schedule that belongs to the Set Name must have its Effective To date before the end date of the PM Set Name. Before assigning a Set Name to a PM schedule, define Set Names within the Set Name Definition window. If you do not want to create Set Names, you can assign PM schedules to set, MAIN; it already exists.
5. Select an Asset Number. Assets that are maintainable and associated with Activities are available. The Asset Group field populates with the Asset Group associated with the current Asset Number. If you wish to define a PM Schedule for a Non-serialized Rebuildable, enter the Asset Group; the Asset Number field does not apply.
6. Select an Activity. Activities associated with Asset Numbers or Non-serialized Rebuilds are eligible for scheduling.
7. Select a Schedule Type. Valid values are Rule Based and List Dates. If you select Rule Based, the Day Interval Rules and Runtime Rules tabs are enabled to enter information. If you select List Dates, you can define information within the List Dates tab.
8. The Effective dates default from the current Asset Activity association, if they exist. Optionally select or update the Effective From and Effective To dates.
9. Optionally enter a Lead Time In Days.

Lead time in a Preventive Maintenance Schedule is different than lead time associated with Work Order creation. Lead time within a Preventive Maintenance Schedule covers the time between the end date of the first run of the Preventive Maintenance Schedule process, and the start date (system date) of the second run of the Preventive Maintenance Schedule process. For example, a department executes the Preventive Maintenance Scheduler process every two months; the end date of each Preventive Maintenance Scheduler process is the end of every other month. However, due to circumstance, the meter data is not ready until the middle of the month. Therefore, the Preventive Maintenance Scheduler process starts in the middle of the month, instead of at the beginning, creating a lapse between the first and second Preventive Maintenance Scheduler executions. Lead time is used to cover this lapse.

10. Optionally enter a Tolerance In Days to indicate a minimum interval in days that suggested Work Orders' dates are spaced from each other.
11. In the Scheduling Options region, indicate how the PM Scheduler process calculates Work Order dates. The *Use Last Service* field works in conjunction with the *to suggest Next Service* field. The date field indicates the Last Service date.
  - *Actual Start Date to Start Date:* The PM Scheduler process uses the Last Service Actual Start Date, and calculates scheduled start dates. This is a forward scheduling method.

- *Actual Start Date to End Date:* The PM Scheduler process uses the Last Service Actual Start Date, and calculates the scheduled end dates. This is a backward scheduling method.
  - *Actual End Date to Start Date:* The PM Scheduler process uses the Last Service Actual End Date, and calculates the scheduled start dates. This is a forward scheduling method.
  - *Actual End Date to End Date:* The PM Scheduler process uses the Last Service Actual End Date, and schedules the scheduled end dates. This is a backward scheduling method.
  - *Scheduled Start Date to Start Date:* The PM Scheduler process uses the Last Service Scheduled Start Date, and calculates scheduled start dates. This is a forward scheduling method.
  - *Scheduled Start Date to End Date:* The PM Scheduler process uses the Last Service Scheduled Start Date, and calculates the scheduled end dates. This is a backward scheduling method.
  - *Scheduled End Date to Start Date:* The PM Scheduler process uses the Last Service Scheduled End Date, and calculates the scheduled start dates. This is a forward scheduling method.
  - *Scheduled End Date to End Date:* The PM Scheduler process uses the Last Service Scheduled End Date, and schedules the scheduled end dates. This is a backward scheduling method.
12. In the Multiple Rules region, indicate how the predicted due dates are determined for multiple rules.
- *First:* The due date is set to the first due date of all rules.
  - *Last:* The due date is set to the last due date of all rules.

For example, below is a Runtime Rule that includes two meters, Meter1 and Meter2.

***Schedule Based On Example***

Interval	Effective From	Effective To	Meter
100	0	10,000	Meter1
50	0	2,500	Meter2

If you specify First in the Multiple Rules region of the PM schedule definition, between the two meters, the first meter that hits the due reading triggers the service. In this case, if Meter1's reading reaches the interval of 100 first, the service happens before Meter2's reading reaches its interval of 50. Conversely, you can choose Last in the Multiple Rules region. In this case, even if Meter1 reaches its due reading, the service is not scheduled until Meter2 has also reached its due reading.

This region is disabled if the current PM schedule definition's Scheduling Type field is populated with List Dates.

13. Optionally select the Reschedule Manual Work Orders check box. If this check box is selected, non-firm, unreleased manual Work Orders are considered during PM scheduling.
14. If the Run To Failure check box is selected, the Preventive Maintenance Scheduler does not automatically schedule this Asset Number and Activity association, although you can create manual Work Orders. This is relevant for Asset Numbers that cost more to maintain than the Asset Number itself. You might also check this box for forecasting and budgeting reasons. For example, your asset is a conveyor belt. It is common in maintenance environments to let this asset wear out completely before replacing it. You estimated that the life of this asset is 18 months, and have set up a schedule for a replacement Work Order every 18 months. In reality, you found that the belts have worn out every 12 months, affecting your cost budget.

You can select this check box and clear it later. For example, you might associate a non-maintainable asset to an activity, but maybe you cannot currently maintain or schedule this asset. You might have future plans to maintain this Asset Number.

If this check box is selected, Work Orders for this asset do not appear in the Maintenance Workbench at the time of PM Scheduling (See: Using the Maintenance Workbench, page 3-51).

15. Optionally select the Default check box to indicate that the current PM schedule definition generates Work Orders. If this check box is not selected, Work Order suggestions will not generate. You can have only one Default PM for an Asset Item/Activity combination.
16. Within the Day Interval Rules tab, optionally enter Effective From and To dates to specify the rule's expiration. This tab is enabled if Rule Based is populated in the Schedule Type field.
17. Enter an Interval In Days. For example, if you enter the number three, a Work Order suggestion is created every three days.

You can optionally create variable Day Interval Rules. For example, you would like Work Order suggestions created every three days in January, and every four days in February.

### Variable Day Interval Rules Example

The screenshot shows the 'Preventive Maintenance (Schedule Definition)' window. The 'Schedule Name' is 'PM42', 'Set Name' is 'MAIN', 'Asset Number' is 'DTF35000', 'Asset Group' is 'Vehicles', 'Activity' is '3000 Mile Truck Maint', and 'Schedule Type' is 'Rule Based'. The 'Effective From' date is '09-OCT-2002'. The 'Asset Type' is 'Capital'. The 'Delivery' is 'Erand Truck 35000', 'Vehicle Asset Group' is 'Vehicle Asset Group', and '3000 Mile Truck Maintenance' is the service description. The 'Scheduling Options' section shows 'Use Last Service' set to 'Actual First Date' with a date of '31-MAY-2003', and 'to suggest Next Service' set to 'Start Date'. The 'For Multiple Rules' section shows 'Use date that comes' set to 'First'. There are checkboxes for 'Reschedule Manual Work Orders', 'Run To Failure', and 'Default' (checked). Below these are tabs for 'Day Interval Rules', 'Runtime Rules', and 'List Dates'. The 'Day Interval Rules' tab is active, showing a table with two rows: one for '01-JAN-2004' to '31-JAN-2004' with an interval of 3 days, and another for '01-FEB-2004' to '29-FEB-2004' with an interval of 4 days. At the bottom are buttons for 'Last Service Info' and 'Suppression'.

18. Optionally within the Runtime Rules tab, select a Meter Name to indicate that Preventive Maintenance scheduling is based on a Runtime Rule. If you have previously set up a Day Interval Rule, you can base the scheduling on a Runtime Rule, as well. Meters associated with this Asset Number (See: Associating Meters with Asset Numbers, page 2-89), and with the Used in Scheduling check box selected in the meter definition, are available.

For example, a Truck 01 Asset Number is scheduled for an oil change every 30 days, or every 1000 miles.

#### Day Interval Rule

Field	Value
Last Service Date	December 26, 2001
Interval In Days	30

### **Runtime Rule**

Field	Value
Last Service Reading	3000
Interval	1000
Last Service Reading Date	January 1, 2002 (this can be found via meter reading history)
Usage Rate	25 miles per day (calculated as the total of the meter readings value changes, divided by the total of the meter reading date intervals)

If the Runtime Rule is taken into account, the next due date is February 10, 2002 (January 1 2002 + 40 days), and every 40 days after that. This is calculated as the interval (1000 miles) divided by the usage rate (25 miles per day).

The PM Scheduler process compares the above suggested dates from the runtime interval rule, to those of the day interval rule: Base Date of December 26, 2001 + every 30 days.

The Work Orders ultimately created by the PM Scheduler process are those of the shortest interval and earliest dates: December 26, 2002 + every 30 days.

**Note:** Runtime Rules are not applicable for Non-Serialized Rebuildables.

19. The Interval and UOM fields work together. For example, for every 2000 miles, this Asset Number needs an oil change.

The UOM defaults from the meter definition of the current meter.

You can optionally create multiple Runtime Rules. For example, from zero to 10,000 miles, you would like your asset serviced every 3,000 miles. From 10,000 to 50,000 miles, you would like your asset serviced every 2,000 miles.

20. You cannot enter the Last Service Reading. This field is automatically updated with the meter reading information recorded at Work Order completion (See: Work Order Completion, page 3-41).

**Note:** The Preventive Maintenance Scheduler (See: Generating Work Orders, page 4-5) automatically calculates the meter usage rate, based on historical data, which is then used to predict the next meter due date. Refer to the example below.

21. If you populated List Dates within the Schedule Type field, select the List Dates tab to define the specific due dates that Work Orders should transpire.

For example, you want asset, Car1, serviced on May 1 and November 1 every year for the next three years. In this case, you would create a List Dates type schedule definition, and list all the due dates within this tab. The PM Scheduler process creates suggested Work Order dates on those specified dates.

22. Optionally choose Last Service Info to enter last service information for the current Asset Number/Activity association. Enter Last Service start and end

dates. These dates are used by the Preventive Maintenance Scheduler as a starting point for calculating the next due date for a suggested Work Order. After the Preventive Maintenance Scheduler suggests a Work Order, and that Work Order is completed, this date resets to the completion date. Last service information is always regarding the Asset Number/Activity association, and independent of the association's PM schedule definition.

The Last Service Reading cannot be greater than the last meter (if the meter is ascending), or less than the last meter reading (if the meter is descending).

#### **Last Service Information**

Asset Type

Capital

Asset Number

DTF35000

Asset Group

Vehicles

Activity

3000 Mile Truck Maint

Delivery Erand Truck 35000

Vehicle Asset Group

3000 Mile Truck Maintenance

—Last Service Dates

Actual Start Date

31-MAY-2003 11:23:59

Actual End Date

31-MAY-2003 11:23:59

Scheduled Start Date

31-MAY-2003 11:23:59

Scheduled End Date

31-MAY-2003 11:23:59

Meter Name	Usage Rate	UOM	Description	Last Service Reading
DTF35000 Odomete	200	MI	Delivery Truck DTF35000	120000

23. Save your work.

#### **To define a Preventive Maintenance schedule for an asset route:**

Preventive Maintenance Schedules can be defined based on Asset Routes. See: Setting Up Asset Routes.

1. Navigate to the Preventive Maintenance Schedules window.
2. Select Asset from the Item Type list of values.
3. Select an Asset Route from the Asset Number list of values.
4. See: Preventive Maintenance Scheduling, page 2-96, for instructions on the remaining fields.

**Note:** You can define Day Interval Rules and List Dates for Asset Routes. You cannot define Runtime Rules.



### To create a suppression activity:

You can suppress other Activities with the current Activity in the scheduling definition. You can enter suppression activities for an Asset Number/Activity combination.

For example, there are two activities associated with a Truck 01 asset: Oil Change (to be performed every five months), and Major Service (to be performed every 12 months). A major service on a Truck 01 includes an Oil Change. Therefore, a suppression definition needs to be defined; the Activity, Major Service, suppresses the child activity, Oil Change.

1. From the Preventive Maintenance Schedules window, choose Suppression.

#### Suppression

The screenshot shows the 'Suppression (EM1)' window. At the top, there are fields for Asset Type (Capital), Asset Number (DTF35000), Asset Group (Vehicles), and Activity (3000 Mile Truck Maint). To the right of these fields are descriptive text boxes: 'Delivery Erand Truck 35000', 'Vehicle Asset Group', and '3000 Mile Truck Maintenance'. Below these fields is a table with two columns: 'Suppressed Activity' and 'Description'. The first row in the table has '15000 Mile Maint' in the 'Suppressed Activity' column and is empty in the 'Description' column. There are several empty rows below it. A vertical scrollbar is on the right side of the table.

Asset Type	Capital	
Asset Number	DTF35000	Delivery Erand Truck 35000
Asset Group	Vehicles	Vehicle Asset Group
Activity	3000 Mile Truck Maint	3000 Mile Truck Maintenance

Suppressed Activity	Description
15000 Mile Maint	

2. Choose a Suppressed Activity. Activities associated with the Asset Numbers are available.

**Note:** One Activity association can suppress multiple Activity associations. One Activity association can be suppressed by one Activity association.

3. Optionally enter a Description for this suppression.
4. Save your work.

**Note:** Suppression is applicable to an Activity association and can also be defined from the Activity Workbench and Suppression window.

## Related Topics

Generating Work Orders, page 4-5

## eAM Planning and Scheduling

Oracle Enterprise Asset Management utilizes Work Orders to create demand for asset maintenance. Operations within Work Orders are completed using the Work Orders' associated material and resource requirements (See: Overview eAM Work Management, page 3-2). Cost savings and work management efficiencies can be achieved by generating predictive work activities, and then using a planning process to balance the work load for resource management.

The process is as follows:

First, a Master Demand Schedule is created. This Master Demand Schedule is then attached to Material Requirements Planning (MRP) options. MRP is launched, creating planned Work Order suggestions. You can use the Planner Workbench to implement the suggestions into purchase requisitions or manufacturing orders. Using the Purchasing AutoCreate feature, purchase orders are created from the requisitions. After the purchase orders are received into inventory, you can issue material into a maintenance Work Order.

This section includes the following topics:

- eAM Planning, page 2-104
- eAM Scheduling, page 2-105

## eAM Planning

Oracle eAM utilizes Material Requirements Planning (MRP) to calculate net material requirements from gross material requirements, by evaluating:

- the master schedule
- bills of material
- scheduled receipts
- on-hand inventory balances
- lead times
- order modifiers

Material Requirements Planning then plans material replenishments by creating a set of recommendations to release or reschedule orders for material, based on net material requirements. MRP assumes infinite capacity is available to meet the material requirements plan.

The following illustration depicts how eAM uses Material Requirements Planning. First, a Master Demand Schedule (MDS) is created. This schedule is then attached to MRP Plan Options. Next, the MRP is launched, creating suggestions for purchasing requisitions. Finally, these suggestions are implemented. They are purchased, and then received into inventory. After the material is in inventory, it can be issued to a maintenance Work Order.

### ***eAM Material Requirements Planning***



This section includes the following topics:

- Defining a Master Demand Schedule Name, page 2-105
- Defining a Material Requirements Plan Name, page 2-106
- Defining Plan Options, page 2-107

## **eAM Scheduling**

Oracle Enterprise Asset Management (eAM) utilizes the Oracle Manufacturing Scheduling application to schedule Work Orders and operations. A constraint-based scheduling engine schedules asset Work Orders and operations scheduled dates, resources, and material constraints. The scheduling process calculates Work Order and operation scheduled duration and dates, based on the forward or backward scheduling goal (See: Routine Work Orders, page 3-3), and Work in Process parameters. The concurrent program is triggered after a Work Order is released (See: eAM Work Order Statuses, page 3-16). The Work Order is automatically moved to a Pending Scheduling status, until the concurrent program finishes scheduling. At that time, the Work Order is moved back to a Released status.

The Scheduler Workbench enables a planner to graphically view and reschedule single Work Orders and operations based on constraints, such as resource. It provides you with a visual display of Work Orders. You can interactively reschedule Work Orders, operations, and resources.

**Important:** You have Oracle Manufacturing's Constraint Based Scheduling available to you if your company has purchased the appropriate license. If you do NOT have this license, you automatically have the eAM Scheduler (infinite scheduler) available to you; this scheduler is not constraint-based.

## **Defining a Master Demand Schedule Name**

Before you define a master schedule manually or load a schedule from another source, you must first define a master demand schedule name. You can also set several options for each name.

### **To define a Master Demand Schedule name:**

1. Navigate to the MDS Names window.

### Master Demand Schedules

Name	Description	Demand Class	Relieve	Inactive On	
MaintMDS	Maintenance Only MDS		<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"/>		

Load / Copy / Merge      Items

2. Enter a Name and Description for the schedule.
3. Save your work.

### Related Topics

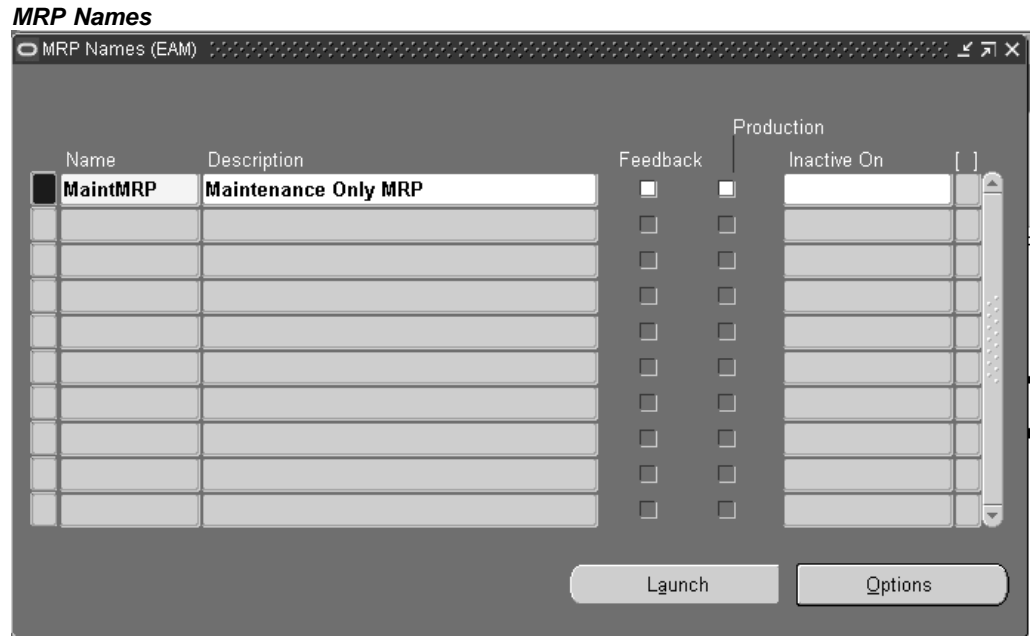
Defining a Schedule Name, *Oracle Master Demand Scheduling/MRP and Oracle Supply Chain Planning User's Guide*

### Defining a Material Requirements Plan Name

Master Demand Schedule names trigger the material requirements planning process. A master demand schedule name must be created to perform material requirement planning for maintenance Work Orders.

#### To define a MRP name:

1. Navigate to the MRP Names window.



2. Enter an alphanumeric Name to identify a unique material requirements.
3. Optionally enter a Description of the MRP name.
4. Optionally select the Feedback check box to monitor the quantity of the planned order that has been implemented as maintenance Work Orders, purchase orders, or purchase requisitions. This provides the planner visibility of the plan's status at any point in time.
5. Optionally select the Production check box to enable a plan to automatically release planned orders. See: *Auto-release Planned Orders, Oracle Master Demand Scheduling/MRP and Oracle Supply Chain Planning User's Guide*.
6. Optionally enter an Inactive On date on which to disable the plan.

As of this date, you can no longer update the plan, nor use the plan name in the planning process. You can still view information and run reports for disabled names.
7. Save your work.

## Related Topics

Overview of Planning Logic, Oracle Master Demand Scheduling/MRP and Oracle Supply Chain Planning User's Guide

# Defining MRP Names, Oracle Master Demand Scheduling/MRP and Oracle Supply Chain Planning User's Guide

## Defining Plan Options

You can enter plan options for any plan. If you are launching the planning process for this plan name for the first time, the plan options you defined in the setup parameters are displayed. Otherwise, the plan options you chose, for the last launch of the planning process, are displayed.

Supply Chain Planning users can also launch a DRP and supply chain MRP and master production schedule (MPS) plan (See also: Reviewing or Adding Plan Options, *Oracle Master Demand Scheduling/MRP and Oracle Supply Chain Planning User's Guide*).

### To enter plan options:

1. Navigate to the Plan Options window.

**Plan Options**

Plan Options (EAM)

Plan	MaintMRP	Maintenance Only MRP	Type	MRP
Schedule	MaintMDS	Maintenance Only MDS	Type	MDS
Overwrite	All			

☒ Append Planned Orders
 ☒ Snapshot Lock Tables

☐ Demand Time Fence Control
 ☐ Planning Time Fence Control

☒ Net WIP
 ☒ Net Purchases

☐ Net Reservations
 ☐ Plan Safety Stock

☐ Plan Capacity

Bill Of Resource   
 Simulation Set

☐ Pegging

Reservation Level   
 Hard Pegging Level

Material Scheduling Method   
 Planned Items

Subinventory Netting

2. Select a material requirements Plan.
3. Select a master demand Schedule.
4. Select MRP from the Type list of values.
5. Select an Overwrite option:

*All:* For a master production schedule (MPS) plan, overwrite all entries and regenerate new MPS entries based on the source master demand schedule. For an MRP, overwrite all MRP firm planned orders for MRP items. This option is displayed when you generate a plan for the first time.

*Outside planning time fence:* For a master production schedule (MPS) plan, overwrite all MPS entries outside the planning time fence. For an MRP, overwrite all planned orders and firm planned orders outside the planning time fence.

*None:* Do not overwrite any firm planned order for MPS or MRP plans.

6. Select the Append Planned Orders check box to append new planned orders. See: Reviewing or Adding Plan Options, *Oracle Master Scheduling/MRP and*

*Oracle Supply Chain Planning User's Guide* for information regarding situations that cause new planned orders to append.

7. Select the Net WIP check box to indicate that the planning process considers standard discrete jobs, non-standard discrete jobs, or repetitive schedules when planning items during the last plan execution.
8. Select Net Reservations to indicate that the planning process considers stock designated for a specific Work Order when planning the items during the last execution of the plan.
9. Select Net Purchases to indicate that the planning process considers approved purchase requisitions when planning the items during the last execution of the plan.
10. Select Plan Capacity to indicate whether the planning process calculates safety stock for each item during the last plan execution.
  - Specify the Bill of Resource (for MPS plans) and, Optionally a Simulation Set. See: *Capacity Modifications and Simulation, Oracle Capacity User's Guide* and *Overview of Bills of Resources, Oracle Capacity User's Guide*.
11. Select Pegging to calculate graphical pegging information. See: *Overview of Graphical Pegging, Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*. The planning process then traces supply information for an item to its corresponding end demand details, which you then can view in a graphical display.
  - If you are working in a project environment, set a Reservation Level and, Optionally a Hard Pegging Level. See: *Reviewing or Adding Project MRP Plan Options, Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*.
12. Select a Material Scheduling Method.

*Operation Start Date:* Schedule material to arrive in Inventory for availability on the start date of a specific operation.

*Order Start Date:* Schedule material to arrive in Inventory for availability on maintenance Work Order start date.
13. Specify which Planned Items you want included.

*All planned items:* Include all planned items in the planning process. You would choose this option to be certain that all items are planned, including those you add to a Work Order or schedule, that are not components on any bill of material. Use this option to avoid missing items you want to plan. For items you do not want to plan, define them with an MRP planning method of Not Planned when defining an item in Inventory.

*Demand schedule items only*

*Supply schedule items only*

*Demand and supply schedule items*
14. Save your work.

## Related Topics

Launching the Planning Process, page 5-3

Viewing Suggested Demand, page 5-4

## Quality Integration Setup

A maintenance Work Order goes through various steps in its lifecycle (See: eAM Work Order Statuses, page 3-16). One of the steps in the lifecycle is Completion. When completing a maintenance Work Order, if the Asset Number has associated, mandatory quality collection plans, you need to enter quality results for the Work Order. A list of quality collection plans associated with the completion transaction appears during the completion process.

While creating a collection plan, you have the option of adding collection triggers to the plan. Triggers are restrictions that you define for a collection plan. For example, Work Orders for assets that belong to the TRUCK Asset Group require the entry of quality results for the collection plan. Data collection is initiated if all collection trigger conditions are satisfied.

Quality Setup tasks for Enterprise Asset Management include the following:

- Creating Collection Elements, page 2-110
- Creating eAM Quality Collection Plans, page 2-113
- Creating eAM Quality Collection Plans for a Supplier, page 2-117

## Creating Collection Elements

Collection elements are the basic building blocks of collection plans, the data structures that you use to collect Quality results. Before you can collect quality data with Quality, you must first create a collection plan. You begin by creating collection elements, which define the characteristics of the product or process that you want to monitor, record, and analyze. See: Overview of Collection Elements, *Oracle Quality User's Guide*.

When you define collection elements, you are creating data fields that you can use in collection plans to collect quality results. After you create a collection element, it is available as a selection on a list of values that you can choose from when you set up collection plans. You can create an unlimited number of user-defined collection elements, or you can use any of Quality's predefined collection elements (See: Predefined Collection Elements, *Oracle Quality User's Guide*) in your collection plans; for example, Asset, Asset Group, Activity, and Work Order. You can also create collection elements by copying them from one collection plan into another.

### To define collection elements:

1. Navigate to the Collection Elements window.



## Collection Elements

The screenshot shows the 'Collection Elements (EM1)' window. At the top, 'Collection Element' is set to 'Maintenance WorkOrder' and 'Element Type' is 'Reference Information'. The 'Enabled' checkbox is checked. Below this, the 'Label' section has a 'Prompt' field with 'Work Order' and an empty 'Hint' field. The 'Data' section shows 'Data Type' as 'Character', 'Reporting Length' as '15', and 'Mandatory' checked. The 'UOM' and 'Default Value' fields are empty. The 'SQL Validation Statement' field contains a complex SQL query. At the bottom, there are four tabs: 'Sequence', 'Spec Limits', 'Values', and 'Actions'.

**Note:** The steps listed below describe how to define Collection Elements one-at-a-time in the Collection Elements window. You can also define several collection elements simultaneously using the Collection Elements Summary window. See: Combination Blocks, *Oracle Applications User's Guide*.

**Note:** The following Collection Elements are included with Oracle Enterprise Asset Management; you do not need to define them: Asset Group, Asset Number, Activity, Maintenance Work Order, Maintenance Operation Sequence.

2. Select the Collection Element name.

The collection element can contain alphanumeric characters, spaces, underscores, and single quotation marks. You cannot use words that are reserved for column names, such as NAME, OCCURRENCE, and ORGANIZATION\_ID. See: Reserved Words, *Oracle Quality User's Guide*.

3. Select the Enabled check box to enable the collection element. You can add enabled collection elements to collection plans.
4. Select its collection Element Type. See: Collection Element Types, *Oracle Quality User's Guide*.
5. Enter text for the data entry Prompt.

The prompt is the label for the collection element field displayed in the Results region of the Enter Quality Results window. Prompts also become the column headings on reports and online inquiries. The default prompt is the name of the collection element, but you can overwrite it.

6. Optionally enter a Hint.

Hints are additional text that appears in the message line, as you enter quality results, to guide you during data entry. See: Message Line, *Oracle Applications User's Guide*.

7. Select the collection element's Data Type.

You can select any data type, however, you cannot change it after you define the collection element. The available data types are Character, Number, Date, Comment, and Sequence.

8. Optionally select the Mandatory check box to indicate that a value must always be entered for this collection element, when entering quality results. A mandatory collection element can be redefined as non-mandatory when added to a collection plan.

9. Enter the Reporting Length.

The reporting length specifies how much space is allocated for this collection element's quality results values on reports, inquiries, and in the Enter Quality Results window.

**Note:** The reporting length does not determine the amount of space used to store quality results values in the quality data repository. Results values can be up to 150 characters in length.

10. If the Data Type is Number, enter the Decimal Precision.

If you define specification limits for this collection element, entering the decimal precision (refers to the number of places after the decimal point) here controls the decimal precision of the specification limit values that you can define.

11. Optionally select a UOM. See: Overview of Units of Measure, *Oracle Inventory User's Guide*. Units of measure can be entered for any collection element, regardless of data type.

12. Optionally enter a Default Value for the collection element.

When you set a default value for the collection element (generally, the most commonly used value for the collection element), it is automatically entered when you enter quality results. You can overwrite this value. See: Default Value Assignment Rules, *Oracle Quality User's Guide*.

13. Optionally enter the SQL Validation Statement.

This statement is used for validation when you enter quality data. You can base a collection element's data validation on any table in the Oracle database. To do this, you can define a SQL validation statement that Quality uses for validation when you collect quality data. This SQL statement must be a SELECT statement in which you select two columns. For example, if you have entered machine numbers in the database table, you can cross-validate machine numbers entered as you collect quality results against the numbers. See: *SQL\*Plus User's Guide and Reference*.

For example, to validate machine numbers from a table called 'machine\_numbers' stored in the database, enter the following SQL validation statement:

```
SELECT machine_number, machine_description
```

```

FROM machine_numbers

WHERE NVL(disable_date, SYSDATE+1) > SYSDATE

AND organization_id=:parameter.org_id

ORDER BY custom_machine_number

```

**Note:** To constrain the SQL Statement to the current organization, you can use the variable, ':parameter.org\_id' for the current organization id. To constrain the SQL Statement to the current user's id, you can use the variable, ':parameter.user\_id' for the current user's id.

If you define both a SQL validation statement and a list of collection element values, the list of values is used for validation; the SQL validation statement is ignored.

## Related Topics

Overview of Collection Elements, *Oracle Quality User's Guide*

Collection Element Types, *Oracle Quality User's Guide*

Predefined Collection Elements, *Oracle Quality User's Guide*

Collection Element Values, *Oracle Quality User's Guide*

Defining Collection Element Actions, *Oracle Quality User's Guide*

Defining Collection Element Alert Actions, *Oracle Quality User's Guide*

Viewing Collection Elements, *Oracle Quality User's Guide*

## Creating eAM Quality Collection Plans

You create collection plans to identify the data that you want to collect, and what actions you want to take based on the quality results that you collect. You can use collection plans to model your test or inspection plans, and you can create an unlimited number of plans to support your enterprise-wide quality data collection and analysis needs. Collection plans are invoked manually for direct results entry, or automatically as you complete a Work Order.

To collect quality data, you must set up a data collection structure called a collection plan. Collection plans are composed of collection elements, their values and specifications, and any actions that you want to initiate in response to quality results. There are some considerations that you must make before you set up collection plans. You first must create collection element types, then the individual collection elements that comprise the plan.

You can attach illustrative or explanatory files to collection plans, in the form of text, images, word processing documents, spreadsheets, or video. Attachments are used to document instructions and corrective action procedures. They are viewed by

operations personnel during quality data collection. See: Attachments for Collection Plans, Specifications, and Result Lines, *Oracle Quality User's Guide* and Viewing Attachments Associated with Quality Results, *Oracle Quality User's Guide*.

### To review a collection plan:

1. Navigate to the Collection Plans window.

**Collection Plans**  
Collection Plans (EM1)

Collection Plan: **FORK LIFT FAILURE ANALYSIS** Views...

Description: **Fork Lift Failure Analysis**

Effective: **13-NOV-2002** -

Plan Type: **Failure** **Failure Analysis** [ ]

Copy Elements... Transactions Specifications...

**Quality Collection Elements**

Name	Seq	Prompt	Mandatory	Enabled	Read-Only	Displayed	[ ]
<input checked="" type="checkbox"/> Fork Lift Failure	10	Failure	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Fork Lift Failure Cause	20	Cause	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Fork Lift Failure Remedy	30	Remedy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Fork Lift Failure Comment	40	Comment	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Values Actions

**Note:** To assist you as you create collection plans, you can select the Summary/Detail option from the View Menu, and run a query to view existing collection plans in summary format. See: Combination Blocks, *Oracle Applications User's Guide*.

2. Select a valid Collection Plan. To create a new collection plan, See: Creating Collection Plans, *Oracle Quality User's Guide*.
3. Choose Transactions. You can create collection plans that are specifically used to collect quality data during transactions performed in other applications (See: Collection Plans for Transactions, *Oracle Quality User's Guide*).

## Collection Transactions

Transaction Description	Mandatory	Background	Enabled
EAM Work Order Completions (Oracle Enterprise Asset Manag...	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
EAM Work Order Completions (Oracle Enterprise Asset Manag...	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" 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"/>

Trigger Name	Condition	From	To
Asset Group	equals (=)	Fork Lifts	

4. Select EAM Work Order Completion or Asset Query from the Transaction Description list of values.
  - EAM Asset Query: enables quality results collection for an asset, independent from any transaction on the asset.
  - EAM Operation Completions: enables quality results collection for a Work Order's operation pertaining to operation completion or during operation completion (See: Operation Completion, page 3-39).
  - EAM Work Order Completions: enables quality results collection for a Work Order pertaining to Work Order completion or during Work Order completion (See: Work Order Completion, page 3-41).
5. Optionally indicate whether this collection plan requires the entry of quality results at Work Order completion. If you select the Mandatory check box, you must save at least one quality data record before saving the Work Order completion transaction.

**Note:** eAM supports Quality collection during operation completion transactions, as well as Standalone Asset Query. Valid Transaction Description values are EAM Operation Completions and EAM Asset Query, respectively.

6. Optionally select the Background check box.

If you select this check box, you can collect quality results for context reference elements (See: Reference Information Collection Element Type, *Oracle Quality User's Guide*).

**Note:** The following Collection Elements are included with Oracle Enterprise Asset Management; you do not need to define them: Asset Group, Asset Number, Activity, Maintenance Work Order, Maintenance Operation Sequence.

Without invoking the Enter Quality Results window, background data collection is initiated when you save the Work Order completion transaction. The system then finds, selects, and initiates the appropriate collection plan or plans.

If collection triggers are defined for background data collection, data collection is initiated if all collection trigger conditions are satisfied (you define triggers for transactional data collection in the Collection Transactions window).

Several collection plans can collect data in the background during the same transaction. When this is the case, the results for context elements on all of these collection plans are automatically saved when the parent transaction is saved.

7. Select the Enabled check box.
8. Optionally select a Trigger Name. Valid trigger values are Activity, Asset Group, Asset Number, and Maintenance Work Order. Triggers are restrictions that you define for this collection plan. In the above example, Work Orders for the JP1 asset require the entry of quality results for the collection plan.

**Note:** If a trigger is not defined, every Work Order requires quality collection results; the collection plan is applicable to all assets.

9. If you selected a Trigger Name, select a Condition.
10. Select a From value. For example, if you selected Asset Group as the Trigger Name, Asset Groups are available. Optionally you can enter a To value to create a range condition. For example, if the trigger is Work Order, you might enter a range of Work Order numbers.
11. Save your work.

## Related Topics

[Adding Collection Plan Attachments, page 13-2](#)

[Triggering a Work Request, page 13-4](#)

[Collection Plans for Transactions, \*Oracle Quality User's Guide\*](#)

[Overview of Collection Plans, \*Oracle Quality User's Guide\*](#)

[Overview of Quality Self-Service, \*Oracle Quality User's Guide\*](#)

[Collection Plan Types, \*Oracle Quality User's Guide\*](#)

[Collection Plan and Import Results Database Views, \*Oracle Quality User's Guide\*](#)

[Collection Elements in Collection Plans, \*Oracle Quality User's Guide\*](#)

[Defining Collection Plan Element Values, \*Oracle Quality User's Guide\*](#)

[Associating Specification Types with Collection Plans, \*Oracle Quality User's Guide\*](#)

[Defining Collection Plan Element Actions, \*Oracle Quality User's Guide\*](#)

[Updating and Deleting Collection Plans, \*Oracle Quality User's Guide\*](#)

[Viewing Collection Plans, \*Oracle Quality User's Guide\*](#)

## Creating eAM Quality Collection Plans for a Supplier

eAM enables you to create Quality collection plans that are optionally mandatory for a supplier to enter crucial Quality data, via iSupplier Portal, before the supplier can complete an Outside Service Processing operation.

### To create and eAM quality collection plan for a supplier:

1. Navigate to the Collection Plans window.

**Collection Plans**

Collection Plans (EM1)

Collection Plan:  Views...

Description:

Effective:  -

Plan Type:  Sanity Code:  [ ]

Copy Elements... Transactions Specifications...

**Quality Collection Elements**

Name	Seq	Prompt	Mandatory	Enabled	Read-Only	Displayed	[ ]
<input checked="" type="checkbox"/> Asset Number	10	Asset Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Asset Group	20	Asset Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Maintenance Op Seq	30	Maintenance Op Seq	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Maintenance WorkOrder	40	Work Order	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Defect Code	50	Defect Code	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Values Actions

**Note:** To assist you as you create collection plans, you can select the Summary/Detail option from the View Menu, and run a query to view existing collection plans in summary format. See: Combination Blocks, *Oracle Applications User's Guide*.

2. Select a valid Collection Plan. To create a new collection plan, See: Creating Collection Plans, *Oracle Quality User's Guide*.
3. Choose Transactions. You can create collection plans that are specifically used to collect quality data during transactions performed in other applications (See: Collection Plans for Transactions, *Oracle Quality User's Guide*).

### Collection Transactions

Transaction Description	Mandatory	Background	Enabled
EAM Operation Completions (Oracle Enterprise Asset Manage	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
EAM Asset Query (Oracle Enterprise Asset Management)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" 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"/>

Trigger Name	Condition	From	To
	equals (=)		

4. Select EAM Operation Completions from the Transaction Description list of values.
5. Optionally select the Mandatory check box to indicate that this collection plan requires the entry of quality results at Operation completion. If this check box is selected, the supplier must enter quality data before completing the Outside Services operation.
6. Save your work.

## Related Topics

Creating eAM Quality Collection Plans, page 2-113

Adding Collection Plan Attachments, page 13-2

Triggering a Work Request, page 13-4

Overview of Collection Plans, *Oracle Quality User's Guide*

Overview of Quality Self-Service, *Oracle Quality User's Guide*

Collection Plan Types, *Oracle Quality User's Guide*

Collection Plan and Import Results Database Views, *Oracle Quality User's Guide*

Collection Elements in Collection Plans, *Oracle Quality User's Guide*

Defining Collection Plan Element Values, *Oracle Quality User's Guide*

Associating Specification Types with Collection Plans, *Oracle Quality User's Guide*

Defining Collection Plan Element Actions, *Oracle Quality User's Guide*

Updating and Deleting Collection Plans, *Oracle Quality User's Guide*

Viewing Collection Plans, *Oracle Quality User's Guide*



## Outside Processing Integration Setup

Contractor services are defined as work services provided by an organization or person who is not an employee of your company. Contractors are paid for their work based on an agreed upon contract or agreement. For example, a contractor service is a painting service. It is also important to associate the purchasing transactions, such as the requisition and purchase order, to the Work Order. In order for this to execute, you must complete the appropriate steps in Purchasing and Enterprise Asset Management.

Outside Service Processing provides the functionality to create items that are contractor services, such as landscaping, include these items on a Work Order, and execute the related purchasing transactions as the Work Order is released. By creating a contract service as an Outside Service Processing item, the purchasing requisition is created when the Work Order is Released. The additional purchasing transaction, including the creation of the purchase order, the approval, and invoicing process, are then managed by Purchasing. This optional process ensures that the actual charges are applied to the Work Order.

The other option is to enable Standard Rate. This applies predetermined standard rates, for contractor services, to the Work Order.

Outside Processing Setup tasks for Enterprise Asset Management include the following:

- Setting Up Outside Service Processing, page 2-119
- Setting Up Direct Items, page 2-126

## Setting Up Outside Service Processing

Purchasing recognizes items, while eAM recognizes resources. As a result, you must link the contractor service item to a resource, for the purchase order to link to the Work Order. This is associated via the Resources window. Additionally, the resource must associate with a department. The department must specify the location where the services are to deliver. This must be a valid location for the organization.

For each contractor service resource, you can determine whether the rate charged to the Work Order is a standard rate or the actual amount, based on the purchase order price. This is set up within the Resources window, and may vary for each resource.

### **To set up purchasing information:**

1. Navigate to the Financials Options window.
2. Select the Supplier-Purchasing tab.

## Financials Options

Financials Options (Vision Operations: USD)

Accounting Supplier - Entry Supplier - Payables Supplier - Purchasing Encumbrance Tax Human Resources

Ship-To Location AD-Atlanta

Bill-To Location AD-Atlanta

Inventory Organization V1 - Vision Operations

Ship Via

FOB Vendor's responsibility ceases upon transfer

Freight Terms Due

3. The options you define in this region, except for Inventory organization, are used as default values for the Purchasing region of the Suppliers window (See: Suppliers, *Oracle Payables User's Guide*). The supplier values default to new supplier sites for the supplier, which default to new purchasing documents for the supplier site.
4. Select Ship-To and Bill-To Locations. These are the names of the ship-to/bill-to location for the system default values. If the name you want is not available, use the Location window to select a new location (See: Setting Up Locations, *Using Oracle HRMS - The Fundamentals*).
5. Select an Inventory Organization. You can associate each of your purchasing operating units with one inventory item master organization. Your eAM Organization (See: Enabling Organizations for Enterprise Asset Management, page 2-6) should point to this item master. When you associate your purchasing operating unit with an inventory organization, items you define in this organization become available in Purchasing. You can choose an inventory organization that uses the same set of books as your Purchasing operating unit. Do not change the inventory organization after you have already assigned on to Purchasing.
6. Optionally select a Ship Via code. This is the freight carrier you use with suppliers. If the type of freight carrier you want is not available, use the Freight Carriers window to define a new shipping method. The value you enter here is the value in the Description field of the Freight Carriers window in Purchasing.
7. Select a FOB. If the type of FOB you want is not available, use the Oracle Purchasing Lookups window to define a new FOB.
8. Select a Freight Terms code. The freight terms for a supplier identify whether you or your supplier pays for freight charges on goods you receive. You can define new freight terms in the Oracle Purchasing Lookups window.
9. Save your work.

### To set up outside services as items:

Create an item for each outside service, such as landscaping services.

1. Navigate to the Master Item window.

**Master Item**

Master Item (V1)

Organization **V1 Vision Operations**

Item **TM Rebuild**

Description **Truck Motor Rebuild Services** [ ... ]

Display Attributes  
☒ Master ☐ Org ☐ All

Main Inventory Bills ... Asset... Costing Purch... Recei... Physi... Gener... MPS/M... Lead ...

**Unit of Measure**

Primary **Each**

Tracking **Primary**

Pricing **Primary**

Secondary

Defaulting

Deviation Factor + **0**

Deviation Factor - **0**

**Conversions**

☐ Standard

☐ Item specific

☒ Both

User Item Type **Outside Processing**

Item Status **Active**

Long Description

2. Enter the item Name for the contractor service. For example, Landscape Service.
3. Select Copy From within the Tools menu.
4. Select @Outside Processing Item from the Template list of values.
5. Choose Apply.
6. Choose Done.
7. Within the Purchasing tab, ensure that the Outside Processing Item check box is selected.
8. Select the Resource Unit Type.  
*Resource:* Costs are based on the resource standard rate.
9. Select a Default Buyer.
10. Enter a List Price for this contractor service.
11. Select Each for the Unit of Issue. This is the unit of measure you use to issue the item from inventory.
12. Within the Receiving tab, select Direct from the Receipt Routing list of values.
13. Save your work.
14. Select the Organization Assignment tab on the left side of the window, then assign this item to the eAM organization.
15. Save your work.

### To link outside service items to resources:

You must define outside resources and link them to outside items in order to automatically generate purchase requisitions for outside services. When you assign outside resources to a department, you also specify a usage rate or amount that determines the quantity you are requisitioning and/or charging to Work Orders.

1. Navigate to the Resources window.

The screenshot shows the 'Resources (EM1)' window with the following fields and values:

- Resource: **TMREBUILD**
- Inactive On: [Empty field]
- Description: **Truck Motor Rebuild - Outside Services**
- Type: **Miscellaneous** (UOM: **Ea**)
- Charge Type: **PO Move** (Basis: **Item**)
- Expenditure Type: [Empty field]
- Supply Subinventory: [Empty field]
- Supply Locator: [Empty field]
- ☒ **Outside Processing**
  - Item: **TM Rebuild**
  - Truck Motor Rebuild Services**
- ☒ **Costed**
  - Activity: [Empty field] (Standard Rate: ☐)
  - Absorption Account: **01-000-2215-0000-000**
  - Variance Account: **01-520-5210-0000-000**
  - Buttons: **Overheads**, **Rates**
- ☐ **Batchable**
  - Minimum Batch Capacity: [Empty field]
  - Maximum Batch Capacity: [Empty field]
  - Batch Capacity UOM: [Empty field]
  - Batching Window: [Empty field]
  - UOM: [Empty field]
- Skills**
  - Competence: [Empty field]
  - Skill Level: [Empty field]
  - Qualification: [Empty field]
- Buttons at the bottom: **Employees**, **Equipment**, **Setups**

2. Select a unit of measure (UOM). This value is the default unit of measure for all transactions, for the current resource.
3. Verify that the Enabled check box is enabled for outside processing.
4. Enter the outside services Item that was entered in Inventory and associate it with the eAM resource.
5. Select the Costed check box to include this outside resource in your Work Order cost. When you define a resource with a charge type of PO Receipt, Cost Management automatically defaults Outside Processing as the cost element.
6. Enter an Absorption Account. You must define an absorption account for each outside resource. The absorption account defaults from the organization's receiving account, which is debited when an outside processing item is received and is subsequently credited when the item is delivered to eAM. The debit goes to the outside processing account associated with the accounting class of the Work Order when the item is delivered to eAM.

7. Optionally enter a Variance Account. You must define a purchase price variance account for each outside resource you define. This account defaults from the organization's purchase price variance account.

If you select the Standard Rate check box while performing the next step, the Variance Account is mandatory.

8. Optionally select the Standard Rate check box to charge the standard, non-purchase order amount to the Work Order. Clear the Standard Rate check box to charge the Work Order with the actual purchase order amount.
1. If you selected the Standard Rate check box, choose Rates to enter your standard rates.

#### **Resource Costs**

Cost Type	Description	Resource Unit Cost
AvgRates	Resource & Overhead Rates used unit	2,550.000

2. Enter a Cost Type of Value. This is dependent on the costing method defined for your eAM organization.
3. Enter a Resource Unit Cost.
4. Save your work and close the window.

#### **To link the outside service resource to a department:**

1. Navigate to the Departments window.

## Departments

Departments (EM1)

Department: **F-Maint**

Description: **Fleet Services Maintenance**

Cost Category: **Maintenance**

Class: **Maint Dept** **Maintenance Departments**

Location: **Seattle Mainte** **Seattle Manufacturing Maintenance Organization**

Project Expenditure Org:

Inactive On:

**Rates** **Resources**

2. Select the Department to associate with the outside service resource.
3. Select a Cost Category for this department. If this is left blank, then the costs related to this department are charged, based on the eAM parameter settings (See: Defining eAM Parameters, page 2-8).
4. Select a valid Location. This is mandatory.
5. Choose Resources.

## Resources

Resources (EM1) - F-Maint

**Owned**

Main **Planning**

Resource	Description	Available 24 Hours	Share	UOM	Units	Check CTP	Group	Schedule by Instance
<b>ATTK</b>	<b>Automotive Tool Kit</b>	<input type="checkbox"/>	<input type="checkbox"/>	<b>HR</b>	<b>3</b>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
<b>Mechanic1</b>	<b>Fleet Services Mechanic</b>	<input type="checkbox"/>	<input type="checkbox"/>	<b>HR</b>	<b>1</b>	<input type="checkbox"/>		<input type="checkbox"/>
<b>RES1</b>		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<b>HR</b>	<b>2</b>	<input type="checkbox"/>		<input checked="" type="checkbox"/>
<b>TMREBUILD</b>	<b>Truck Motor Rebuild - Outsid</b>	<input type="checkbox"/>	<input type="checkbox"/>	<b>Ea</b>	<b>1</b>	<input type="checkbox"/>		<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		<input type="checkbox"/>

**Instances** **Tolerance Fences** **Shifts**

**Borrowed**

Resource	Description	Owning Department	UOM	Units	Check CTP	Group
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	

6. Select the outside service Resource.
7. Optionally indicate whether this resource is Available 24 Hours a day. You cannot assign shifts to a resource that is available 24 hours a day.

8. Optionally indicate whether this department can share this resource and capacity with other departments.
9. Enter the number of capacity Units (resource units) available for this department.
10. Save your work.

For information on all remaining fields, See: *Defining a Resource, Oracle Bills of Material User's Guide*.

### To define WIP parameters:

1. Navigate to the Work in Process Parameters window.

**Work in Process Parameters**

Work in Process Parameters (EM1)

Discrete Costing Move Trans... Backflush ... Intraoperation Outside Pr... Scheduling Mobile Serial Other

Shop Floor Status for PO Move Resources

Requisition Creation Time **At Job/Schedule Release**

**Job Roles for Notifications**

Production Scheduler

Shipping Manager

**Job Change Controls for Purchasing Documents**

Propagate Job Change to Purchasing **Automatic**

**Need By Date Tolerance**

Days Early  Days Late

[ ]

2. Select the Outside Processing tab.
3. Select a value for Requisition Creation Time.

*At Job/Schedule Release* - This enables automatic creation of a purchase order requisition, for contractor services, when the Work Order is Released.

*Manual* - Choose Manual to manually create requisitions. With this selection, requisitions are not automatically created.

*At Operation* - Oracle recommends that you do not select At Operation. Within eAM, At Operation is equivalent to selecting Manual.

4. Save your work.

## Related Topics

Supplier - Purchasing Financials Options, *Oracle Payables User's Guide*

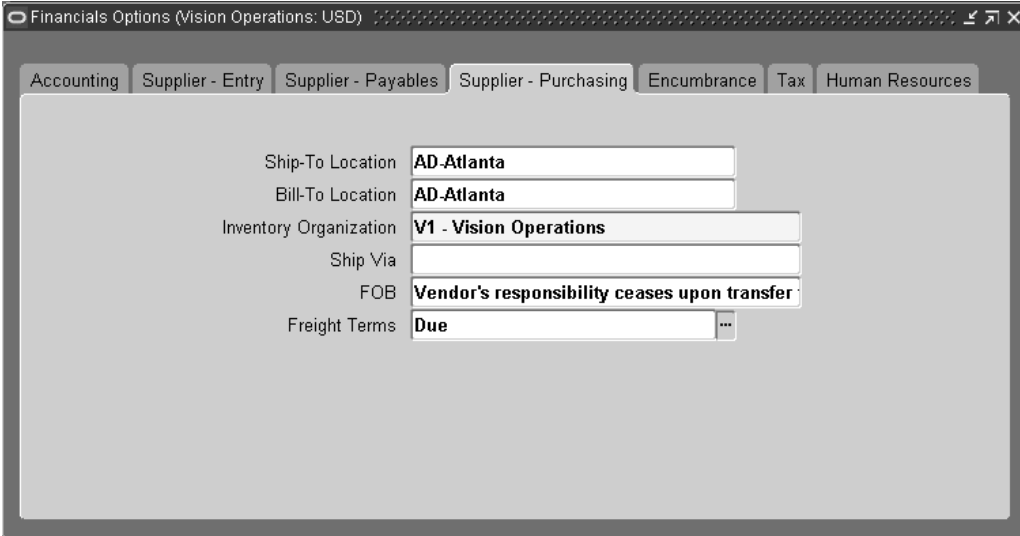
## Setting Up Direct Items

You can add Direct Items to a Maintenance Bill of Material (BOM) (See: Setting Up Maintenance Bills of Material, page 2-71). When the Maintenance BOM is associated with a Work Order, you can add more Direct Items to its material requirements list before it is released (See: Defining Inventory Material Requirements, page 3-26). The system automatically creates Requisition/Purchase Orders (if the Auto Request Material check box is selected within the Maintenance BOM), for the associated Direct Items, when the Work Order is released for execution. The supplier can view the maintenance Work Order detail information within Work Order Details page, via iSupplier Portal.

### To set up purchasing information:

1. Navigate to the Financials Options window.
2. Select the Supplier-Purchasing tab.

#### Financials Options



The screenshot shows the 'Financials Options (Vision Operations: USD)' window with the 'Supplier - Purchasing' tab selected. The window contains the following fields:

Field	Value
Ship-To Location	AD-Atlanta
Bill-To Location	AD-Atlanta
Inventory Organization	V1 - Vision Operations
Ship Via	
FOB	Vendor's responsibility ceases upon transfer
Freight Terms	Due

The options you define in this region, except for Inventory organization, are used as default values for the Purchasing region of the Suppliers window (See: Suppliers, *Oracle Payables User's Guide*). The supplier values default to new supplier sites for the supplier, which default to new purchasing documents for the supplier site.

3. Select Ship-To and Bill-To Locations. These are the names of the ship-to/bill-to location for the system default values. If the name you want is not available, use the Location window to select a new location (See: Setting Up Locations, *Using Oracle HRMS - The Fundamentals*).
4. Select an Inventory Organization. You can associate each of your purchasing operating units with one inventory item master organization. Your eAM Organization (See: Enabling Organizations for Enterprise Asset Management, page 2-6) should point to this item master. When you associate your purchasing operating unit with an inventory organization, items you define in this organization become available in Purchasing. You can choose an inventory organization that uses the same set of books as your Purchasing operating unit. Do not change the inventory organization after you have already assigned on to Purchasing.



5. Optionally select a Ship Via code. This is the freight carrier you use with suppliers. If the type of freight carrier you want is not available, use the Freight Carriers window to define a new shipping method. The value you enter here is the value in the Description field of the Freight Carriers window in Purchasing.
6. Select a FOB. If the type of FOB you want is not available, use the Oracle Purchasing Lookups window to define a new FOB.
7. Select a Freight Terms code. The freight terms for a supplier identify whether you or your supplier pays for freight charges on goods you receive. You can define new freight terms in the Oracle Purchasing Lookups window.
8. Save your work.

## Related Topics

Non-Stock Direct Item Setup, page 2-83

Setting Up Asset Bills of Material, page 2-54

Setting Up Maintenance Bills of Material, page 2-71

Defining Rebuildable Bills of Material, page 2-82

Supplier - Purchasing Financials Options, *Oracle Payables User's Guide*

*iSupplier Portal User's Guide*

## Cost Management Integration Setup

Costs are generated as maintenance work is executed and completed. These costs roll up through the Parent/Child hierarchies defined within Enterprise Asset Management, and can roll up to any level within an asset hierarchy. Labor, Material, and Equipment charges can further classify into several maintenance cost categories.

All work is captured and retained by Enterprise Asset Management. You can reference work that has been completed to review operations, resources, and costs. This information can help you understand the scope of work and the process by which it is completed.

This section includes the following topics:

- eAM Costing Methods and Mappings, page 2-127
- Setting Up Cost Categories, page 2-129
- Setting Up Purchase Order Category Associations for Direct Items, page 2-130
- Setting Up eAM Cost Management, page 2-132
- Setting Up Zero Cost Rebuild Item Issue, page 2-134

## eAM Costing Methods and Mappings

eAM supports four perpetual costing methods: standard, average, FIFO, and LIFO. As a foundation, eAM uses the following five basic cost elements provided by Cost Management (See: Cost Elements, *Oracle Cost Management User's Guide*):

- Material
- Material Overhead

- Resource
- Resource Overhead
- Outside Processing

Asset management requires different cost classifications. eAM provides these cost classifications, while maintaining the integrity of the basic costing rules. The five cost elements above are translated into cost elements that are familiar to maintenance managers.

eAM classifies work done on maintenance Work Orders into cost categories. By default, eAM has defined three cost categories: Contract, Operations, and Maintenance.

You can define additional cost categories, if needed. Each cost category is further classified into three cost elements: Equipment, Labor, and Material.

- *Material* - Costs from material transactions.
- *Labor* - Costs from labor resource transactions.
- *Equipment* - Costs from equipment resource transactions.

Material charges are classified as Material cost elements. Resource charge of type person is classified as a Labor cost element. Resource charge of type machine is classified as Equipment cost element. All other resource types are classified by the default cost element in the eAM Parameters (See: Defining eAM Parameters, page 2-8).

For each department, a maintenance cost classification is identified to reflect the above breakdown. The cost category for the Material cost element is the cost category of the department assigned to the routing of the operation. For the Labor cost element, it is the cost category of the resource's owning department. For the Equipment cost element, it is the cost category of the asset's owning department.

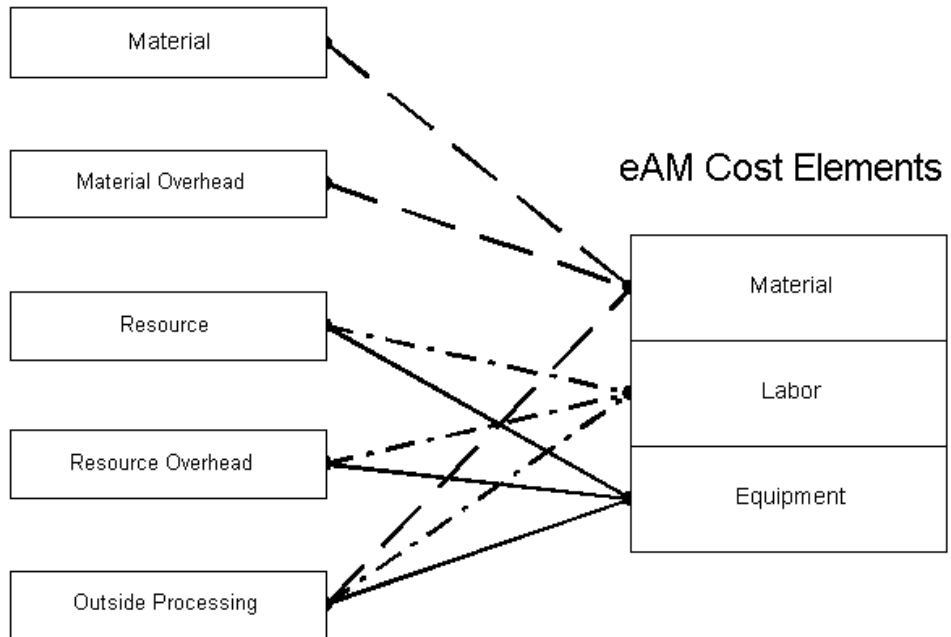
#### **eAM Mappings**

The three cost elements (Material, Labor, and Equipment) are mapped to the five basic cost elements (Material, Material Overhead, Resource, Resource Overhead, and Outside Processing) provided by Cost Management.

The following diagram illustrates that the eAM Material cost classifications are mapped to Material, Material Overhead, and Outside Processing. Labor and Equipment cost classifications are mapped to Resource, Resource Overhead, and Outside Processing.

### ***Cost Element Mappings***

#### **Cost Management Cost Elements**



## **Setting Up Cost Categories**

Cost Category codes are used as the default for departments that do not have a cost category defined. Department costs are then posted to the appropriate cost elements. Valid values are Maintenance, Operations, Contract, and any other values that you might have added within this extensible lookup table. See: Overview of eAM Cost Management, page 6-1.

By default, eAM has defined three cost categories: Contract, Operations, and Maintenance. However, you can define additional cost categories, if needed. After you have added the cost categories, they are available in the Cost Category list of values, within the Enterprise Asset Management Parameters window (See: Defining eAM Parameters, page 2-8).

#### **To define additional cost categories:**

1. Navigate to the Oracle Manufacturing Lookups window.

## Cost Category Lookups

Oracle Manufacturing Lookups

Type: **BOM\_EAM\_COST\_CATEGORY**  
Meaning: **BOM\_EAM\_COST\_CATEGORY**  
Application: **Oracle Bills of Material**  
Description: **Enterprise Asset Management Cost Category**

Access Level:  
☒ User  
☐ Extensible  
☐ System

Effective Dates: From To Enabled

Code	Meaning	Description	Tag	From	To	Enabled
1	Maintenance	Maintenance				<input checked="" type="checkbox"/>
2	Operations	Operations				<input checked="" type="checkbox"/>
3	Contract	Contract				<input checked="" type="checkbox"/>
4	Safety	Safety		11-JUN-2003		<input checked="" type="checkbox"/>
5	Engg	Engg		11-JUN-2003		<input checked="" type="checkbox"/>
6	Admin	Admin		11-JUN-2003		<input checked="" type="checkbox"/>
7	Office	Office Maintenance		22-JAN-2004	03-MAY-2004	<input checked="" type="checkbox"/>
8	Stores	Stores Maintenance		22-JAN-2004		<input checked="" type="checkbox"/>
9	Caps	caps category		19-APR-2004		<input checked="" type="checkbox"/>

2. Select BOM\_EAM\_COST\_CATEGORY from the Type list of values.
3. Enter a numeric value in the Code field. Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

**Warning:** Do not use alpha codes. Entering alpha codes causes database errors in the application.

4. Enter the Meaning of the code, for example, High.
5. Enter a Description for the code.
6. Optionally enter a Tag to categorize lookup values. This field is informational.
7. The Effective From Date defaults as the system date, but you can update this. Optionally enter a Effective To Date to indicate an expiration of the code.
8. Select the Enabled check box to enable this code for Enterprise Asset Management.
9. Save your work.

## Setting Up Purchase Order Category Associations for Direct Items

You can specify whether direct items are material, labor, or equipment charges on a Work Order, based on the user-specified Purchasing Category on the requisition or purchasing line. Purchasing Categories are associated with a maintenance cost element and its respective valuation account. If an association is not set up, direct items are charged as material on the Work Order.

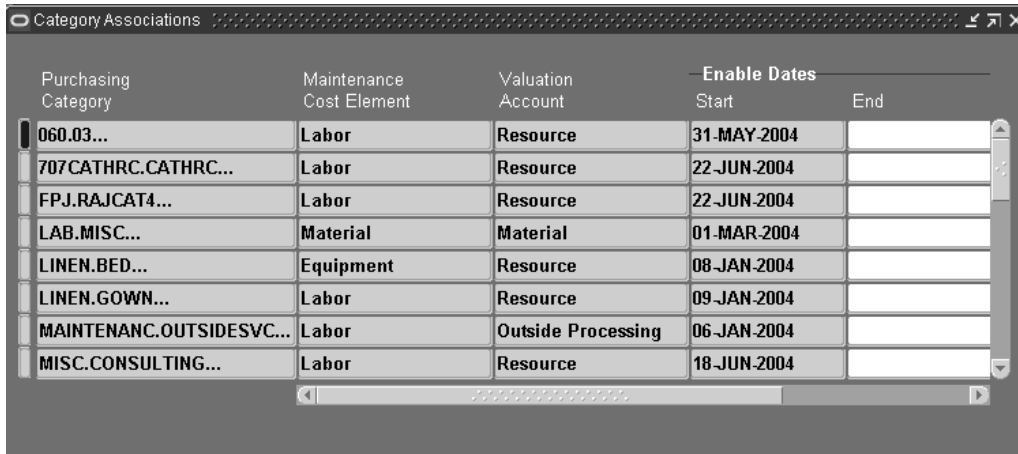
Direct Items may be Non-Stock or Description-based. Non-Stock Direct Items are defined within Oracle Inventory (See: Non-Stock Direct Item Setup, page 2-83), and the Purchasing Category for this type of Direct Item defaults from the Purchasing Category Set's Item Assignments.

For projects, you can assign direct items to a Direct Item Expenditure Type, other than the one assigned at the Organization level. This is performed, based on the Direct Item Expenditure Type associated with the Purchasing Categories used on the requisition or purchasing line.

### To set up associations for purchasing categories used for direct items:

1. Navigate to the Find Category Associations window.
2. Choose New.

#### Category Associations



Purchasing Category	Maintenance Cost Element	Valuation Account	Enable Dates	
			Start	End
060.03...	Labor	Resource	31-MAY-2004	
707CATHRC.CATHRC...	Labor	Resource	22-JUN-2004	
FPJ.RAJCAT4...	Labor	Resource	22-JUN-2004	
LAB.MISC...	Material	Material	01-MAR-2004	
LINEN.BED...	Equipment	Resource	08-JAN-2004	
LINEN.GOWN...	Labor	Resource	09-JAN-2004	
MAINTENANC.OUTSIDESVC...	Labor	Outside Processing	06-JAN-2004	
MISC.CONSULTING...	Labor	Resource	18-JUN-2004	

3. Select a Purchasing Category. See: *Defining Category Sets, Oracle Inventory User's Guide*.
4. Select a Maintenance Cost Element.
5. Select a Valuation Account. If the Maintenance Cost Element is Material, you can choose the Material Valuation Account. If the Maintenance Cost Element is Labor or Equipment, you can select either of the Resource or Outside Processing Valuation Accounts.
6. Select a Start Date.
7. Optionally select an End Date. A Purchasing Category may have one existing association at a time. If you want to assign a different association for a category, select an End Date.
8. Optionally select a Direct Item Expenditure Type if your organization uses Oracle Projects.
9. Save your work.

## Related Topics

Defining Items, *Oracle Inventory User's Guide*

Defining Categories, *Oracle Inventory User's Guide*

Defining Category Sets, *Oracle Inventory User's Guide*

## Setting Up eAM Cost Management

You can reference work that has been completed to review operations, resources, and costs. This information can help you understand the scope of work and the process by which it is completed. To capture costs for all work within eAM, some key setups must be in place:

- Define a default cost element.
- Define a default cost category.

First, define a default cost element (Material, Labor, or Equipment) when setting up the eAM Parameters. See: *Defining eAM Parameters*, page 2-8. This is used when no pre-defined mapping exists to the cost elements in eAM. For example, department overheads are not linked to a particular eAM cost element for cost analysis. Therefore, the default cost element carries the cost for analysis. Also, outside processing types of Currency, Amount, and Miscellaneous are not linked to a particular eAM cost element. When one of these types is used in outside processing, the costs are allocated to the default cost element (See: *eAM Costing Methods and Mappings*, page 2-127).

Next, define a default cost category when setting up the eAM Parameters. This defaulted cost category is used if there is no cost category defined for the departments.

### **To define a default cost element and cost category:**

1. Navigate to the Enterprise Asset Management Parameters window.

### Enterprise Asset Management Parameters

The screenshot shows the 'Enterprise Asset Management Parameters (EAM)' window. It contains several sections with default settings:

- Asset Number Defaults:** ☒ Asset Number Auto Generation
- Cost Defaults:** Cost Element: **Material**, Cost Category: **Maintenance**
- Preventive Maintenance:** ☒ Implement From Horizon Start Date
- Work Request:** ☒ Auto Approve, ☒ Extended Log, ☒ Default Asset from Employee Location, ☒ Asset Number Mandatory
- Work Order Defaults:** WIP Accounting Class: **EAMWAC**, EAM WIP Accounting Class: **EAM WIP Accounting Class**, Work Order Prefix: **WO**, Default Department: **Def\_dep**.  
☒ Enable Material Issue Requests, ☐ Invoice Billable Items Only, ☐ Value Rebuildables At Zero Cost, ☐ Auto Firm on Release
- Account Defaults:** Maintenance Offset: **01-580-7740-0000-000**

2. In the Cost Defaults region, select an eAM Cost Element to indicate how to capture cost overheads, and any miscellaneous resource costs. Valid values are Equipment, Labor, and Material.
3. Select a Cost Category to use as the default for departments that do not have a cost category defined. Department costs are then posted to the appropriate cost classification.

#### To define a cost category by department:

1. Navigate to the Departments window.

## Departments

Departments (EAM)

Department	CA-Maint
Description	Maintenance Dept
Cost Category	Maintenance
Class	
Location	San Diego, CA 060000073
Project Expenditure Org	
Inactive On	

[ ]

Rates Resurces

2. Select a Cost Category.

**Note:** It is not required to provide a cost category for a department (crew). However, if you do not provide a cost category for a department (crew), costs for that crew are allocated to the defaulted cost category specified in the eAM parameters (See: Defining eAM Parameters, page 2-8). Each time costs for that element are charged to a Work Order, this default cost category is used for reporting and analysis.

## Related Topics

- Defining eAM Parameters, page 2-8
- Defining Departments and Resources, page 2-12
- eAM Cost Estimation, page 6-2
- Viewing Cost Information, page 6-3
- Transferring Invoice Variances, page 6-14

## Setting Up Zero Cost Rebuild Item Issue

eAM Work Order costing supports both WIP Component Issues and the return of rebuildables from/to expense subinventories at their current or zero cost. You can issue rebuildable components from the Expense Subinventory to the maintenance Work Order at zero cost and/or return rebuildable components to the Expense Subinventory at zero cost.

Enterprise Asset Management parameters determine organization level defaults for individual transactions. Set up Work Order default information to establish how rebuildables are valued in the current organization.

### To set up zero cost rebuild item issue:

1. Navigate to the Enterprise Asset Management Parameters window.



### Enterprise Asset Management Parameters

**Enterprise Asset Management Parameters (EAM)**

**Asset Number Defaults**

☒ Asset Number Auto Generation

**Cost Defaults**

Cost Element **Material** Cost Category **Maintenance**

**Preventive Maintenance**

☒ Implement From Horizon Start Date

**Work Request**

☒ Auto Approve ☒ Extended Log

☒ Default Asset from Employee Location ☒ Asset Number Mandatory

**Work Order Defaults**

WIP Accounting Class **EAMWAC** **EAM WIP Accounting Class**

Work Order Prefix **WO**

Default Department **Def\_dep**

☒ Enable Material Issue Requests ☐ Invoice Billable Items Only

☐ Value Rebuildables At Zero Cost ☐ Auto Firm on Release

**Account Defaults**

Maintenance Offset **01-580-7740-0000-000**

2. Within the Work Order Defaults region, select the Value Rebuildables at Zero Cost to indicate that rebuildable components charge at zero cost.
3. Save your work.

### Related Topics

Defining eAM Parameters, page 2-8

## Process and Discrete Manufacturing Integration Setup

Enterprise Asset Management integrates with Process and Discrete Manufacturing, enabling your maintenance environment to identify Enterprise Asset Management asset relationships with production equipment. This feature associates an asset or many assets to the production equipment located in a discrete or process manufacturing organization. After establishing, you can view the resource usage (maintenance Work Orders, batches, or FPOs) emanating from production, associated with a maintainable asset. In discrete manufacturing organizations, you can view

maintenance equipment downtime requirements and their affect on capacity during production planning and scheduling.

This section includes the following topics:

- Organization Setup, page 2-136
- Associating Assets with Production Equipment, page 2-137

## Organization Setup

In order for eAM to integrate with process or discrete manufacturing, determine which process or discrete manufacturing organization is associated with your eAM organization.

Process Manufacturing organizations are never the same as eAM organizations; they are mutually exclusive. Although it is possible, Oracle does not recommend commingling eAM and discrete manufacturing organizations. They should have separate organization codes.

### **To associate a process or discrete manufacturing organization with an eAM organization:**

1. Navigate to the Organization Parameters window, and select a valid process enabled or discrete manufacturing organization from the Organization Code list of values.

### Organization Parameters

Organization Parameters (PR2)

Inventory Pa... Costing Info... Revision, L... ATP, Pick, ... Inter-Org Inf... Other Accou... [ ... ]

Organization Code **PR2**

Item Master Organization **PR-Process Master**

Calendar **Vision01**

☒ Process Enabled

Process Organization **PR2**

Demand Class

Move Order Timeout Period Days

Move Order Timeout Action **Approve automatically**

Locator Control **Determined at Subinventory le...**

☒ Allow Negative Balances

☐ WMS Enabled

☐ Quality Skipping Inspection Control

☐ EAM Enabled

EAM Organization **EAM** **EAM**

**Capacity**

Load Weight UOM

Volume UOM

2. Enter an EAM Organization to associate with the current Organization Code. This eAM organization is now linked to the organization code you selected above.

### Related Topics

Organization Setup, page 2-5

Creating an Organization, *Oracle Human Resources User's Guide*

## Associating Assets with Production Equipment

You can link an asset to production equipment defined within a process or discrete organization, as well as asset equipment defined within an eAM organization. This relationship is defined while defining or updating assets within eAM.

### To associate an asset with production equipment:

1. Navigate to the Define Asset Number window.

### Define Asset Number

Define Asset Number (EAM)

Asset Type: Capital

Asset Group: AG-J-2

Asset Number: AN-J-2

Asset Category:

asset group 2

asset number

Main Production Others

Production Organization: PR2

Equipment Item: ...

Equipment Serial Number:

Attributes Resource Usage Associate Activity

2. Select an Asset Number that you want to link to production equipment.
3. In the Production tab, select a valid Production Organization.  
The list of values displays those process and discrete organizations that have the current eAM organization selected as their maintenance organization (See: Organization Setup, page 2-136).
4. Select an Equipment Item. This is mandatory if you populated the Production Organization field. Items that were defined with an equipment template (See: Item Templates, *Oracle Inventory User's Guide*), or with the Equipment item attribute enabled (See: Physical Attributes, *Oracle Inventory User's Guide*), are available.
5. Enter an Equipment Serial Number. This is mandatory if you populated the Production Organization field. This is the specific name of the component within the Equipment Type, defined above.

## Related Topics

Defining Asset Numbers, page 2-47

Viewing Resource Usage, page 10-2

## Project Manufacturing Integration Setup

Enterprise Asset Management supports a variety of ways to define work breakdown structures. The methods include, using third party project management systems (with on-line integration), project templates, Seiban number wizard, copy, and manual entry. Work breakdown structures are commonly needed for program management. To support financial project management and reporting, the combination of Oracle

Projects and Oracle Project Manufacturing enables budgeting, project costing and tracking, project billing, project revenue recognition, project cash forecasting, and project cost collection, including multi-currency and tax regulations.

To support project supply chain management and execution, Project Manufacturing provides functionality for project sales management, project advanced supply chain planning, project procurement, project execution, and project quality management.

The following diagram illustrates the eAM Project Manufacturing process. First, a maintenance Work Order is linked to a project or task. If a requisition or purchase order is created for that Work Order, the commitments for the Work Order's associated project or task are updated. The Project Cost Collector process (See: Project Cost Collector, *Oracle Cost Management User's Guide*) then passes the costs to the Work Order's associated project WIP accounting class accounts, rather than the WIP accounting class associated with the eAM asset or eAM organization.

Resources and Material charge against a Work Order. The Work Order is associated with a Project. The charges are transferred to the Project expenditures via the Cost Collector process.

#### **eAM Project Manufacturing**



This section includes the following topics:

- Project Definition, page 2-139

## **Project Definition**

You can inquire on an existing, or copy a new project from a template or existing project. To create a new project, See: Project Definition (Assigning Project Parameters), *Oracle Project Manufacturing User's Guide*. Associate this project number with a planning group, a cost group, and a default WIP accounting class.

### **To inquire on an existing project:**

1. Navigate to the Find Projects window.

## Find Projects

Find Projects (Vision Project Mfg: ANY)

<b>Project</b> Search For: <b>Projects, Templates</b> Number: <b>eAM CIP Project Template</b> Name: <b>eAM CIP Project Template</b> Long Name: <b>eAM CIP Project Template</b> Type: Organization: Status: Product Source: Source Reference: 		<b>Key Member</b> Name: Number: Role: 
<b>Classification</b> Category: Class Code: 		<b>Customer</b> Name: Number: Relationship: 
<input type="button" value="Clear"/> <input type="button" value="Find"/>		

2. Select a project Number.
3. Choose Find.
4. Choose Open.

## Projects, Templates

Projects, Templates (Vision Project Mfg: ANY)

Number	<b>eAM CIP Project Template</b>	Name	<b>eAM CIP Project Template</b>
Type	<b>Construction</b>	Organization	<b>Los Angeles Manufacturing</b>
Long Name	<b>eAM CIP Project Template</b>		
Trans Duration	<b>05-MAY-2004</b>	Status	<b>Active</b>
Description	<b>eAM CIP Project Template</b>		
	<input type="checkbox"/> Public Sector	<input checked="" type="checkbox"/> Workflow in Process	
Template Dates		<input checked="" type="checkbox"/> Template	[ ]
		<input type="button" value="Change Status"/>	

**Options**

<input checked="" type="checkbox"/>	Tasks
<input type="checkbox"/>	Classifications
<input type="checkbox"/>	Currency
<input type="checkbox"/>	Cross Charge
<input type="checkbox"/>	Key Members
<input type="checkbox"/>	Additional Information
<input type="checkbox"/>	Resource List Assignments
<input type="checkbox"/>	Transaction Controls

- Optionally you can view detailed task information by choosing Detail (See: Viewing Project Details, *Oracle Project Manufacturing User's Guide*).

**To assign project parameters:**

- Navigate to the Project Parameters window.

**Project Parameters**

Project Parameters

Project Number **eAM CIP 1** Project Name **eAM CIP 1**

Planning Group

General Invoice Transfer Task AutoAssignment Other

— Default WIP Classes —

Organization	Planning Group	Cost Group	Standard	Maintena
<b>Los Angeles Manufacturing</b>		<b>eAM</b>		<b>Maintena</b>

WIP Classes by Task

- Select a valid Project Number.
- Optionally select a Planning Group.
- Select a Cost Group.

If the current organization has selected Average as its primary costing method in the Organization Parameters window, the Cost Group field is required. The list of values includes the Common Cost Group and the user defined cost groups. The list of user defined cost groups includes those cost groups with valid accounts and with Project selected in the Cost Group window (See: Project Cost Groups, *Oracle Cost Management User's Guide*). You must assign the project to its own Cost Group to keep weighted average costing at the project level.

Associate a Maintenance type WIP Accounting Class to this Cost Group. See: Project Cost Groups, *Oracle Cost Management User's Guide*.

- Optionally assign a Maintenance WIP Accounting Class to the current project. You can select any Maintenance type WIP Accounting Class that is associated with the selected Cost Group.
- Optionally select the name of the Planning Group with which you want to associate your project.

If you plan material requirements by a group of projects, rather than by each individual project, you need to define a planning group and to assign all the projects to this planning group. If you plan material requirements by a single project, you do not need to associate the project with any planning group (See: Defining Planning Group Lookups, *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*).

7. Select the Other tab.
8. Select maintenance from the Direct Item Expenditure Type list of values. This expenditure type enables the Cost Collector process to pass costs for direct items to project maintenance Work Orders.
9. Save your work.

## Related Topics

Associating a Work Order with a Project, page 11-5  
Creating Purchase Orders from Requisitions, page 11-6  
Updating the Commitments for a Project, page 11-13  
Viewing Commitments, page 11-14  
Project Definition, *Oracle Project Manufacturing User's Guide*  
Assigning Project Parameters, *Oracle Project Manufacturing User's Guide*  
Project Cost Groups, *Oracle Cost Management User's Guide*  
Defining Project Cost Groups, *Oracle Cost Management User's Guide*  
WIP Accounting Classes, *Oracle Work in Process User's Guide*  
Project Manufacturing Parameters, *Oracle Project Manufacturing User's Guide*

## Property Manager Integration Setup

The eAM and Property Manager integration enables eAM assets to correspond with locations defined in Property Manager. The information transferred from Property Manager are the three-level land or building hierarchies, and the associated Location Codes within Property Manager. eAM also provides user-defined Area codes, enabling you to logically sort assets by where they are physically located. However, Area codes in eAM do not equal locations in Property Manager. See: Setting Up Areas, page 2-11.

This section includes the following topics:

- Setting Up eAM Prerequisites, page 2-142
- Executing the Export Process
- Executing the Asset Number Interface, page 2-144

## Setting Up eAM Prerequisites

The following must be defined within eAM before the Export Locations to Enterprise Asset Management concurrent request process can export locations into eAM:

- Asset Group (See: Defining Asset Groups, page 2-36)



- Organization (See: Organization Setup, page 2-5)
- Owning Department (See: Defining Departments and Resources, page 2-12)

## Executing the Export Process

Locations from Property Manager are always exported as a hierarchy. The first time that you execute the process, the starting node of the hierarchy is specified as the top level of building or land hierarchies. Thereafter, any level within the building or land hierarchy is specified.

After the process has executed, any changes within Property Manager's building or land hierarchies are automatically changed within eAM's corresponding asset hierarchies.

The Export Locations to Enterprise Asset Management process executes from the Property Manager responsibility. This process can execute in both create and update modes.

### To run the Export Locations to Enterprise Asset Management process:

1. Navigate to the Submit Request window.

#### Submit Request

The screenshot shows the 'Submit Request' window with the following details:

- Run this Request...**
  - Name: **Export Locations to Enterprise Asset Management**
  - Parameters: (empty field)
  - Language: **American English**
- Parameters** (expanded section):
  - Batch Name: (empty field)
  - Location Code Low: (empty field)
  - Location Code High: (empty field)
  - Location Type: (empty field)
  - Default Organization: (empty field)
  - Default Asset Group Item: (empty field)
  - Default Owning Department: (empty field)
- Buttons: OK, Cancel, Clear, Help

2. Select Export Locations to Enterprise Asset Management.
3. Enter the following parameters:

**Batch ID:** This is a user-defined parameter that is used to identify each export process by a unique identifier.

**Batch Name:** This is a user-defined, optional parameter, used to identify each export process by name.

**Location Code From:** Enter the Location Code From. This code, defined in Property Manager, is the starting node of the building or land hierarchies. This code reflects the Enterprise Asset Management Asset, and is normally entered into one Enterprise Asset Management Asset Group per transfer.

*Location Code To:* Enter the Location Code To. This code, defined in Property Manager, is the ending node of the building or land hierarchies. This code reflects the Enterprise Asset Management Asset, and is entered into one eAM Asset Group per transfer.

*Organization Code:* Select the eAM enabled organization code. This code is defined within eAM. See: Organization Setup, page 2-5.

*Inventory Item ID:* Select the Asset Group (defined within eAM). The eAM assets are created in this Asset Group. See: Defining Asset Groups, page 2-36.

*Owning Department ID:* Select the Owning Department ID. This is the designated maintenance department to associate with the exported asset/location, within eAM.

4. Choose OK.
5. Choose Submit.

## Related Topics

Property Manager Integration, page 9-2

Submitting a Request, *Oracle Applications User's Guide*

## Executing the Asset Number Interface

Locations are set up in Property and are exported to Enterprise Asset Management (eAM) with a two-step process. This allows you the opportunity to modify data before it is exported to eAM. First, push the location records from Property Management to eAM (See: Executing the Export Process). After submission of the concurrent process, the Property Management Location information are entered into the EAM Asset Interface table and are accessed via the Pending Asset Number window within eAM. You can update all relevant information, including Asset Group, Asset Number, Owning Department, and WIP Accounting Class, for this information, before submitting the interface process.

### To view pending asset numbers:

1. Navigate to the Pending Asset Number window.

### Pending Asset Number

Pending Asset Number						
Batch Name	Process Flag	Import Mode	Import Scope	Org Code	Asset Group	Asset Number
Amy's batch	Pending	Import	Without Attribu	EAM	OPERATIONS-MILL	FLT
Amy's batch	Pending	Import	Without Attribu	EAM	OPERATIONS-MILL	SPC-1
Amy's batch	Pending	Import	Without Attribu	EAM	OPERATIONS-MILL	300 BLDGFL
Amy's batch	Pending	Import	Without Attribu	EAM	OPERATIONS-MILL	SR-BLDG
Amy's batch	Pending	Import	Without Attribu	EAM	OPERATIONS-MILL	Bldg 600FL1
Amy's batch	Pending	Import	Without Attribu	EAM	OPERATIONS-MILL	GH
Amy's batch	Pending	Import	Without Attribu	EAM	OPERATIONS-MILL	HQ-5-1008
Amy's batch	Pending	Import	Without Attribu	EAM	OPERATIONS-MILL	av-p2
Amy's batch	Pending	Import	Without Attribu	EAM	OPERATIONS-MILL	av-p3
Amy's batch	Pending	Import	Without Attribu	EAM	OPERATIONS-MILL	alblldg1
Amy's batch	Pending	Import	Without Attribu	EAM	OPERATIONS-MILL	CD08
Amy's batch	Pending	Import	Without Attribu	EAM	OPERATIONS-MILL	Bldg 600FL1

2. Update the information, as necessary.
3. Choose Submit to update your changes.

## Related Topics

Executing the Export Process, page 2-143

## Service Integration Setup

Use Service Requests to report and request maintenance service for unplanned maintenance demand on internal assets and rebuildable items. Service Requests that are classified as type Maintenance are used to identify requests for eAM maintenance. For example, when an employee notices that a printer is broken, he/she can create a Service Request, even though a technician is scheduled to regularly check the printer monthly. You can create both Service and Work Requests for capital assets and rebuildables, simultaneously, within one eAM organization.

If a valid asset or rebuildable serial number is entered on the Service Request, the respective serial number's owning department defaults (See: Defining Asset Numbers, page 2-47), and the Service Request is visible within the eAM Maintenance Workbench. The Owing Department can then approve the Service Request and create a Work Order, or reject the Service Request and notify the Service Request owner to cancel it. However, customers or employees who report problems are often not aware of the asset or rebuildable's serial number requiring maintenance. In this situation, a default department is used as the Owing Department. You may customize an eAM Workflow process to identify appropriate default owning departments and department approvers. Within Oracle Service, an agent can create a request for maintenance, provide a problem summary, and provide any additional information, such as an incident address or notes.

A planner creates a Work Order and then releases it to execute. The planner can choose to create one or multiple Work Orders for a single Service Request. When a Work Order is complete, the Service Request owner updates the Service Request status to Closed.

A support agent can view all Work Order information for each Work Order created for a Service Request. You can create eAM Work Orders for Service and/or Work Requests, or associate requests to existing Work Orders.

You can customize a workflow process that creates notifications to eAM personnel that indicate Service Requests requiring work and approval.

**Note:** Oracle Service must be installed to utilize Service Request functionality.

This section includes the following topics:

- Creating Maintenance Service Request Types, page 2-146
- Enabling Service Requests for Assets and Rebuildables, page 2-147
- Enabling eAM Specific Fields, page 2-147

## Creating Maintenance Service Request Types

Within Oracle Service, create at least one Maintenance Service Request Type. You can define multiple Service Request Types, if necessary.

### To create a Maintenance service request type:

1. Navigate to the Service Request Type window.

#### *Service Request Types*

Type	Business Process	Status Group Name	Start Date	End Date	Asset Maintenance	Complex Maintenance	Image File Name
EA Workflow SR Type1167	Customer Support				<input type="checkbox"/>	<input type="checkbox"/>	
EAM SR	Customer Support				<input checked="" type="checkbox"/>	<input type="checkbox"/>	
EAM Service Request Type	Customer Support		01-JAN-2003		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
FR: Building Maintenance	Customer Support	Customer Call			<input checked="" type="checkbox"/>	<input type="checkbox"/>	
FR: Employee Move & Transfer	Customer Support	Customer Call			<input checked="" type="checkbox"/>	<input type="checkbox"/>	
FR: Labor Request	Customer Support	Customer Call			<input checked="" type="checkbox"/>	<input type="checkbox"/>	
FR: Office Equipment	Customer Support	Customer Call			<input checked="" type="checkbox"/>	<input type="checkbox"/>	
FR: Office Keys/Badges	Customer Support	Customer Call			<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Description: Please use this type to request service for Lighting, Electrical, Air Conditioning

Workflow:

☐ Auto Launch Workflow
 ☐ Abort Workflow on Final Status without Warning
 ☒ Web Entry

2. Enter the name of the Service Request Type.
3. Select Customer Support, from the Business Process list of values.
4. Optionally select effective dates for this request type.

5. Select the Asset Maintenance check box to indicate that this Service Request Type is of type Maintenance (viewable in eAM). Maintenance Type Service Requests are viewable in eAM.
6. Save your work.

## Enabling Service Requests for Assets and Rebuildables

To set up Service Request functionality for Asset and Rebuildable Serial Numbers, enable Asset Groups and Rebuildable Items for Service Requests, respectively.

### To enable Service Requests for asset groups and rebuildable items:

1. Navigate to the Master Item window.

**Master Item**

Master Item (V1)

Organization: **V1 Vision Operations**

Item: **75100027**

Description: **Motor** [ ... ]

Display Attributes: ☒ Master ☐ Org ☐ All

Recei... Physi... Gener... MPS/M... Lead ... Work ... Order... Invoi... **Service** Web O...

**Service**

Service Request: **Enabled**

☐ Enable Contract Coverage

☐ Enable Defect Tracking

☐ Enable Provisioning

**Installed Base**

☐ Track in Installed Base

☐ Create Fixed Asset

Instance Class: [ ... ]

**Service Contracts**

Contract Item Type: [ ... ]

Duration: [ ... ]

Duration Period: [ ... ]

Template: [ ... ]

Starting Delay (Days): [ ... ]

**Debrief and Charges**

Recovered Part Disposition: [ ... ]

☐ Enable Service Billing

Billing Type: [ ... ]

2. Select an Asset Group or Rebuildable Item.
3. Select the Service tab.
4. Select Enabled, from the Service Request list of values.
5. Save your work.

## Enabling eAM Specific Fields

The Service Request window enables a customer support agent to view pertinent information for an entered Service Request, such as associated Work Orders and their statuses. It is necessary to have this important information visible at all times, within the Service Request window. You can customize which fields and records appear (See: Customizing the Presentation of Data in a Folder, *Oracle Applications User's Guide*).

Utilize Oracle's folders functionality to ensure that key eAM-specific fields are visible for maintenance Service Requests. By default, eAM specific fields are hidden. This folders feature provides you a user-defined display of retrieved information, such as:

- Columns displayed
- Width of columns displayed
- Sequence of columns
- Prompts associated with columns
- Sequence of records

You can prevent users from creating or modifying folders with profile option, FLEXVIEW: ALLOW\_CUSTOMIZATION.

### To display eAM-specific fields in the Service Request window:

1. Navigate to the Service Request window.

**Service Request**

Service Request (69492 - Noise and vibration out of norm) . Asia/Tokyo

Log and Notes Profile...

Contact Type: **Employee** Customer Type: **Organization** Category: **av-ag1** Number: **69492**

First: **MS.** Last: **Rachel** Name: **Business World ..** Item: **av-ag1** Reported: **03-MAR-2004 07:3**

Email: **rabbott@visionhr.** Number: **18057** Desc: **Asset Group #1** Type: **eAM Customer Re**

Relationship: **159** Account: **Open** Revision: **High** Status: **Open**

Phone: **Madhavan, M** Email: **Phone Type** Instance: **av-an1** Severity: **Test1** Group: **Owner**

Subject Workbench Contacts / ... Tasks Interactions Related Obj... Service Hist... Charges Work Orders Maintenance... Custom1 Custom2

Work Order	Status	Department	Maintained Asset Number	Asset Group	Asset Type	Asset Activity	Priority	Firm
W096728	Cancelled	Dep10	av-an20	av-ag1	Capital	av-act1	High	<input checked="" type="checkbox"/>
								<input type="checkbox"/>
								<input type="checkbox"/>
								<input type="checkbox"/>

2. From the Folder menu, select an existing, or create a new, Folder definition.
3. Save your work.

## Related Topics

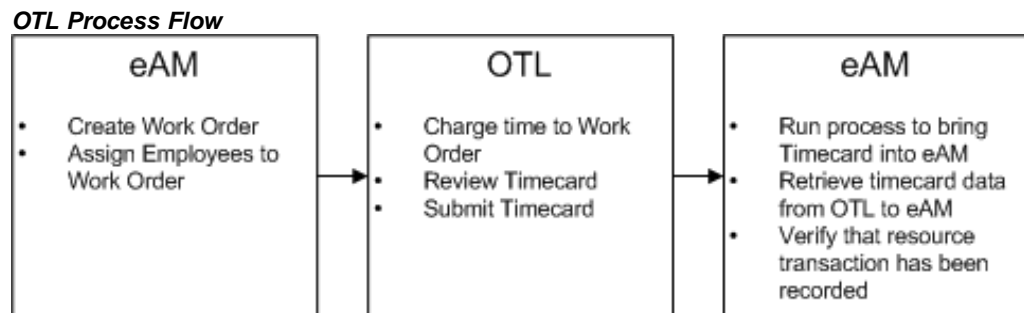
Customizing the Presentation of Data in a Folder, *Oracle Applications User's Guide*  
*Oracle Applications 11i Workflow*

## Oracle Time and Labor Integration Setup

Oracle Time and Labor (OTL) is the repository in which time is entered by employees working in a particular organization. Employees working on Oracle Enterprise Asset Management (eAM) work orders enter their time using OTL Self-Service. Information collected is stored in OTL Time Store, and is composed of a series of business rules and processes. eAM extracts information from the Time Store and charges eAM work orders for the time spent by employees that work on them.

There are multiple steps within the integration flow. First, timecard information is entered for a specific Work Order, within Oracle Time Store (a piece of Oracle Time and Labor). That information is then extracted from Oracle Time Store to Oracle Enterprise Asset Management. This extraction dynamically creates a resource transaction within Oracle Enterprise Asset Management. Finally, the Cost Manager process is executed. This process charges the resource transaction. After this process executes, you can view the actual costs for the period that you charged, within the Work Order.

The process is as follows:



This section contains the following topics:

- Setting Up Overview, page 2-149

### Setting Up Overview

There are two required setup procedures for this integration. The first is to establish employees needing to use this functionality as Persons within Oracle Human Resources (See: *Oracle Human Resources User's Guide*). After established, those Persons are assigned to respective Users, within Enterprise Asset Management. The second setup procedure consists of creating Preference Values, and then linking those values to eligibility criteria.

This section contains the following topics:

- Defining Persons as Users, page 2-149
- Creating Eligibility Criteria, page 2-150

### Defining Persons as Users

Establish employees needing to use this functionality as Persons within Oracle Human Resources (See: *Oracle Human Resources User's Guide*). After established, those Persons must be assigned to respective Users, within Oracle Enterprise Asset Management (eAM).

### To define Persons as Users within eAM:

1. Navigate to the Users window.

**Users**

User Name

Description

Password

**Password Expiration**

☐ Days

☐ Accesses

☒ None

**Effective Dates**

From

To

**Responsibilities** **Securing Attributes**

Responsibility	Application	Description	Security Group	From	To
<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"/>

2. Enter a User Name.
3. Select the Person that was created in Oracle Human Resources.
4. Enter a Password.
5. Within the Responsibilities tab, select the appropriate Responsibilities to assign to this User. The responsibilities, US OTL Administrator and Self Service Time and Expenses, are seeded but the Administrator needs to manually assign them to the Person/User.
6. Save your work. Repeat steps one through five for all appropriate Persons.

## Creating Eligibility Criteria

You need to create Preference Values, and then link those values to eligibility criteria.

**Note:** Preferences are seeded, but the preferences must be assigned to the user.

### To create eligibility criteria:

1. Navigate to the Preferences window.



## Preferences

Preferences Eligibility Criteria People

**Preference Tree**

- Change And Late Audit (Cla)
- Default Preferences
  - Self-Service
  - Time Store
  - Timekeeper
- Default Preferences - Eam
  - Eam Application Sets
  - Eam Approval Periods
  - Eam Approval Styles
  - Eam Evaluate Rules
  - Eam Retrieval Rules Groups
- Default Preferences - Projects
- Exempt
- Vhs Biweekly

Name in Tree: **EAM Self-Service Timecard**

Preference: **Self-Service timecard, review and confirmation layout pages**

Preference Values: **EAM Timecard Layout.EAM Review Layout**

☐ Editable by user? ☐ Displayed to user?

Rule Name	Link by	Linked to	Precedence

2. Select the Preference Tree node, then choose New.
3. Enter the name of your tree.
4. Select the *Self-Service timecard, review and confirmation layout pages* Preference.
5. Within the OTL Preferences window, select EAM Timecard Layout from the Timecard Layout list of values.

## OTL Preferences

OTL Preferences

Timecard Layout: **EAM Timecard Layout**

Review Layout: **EAM Review Layout**

Confirmation Layout: **EAM Confirmation Layout**

Detail Layout:

Export Layout:

Audit Layout:

OK Cancel Clear Help

6. Select EAM Review Layout from the Review Layout list of values.
7. Select EAM Confirmation Layout from the Confirmation Layout list of values.

8. Choose OK.
9. Save your work. After saved, you have created a new node on the Preference Tree. Expand this new node, and select Eam Self-Service Timecard.

**Preferences**

Preferences Eligibility Criteria People

Preference Tree

- Change And Late Audit (Cla)
- Default Preferences
- Default Preferences - Eam
- Default Preferences - Projects
- Exempt
- Vhs Biweekly
- EAM Self-Service Timecard
  - Change And Late Audit (Cla)
  - Default Preferences
  - Default Preferences - Eam
  - Default Preferences - Projects
  - Eam Self-Service Timecard**
  - Exempt
  - Vhs Biweekly

Name in Tree  
**EAM Self-Service Timecard**

Preference  
**Self-Service timecard, review and confirmation layout pages**

Preference Values **EAM Timecard Layout.EAM Review Layout**

☐ Editable by user? ☐ Displayed to user?

Rules

Rule Name	Link by	Linked to	Precedence

10. To create eligibility criteria for timecard entry, select the Eligibility Criteria tab.
11. Enter the Name of the rule. You can have one rule for everyone, or multiple rules to create different eligibility criteria for different groups.
12. Select EAM Self-Service Timecard from the Name of Branch list of values. This value was previously defined during steps one through nine.
13. Select Person, Organization, or All People from the Link by list of values. If you are creating one rule for all users, select All People.
14. Enter a Precedence value. Valid values are all positive numbers. If you have multiple rules, the rule with the highest precedence is displayed first, and so on. For example, an employee can view the time card with a rule precedence value of 95, versus the timecard with a rule precedence value of 94.
15. Save your work.

## Related Topics

Time and Expenses, page 12-2

## Work Order Billing Setup

While maintaining an asset or servicing a customer request, you can bill a third party customer for the work that they performed. The cost of the work performed is based on the material and resource requirements (Bill of Material) of the Work Order, or the cost of the Activity associated with the Work Order.

This section includes the following topics:

- Setting Up Parameters, page 2-153
- Setting Up Item Costs and Prices, page 2-153
- Service Attribute Setup, page 2-158
- Setting Up Billable Material, page 2-159
- Setting Up a Billable Resource, page 2-160
- Setting Up a Billable Activity, page 2-162

## Setting Up Item Costs and Prices

The Billing Basis is either Cost Plus or Price List. The Billing Basis affects your item setup procedures. If you want the flexibility of using both billing basis types for an item, you need to set up both costs and prices for that item. An item is an Activity, Material, or Resource.

This section includes the following topics:

- Setting up Costs for the Cost Plus Billing Basis, page 2-154
- Setting up Prices for the Price List Billing Basis, page 2-157

## Setting Up Parameters

You can optionally create the ability to change the billable material on a Work Order at the time a bill is created.

### **To enable the change of billable material functionality:**

1. Navigate to the Enterprise Asset Management Parameters window.

### Enterprise Asset Management Parameters

**Enterprise Asset Management Parameters (EAM)**

**Asset Number Defaults**

☒ Asset Number Auto Generation

**Cost Defaults**

Cost Element: **Material** Cost Category: **Maintenance**

**Preventive Maintenance**

☒ Implement From Horizon Start Date

**Work Request**

☒ Auto Approve ☒ Extended Log

☒ Default Asset from Employee Location ☒ Asset Number Mandatory

**Work Order Defaults**

WIP Accounting Class: **EAMWAC** EAM WIP Accounting Class

Work Order Prefix: **WO**

Default Department: **Def\_dep**

☒ Enable Material Issue Requests ☐ Invoice Billable Items Only

☐ Value Rebuildables At Zero Cost ☐ Auto Firm on Release

**Account Defaults**

Maintenance Offset: **01-580-7740-0000-000**

2. Optionally select the Invoice Billable Items Only check box. If selected, you can change the billable material at the time the bill is created.

If selected, this check box indicates that you want to invoice only billable items. Billable items are those that have a populated value within the Billing Type field, within the Service Tab, of the Master Item window. Billing Type is relevant only if you have this check box selected. Also, selecting this check box means that you can choose a different item to bill. See: Service Attribute Setup, page 2-158.

3. Save your work.

## Setting up Costs for the Cost Plus Billing Basis

The cost plus method utilizes costs associated with an item. The item should have a cost defined for it. First, you need to ensure that the appropriate item attributes are set up correctly for the item.

### To set up an item's attributes:

1. Navigate to the Master Item window.

**Master Item**

Master Item (V1)

Organization: **V1** Vision Operations

Item: **av-bill-resitem**

Description: **EAM Billable Resource Item** [ ... ]

Display Attributes: ☒ Master ☐ Org ☐ All

Asset Manag... Costing Purch... Recei... Physi... Gener... MPS/M... Lead ... Work ... Order... <>

☒ Costing Enabled

☒ Inventory Asset Value

☒ Include In Rollup

Cost of Goods Sold Account: **01-510-5110-0000-000**

Standard Lot Size: [ ]

2. Optionally select the Costing Enabled check box to report, value, and account for any item costs. You need to select this check box if you are using the cost plus billing method.
3. Optionally select the Inventory Asset Value check box. You need to select this check box if you are using the cost plus billing method.
4. Save your work.

### To set up costs for an item:

1. Navigate to the Item Costs Summary window.

### Item Costs Summary

Item Costs Summary (V1)

**Standard**

Item	Cost Type	Based on Rollup	Unit Cost	Material	Material Overhead
av-bill-resitem	Frozen	<input type="checkbox"/>	0.000		
		<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"/>			

Item Description: **EAM Billable Resource Item** UOM: **Ea**  
 Cost Type Description: **Frozen Standard Cost Type** Default Cost Type: **Frozen**

Views Costs New Open

- Choose Costs.

### Item Costs

Item Costs (V1) - av-bill-resitem, Frozen

Cost Information Activity Information

**User Defined Item Costs**

Cost Element	Sub-Element	Activity	Basis	Rate or Amount	Unit Cost
Resource	Res.4		Item	10.5	10.500

Basis Factor: **1** MFG Shrinkage Factor: **1**

**Rollup Item Costs**

Cost Element	Sub-Element	Activity	Basis	Rate or Amount	Unit Cost

Basis Factor: Source Type: MFG Shrinkage Factor:

- Enter cost information for your item.
- Save your work.

## Related Topics

Costing Attribute Group, *Oracle Inventory User's Guide*

Defining Item Costs, *Oracle Cost Management User's Guide*

## Setting up Prices for the Price List Billing Basis

The price list method uses a specified price list. The specified item should have at least one entry in the price list. First, you need to ensure that the appropriate item attributes are set up correctly for the item.

### To set up an item's attributes:

1. Navigate to the Master Item window.

The screenshot shows the 'Master Item' window for item 'av-bill-resitem' in organization 'V1'. The description is 'EAM Billable Resource Item'. The 'Display Attributes' section shows 'Master' selected. The 'Order...' tab is active, showing various attributes. The 'Customer Ordered' checkbox is checked. Other attributes include 'Internal Ordered', 'Pick Components', 'Assemble to Order', 'Ship Model Complete', 'Returnable', 'RMA Inspection Required', and 'Financing Allowed'. The 'Customer Orders Enabled' checkbox is also checked. The 'Internal Orders Enabled' checkbox is unchecked. The 'Shippable' checkbox is checked, and 'OE Transactable' is also checked. The 'Check ATP' dropdown is set to 'None'. The 'ATP Rule' and 'ATP Components' are also set to 'None'. The 'Picking Rule' is empty. The 'Default Shipping Organization' is empty. The 'Default SO Source Type' is set to 'Internal'. The 'Shipping Subinventory' is empty. The 'Tolerances' section shows 'Over Shipment' and 'Under Shipment' fields, and 'Over Return' and 'Under Return' fields.

2. Optionally select the Customer Ordered check box in order to create a price within the price list. You need to select this check box if you are using the price list billing method.
3. Save your work.

### To set up prices for an item:

1. Navigate to the Advanced Pricing - Price Lists window.

## Advanced Pricing - Price Lists

Product Context	Product Attribute	Product Value	Product Description	U
Item	Item Number	#80000	Sentinal Multimedia	E
Item	Item Number	#81000	One Year Maintenance - reve	E
Item	Item Number	#82000	Consulting/Training	E
Item	Item Number	CM31556	Monitor - 19" Flat	E
Item	Item Number	CM28287	Optiball Wireless Mouse	E

2. Enter price information for your item.

The same item can repeat multiple times in the price list, with varying values for Start Date, End Date, and Precedence. For example, it is invalid to have overlapping date ranges, if the Precedence is the same.

3. Save your work.

## Related Topics

Order Entry Attribute Group, *Oracle Inventory User's Guide*

## Service Attribute Setup

Set the Billing Type for each item that you want billable. The Billing Type field within the Master Item window must be populated if you have selected the Invoice Billable Items Only check box, within the Enterprise Asset Management Parameters window. See: Setting Up Parameters, page 2-153.

### To set up the Billing Type attribute:

1. Navigate to the Master Item window.



### Master Item

The screenshot shows the 'Master Item (V1)' window. At the top, the 'Organization' is 'V1 Vision Operations' and the 'Item' is 'av-bill-resitem'. The 'Description' is 'EAM Billable Resource Item'. Below this is a tabbed interface with tabs for 'Recei...', 'Physi...', 'Gener...', 'MPS/M...', 'Lead ...', 'Work ...', 'Order...', 'Invoi...', 'Service', and 'Web O...'. The 'Service' tab is selected. It contains four main sections: 'Service' with a 'Service Request' dropdown and checkboxes for 'Enable Contract Coverage', 'Enable Defect Tracking', and 'Enable Provisioning'; 'Service Contracts' with fields for 'Contract Item Type', 'Duration', 'Duration Period', 'Template', and 'Starting Delay (Days)'; 'Installed Base' with checkboxes for 'Track in Installed Base' and 'Create Fixed Asset', and an 'Instance Class' dropdown; and 'Debrief and Charges' with a 'Recovered Part Disposition' dropdown, a checked 'Enable Service Billing' checkbox, and a 'Billing Type' dropdown set to 'Labor'.

2. Select the Service tab.
3. Optionally select a Billing Type of Expense, Labor, or Material. This field must be populated if you have selected the Invoice Billable Items Only check box, within the Enterprise Asset Management Parameters window. See: Setting Up Parameters, page 2-153.
4. Save your work.

## Setting Up Billable Material

To create billable material, first set specific attributes within the Master Item window. Next, assign the resource item to your organization. Decide whether you are pricing this item using the Cost Plus or Price List method, or both, and perform the additional setup for those methods (See: Setting Up Item Costs and Prices, page 2-153). Finally, define costs and prices for your item.

### To set up billable material:

1. Navigate to the Master Item window.

### Master Item

Master Item (V1)

Organization: V1 Vision Operations

Item: av-Billable Item

Description: EAM Billable Item

Display Attributes: Master (selected), Org, All

Recei... Physi... Gener... MPS/M... Lead ... Work ... Order... Invoi... Service Web O...

☒ Invoiceable Item

☒ Invoice Enabled (J)

Accounting Rule: [ ]

Invoicing Rule: [ ]

Tax Code: [ ]

Sales Account: 01-510-4110-0000-000

Payment Terms: [ ]

2. Select the Invoicing tab.
3. Optionally select the Invoiceable Item check box to indicate that the current material item can invoice. You can select this attribute at the Master Organization level.
4. Optionally select the Invoice Enabled check box to indicate that invoices are enabled for the current material item.

**Note:** For the current material item, you need to ensure the Billing Type is populated with Material, within the Service tab. See: Service Attribute Setup, page 2-158.

5. Assign the current item to your organization.
6. Save your work.

## Setting Up a Billable Resource

To create a billable resource, you need to first create a resource item by setting specific attributes within the Master Item window. Next, you need to assign the resource item to your organization. Decide whether you are pricing this item using the Cost Plus or Price List method, or both, and perform the additional setup for those methods (See: Setting Up Item Costs and Prices, page 2-153). Next, you need to define a resource and associate the resource item to the resource. Finally, assign the resource to a department.

### To set up a billable resource:

1. Navigate to the Master Item window.

### Master Item

The screenshot shows the 'Master Item (V1)' window. At the top, the 'Organization' is 'V1 Vision Operations' and the 'Item' is 'av-bill-resitem'. The 'Description' is 'EAM Billable Resource Item'. On the right, the 'Display Attributes' section has radio buttons for 'Master', 'Org', and 'All', with 'Master' selected. Below this is a row of tabs: 'Recei...', 'Physi...', 'Gener...', 'MPS/M...', 'Lead ...', 'Work ...', 'Order...', 'Invoi...', 'Service', and 'Web O...'. The 'Invoi...' tab is currently selected. The main area of the window contains the following fields and checkboxes:

- ☒ Invoiceable Item
- ☒ Invoice Enabled
- Accounting Rule: [Empty text box]
- Invoicing Rule: [Empty text box]
- Tax Code: [Empty text box]
- Sales Account: 01-510-4110-0000-000
- Payment Terms: [Empty text box]

2. Select the Invoicing tab.
3. Optionally select the Invoiceable Item check box to indicate that the current resource item can invoice. You can select this attribute at the Master Organization level.
4. Optionally select the Invoice Enabled check box to indicate that invoices are enabled for the current resource item.

**Note:** For the current resource item, you need to ensure the Billing Type is populated with Labor, within the Service tab. See: Service Attribute Setup, page 2-158.

5. Assign the current item to your organization.
6. Save your work and close the window.
7. Navigate to the Resources window.

## Resources

The screenshot shows the Oracle Resources (EM1) window. The Resource field is set to 'FliftMech'. The Description is 'Fork Lift Mechanic'. The Type is 'Person' and the UOM is 'HR'. The Charge Type is 'Manual' and the Basis is 'Item'. The Expenditure Type is empty. The Supply Subinventory and Supply Locator are empty. The Billing section shows the Item as 'av-bill-resitem' and 'EAM Billable Resource Item'. The Skills section shows Competence, Skill Level, and Qualification. The Batchable section shows Minimum Batch Capacity, Maximum Batch Capacity, and Batch Capacity UOM. The window also has buttons for Employees, Equipment, and Setups.

8. Enter the name of the Resource within the Resource field.
9. Within the Billing region, select the resource item you created within the Master Item window to ensure that the resource is available for billing.

**Note:** Rates defined in the Resources window are not used for billing. For billing rates for the resource item, See: Setting Up Item Costs and Prices, page 2-153.

10. Save your work.
11. Assign the current resource to a department. See: Defining Departments and Resources, page 2-12.
12. Save your work.

## Setting Up a Billable Activity

To create a billable Activity, first set specific attributes within the Master Item window. Next, decide whether you are pricing this item using the Cost Plus or Price List method, or both, and perform the additional setup for those methods (See: Setting Up Item Costs and Prices, page 2-153). Finally, associate the Activity to the Asset Group / Asset Number that is used to create the Work Order.

### To set up a billable activity:

1. Navigate to the Master Item window.
2. Select the Invoicing tab.

3. Optionally select the Invoiceable Item check box to indicate that the current Activity item can invoice. You can select this attribute at the Master Organization level.
4. Optionally select the Invoice Enabled check box to indicate that invoices are enabled for the current Activity item.
5. Assign the current item to your organization.
6. Save your work.

## **Related Topics**

Initiating Billing, page 14-4



# Part 3

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## Enterprise Asset Management User

The Enterprise Asset Management User is anyone in an organization who may access eAM. This might include an employee who uses Work Requests to report problems, a Plant Manager who accesses eAM to review high cost assets and their work history, as well as a Maintenance User, such as a technician who accesses the Maintenance User Workbench to review his/her daily work assignments.

This part contains the following chapters:

- Chapter 3, "eAM Work Management", page 3-1
- Chapter 4, "Preventive Maintenance", page 4-1
- Chapter 5, "eAM Planning and Scheduling", page 5-1
- Chapter 6, "eAM Cost Management", page 6-1
- Chapter 7, "Direct Item Procurement for eAM Work Orders", page 7-1
- Chapter 8, "Contractor Services", page 8-1
- Chapter 9, "eAM Property Manager", page 9-1
- Chapter 10, "Process and Discrete Manufacturing Integration", page 10-1
- Chapter 11, "eAM Project Manufacturing", page 11-1
- Chapter 12, "Integration with Oracle Time and Labor", page 12-1
- Chapter 13, "eAM Quality", page 13-1
- Chapter 14, "Work Order Billing", page 14-1
- Chapter 15, "Oracle Service Integration", page 15-1



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## eAM Work Management

This chapter covers the following topics:

- Overview eAM Work Management
- eAM Work Orders
- Routine Work Orders
- Preventive Maintenance Work Orders
- Rebuild Work Orders
- Easy Work Orders
- eAM Work Order Statuses
- Defining Work Order Documents
- eAM Operations and Tasks
- Defining Asset Shutdown Statuses
- Preparing Work Order Operations
- Viewing Work Order Operations
- Defining Inventory Material Requirements
- Defining Direct Item Material Requirements
- Viewing Material Requirements
- Defining Resource Requirements
- Viewing Resource Requirements
- Work Order Relationships
- Parent-Child Relationship
- End to Start Dependency
- Cost Relationship
- Follow-up Work Relationship
- eAM Work Order Transactions
- Operation Completion
- Work Order Completion
- Rebuild Work Order Completion

- Transacting Material
- Transacting Resources
- Viewing Resources Transactions
- Closing Work Orders
- eAM Work Order Planning
- Using the Maintenance Workbench

## Overview eAM Work Management

The Work Order is the foundation of all maintenance organizations. Work orders define what resources and items are needed to conduct work. They can automatically generate through the use of Preventive Maintenance Schedules, the issue of an inventoried rebuildable, breach of quality results, or manually generated as a routine Work Order. These Work Orders are then reviewed and shared with Operations to produce an estimated schedule.

Enterprise Asset Management integrates with Oracle Quality. Use Quality Collection Plans to predefine required feedback information that must be entered into Enterprise Asset Management, upon a Work Order's completion. For example, data to collect may include inspection points for an Asset Number, and Downtime variables. If a variance is recorded into the quality plan, a Work Request or Work Order is created. You can define quality collection plans directly on the Work Order, or define them as attributes of an Activity to ultimately default into future Work Orders generated for specific Asset Number/Activity combinations.

For each Work Order, the estimated costs aggregate, from the associated BOM and resources, to develop a costing profile for the current Work Order. You can use Costing Profiles for future Budgeting and Forecasting.

For each Work Order, the actual costs aggregate during the Work Order's lifecycle. These costs roll up, based on the hierarchy of the current Work Order's associated Asset Number. View these actual costs by period, at a transaction level, or at a summary level. Costs can roll up, based on the hierarchy of Work Orders. You can view the costs (both actual and estimates) by period, at a transaction or summary level.

This chapter is divided into the following sections:

- eAM Work Orders, page 3-2
- eAM Operations and Tasks, page 3-19
- Work Order Relationships, page 3-35
- eAM Work Order Transactions, page 3-39
- eAM Work Order Planning, page 3-51

## eAM Work Orders

Enterprise Asset Management Work Orders are created against assets and rebuildable inventory items. They are defined manually, or generated automatically based on a scheduled Activity. If you attach an Activity to a manually created Work Order (normally the role of a Planner), the Work Order inherits the Activity's attributes, such as the maintenance BOM, maintenance route (operations), attachments, quality plans, cost

information, and scheduling rules. When preplanned Work Orders are created for assets, the Activity information associated with the Work Order's current Asset Number automatically attaches material and resource requirement information to the Work Order.

This section includes the following topics:

- Routine Work Orders, page 3-3
- Preventive Maintenance Work Orders, page 3-8
- Rebuild Work Orders, page 3-9
- Easy Work Orders, page 3-16
- eAM Work Order Statuses, page 3-16
- Defining Work Order Documents, page 3-18

## **Routine Work Orders**

Routine Work Orders are normally created by a Planner from the Maintenance Workbench (See: Using the Maintenance Workbench, page 3-51), and are also created using a menu option. Material and resource planning (See: Overview of Planning and Scheduling, page 5-1) is used at each status of the routine Work Order (See: eAM Work Order Statuses, page 3-16).

### **To manually create a Work Order:**

1. Navigate to the Find Work Orders window.
2. Choose New.

## Work Order

Work Order (EAM)

Work Order: WO137234  
Asset Number: JP-AN1  
Asset Group: av-ag1  
Asset Activity: cleaning  
Class: EAMWAC  
Status: Draft  
Work Order Type:  
Instance Number:  
Parent Work Order:  
Relationship Type:

Cleaning of comps

Scheduled Dates  
Start: 15-JUL-2004 11:38:24  
Completion: 16-JUL-2004 12:38:24  
Duration(hours): 25

Actual Dates  
Actual Start Date:  
Actual Completion Date:

Main Activity Project Rebuild Maintenance Request Bill, Routing

Owning Department: DEP-MAINT  
Priority: High  
Requested Start Date: 15-JUL-2004 11:38:24  
Requested Due Date:  
Shutdown Type: ...

☒ Firm  
☐ Notification Required  
☐ Tagout Required  
☐ Planned  
☒ Enable Material Issue Requests

Operations Materials Resources Relationships Asset Route Costs

The header information displays general information about the Asset Number and the type of work required.

3. The Work Order number is assigned, but you can update it.
4. Enter an Asset Number requiring maintenance. The Asset Group defaults (See: Defining Asset Numbers, page 2-47).
5. Select an Asset Activity. Only Asset Activities associated with this Asset Number are available.

**Note:** If this Work Order was previously created, you can add an Asset Activity, as long as the Work Order is at an Unreleased or Draft status, or an Asset Activity was not previously defined. If any tasks, material, or resource requirements exist, these must be deleted before adding an Asset Activity to an existing Work Order.

After selecting an Asset Activity, the associated maintenance BOM (material) (See: Setting Up Maintenance Bills of Material, page 2-71) and maintenance route (resources), associated with the Activity (See: Defining Maintenance Routes, page 2-68), attach to the Work Order. After an Asset Activity is saved to a Work Order, you can no longer change or delete it.

6. Enter a WIP accounting Class code to represent the charge (expense) accounts associated with the Asset Number. This defaults from the Asset Number (See: Defining Asset Numbers, page 2-47); you can update it.

7. Enter the Status. For example, Unreleased, Released, On Hold, and Draft. Certain transactions update this status automatically, including Work Order Completion, for example (See: eAM Work Order Statuses, page 3-16).
8. Optionally select a Work Order Type. Work Order Types enable you to differentiate Work Orders, for example, Routine, Preventive, Rebuild, Emergency, or Facilities. Maintenance management can use this information to sort and monitor work activities for reporting and budgeting. Work Order Types are referenced in the Work Order. For information on how to create valid values within the available list of values, See: Work Order Types, page 2-31.
9. The Instance Number field tracks the instances associated with the current Work Order. This field is disabled.
10. If this is a child Work Order in a Work Order network and Parent Child is populated in the Relationship Type field, the Parent Work Order is populated in this field.
11. The Relationship Type field indicates the type of Relationship associated with the Work Order. Valid relationships are Parent Child, End to Start Dependency, Cost, and Follow-up Work. Manage complex maintenance jobs through these four types of Work Order relationships. See: Work Order Relationships, page 3-35.
  - *Parent Child:* This relationship enables a network of Work Orders, which includes one top level Work Order that defines the time line of all its children Work Orders. The start and end dates of the children Work Orders are within the start and end dates of the parent Work Order. A child Work Order can be parent to another Work Order. One parent can have multiple children, but one child can have a single parent. There can be an infinite number of parent-child Work Order levels, within the Parent-Child relationship.
  - *End to Start Dependency:* You can create Work Orders with scheduling dependency relationships (including child sibling Work Orders). For example, one Work Order's scheduled start date is dependent on another Work Order's completion. With this relationship, the next Work Order cannot start until the prior Work Order is completed.
  - *Cost:* You can roll the child Work Order costs into the parent Work Order, for reporting purposes. You can base the cost roll up, within a hierarchy, on scheduling relationships. Scheduling relationships are not required to roll up costs within a hierarchy. You can create a cost reporting hierarchy that is different from the scheduling hierarchy.
  - *Follow-up Work:* You can create a Work Order for the current capital Asset Number or Rebuildable Item, while executing work for the asset on another Work Order. For example, a second problem with the asset is discovered while executing a Work Order. A Follow-up Work Order, associated with the original Work Order, is created for the issue. This is independent of scheduling or cost relationships.
12. In the Scheduled Dates region, enter the Work Order's scheduled Start date if it is based on a forward schedule. The scheduling process uses this date as a starting point to calculate the scheduled end date and duration for allocated resources and material. If the material/resources are not available by this date, the scheduling process moves the start date forward (See: eAM Scheduling, page 2-105).

**Note:** Actual dates are entered at operation and Work Order completion. Scheduled dates are calculated by the Enterprise Asset Management scheduler if you have Oracle Manufacturing

Scheduling enabled (See: Overview of Setting Up, *Oracle Manufacturing Scheduling User's Guide*). Otherwise, the EAM scheduler calculates the dates.

13. Enter a scheduled Completion date for backward scheduling. This date indicates the requested end by date for the work. The scheduling process uses this date as a starting point to calculate the scheduled start date and duration for allocated resources and material. If the material and resources are not available by that date, the scheduling process moves the start date backwards to ensure completion by the required end date (See: eAM Scheduling, page 2-105).

**Note:** Actual dates are entered at operation and Work Order completion. Scheduled dates are calculated by the Enterprise Asset Management scheduler if you have Oracle Manufacturing Scheduling enabled (See: Overview of Setting Up, *Oracle Manufacturing Scheduling User's Guide*). Otherwise, the EAM scheduler calculates the dates.

14. Within the Main tab, the Owning Department defaults from the selected Asset Number (See: Defining Asset Numbers, page 2-47). This indicates the persons or department responsible for this Asset Number.
15. Optionally select a Priority. For example, High, Medium, or Low.
16. The Shutdown Type defaults from the Activity. This helps the planner group Work Orders that may require shutdowns, so that they are planned together.
17. If the Firm check box is selected, planning and scheduling does not adjust the schedule, regardless of material or resource availability (See: Overview of Planning and Scheduling). This check box defaults as selected or cleared, depending on the Auto Firm On Release check box setting, established in the Enterprise Asset Management Parameters setup for the current organization (See: Defining eAM Parameters, page 2-8). This defaults only after the Work Order is released.

If the check box is selected, the end date is calculated, based on the Work Order duration. The scheduler automatically calculates the duration based on the operations (resource duration setup) on the Work Order. You can update this check box for Work Orders at Draft, Released, Unreleased, On-Hold, or Cancel statuses (See: eAM Work Order Statuses, page 3-16).

18. Optionally select the Notification Required check box.
19. Optionally select the Tagout Required check box to indicate that the Area needs to be secured for operations required to execute this Work Order. Tags are generally printed and placed on an asset, warning the plant that it is shutdown and should not be started. This check box helps the planner isolate those jobs that require a tagout.

#### **To store tagout documents using the Attachments feature**

20. Select the paperclip Attachments icon to attach relevant tagout documents. You can attach URL, file, or text attachments. See: Defining Work Order Documents, page 3-18.
21. The Planned check box is selected if the current Work Order was created from forecasted Work Orders (See: Preventive Maintenance Work Orders, page 3-8).
22. Optionally select the Enable Material Issue Requests check box to enable eAM to manage material availability for the current Work Order. Material is physically

available to a Work Order via the material request and verification process. This check box is selected by default if it is selected on the eAM Parameters window.

23. Optionally select the Activity tab.
  1. Optionally select an Activity Type. This code indicates the type of maintenance for this Activity and is used when defining a job or a standard job, for example, Inspection, Overhaul, Lubrication, Repair, Servicing, or Cleaning. This value defaults from the Activity (See: Defining Activities, page 2-37).
  2. Optionally select an Activity Cause to specify what situation caused this work to generate, for example, Breakdown, Vandalism, Normal Wear, or Settings. This value defaults from the Activity (See: Defining Activities, page 2-37).
  3. Optionally select an Activity Source to specify reasons Activities need execution, for example, Warranty Compliance, OSHA Compliance, or Military Specification Requirements. This value defaults from the Activity (See: Defining Activities, page 2-37).
24. Optionally select the Project tab. This tab is enabled only if Project Manufacturing is installed and enabled.
  1. Optionally select a Project.
  2. Optionally select a Task.
25. You can select the Rebuild tab if this Work Order is created for a rebuildable item. See: Rebuild Work Orders, page 3-9.
26. Optionally select the Maintenance Request tab to display Service and Work Requests associated with this Work Order. You can add Service and/or Work Requests to a Work Order by selecting a Service Request and/or Request Number, respectively. Only Work Requests at an Awaiting Work Order status and Maintenance Type Service Requests at an Open status are available for association. You may associate multiple Work Requests to a single Work Order, but only one Work Order can associate with a Service Request. You can associate a Service Request to multiple Work Orders. You can dissociate a Work Request from a Work Order.

#### **To dissociate a Work Request from a Work Order**

27. Highlight the Work Request.
28. Choose Delete.
29. Select the Bill, Routing tab to select alternate, predefined BOMs and Routings. See: Setting Up Maintenance Bills of Material, page 2-71 and Defining Maintenance Routes, page 2-68.

After the alternate BOM and Routing are selected, the system uses the associated items and assigns the associated resources needed to execute the Work Order.
30. Optionally choose Operations to prepare necessary operations. These operations default from the maintenance route (See: Defining Maintenance Routes, page 2-68) associated with the current Activity, but you can update and add to them (See: Preparing Work Order Operations, page 3-21).
31. Optionally choose Materials to view or add items from the associated Asset Number's items list (See: Setting Up Maintenance Bills of Material, page 2-71 and Defining Material Requirements, page 3-26). From the Material Requirements

window, you can optionally choose Select Materials to add materials from this Asset BOM to the material requirements for the current Work Order.

32. Optionally choose Resources to view, add, or update the resources assigned to each operation. See: Defining Resource Requirements, page 3-31.
33. Optionally choose Relationships to manage Work Order schedules and view Work Order details. See: Work Order Relationships, page 3-35.
34. Optionally choose Asset Route to view the Asset Route associated with the current Work Order's Asset Group. You might need to perform one Activity on multiple Asset Numbers. To eliminate the possibility of creating multiple Work Orders for the same Activity, you can define Asset Routes. See: Defining Asset Routes, page 2-53.

You can choose Asset Route if an Asset Route is associated with the current Asset Number.

35. Optionally choose Costs to view the costs of Work Orders falling in the specific accounting periods, specified in the Accounting Information by Period region. Accounting Periods are defined within Oracle General Ledger. See: Defining Period Types, *Oracle General Ledger User's Guide* and Defining Calendars, *Oracle General Ledger User's Guide*.
  1. Optionally select a Work Order, then choose Value Summary to view a summary of the actual, estimated, and variance costs for labor hours, equipment hours, and material against the current Work Order.
    - *Actual Costs*: This is the accumulation of all costs for material and resource transactions for the Asset Number's associated maintenance Work Orders, based on a specified period.
    - *Estimates*: A BOM (material parts list) and routing (resources) can associate with a Work Order. When you select the Estimates tab, the estimated costs of all material and resources associated with a Work Order appear, enabling you to budget costs.
    - *Variances*: The difference between the actual costs recorded and estimated costs.
    - *Material*: All material and material overhead transaction costs.
    - *Labor*: All employee resource and resource overhead transaction costs.
    - *Equipment*: All material resource and resource overhead transaction costs.
  2. Optionally choose Details to view actual, estimated, and variance costs for labor hours, equipment hours, and material for specific operations of the current Work Order.
36. Optionally select a Work Order, then choose Value Summary to view a summary of the actual, estimated, and variance costs for labor hours, equipment hours, and material against the current Work Order.
37. Save your work.

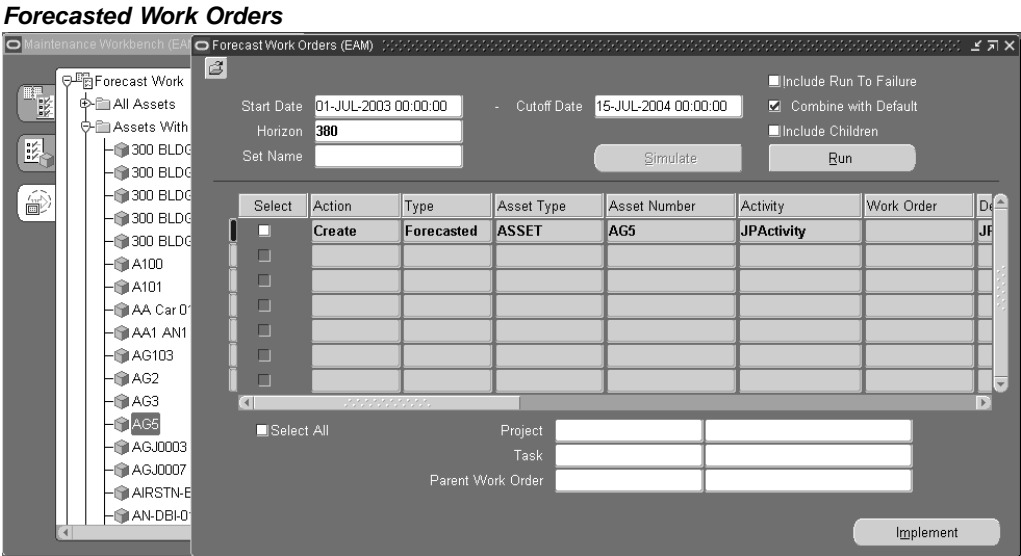
## Preventive Maintenance Work Orders

Enterprise Asset Management enables you to generate Work Orders automatically based on meter readings, runtime intervals, and calendar days. Preventive maintenance Activities reduce the probability of failure or degradation of the assets' physical



conditions. These Activities are executed periodically, by usage, or based on the condition of an Asset Number (asset or rebuildable serial number). Meters are entered to measure any Asset Number that needs to be measured and periodically serviced, based on the measurement. For example, a pipe may start out at 12 millimeters, but when it wears to only four millimeters, it needs to be replaced (See: Meters, page 2-87).

Scheduling definitions are defined to create forecasted, scheduled Work Orders, based on meter readings. You can create a Preventive Maintenance scheduling definition (See: Preventive Maintenance Scheduling, page 2-96) for an Asset Number and/or Rebuildable Item/Activity combination (See: Associating Asset Numbers with Activities, page 2-74), or an Asset Route (See: Defining Asset Routes, page 2-53). After you have defined Preventive Maintenance scheduling definitions, the Preventive Maintenance scheduler process may execute. You can view these forecasted Work Orders using the Maintenance Workbench (See: Using the Maintenance Workbench, page 3-51). You can execute the Generate Preventive Maintenance Work Orders process. When this process executes, the WIP Mass Load process executes in the background, creating forecasted Work Orders in an Unreleased status. (See: Generating Work Orders, page 4-5). You can choose the Implement button to change the status of the Unreleased Work Orders to Released Work Orders.



## Related Topics

Preventive Maintenance Overview, page 4-1

## Rebuild Work Orders

Rebuild Work Orders are created as child Work Orders.

For example, a Work Order was issued for the inspection of a pump. During the pump inspection, you found that the motor, one of the components of the pump, is problematic. You have two options: You can repair and then re-install this motor (rebuildable item), or you can replace the rebuildable item by issuing a new motor rebuildable item from inventory. If you choose to perform a material issue from inventory, the old motor rebuildable item attaches to the Work Order, automatically creating the child, rebuild Work Order number associated to the parent Work Order. In

this case, the Asset Number genealogy would automatically update to identify this new item number. See: Overview of Inventory Transactions, *Oracle Inventory User's Guide*.

If you choose to repair and then re-install the problematic motor rebuildable item, you can manually create the child rebuild Work Order for the old motor (rebuildable item).

The instructions below show you the option of creating a rebuild Work Order without issuing any new material. The rebuildable item is replaced back into the asset (motor placed back into the pump, for example), and does not go to a subinventory when the Work Order is completed. In this case, the Asset Number genealogy is not updated.

### To create rebuild Work Orders:

1. Navigate to the Find Rebuild Work Orders window.
2. Choose New.

**Rebuild Work Order**

Rebuild Work Order (EAM)

Work Order	WO103739	Repair for non-serialized rebuildable
Rebuild Item	av-reb2	Non-serialized Rebuild
Serial Number		Scheduled Dates
Rebuild Activity	Calibration	Start 14-APR-2004 18:47:20
Class	EAMWAC	Completion 14-APR-2004 18:47:20
Status	Draft	Duration(hours) 0
Work Order Type	Routine	Actual Dates
Instance Number		Actual Start Date
Parent Work Order	115159	Actual Completion Date
Relationship Type	Parent Child	

Main Activity Project Rebuild Maintenance Request Bill, Routing

Rebuild Source 115159

Charge Asset Alex's asset

Charge Asset Group AG-J-1

Operations Materials Resources Relationships Asset Route Costs

The header information displays general information about the rebuildable item and the type of work required.

3. A Work Order number is assigned, but you can update it.
4. Optionally enter a Description for this Work Order, up to 240 characters.
5. Enter a Rebuild Item requiring maintenance.
6. Select a Serial Number from the list of values (See: Defining Rebuildable Items, page 2-77 and Generating Serial Numbers, *Oracle Inventory User's Guide*).

7. Optionally select a Rebuild Activity. Only Activities associated with this Rebuildable Item are available (See: Rebuildable Item/Activity Association, page 2-80). If an Activity does not exist, you can add operations, and material/resource requirements to this Work Order manually. See: Defining Material Requirements, page 3-26, Defining Resource Requirements, page 3-31, and Preparing Work Order Operations, page 3-21. If an Activity does exist, you can update the material and resources by choosing the Materials or Resources buttons from this window or by utilizing the Maintenance Workbench (See: Using the Maintenance Workbench, page 3-51).
8. Enter a Work In Process (WIP) accounting Class code. This represents the charge (expense) accounts associated with the Asset Number. This defaults from the Asset Number (See: Defining Asset Numbers, page 2-47) and can be updated.
9. Enter the Status. For example, Unreleased, Released, On Hold, and Draft. Certain transactions update this status automatically, including Work Order Completion, for example (See: eAM Work Order Statuses, page 3-16).
10. Optionally select a Work Order Type. Work Order Types enable you to differentiate Work Orders, for example, Routine, Preventive, Emergency, or Facilities. Maintenance management can use this information to sort and monitor work activity for reporting and budgeting. Work Order Types are referenced in the Work Order. For information on how to create valid values within the available list of values, See: Work Order Types, page 2-31.
11. The Instance Number field tracks the instances that are associated with the current Work Order. This field is disabled.
12. If this is a child Work Order in a Work Order network and Parent Child is populated in the Relationship Type field, the Parent Work Order is populated in this field.
13. The Relationship Type field indicates the type of Relationship associated with the Work Order. Valid relationships are Parent Child, End to Start Dependency, Cost, and Follow-up Work. Manage complex maintenance jobs through these four types of Work Order relationships. See: Work Order Relationships, page 3-35.
  - *Parent Child:* This relationship enables a network of Work Orders, which includes one top level Work Order that defines the time line of all its children Work Orders. The start and end dates of the children Work Orders are within the start and end dates of the parent Work Order. A child Work Order can be parent to another Work Order. One parent can have multiple children, but one child can have a single parent.
  - *End to Start Dependency:* You can create Work Orders with scheduling dependency relationships (including child sibling Work Orders). For example, one Work Order's scheduled start date is dependent on another Work Order's completion. With this relationship, the next Work Order cannot be created until the prior Work Order, for the current asset, is completed.
  - *Cost:* You can roll the child Work Order costs into the parent Work Order, for reporting purposes. You can base the cost roll up, within a hierarchy, on scheduling relationships. Scheduling relationships are not required to roll up costs within a hierarchy. You can create a cost reporting hierarchy that is different from the scheduling hierarchy.
  - *Follow-up Work:* You can create a Work Order for the current capital Asset Number or Rebuildable Item, while executing work for the asset on another Work Order. For example, a second problem with the asset is discovered

while executing a Work Order. A Follow-up Work Order, associated with the original Work Order, is created for the issue. This is independent of scheduling or cost relationships.

14. In the Scheduled Dates region, enter the scheduled Start date of the Work Order if it is based on a forward schedule. The scheduling process uses this date as a starting point to calculate the scheduled end date and duration for allocated resources and material. If the material/resources are not available by this date, the scheduling process moves the start date forward (See: eAM Scheduling, page 2-105).

**Note:** Actual dates are entered at operation and Work Order completion. Scheduled dates are calculated by the Enterprise Asset Management scheduler if you have Oracle Manufacturing Scheduling enabled (See: Overview of Setting Up, *Oracle Manufacturing Scheduling User's Guide*). Otherwise, the EAM scheduler calculates the dates.

15. Enter a scheduled Completion date for backward scheduling. This indicates the requested end by date of the work. The scheduling process uses this date as a starting point to calculate the scheduled start date and duration for allocated resources and material. If the material and resources are not available by that date, the scheduling process moves the start date backwards to ensure completion by the required end date (See: eAM Scheduling, page 2-105).

**Note:** Actual dates are entered at operation and Work Order completion. Scheduled dates are calculated by the Enterprise Asset Management scheduler if you have Oracle Manufacturing Scheduling enabled (See: Overview of Setting Up, *Oracle Manufacturing Scheduling User's Guide*). Otherwise, the EAM scheduler calculates the dates.

16. Within the Main tab, the Owning Department defaults from the selected Asset Number (See: Defining Asset Numbers, page 2-47). This indicates the persons or department responsible for this Asset Number.
17. Optionally select a Priority. For example, High, Medium, or Low.
18. The Shutdown Type defaults from the Rebuild Activity. This helps the planner group Work Orders that may require shutdowns, so that they are planned together.
19. If the Firm check box is selected, planning and scheduling does not adjust the schedule, regardless of material or resource availability (See: Overview of Planning and Scheduling). This check box defaults as selected or cleared, depending on the Auto Firm On Release check box setting, established in the Enterprise Asset Management Parameters setup for the current organization (See: Defining eAM Parameters, page 2-8). This defaults only after the Work Order is released.

If the check box is selected, the end date is calculated, based on the Work Order duration. The scheduler automatically calculates the duration based on the operations (resource duration setup) on the Work Order. You can update this check box for Work Orders at Draft, Released, Unreleased, On-Hold, or Cancel statuses (See: eAM Work Order Statuses, page 3-16).

20. Optionally select the Notification Required check box.

21. Optionally select the Tagout Required check box to indicate that the Area needs to be secured for operations required to execute this Work Order. Tags are generally printed and placed on an asset, warning the plant that it is shutdown and should not be started. This check box helps the planner isolate those jobs that require a tagout.

#### **To store tagout documents using the Attachments feature**

22. Select the paperclip Attachments icon to attach relevant tagout documents. You can attach URL, file, or text attachments. See: Defining Work Order Documents, page 3-18.
23. The Planned check box is selected if the current Work Order was created from forecasted Work Orders (See: Preventive Maintenance Work Orders, page 3-8).
24. Optionally select the Enable Material Issue Requests check box to enable eAM to manage material availability for the current Work Order. Material is physically available to a Work Order via the material request and verification process.
25. Optionally select the Activity tab.
  1. Optionally select an Activity Type. This code indicates the type of maintenance for this Activity and is used when defining a job or a standard job, for example, Inspection, Overhaul, Lubrication, Repair, Servicing, or Cleaning. This value defaults from the Activity (See: Defining Activities, page 2-37).
  2. Optionally select an Activity Cause to specify what situation caused this work to generate, for example, Breakdown, Vandalism, Normal Wear, or Settings. This value defaults from the Activity (See: Defining Activities, page 2-37).
  3. Optionally select an Activity Source to specify reasons Activities need execution, for example, Warranty Compliance, OSHA Compliance, or Military Specification Requirements. This value defaults from the Activity (See: Defining Activities, page 2-37).
26. Optionally select the Project tab. This tab is enabled if Project Manufacturing is installed and enabled.
  1. Optionally select a Project.
  2. Optionally select a Task.
27. You can select the Rebuild tab if this Work Order is created for a rebuildable item. See: Rebuild Work Orders, page 3-9.
28. Optionally select the Maintenance Request tab to display Service and Work Requests associated with this Work Order. You can add Service and/or Work Requests to a Work Order by selecting a Service Request and/or Request Number, respectively. Work Requests at an Awaiting Work Order status and Maintenance Type Service Requests are available for association. You may associate multiple Work Requests to a single Work Order, but one Work Order can associate with a Service Request. You can associate a Service Request to multiple Work Orders. You can dissociate a Work Request from a Work Order.

#### **To dissociate a Work Request from a Work Order**

29. Highlight the Work Request.
30. Choose Delete.
31. Select the Bill, Routing tab to select alternate, predefined BOMs and Routings. See: Setting Up Maintenance Bills of Material, page 2-71 and Defining Maintenance Routes, page 2-68.

After the alternate BOM and Routing are selected, the system uses the associated items and assigns the associated resources needed to execute the Work Order.

32. Optionally choose Operations to prepare necessary operations. These operations default from the maintenance route (See: Defining Maintenance Routes, page 2-68) associated with the current Activity, but you can add or update them (See: Preparing Work Order Operations, page 3-21).
33. Optionally choose Materials to view, add, or update the associated Asset Number's items list (See: Setting Up Maintenance Bills of Material, page 2-71 and Defining Material Requirements, page 3-26). From the Material Requirements window, you can optionally choose Select Materials to add Materials from the Asset BOM to the material requirements for the current Work Order.
34. Optionally choose Resources to view, add, or update the resources assigned to each operation. See: Defining Resource Requirements, page 3-31.
35. Optionally choose Relationships to manage Work Order schedules and view Work Order details. This button is enabled if a Relationship Type was previously selected. See: Work Order Relationships, page 3-35
36. Optionally choose Asset Route to view the Asset Route associated with the current Work Order's Asset Group. You might need to perform one Activity on multiple Asset Numbers. To eliminate the possibility of creating multiple Work Orders for the same Activity, you can define Asset Routes. See: Defining Asset Routes, page 2-53.

You can choose Asset Route if an Asset Route is associated with the current Asset Number.

37. Optionally choose Costs to view the costs of Work Orders falling in the specific accounting periods, specified in the Accounting Information by Period region. Accounting Periods are defined within Oracle General Ledger. See: Defining Period Types, *Oracle General Ledger User's Guide* and Defining Calendars, *Oracle General Ledger User's Guide*.
1. Optionally select a Work Order, then choose Value Summary to view a summary of the actual, estimated, and variance costs for labor hours, equipment hours, and material against the current Work Order.

### Maintenance Work Order Value Summary

Maintenance Work Order Value Summary (EAM) - WO103739

Period From **01-JAN-2003** Period To **31-JUL-2004** Refresh

Asset Group		Completion Date	<b>14-APR-2004 20:47:20</b>
Asset Number		Work Order Status	<b>Draft</b>
Asset Activity	<b>Calibration</b>	Parent Work Order	<b>115159</b>
Rebuild Item	<b>av-reb2</b>	Estimation Status	<b>Re-Estimate</b>
Rebuild Serial Number		Last Estimate Id	<b>3083775</b>
Owning Department	<b>Def_dep</b>	Last Estimate Date	<b>28-APR-2004 10:36:53</b>

Actual Costs Estimates Variances

Cost Category	Total	Material	Labor	Equipment
Job Total				

Details

- *Actual Costs:* This is the accumulation of all costs for material and resource transactions for the Asset Number's associated maintenance Work Orders, based on a specified period.
  - *Estimates:* A BOM (material parts list) and routing (resources) can associate with a Work Order. When you select the Estimates tab, the estimated costs of all material and resources associated with a Work Order appear, enabling you to budget costs.
  - *Variances:* The difference between the actual costs recorded and estimated costs.
  - *Material:* All material and material overhead transaction costs.
  - *Labor:* All employee resource and resource overhead transaction costs.
  - *Equipment:* All material resource and resource overhead transaction costs.
2. Optionally choose Details to view actual, estimated, and variance costs for labor hours, equipment hours, and material for specific operations of the current Work Order.
38. Save your work.

**Note:** A requirement for rebuild Work Orders that are created automatically via a material transaction is that the completion subinventory must be an expense subinventory (See: Subinventory General Ledger Account Fields, *Oracle Inventory User's Guide* and Work Order Completion, page 3-41).

**Note:** A rebuild Work Order's owning department defaults from the owning department of its parent Work Order. This is viewable if you select the Main tab.

## Related Topics

Overview of eAM Cost Management, page 6-1

## Easy Work Orders

Easy Work Orders are unplanned Work Orders, and enable you to avoid operation and resource planning. An Activity does not default into the Work Order, based on the Asset Number/Activity association as with planned Work Orders, however, you can add an Activity to an Easy Work Order. These Work Orders are only created in Maintenance User. Work Orders can create at any status, such as Released (See: eAM Work Order Statuses, page 3-16), enabling you to execute the Work Order by requesting material and charging labor.

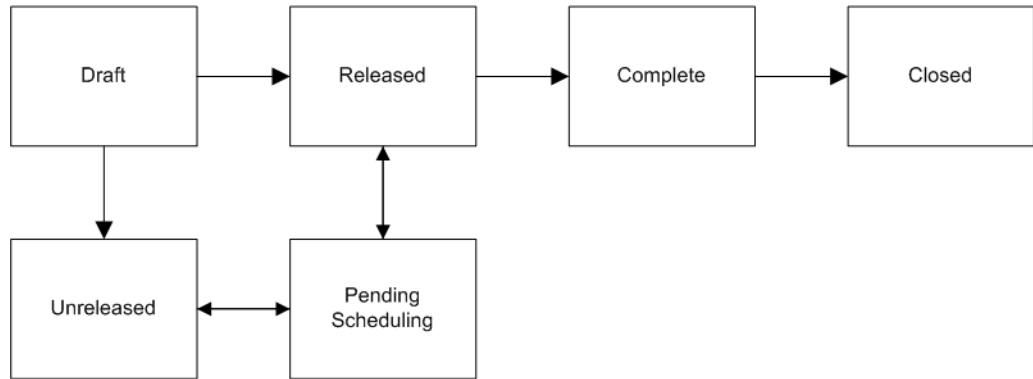
## eAM Work Order Statuses

An Enterprise Asset Management Work Order may progress through several statuses throughout its lifecycle duration. The diagram below illustrates how Enterprise Asset Management Work Orders may start at a Draft status, then move to Released, Complete, and finally Closed. These statuses can vary depending on the type of Work Order created. For example, easy Work Orders are created in a Released status, completely bypassing the Draft status.

Multiple Work Orders associated with the same Activity combination cannot be at a Released status. See: Work Order Relationships, page 3-35.



## eAM Work Order Lifecycle



Status	Description
Draft	Infinite resource capacity scheduling of Work Orders at a Draft status may take place. You cannot charge labor, or request material for Work Orders at this status.
Released	After a Work Order is Released, you can execute a Work Order. You can charge labor, request material, and scheduling for this Work Order takes place (See: eAM Scheduling, page 2-105) to create the scheduled start or end date. You can release a Work Order from the Work Orders window (See: Routine Work Orders, page 3-3), and the Maintenance Workbench (See: Using the Maintenance Workbench, page 3-51).
Unreleased	You can move an Enterprise Asset Management Work Order in Draft or Released status to Unreleased. Scheduling can take place for these Work Orders (See: eAM Scheduling, page 2-105) but you cannot charge labor or request material. An Unreleased Work Order cannot be changed to a Draft status.

Status	Description
Pending Scheduling	If the Constraint Based Scheduler is enabled, the Work Order status changes to Pending Scheduling, if a status of Released is chosen. After the Scheduler process finishes running, the status changes back to Released. The Work Order is scheduled, based on the constraint option chosen at the organization level.
Complete	A Complete status for an Enterprise Asset Management Work Order does not require any completed operations. When a Work Order is completed, you can still charge labor. You can uncomplete a Work Order; this transitions it to a Released status. Uncompletion is performed within the work order complete/uncomplete pages in Maintenance User or via the Work Order Completion window within the forms application (See: Work Plans, page 18-45).
Complete - No Charges	A Complete - No Charges status for an Enterprise Asset Management Work Order does not require any completed operations. You cannot charge labor at this status (See: Work Plans, page 18-45).
Closed	You cannot charge any accounts after an Enterprise Asset Management Work Order is closed. If a Work Order was at a Released status at the time of closing it, you can unclosed the Work Order to bring it back to a Released status. If a Work Order was at a Complete status at the time of closing it, you can unclosed the Work Order to bring it back to a Complete status. For all other statuses during Work Order closing, unclosing the Work Order transitions it to an Unreleased status. See: Closing Work Orders, page 3-47.
On-Hold	Enterprise Asset Management Work Orders at Released and Unreleased statuses can be put on hold. You cannot charge labor or request material for a Work Order at this status.
Cancel	You can cancel an Enterprise Asset Management Work Order at any status in its lifecycle.

## Defining Work Order Documents

You can attach existing documents to a Work Order, and create text to associate with a Work Order. You can attach text and files, such as spreadsheets, graphics, and OLE objects.

### To define Work Order documents:

1. Navigate to the EAM Work Order Documents window.

## EAM Work Order Documents

The screenshot shows the 'EAM Work Order Documents' form. The 'Category' dropdown is set to 'Maintenance Job Attachn'. The 'Description' field is empty. In the 'Source' section, 'Data Type' is 'File' and the 'File' field is empty. The 'Usage' section has three radio buttons: 'Standard' (selected), 'Template', and 'One-Time'. The 'Security' section has 'Type' set to 'Organization', 'Owner' set to 'EAM', and a 'Share' checkbox. The 'Effective Dates' section has 'From' and 'To' fields. The 'Magnification' is set to '100%'. At the bottom, there is an 'Open Document...' button and a scrollbar.

2. Select a Data Type.

## Related Topics

Working With Attachments, *Oracle Applications User's Guide*

## eAM Operations and Tasks

Operations on a Work Order are the instructions or tasks to perform a repair. These operations are assigned resources, for example, trades people, outside service providers, and equipment.

This section includes the following topics:

- Defining Asset Shutdown Statuses, page 3-20
- Preparing Work Order Operations, page 3-21
- Viewing Work Order Operations, page 3-25
- Defining Inventory Material Requirements, page 3-26
- Defining Direct Item Material Requirements, page 3-29
- Viewing Material Requirements, page 3-30
- Defining Resource Requirements, page 3-31
- Viewing Resource Requirements, page 3-34

## Defining Asset Shutdown Statuses

Shutdown of an asset is sometimes necessary to perform a maintenance Activity. You can create new shutdown information associated with an asset, or view existing shutdown history information already recorded to an asset. Shutdown information consists of start and end dates, Work Order numbers requiring maintenance on the asset, and specific operation sequences. While completing a Work Order to its operations, you can view asset shutdown information in the Asset Status window.

All shutdown information entered within the Asset Status window is for information purposes only.

### To view and define shutdown information for an asset:

1. Navigate to the Asset Status window.

**Asset Status**

Asset Status (EAM)

Asset Number  

Asset Group

Start Date  -

End Date  -

**Shutdown Details**

Start Date	End Date	Work Order	Op Seq	Shutdown Descripti
17-NOV-2004 00:00:00	27-NOV-2004 00:00:00			

2. Select an Asset Number.
3. Choose Find. All shutdown information for the current asset appears in the Shutdown Details region.
4. To add new shutdown information for the current asset, Select a Start Date.
5. Select an End Date.
6. Optionally associate the shutdown information to a specific Work Order requiring maintenance on the current asset. Only Work Orders created for the current asset are available.
7. Optionally associate shutdown information to the operation level of a Work Order by choosing a specific Operation Sequence.
8. Optionally enter a Shutdown Description.
9. Save your work.

## Preparing Work Order Operations

Operations (also known as tasks) are the instructions to perform maintenance activities. Each operation is assigned to a department (See: Defining Departments and Resources, page 2-12), associated with assigned resources (trades people, outside service providers, and equipment). When you create a Work Order for an Asset Number, you can attach the Asset Number's associated Activity (See: Numbers with Activities) to that Work Order, bringing its related maintenance route (See: Defining Maintenance Routes, page 2-68) and BOM. The maintenance route is comprised of operations necessary to complete the Activity. You can view and update these operations from the Work Order.

### To prepare operations:

1. Navigate to the Select Work Order window.
2. Choose a Work Order.
3. Choose Continue.

Operations can be scheduled to run in parallel, sequence, or through dependent steps. In the screen shot below, for example, Operation 20 is dependent on Operation 10, since there is a line connecting the operations; Operation 20 cannot be performed until Operation 10 is complete. Operations 30 and 40 run in parallel to each other. Operation 40 is independent; it can be performed at any time.

### Operations

Operation	Operation Code	Assigned Department	Completed	Description	Shutdown Type	Scheduled Start Date
10	Dep1	Dep1	<input checked="" type="checkbox"/>	Default Operation for Work Order		31-MAR-2004 11
			<input type="checkbox"/>			
			<input type="checkbox"/>			
			<input type="checkbox"/>			
			<input type="checkbox"/>			

4. Choose the Operation icon, then click in the header to display the New Operation window.
  1. Optionally enter or update an Operation sequence, or let it generate for you, according to your profile setup (See: Item and Operation Sequence, *Oracle Bills of Material User's Guide*). Operations are generally assigned in increments of ten, enabling you to later insert additional steps.

2. Optionally enter a Description for this operation.
3. Optionally to copy or reference standard operations into a routing, select an Operation Code. If you use a standard operation code, the operation information for that code is copied into the current operation. You can then update that information (See: *Creating a Standard Operation, Oracle Bills of Material User's Guide*).
4. Select an Assigned Department. The assigned department identifies the role responsible for performing the task.
5. Select a scheduled Start Date for this operation to base on a forward schedule. The Enterprise Asset Management scheduling process uses the scheduled start date as a starting point to calculate the duration of the operation, based on the resources and material. If the material and resources are not available by this date, the scheduling process moves the start date of the Work Order forward. The planning process uses the scheduled start date to recommend creation of purchase orders for the material (See: *Overview of Planning and Scheduling*, page 5-1).
6. Select a scheduled Completion date for this operation to base on a backward schedule. The Enterprise Asset Management scheduling process uses the scheduled end date as a starting point to calculate the duration of the operation, based on the resources and material. If the material and resources are not available by this date, the scheduling process moves the completion date of the Work Order backward. The planning process uses the scheduled completion date to recommend creation of purchase orders for the material (See: *Overview of Planning and Scheduling*, page 5-1).

**Note:** Actual dates are entered at operation and Work Order completion. Scheduled dates are calculated by the Enterprise Asset Management scheduler if you have Oracle Manufacturing Scheduling enabled (See: *Overview of Setting Up, Oracle Manufacturing Scheduling User's Guide*). Otherwise, the WIP scheduler calculates the dates.

7. Optionally select a Shutdown Type to help the planner group Work Orders that may require shutdowns. When the Work Orders are grouped, they are planned together.
8. Choose OK to return to the Operations window.

The operations entered in the previous window appear at the bottom of this window. Scroll over to the far right field.

The Duration identifies the duration of the operation and is measured in hours. You can manually enter this, or let it calculate as the difference between the estimated Start Date and estimated End Date.

5. After all necessary operations are entered, you can create dependencies as necessary. Optionally choose the Connect icon to connect dependent operations. After chosen, you can draw a line between dependent operations.  
  
You might need to move operations around. Optionally choose the Drag icon to move an operation.

- Optionally choose Dependencies to set dependencies between operations. For example, Operation 30 is dependent on Operation 10 completing.

#### **Dependent Operations**

Dependent Operations (EAM) - WO100229, 10

**Prior Operations**

Prior Operation	Description	Completed	Department	Scheduled Start Date	Scheduled Completion Date
		<input checked="" type="checkbox"/>			
		<input type="checkbox"/>			
		<input type="checkbox"/>			

**Next Operations**

Next Operation	Description	Completed	Department	Scheduled Start Date	Scheduled Completion Date
		<input type="checkbox"/>			
		<input type="checkbox"/>			
		<input type="checkbox"/>			

- Optionally choose Materials to view or update the associated items list for the current operation (See: Setting Up Maintenance Bills of Material, page 2-71 and Defining Inventory Material Requirements, page 3-26).

## Material Requirements

Material Requirements (EAM) - WO100229, 10

**Inventory Items**

Main Quantities Supply Comment ATP

	Material	Op	Department	Date Required	Material Description
<input type="checkbox"/>		10			
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Select All Check ATP Select Materials Direct Item Copy To Asset

**Create Direct Items**

Op	Item Type	Item	Description	UOM	Required Qty	Purchasing Category	Need By Date	Sum
10	Non Stock	Dry Wall S	Dry Wall Serv	Ea	12	MISC.MISC	09-APR-2004	
10	Non Stock	Dry Wall S	Dry Wall Serv	Ea	12	MISC.MISC	09-APR-2004	

- Optionally choose Resources to view or update the resources assigned to the current operation.

## Resources

Resources (EAM)

Main Quantities Scheduling Costing

Operation	Res Seq	Resource	Schedule Sequence	Assigned Units	Scheduled	Start Date
10	10	Res-100PEP	10	1	Yes	31-MAR-2004

Instances



If you select the Scheduling tab, for each resource operation, you can choose if it is included in scheduling. You can schedule at the resource level within an operation. See: Defining Resource Requirements, page 3-31.

- Select Yes or No from the Scheduled list of values.

**Note:** You can view Work Order operations in a view-only mode. See: Viewing Work Order Operations, page 3-25.

## Viewing Work Order Operations

You can view the operations required to perform a repair. These operations are assigned resources (trades people, outside service providers, and equipment), as well as material. The View Operations window does not enable you to update the operations. For instructions on updating operations, See: Preparing Work Order Operations, page 3-21.

### To view operations:

1. Navigate to the View Operations window.
  1. Within the Select Work Order window, select a Work Order.
  2. Choose Continue.

#### View Operations

Operation	Operation Code	Assigned Department	Completed	Description	Shutdown Type	Scheduled Start Date
10	Dep1		<input checked="" type="checkbox"/>	Default Operation for Work Order		31-MAR-2004 11
			<input type="checkbox"/>			
			<input type="checkbox"/>			
			<input type="checkbox"/>			
			<input type="checkbox"/>			

2. Choose Dependencies to view operation dependency information.
3. Choose Materials to view material requirements. See: Defining Material Requirements, page 3-26.
4. Choose Resources to view resource assignment. See: Defining Resource Requirements, page 3-31.

## Related Topics

Preparing Work Order Operations, page 3-21

## Defining Inventory Material Requirements

When entering a Work Order for an Asset Number, the Asset Number's associated Activity attaches the required material and resources to complete its operations. However, you can update, add, view, and delete material requirements for a specific Work Order.

### To define Work Order material requirements:

1. Navigate to the Select Work Order window.
2. Choose a Work Order.
3. Choose Continue.

### Material Requirements

Material Requirements (EAM) - WO137234

Inventory Items

Main Quantities Supply Comment ATP

	Material	Op	Department	Date Required	Material Description
<input type="checkbox"/>	av-item1	10	Dep2	15-JUL-2004	Item#1
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Select All Check ATP Select Materials Direct Item Copy To Asset

Create Direct Items

Op	Item Type	Item	Description	UOM	Required Qty	Purchasing Category	Need By Date	Su
					1			

4. Optionally, within the Inventory Items region, you can view or update the current Work Order's associated Asset Number's item list (See: Setting Up Asset Bills of Material, page 2-54) by placing your cursor in the Material field or by choosing Select Materials. When you choose Select Materials, the current Asset Number's associated Asset Bill of Material items are available to add to the required material for the current Work Order.

### Select Materials

Select Materials (EAM) - WO137234

Asset Number **JP-AN1**

Asset Group **av-ag1** To Operation

	Material Description	UOM	Quantity	Supply Type
<input checked="" type="checkbox"/> Item 200	Item 200 - Sharma's	Ea	1	Assembly Pull
<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"/>				

Select All OK Cancel

- Optionally select the Main tab to change operation sequence and the Date Required.

**Note:** If you are accessing the Select Materials window via the Operations window, you cannot change operation information. If you are accessing the Select Materials window via the Work Order window, you can change operation information.

- Optionally select the Quantities tab to update the quantities Required.
- Optionally select the Supply tab to select a supply Type.
- Optionally select the Comment tab to enter information for the current Material.
- Optionally choose the ATP tab to define available to promise information for the current material. If you select the ATP Allowed check box, available to promise information can calculate for the current material.
- Optionally choose Check ATP to check available to promise information for the selected material.

## ATP Results

ATP Results

Calendar Organization  Demand Class

View Results

Group Available Date

Required and Projected ATP and Early ATP Description

Org	Item/Resource	Type	UOM	Required Quantity	Required Date	Available Quantity	Projected Transactable

Request Item

Supply/Demand Period ATP Open

11. Optionally choose Direct Item to create requisitions for direct items, and add them to your items list. Oracle Self Service Purchasing defaults the Work Order Number and Operation Number, as well as the class code information for correct expensing. Direct Items are one time, non-inventoried items that are purchased directly from the supplier. After you choose Direct Item, the current Work Order and operation reference values are passed to the requisition created. If the Work Order is project related, the project and task information is captured in the purchase requisition (See: Overview of Direct Item Procurement for eAM Work Orders, page 5-1). You can exit Self Service Purchasing and return to the Material Requirements window by choosing Return To Portal.

Upon re-inquiry of this Work Order, the Direct Items region reflects any requisition and purchase order details.

**Note:** You must have Oracle Self Service Purchasing installed for this functionality. You can purchase direct items from a Requisition or Purchase Order window if you have Oracle Purchasing installed (See: Entering Purchase Orders for Direct Items, page 7-15).

**Note:** You can procure direct items to Work Orders at Released statuses.

12. Choose Copy to Asset to dynamically update the BOM associated to the Asset Group with any items list changes (See: Setting Up Asset Bills of Material, page 2-54).
13. Save your work.

**Note:** You can view Work Order material requirements in a view-only mode. See: Viewing Material Requirements, page 3-30.

## Related Topics

ATP Calculations, *Oracle Inventory User's Guide*

Viewing ATP Information, *Oracle Inventory User's Guide*

## Defining Direct Item Material Requirements

Direct Items represent items with infrequent use or criticality; they are not included in the internal catalog as stocked items. These items are considered as "one off", bought directly from a vendor for a specific Work Order and Operation. These items are delivered directly to the Shop Floor for maintenance Work Order execution.

To set up Non-Stock Direct Items, access the Master Item window within Oracle Inventory, and set up the item with the Stockable check box cleared. See: Defining Items, *Oracle Inventory User's Guide*. Description Based Direct Items are not set up within Oracle Inventory.

You can add Non-Stock Based Direct Items to Asset (See: Setting Up Asset Bills of Material, page 2-54), Maintenance (See: Setting Up Maintenance Bills of Material, page 2-71), and Rebuildable Bills of Material (See: Defining Rebuildable Bills of Material, page 2-82), but you can add Non-Stock and Description Based Direct Items directly to the material requirements for an existing Work Order.

If direct items exist on an Activity Bill of Material, they default as material requirements when creating a Work Order for that activity. However, you can add additional direct item material requirements to an existing Work Order.

### **To add direct item material requirements:**

1. Navigate to the Select Work Order window.
2. Choose a Work Order.
3. Choose Continue.

## Material Requirements

Material Requirements (EAM) - WO100229, 10

Inventory Items

Main Quantities Supply Comment ATP

	Material	Op	Department	Date Required	Material Description
<input type="checkbox"/>		10			
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Select All Check ATP Select Materials Direct Item Copy To Asset

Create Direct Items

	Op	Item Type	Item	Description	UOM	Required Qty	Purchasing Category	Need By Date	Su
	10	Non Stock	Dry Wall S	Dry Wall Serv	Ea	12	MISC.MISC	09-APR-2004	
	10	Non Stock	Dry Wall S	Dry Wall Serv	Ea	12	MISC.MISC	09-APR-2004	

4. Within the Create Direct Items region, select an Operation.
5. Select an Item Type.
  - *Description Based Item*: This direct item type is not stored in Oracle Inventory.
  - *Non Stock Item*: This direct item type is stored in Oracle Inventory. Its Master Item record's Stockable check box is cleared.
6. If you selected a Non Stock Item Type, select an Item. This field is disabled if a Description Based Item Type was previously selected.
7. Enter a Description, if you previously selected a Description Based Item Type.
8. Select a UOM. If you previously selected a Non Stock Item Type, this value defaults from the Master Item.
9. Select a Purchasing Category. See: Setting Up Purchase Order Category Associations for Direct Items, page 2-130.
10. Enter a Need By Date. The system date defaults.
11. Save your work.

## Viewing Material Requirements

When you enter a Work Order for an Asset Number, the Work Order's associated Activity attaches the required material (See: Setting Up Maintenance Bills of Material, page 2-71) and resources to complete its operations. You can view material requirements for a specific Work Order.

### To view Work Order material requirements:

1. Navigate to the View Material Requirements window.
  1. From the Select Work Order window, select a Work Order.
  2. Choose Continue.

#### View Material Requirements

Material	Op	Department	Date Required	Material Description
<input type="checkbox"/> av-item1	10	Dep2	15-JUL-2004	Item#1
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				
<input type="checkbox"/>				

Select All Check ATP Select Materials Direct Item Copy To Asset

Op	Item Type	Item	Description	UOM	Required Qty	Purchasing Category	Need By Date	Su
10	Non Stock	Item-NSD		Ea	1	MISC.MISC	15-JUL-2004	
10	Description		iSP Outside P	Ea	1	MISC.MISC	15-JUL-2004	
10	Description		description fo	BG	1	207.75	15-JUL-2004	

2. In the Inventory Items region, you can view Inventoried items on this Work Orders's required items. You can view them by warehouse, and at the subinventory level.
  1. In the Main tab, you can view operation sequence and the Date Required.
  2. In the Quantities tab, you can view the quantities Required.
  3. In the Supply tab, you can view supply Type information.
  4. In the Comment tab, you can view comment information.
  5. In the ATP tab, you can view defined available to promise information.

### Related Topics

Defining Material Requirements, page 3-26

Defining Subinventories, *Oracle Inventory User's Guide*

### Defining Resource Requirements

You can view, update, add, or delete resource requirements for a Work Order. Resources are used to perform a task for a maintenance operation. A resource is an employee, piece of equipment, or contractor service, used to perform an operation. A resource and usage rate for all scheduled Activities is required in a routing.

When defining departments, available resources are assigned in each department and the shifts that each resource is available. For each operation defined, you specify a department and list of resources and usages. An operation can use any resource that is available in the department, but not all resources are assigned to the department. An operation can use resources that are owned or borrowed from other departments. (See: Defining Departments and Resources, page 2-12).

1. Navigate to the Select Work Order window.
2. Choose a Work Order.
3. Choose Continue.

## Resources

4. Select an Operation. Only valid operations, associated with the routing, are available. See: Preparing Work Order Operations, page 3-21.



**Note:** If you access the Resources window via the Operations window, you cannot change operation information. If you access the Resources window via the Work Order window, you can change operation information.

5. Enter a Resource Sequence. You can have multiple resources for an operation.
6. Select a Resource.
7. In the Main tab, the UOM defaults based on the Resource definition. See: Defining Departments and Resources, page 2-12. You can update this if the BOM: Update Resource UOM profile option is set to Yes.  
  
The UOM requires a time-based measure, for this Work Order to schedule. It must be the same as the site level profile option, BOM: Hour UOM. See: Bills of Material Profile Options, *Oracle Bills of Material User's Guide*.
8. Select a Basis to charge and schedule the resource. This defaults based on the Resource definition. See: Defining a Resource, *Oracle Bills of Material User's Guide*.
  - *Item:* Charge and schedule the resource where the resource usage quantity is the amount required per assembly unit you make.
  - *Lot:* Charge and schedule the resource where the resource usage quantity is the amount required per job or schedule.
9. Enter the Usage Rate or Amount Value for the resource. You can post usage time for employees, equipment, and miscellaneous material.
10. Select the Quantities tab. You can view the Required quantity of this resource to use. This information defaults from the Usage Rate/Amount information. You can also view the Applied amount or rate of the resource already used. The Open amount or rate identifies the amount of the resource left to use (the difference between the Required and Applied).
11. Select the Scheduling tab. This information defaults from the current operation's setup. See: Preparing Work Order Operations, page 3-21.  
  
Select Yes in the Scheduled field to indicate that this resource can be scheduled.
12. Select the Costing tab. You can view and update this resource's costing information.
  1. Select a Charge Type.
    - *Manual:* You can manually enter the cost.
    - *PO receipt:* The cost defaults as the cost on the purchase order receipt.
  2. The Department defaults as the area the current resource is assigned to. See: Defining Departments and Resources, page 2-12.
13. Optionally choose Instances to view or update a list of specific people or equipment assigned to this resource. The Person tab displays persons grouped in specific roles. The Equipment tab displays similar types of equipment grouped by resource. You can define specific machines to any of your machine type resources and you can define specific employees to any of your labor type resources. When a resource has instances defined, you can view the resource load and capacity in the Scheduler Workbench (See: Using the Scheduler Workbench, page 5-6).

For example, you can define all machines belonging to the resource, GRINDERS. An individual grinder machine can then be a specific resource requirement and scheduled, and can have its own unique capacity definition.

This information defaults from your current resource definition. You can add people and equipment that are associated with the current resource.

See: Defining a Resource, *Oracle Bills of Material User's Guide*.

**Resource Instances**

Resource Instances (EAM)

Person Equipment

Instance Name	Effective Start Date

14. Save your work.

## Related Topics

Defining a Resource, *Oracle Bills of Material User's Guide*

## Viewing Resource Requirements

You can view resource requirements for a Work Order. Resources define the time an assembly spends at an operation and the cost you incur for the operation. A resource is an employee, piece of equipment, or contractor service, used to perform an operation. A resource and usage rate for all scheduled Activities are required in a routing.

### To view resource requirements:

1. Navigate to the View Resource Requirements window.
2. From the Select Work Order window, select a Work Order.

3. Choose Continue.

***View Resource Requirements***

**View Resource Requirements (EAM) - WO137234**

Main Quantities **Scheduling** Costing

—Usage Rate or Amount—

Operation	Res Seq	Resource	UOM	Basis	Value	Inverse
10	1	Res2M	HR	Item ▼	10	.1
10	2	Res2P	HR	Item ▼	15	.066667
				▼		
				▼		
				▼		
				▼		
				▼		
				▼		
				▼		
				▼		
				▼		

Instances

4. View the list of operations and their resources associated to the current Work Order.

## Related Topics

Preparing Work Order Operations, page 3-21

Defining Departments and Resources, page 2-12

Defining Resource Requirements, page 3-31

Defining a Resource, *Oracle Bills of Material User's Guide*

## Work Order Relationships

Work Order Relationships enable you to manage a network of related Work Orders, enabling you to manage complex projects, such as planned or facility shutdowns. The different relationships provide separate scheduling rules that are used to manage large projects. A Gantt chart enables you to manage work by displaying Work Order schedules and a summary of Work Order details. The Gantt Chart's drag and drop functionality enables you to manage schedules with ease.

This section includes the following topics:

- Work Order Relationship Definition, page 3-36
- Parent-Child Relationship, page 3-36
- End to Start Dependency, page 3-37
- Cost Relationship, page 3-37

- Follow-up Work Relationship, page 3-38

## Work Order Relationship Definition

Work Orders for different assets may associate to each other in a hierarchy. Valid relationships are Parent Child, End to Start Dependency, Cost, and Follow-up Work. Manage complex maintenance jobs through these four types of Work Order relationships. See: Routine Work Orders, page 3-3. A Gantt chart enables you to manage work by displaying Work Order schedules and a summary of Work Order details. The Gantt Chart's drag and drop functionality enables you to manage schedules with ease.

## Parent-Child Relationship

The Parent-Child Relationship enables a network of Work Orders, which includes one top level Work Order that defines the time line of all its children Work Orders. The start and end dates of the child Work Orders are within the start and end dates of the parent Work Order. The parent Work Order dates are scheduled, while its child Work Orders automatically schedule, as well. A child Work Order can parent another Work Order. One parent can have multiple children, but one child can have a single parent. You can have an infinite number of parent-child Work Order levels.

### To create parent Work Orders:

1. Navigate to the Create Work Order page.
2. Create a Work Order.
3. Select the Work Relationships sub-tab. This page graphically displays the Work Order's schedule. The tab enables you to view the scheduling relationships for the Work Order in a graphical format and lists the Work Order's possible relationships.

## Work Relationships

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[Work Orders: All](#) >

**Work Order: av-wo1307parent**

[Update Work Order](#)

Work Order**av-wo1307parent**

Department**Dep1**

Activity

Scheduled Start Date**12-Jul-2004 22:27:29**

Project

Enable Material Issue Request**Yes**

Description**Parent WO**

Status**Released**

Duration**500**

Scheduled Completion Date**02-Aug-2004 18:27:29**

Task

Work Order Attachments**None** [Add](#)

[Operations](#) [Materials](#) [Resources](#) [Quality Plans](#) [Requests](#) [Purchasing](#) **[Work Relationships](#)**

Select Work Order: [Update Dependencies](#) [Go](#) [Update Work Hierarchy](#) [Update Alternate Cost Hierarchy](#) [View Cost](#)

[Expand All](#) | [Collapse All](#)

Select Focus

Work Order

July

7/11

7/18

7/25

August

8/1

▼ av-wo1307parent

av-wo1307child1

av-wo1307child2

av-wo1307child3

av-wo1307child1

av-wo1307child2

av-wo1307child3

▼ View All Relationships

Work Order	Description	Relation	Relation Status	Asset Type	Asset Group	Asset Number
av-wo1307child1	Child-1	Scheduling Child	Valid	Capital	av-ag1	av-an15
av-wo1307child2	Child-2	Scheduling Child	Valid	Capital	av-ag1	av-an15
av-wo1307child3	Child-3	Scheduling Child	Valid	Capital	av-ag1	av-an15

[Operations](#) [Materials](#) [Resources](#) [Quality Plans](#) [Requests](#) [Purchasing](#) **[Work Relationships](#)**

[Return To Work Orders: All](#)

[Update Work Order](#)

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## End to Start Dependency

You can create Work Orders with scheduling dependency relationships (including child sibling Work Orders). For example, one Work Order's scheduled start date is dependent on another Work Order's completion. With this relationship, the next Work Order cannot start until the prior Work Order is completed.

## Cost Relationship

You can optionally roll a child Work Order's costs into the parent Work Order, for reporting purposes. You can perform cost roll ups on ad hoc Work Orders because the cost roll up is independent of scheduling relationships. You can base the cost roll up, within a hierarchy, on scheduling relationships, as well. Scheduling relationships are not required to roll up costs within a hierarchy. You may create a cost reporting hierarchy that is different than the scheduling hierarchy.

eAM Work Management 3-37

To create Work Order costing groups:

ORACLE Asset Management

Home | Assets | Work Requests | Work Orders | Work Plan | Stores

Assets > Capital > Work Orders > Work Order Details > Edit Cost Hierarchy

Organization: EAM

Import Work Hierarchy

Here you can build the work hierarchy either by creating child work orders or by adding an existing work order to the hierarchy.

Select a Work Order and:

Expand All | Collapse All

WO81970

Select From Work Order	Description	Asset Number	Status	Scheduled Start Date	Scheduled Completion Date	Remove
WO81970	Thanks Giving Shutdown	ORCL-HQ	Released	28-Nov-2003 02:22:00	30-Nov-2003 23:52:00	
WO117356	Annual Generator Overhaul	G1	Released	28-Nov-2003 07:29:00	30-Nov-2003 08:59:00	
WO81972	Controlled Shutdown of Data Center	Data Center	Released	28-Nov-2003 02:30:00	28-Nov-2003 04:30:00	
WO117358	Controlled Startup of Data Center	Data Center	Unreleased	30-Nov-2003 13:57:00	30-Nov-2003 18:57:00	
WO117362	Annual Generator Overhaul	G1	Released	28-Nov-2003 09:12:00	30-Nov-2003 10:42:00	
WO117368	Landscaping Services for Thanks Giving	Court Yard	Released	28-Nov-2003 02:22:00	28-Nov-2003 10:22:00	

Return To Work Order Details

Home | Assets | Work Requests | Work Orders | Work Plan | Stores | Diagnostics | Home | Logout | Preferences

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Feedback Statement

## Follow-up Work Relationship

You can create a Work Order for a capital Asset Number or Rebuildable Item, while executing work for the asset on another Work Order. For example, a second problem with an asset is discovered while executing a Work Order. A Follow-up Work Order, associated with the original Work Order, is created for the issue. This is independent of scheduling or cost relationships.

To create follow-up Work Orders:

ORACLE Asset Management

Home | Assets | Work Requests | Work Orders | Work Plan | Stores

All | Requests

Organization: EAM

Work Orders

Simple Search

Please enter your search criteria and hit the "Go" button. You may note that the search is case insensitive.

Asset Type: [Dropdown]

Asset Number: G1

Work Order: [Text Box]

Go Clear

Advanced Search

Create Work Order

Select a Work Order and ...

Select Work Order / Asset

Select Work Order / Asset	Description	Scheduled Start Date	Duration (hours)	Working Department	Status	Work Order Completion	Update Work Order
WO117362	Generator Overhaul	28-Nov-2003 09:12:00	49.5 Days		Released		
WO82735	Generator Capital Review by Inspector	14-Nov-2003 05:44:29	0 Days		Draft		

Home | Assets | Work Requests | Work Orders | Work Plan | Stores | Diagnostics | Home | Logout | Preferences

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## Related Topics

eAM Scheduling, page 2-105

## eAM Work Order Transactions

There are two types of Enterprise Asset Management Work Order transactions: material and resource. A material transaction is utilized when you issue material from inventory to a Work Order. A resource transaction is utilized when you charge resources (for example labor, or equipment) to a Work Order.

This section includes the following topics:

- Operation Completion, page 3-39
- Work Order Completion, page 3-41
- Rebuild Work Order Completion, page 3-43
- Transacting Material, page 3-45
- Transacting Resources, page 3-45
- Viewing Resource Transactions, page 3-46
- Closing Work Orders, page 3-47

## Operation Completion

Operations are the instructions or tasks to perform a repair. Every operation is assigned to a department (See: Defining Departments and Resources, page 2-12), associated with assigned resources (trades people, contractor services, and equipment). When you enter a Work Order for an Asset Number, the Asset Number's associated Activity (See: Associating Asset Numbers with Activities, page 2-74) attaches to the Work Order, delivering its related maintenance route (See: Defining Maintenance Routes, page 2-68) and BOM. The maintenance route is comprised of operations necessary to complete the Activity. You can Complete and Uncomplete operations. After an operation is complete, you can perform an Operation Uncompletion. If an operation is dependent upon another operation, you cannot uncomplete that operation's dependency if the current operation is complete. For example, operation 20 is dependent on operation 10 completing. You cannot uncomplete operation 10 after operation 20 has been completed.

You can complete or uncomplete an operation via Maintenance Super User.

### **To complete an operation:**

1. Navigate to Operations window.

## Operations

The screenshot shows the 'Operations (EAM) - WO137234' window. A context menu is open over the first row of the table, which is selected. The menu options are: Delete Operation, Complete Operation (highlighted), Material Issue, and Resource Transaction.

Operation	Operation Code	Assigned Department	Completed	Description	Shutdown Type	Scheduled Start Date
10		Dep2	<input type="checkbox"/>			15-JUL-2004 11:2
			<input type="checkbox"/>			
			<input type="checkbox"/>			
			<input type="checkbox"/>			
			<input type="checkbox"/>			
			<input type="checkbox"/>			

Buttons at the bottom: Dependencies, Materials, Resources.

2. Select a Work Order.
  3. Right click to select an Operation Sequence and choose Complete Operation (See: Defining Maintenance Routes, page 2-68 and Preparing Work Order Operations, page 3-21). This is the operation you wish to complete.
  4. The Transaction Date defaults as the system date, but you can optionally change this.
  5. Optionally enter a Reconciliation Code. This is a simple description of why you are completing this operation. For example, Operation Completed or Operation Partially Completed.
  6. Enter Duration region information. Enter two values within this region: Duration, Actual Start Date, or Actual End Date. The value that you do not enter automatically calculates.
- Actual Duration identifies the total elapsed time of the Work Order. It is automatically calculated as the difference between the Scheduled Start Date and Scheduled End Date of the operation.
7. Optionally enter a date range if the operation was shutdown during the operation.
  8. Save your work.

### To uncomplete an operation:

1. Navigate to the Operations window.
2. Select a Work Order.
3. Right click to select a completed Operation Sequence (See: Defining Maintenance Routes, page 2-68 and Preparing Work Order Operations, page 3-21). This is the operation you wish to uncomplete.
4. The Transaction Date defaults as the system date, but you can optionally change this.



5. Optionally enter a Reconciliation Code. This is a simple description of why you are uncompleting this operation.
6. Oracle Quality collection plans, associated with the current Work Order's Asset Number and requiring completion, appear. When the collection plan was created, it was specified if the collection plan required completion. Also, triggers might have been specified to make only certain assets eligible for the collection plan. See: *Quality Integration Setup*, page 2-110.  
  
Required fields are dependent on the Collection Plan's collection element specifications. See: *Quality Integration Setup*, page 2-110.
7. Save your work.

## Related Topics

Preparing Work Order Operations, page 3-21

Defining Maintenance Routes, page 2-68

Operation Completion Moves, *Oracle Work in Process User's Guide*

## Work Order Completion

Enterprise Asset Management Work Orders are created against assets. They are defined manually, or generated automatically based on a scheduled Activity. If you attach a manually created Work Order to an Activity (normally the role of a Planner), the Work Order inherits the Activity's attributes, such as the Asset BOM, Asset Route (operations), attachments, quality plans, cost information, and scheduling rules.

The operations within a Work Order do not need to be complete to complete a Work Order. However, the date you complete a Work Order must be greater than (later) or equal to the end date of the operation that has the latest end date. Likewise, the date you start a Work Order must be earlier than or equal to the start date of the operation with the earliest start date. You can uncomplete a Work Order after it is completed to transition it to a Released status (See: *eAM Work Order Statuses*, page 3-16).

Planners or Crew Supervisors can complete or uncomplete Work Orders, using the Maintenance workbench (See: *Using the Maintenance Workbench*, page 3-51), from the Work Plan tab in Maintenance User, or by accessing the Work Order Completion menu option.

### To complete a Work Order:

1. Navigate to the Work Order Completion window.

## Work Order Completion

Work Order Completion (EAM)

Work Order: WO137234

Asset Number: JP-AN1

Asset Group: av-ag1

Asset Activity: cleaning

Activity Type:

Activity Cause:

Transaction Type: Complete Job

Transaction Date: 15-JUL-2004 20:58:34

Reconciliation Code:

Cleaning of comps

Duration

Duration (hours): 25

Actual Start Date: 15-JUL-2004 11:38:24

Actual End Date: 16-JUL-2004 12:38:24

Shutdown History

Start Date:

End Date:

Meter Readings

2. Select a Work Order
3. The Transaction Date defaults as the system date, but you can optionally update it.
4. Optionally enter a Reconciliation Code. This is a simple description of why you are completing this Work Order. For example, Work Order Completed or Work Order Partially Completed.
5. Optionally enter Duration region information. You must enter two values within this region: Duration, Actual Start Date, or Actual End Date. The value that you do not enter is automatically calculated.

Actual Duration identifies the total elapsed time of the Work Order. It is automatically calculated as the difference between the Scheduled Start Date and Scheduled End Date.

6. Choose Meter Readings to enter readings for meters associated with this Asset Number. Readings for meters defined as mandatory must be entered. You can optionally enter non-mandatory readings.

At Work Order completion, meter readings are mandatory for Work Orders generated by the Preventive Maintenance scheduling engine. After a Work Order is completed, meter readings are required for all runtime interval meters associated with the Asset Number in the Preventive Maintenance scheduling definition. See: Preventive Maintenance Scheduling, page 2-96. If there is a meter associated with this Asset Number, you are prompted to enter a Current Reading or a Reading Change. If you enter a Current Reading, the Reading Change defaults. If you enter a Reading Change, the Current Reading defaults. See: Entering Meter Readings, page 4-2.

- Select the Reset check box to indicate if you would like to Reset the Current Reading to zero.
7. Oracle Quality collection plans associated with the current Work Order's Asset Number and requiring completion appear. When the collection plan was created, it was specified if the collection plan required completion. Also, during the Enterprise Asset Management collection plan creation process, triggers might have been specified to make only certain assets eligible for the collection plan. See: Quality Setup, page 2-110.

Required fields are dependent on the Collection Plan's collection element specifications. See: Quality Setup, page 2-110.

8. Save your work.

#### **To uncomplete a Work Order:**

1. Navigate to the Work Order Completion window.
2. Select a completed Work Order.
3. The Transaction Date defaults as the system date, but you can optionally update it.
4. Optionally enter a Reconciliation Code. This is a simple description of why you are uncompleting this Work Order.
5. Optionally in the Duration region, enter an actual Duration, Actual Start Date, and Actual End Date. Actual Duration identifies the total elapsed time of the Work Order. It is automatically calculated as the difference between the Estimated Start Date and Estimated End Date. Changing the times and duration affects resource usage for employees and equipment.
6. Save your work.

### **Related Topics**

Entering Meter Readings, page 4-2

## **Rebuild Work Order Completion**

There are two ways to create rebuild Work Orders. In the scenario that a new rebuildable item is issued from inventory to be placed into the asset, a rebuild Work Order creates for the rebuildable item that was taken out with a need for repair, given the required information was entered into the material transaction (See: Transacting Material, page 3-45). This child Work Order of the parent Work Order can complete, independent of the parent Work Order. However, if the rebuildable item needing repair is removed from the asset, repaired, then reinstalled, that manually created child, rebuild Work Order must first be completed before the parent Work Order can complete. In this scenario, first complete all rebuild/children Work Orders (See: Rebuild Work Orders, page 3-9) before you can complete a parent Work Order (See: Work Order Completion, page 3-41). The operations within a Work Order do not need to be complete in order to complete a Work Order. However, the date you complete a Work Order must be greater than (later) or equal to the end date of the operation that has the latest end date. Likewise, the date you start a Work Order must be earlier than or equal to the start date of the operation with the earliest start date. You can uncomplete a Work Order after it is completed, transcending it to a Released status (See: eAM Work Order Statuses, page 3-16).

Planners or Crew Supervisors can complete or uncomplete Work Orders using the Maintenance workbench (See: Using the Maintenance Workbench, page 3-51), from the Work Plans tab in Maintenance User (See: Work Plans, page 18-45), or by accessing the Rebuildable Work Order Completion menu option.

#### **To complete a rebuild Work Order:**

1. Navigate to the Rebuild Completion window.

### Rebuild Completion

The screenshot shows the 'Rebuild Completion (EAM)' window. It contains several input fields organized into sections:

- Work Order:** av-wo2906f
- Rebuild Item:** av-reb1
- Serial Number:** av-rsn18
- Rebuild Activity:** (empty)
- Transaction Type:** Complete Job
- Transaction Date:** 15-JUL-2004 21:05:26
- Reconciliation Code:** (empty)
- Rebuild WO:** (empty)
- Parent Details:**
  - Parent Work Order: (empty)
  - Asset Number: (empty)
  - Asset Group: (empty)
- Duration:**
  - Duration (hours): 0
  - Actual Start Date: 29-JUN-2004 08:04:13
  - Actual End Date: 29-JUN-2004 08:04:13
- Completion Location:**
  - Subinventory: SUBEX
  - Locator: (empty)
  - Lot Number: (empty)
- Meter Readings:** (button)

2. Select a rebuild Work Order. Only rebuild Work Orders are available.
3. The Transaction Date defaults as the system date, but you can optionally update it.
4. Optionally enter a Reconciliation Code. This is a simple description of why you are completing this Work Order. For example, Work Order Completed or Work Order Partially Completed.
5. In the Duration region, enter an actual Duration and Actual Start Date. Actual Duration identifies the total elapsed time of the Work Order. It automatically calculates as the difference between the Scheduled Start Date and Scheduled End Date. Changing the times and duration affects resource usage for employees and equipment.
6. If the rebuild Work Order is generated from a material issue or is a standalone rebuild Work Order for a Rebuildable Item's serial number that resides out of inventory, then enter the Completion Location region information.
  1. Enter the completion Subinventory. For Rebuild Work Orders that are created from a material transaction, this must be an expense subinventory.
  2. If the rebuildable item is locator controlled, enter a Locator. See: Inventory Attribute Group, *Oracle Inventory User's Guide*.
  3. If the rebuildable item is lot controlled, enter a Lot Number. See: Inventory Attribute Group, *Oracle Inventory User's Guide*.
7. Save your work.

#### To uncomplete a rebuild Work Order:

1. Navigate to the Rebuild Completion window.
2. Select a completed rebuild Work Order.
3. The Transaction Date defaults as the system date, but you can optionally update it.
4. Optionally enter a Reconciliation Code. This is a simple description of why you are uncompleting this Work Order.

5. Save your work.

## Related Topics

Defining Subinventories, *Oracle Inventory User's Guide*

## Transacting Material

You might need to issue a rebuildable item or asset from inventory to a maintenance Work Order. For example, a Work Order was issued for the inspection of a pump. During the pump inspection, you found that the motor, one of the components of the pump, is problematic. You can replace the rebuildable item by issuing a new motor rebuildable item from inventory. If you choose to perform a material issue from inventory, the old motor rebuildable item attaches to the Work Order, automatically creating the child, rebuild Work Order number associated to the parent Work Order. In this case, the Asset Number genealogy automatically updates to identify this new item number. See: Overview of Inventory Transactions, *Oracle Inventory User's Guide*.

You can execute a material issue transaction from the Stores tab page, within Maintenance Super User (See: Stores, page 18-57).

## Related Topics

Issuing and Returning Specific Components, *Oracle Work in Process User's Guide*

## Transacting Resources

Resource transactions define the time an assembly spends at an operation and the cost you incur for an operation. There are two types of resources: person and machine. You can transact both person and machine resources. A resource is an employee, piece of equipment, or contractor service, used to perform an operation. You can charge resources to a specific Work Order.

### To create a resource transaction:

1. Navigate to the Resource Transactions window.

**Resource Transactions**

Resource Transactions (EAM)

Work Order	WO137234	Cleaning of comps
Asset Number	JP-AN1	
Asset Group	av-ag1	Asset Group #1
Rebuild Item		
Serial Number		
Date	15-JUL-2004 21:26:29	

Continue

2. Select a valid Work Order.
3. Choose Continue.

### Resource Transactions

Operation Seq	Department	Resource Seq	Resource	Employee	UOM	Quantity	Activity
10	Dep2	1	Res2M		HR	30	

4. Enter the Operation Sequence of the current Work Order's routing to charge (See: Preparing Work Order Operations, page 3-21).
5. Enter the Resource Sequence to charge (See: Defining Resource Requirements, page 3-31).
6. Select a UOM to measure the quantity charged. This defaults from the current resource's department setup (See: Defining Departments and Resources, page 2-12).
7. Enter the Quantity to charge.
8. Optionally select an Activity describing the type of work performed for the current operation.
9. Save your work.

## Related Topics

Resource Transactions, *Oracle Work in Process User's Guide*

## Viewing Resources Transactions

Resource transactions define the time an assembly spends at an operation and the cost you incur for an operation. There are two types of resources: person and machine. You can transact both person and machine resources. A resource is an employee, piece of equipment, or contractor service, used to perform an operation. You can charge resources to a specific Work Order. You can view all transactions that have charged against a specific resource.

### To view a completed resource transaction:

1. Navigate to the Find Resource Transactions window.

You can narrow your selection of transactions by any field within this window. For example, you can view all resource transaction information charged during a

specific period, or view all transaction information transpired for a specific Work Order number.

2. Choose Find.

### View Resource Transactions

Transaction Date	Work Order	Asset Number	Asset Group	Rebuild Item
15-JUL-2004 11:26:40	cap-uomwo	cap-locan	cap-ag	
15-JUL-2004 11:14:02	cap-uomwo	cap-locan	cap-ag	
15-JUL-2004 09:26:42	cap-uomconwo	cap-locan	cap-ag	
15-JUL-2004 08:48:22	cap-uomconwo	cap-locan	cap-ag	
15-JUL-2004 08:31:42	cap-uomconwo	cap-locan	cap-ag	
14-JUL-2004 04:23:59	sj-asset-attach	AGJ0003	AG-J-1	
14-JUL-2004 04:17:56	sj-asset-attach	AGJ0003	AG-J-1	
14-JUL-2004 04:17:31	sj-asset-attach	AGJ0003	AG-J-1	

Transaction Date: 15-JUL-2004 11:26:40      Work Order: cap-uomwo  
Asset Number: cap-locan      Rebuild Item:

Distributions

3. View resource transaction information specific to a Work Order by selecting the Job or Schedule Header tab.
4. View resource transaction information specific to a Work Order operation by selecting the Operation, Quantities tab.
5. View resource transaction information specific to a resource by selecting the Resource Information tab.

## Closing Work Orders

You can close a maintenance Work Order at any status within its lifecycle (See: eAM Work Order Statuses, page 3-16). You can close one or many Work Orders at once. You cannot charge any accounts after a maintenance Work Order is closed. If a Work Order was at a Released status at the time of closing it, you can unclosed the Work Order to transition it to a Released status. If a Work Order was at a Complete status at the time of closing it, you can unclosed the Work Order to transition it to a Complete status. For all other statuses during the closing of a Work Order, unclosing the Work Order transitions it to an Unreleased status.

### To close a Work Order:

1. Navigate to the Find Work Order window.
2. Select a Work Order. You can optionally enter other data selection information.

3. Choose Find. The Close Work Order window appears.

**Close Work Order**

Close Work Order (EAM)

Work Order	WO104452	Perform Oil Change
Asset Number	A100	
Asset Group	PUMPS	
Asset Activity		
Class	EAMWAC	
Status	Complete	
Work Order Type	Routine	
Instance Number		
Parent Work Order		
Relationship Type		

**Scheduled Dates**

Start	16-APR-2004 08:25:09
Completion	16-APR-2004 20:25:09
Duration(hours)	

**Actual Dates**

Actual Start Date	16-APR-2004 08:25:09
Actual Completion Date	16-APR-2004 20:25:09

Main Activity Project Rebuild Maintenance Request Bill, Routing

Owning Department	MNTDEPT	<input checked="" type="checkbox"/> Firm
Priority	High	<input type="checkbox"/> Notification Required
Requested Start Date	16-APR-2004 08:25:09	<input type="checkbox"/> Tagout Required
Requested Due Date		<input type="checkbox"/> Planned
Shutdown Type	Required	<input checked="" type="checkbox"/> Enable Material Issue Requests

Operations Materials Resources Relationships Asset Route Costs

4. From the Tools menu, select Close Work Orders. The Close EAM Work Orders window appears.



### Close EAM Work Orders

**Close EAM Work Orders**

**Report Type**

☒ Summary

☐ Detail Using Planned Start Quantity

☐ Detail Using Actual Completion Quantity

☐ No Report

Actual Close Date 15-JUL-2004 21:37

Submission Date 15-JUL-2004 21:37:59

OK Cancel

5. Select a Report Type. Your selection determines the type of information presented on the report that is produced by the concurrent process (Close Discrete Jobs) closing the Work Order. The report presents project information, the Work Orders closed, status information, and quantity information.
6. Select an Actual Close Date. This date must be greater than or equal to the system date.
7. Select a Submission Date. This date must be greater than or equal to the system date.
8. Choose OK.

#### **To unclose a Work Order:**

1. Navigate to the Find Work Orders window.
2. Select a closed Work Order. You can optionally enter other data selection information.
3. Choose Find. The Close Work Order window appears.

### Close Work Order

Close Work Order (EAM)

Work Order	WO104452	Perform Oil Change
Asset Number	A100	
Asset Group	PUMPS	
Asset Activity		
Class	EAMWAC	
Status	Closed	
Work Order Type	Routine	
Instance Number		
Parent Work Order		
Relationship Type		

**Scheduled Dates**

Start	16-APR-2004 08:25:09
Completion	16-APR-2004 20:25:09
Duration(hours)	

**Actual Dates**

Actual Start Date	16-APR-2004 08:25:09
Actual Completion Date	16-APR-2004 20:25:09

Main Activity Project Rebuild Maintenance Request Bill, Routing

Owning Department	MNTDEPT	<input checked="" type="checkbox"/> Firm
Priority	High	<input type="checkbox"/> Notification Required
Requested Start Date	16-APR-2004 08:25:09	<input type="checkbox"/> Tagout Required
Requested Due Date		<input type="checkbox"/> Planned
Shutdown Type	Required	<input checked="" type="checkbox"/> Enable Material Issue Requests

Operations Materials Resources Relationships Asset Route Costs

4. From the Tools menu, select Unclose Work Orders.

5. Save your work.

### To close a rebuild Work Order:

1. Navigate to the Find Rebuild Work Orders window.
2. Select a Work Order. Only rebuild Work Orders are available.
3. Choose Find. The Close Rebuild Work Order, page A-1 window appears.
4. From the Tools menu, select Close Rebuild Work Orders. The Close EAM Work Orders window appears.
5. In the Report Type region, select a report type. Your selection determines the type of information presented on the report that is produced by the concurrent process (Close Discrete Jobs) closing the Work Order. The report presents project information, the Work Orders closed, status information, as well as quantity information.
6. Select an Actual Close Date. This date must be greater than or equal to the system date.
7. Select a Submission Date. This date must be greater than or equal to the system date.
8. Choose OK.

## To unclose a rebuild Work Order:

Navigate to the Find Work Orders, page A-1 window.

9. Select a closed rebuild Work Order from the list of values.
10. Choose Find. The Close Rebuild Work Order, page A-1 window appears.
11. From the Tools menu, select Unclose Rebuild Jobs.
12. Save your work.

## Related Topics

Closing Discrete Jobs Using Submit Requests, *Oracle Work in Process User's Guide*

## eAM Work Order Planning

A planner performs several functions, including purchasing required material for Work Orders, approving Work Requests, creating Work Orders, releasing Work Orders, and completing Work Orders. This section includes the following topics:

- Using the Maintenance Workbench, page 3-51

## Using the Maintenance Workbench

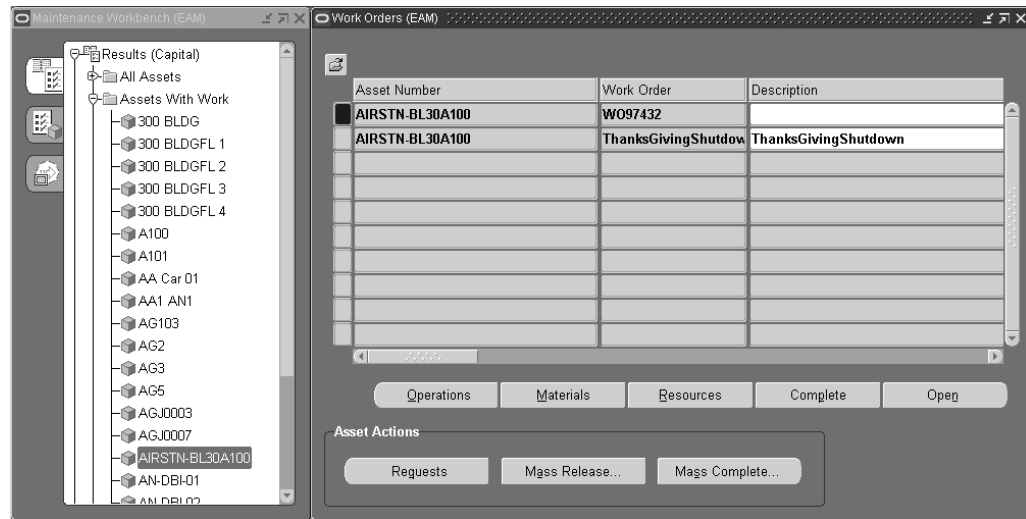
Using the Maintenance Workbench, a Planner can mass release and mass complete Work Orders. You cannot complete mass Work Orders that have mandatory meter readings and mandatory quality plans associated with a Work Order (See: Work Order Completion, page 3-41). A planner can also procure direct items (See: Overview of Direct Item Procurement for eAM Work Orders, page 5-1) for Work Orders, without having to leave the Maintenance Workbench. You can generate Work Orders from suggested Work Orders, manage Work Order required material, resources, and update Work Order operations as necessary.

You can forecast multiple assets at once. You can select multiple assets to forecast, and then execute the forecast. After execution, you can create a Work Order, associate the Work Order with a project and task for capital expenditures, and associate the Work Order with a parent Work Order. This is useful for shutdowns. When an organization knows that they will be shutting down a portion of their plant or facility, they can add the preventive maintenance Work Orders to the shutdown and, via projects, capitalize the costs into fixed assets.

### To use the maintenance workbench:

1. Navigate to the Maintenance Workbench window.
2. You can narrow your data selection using any of the fields available. For example, select an Asset Number, to view all Work Orders related to that Asset Number.
3. Choose Launch.

## Maintenance Workbench



4. Optionally in the Maintenance Workbench pane, select the Results (Capital) tab, Results (Rebuildable Inventory) tab, or the Forecast Work tab.

Selecting the Results (Capital) tab displays Asset Number information (See: Defining Asset Numbers, page 2-47) in a tree structure format. If you expand the Results (Capital) branch, the tree details Asset Number information into three lower branches, including All Assets, Assets With Work, and Routes.

- *All Assets*: All assets, associated with the data selection entered in Step 2, appear under the expanded All Assets branch.
- *Assets With Work*: All assets with Work Orders (See: eAM Work Orders, page 3-2), associated with the data selection entered in Step 2, appear under the expanded Assets With Work branch.
- *Routes*: All assets with an associated Asset Route (See: Defining Asset Routes, page 2-53), associated with the data selection entered in Step 2, appear under the expanded Routes branch.

Selecting the Results (Rebuildable Inventory) tab displays rebuildable item information (See: Defining Rebuildable Items, page 2-77) in a tree structure format. If you expand the Results (Rebuildable Inventory) branch, the tree details rebuildable item information into three lower branches, including All Rebuildables, Rebuildables with Work Orders, and Instance Numbers.

- *All Rebuildables*: All rebuildables, associated with a rebuild Work Order, appear.
- *Rebuildables with Work Orders*: All rebuildable items with Work Orders (See: eAM Work Orders, page 3-2), associated with the data selection entered in Step 2, appear.
- *Instance Numbers*: All Instance Numbers appear.

Selecting the Forecast Work tab displays the Forecast Work Orders window, associated with Asset Number information in the Maintenance Workbench pane. You can forecast for multiple assets at once. If you expand the Forecast Work branch, the tree details Asset Number information into three lower branches, including All Assets, Assets With Work, and Routes.

- *All Assets:* All assets, associated with the data selection entered in Step 2, appear under the expanded All Assets branch.
- *Assets With Work:* All assets with Work Orders (See: eAM Work Orders, page 3-2), associated with the data selection entered in Step 2, appear under the expanded Assets With Work branch.
- *Routes:* All assets with an associated Asset Route (See: Defining Asset Routes, page 2-53), associated with the data selection entered in Step 2, appear under the expanded Routes branch.

### Forecasted Work Orders

Forecasted Work Orders (EAM)

Start Date: 01-JUL-2003 00:00:00 - Cutoff Date: 15-JUL-2004 00:00:00

Horizon: 380

Set Name:

☐ Include Run To Failure  
☒ Combine with Default  
☐ Include Children

Select	Action	Type	Asset Type	Asset Number	Activity	Work Order	
<input checked="" type="checkbox"/>	Create	Forecasted	ASSET	AG5	JPActivity		JF
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

☐ Select All

Project:

Task:

Parent Work Order:

1. Enter a Cutoff Date to indicate how far out you would like the Work Orders to create from the suggested dates. The Horizon defaults as the difference between the Start Date and Cutoff Date.
2. Optionally select a Set Name.
3. Optionally select the Include Run To Failure check box to indicate that the scheduling process should include suggested Work Orders for Run To Life Asset Number/ Activity associations. If this check box is cleared, manual Work Orders can be created. Run To Life items are typically items that cost more to maintain than the item itself. For more information on Run To Life items, See: Preventive Maintenance Scheduling, page 2-96.
4. Choose Run to generate Work Order suggestions for the specified date period. The Expected Start Date is calculated if you are using backward scheduling, and the Expected End Date is calculated if you are using forward scheduling (See: Information on the Rescheduling Point region in Preventive Maintenance Scheduling, page 2-96).
5. Optionally choose Implement to release the selected (indicated by the check box on the left side of the window) forecasted Work Orders. The Work Orders are created at an Unreleased status (See: eAM Work Order Statuses, page 3-16).

**Note:** You can Forecast Work for assets, but not rebuildable items.

5. If you selected the Results (Capital) or Results (Rebuildable Inventory) tab, you can optionally, choose Operations to view the tasks associated with a specific Work Order (See: eAM Operations and Tasks, page 3-19). You can view and update the material and resources associated with a specific operation.
6. Optionally choose Materials to view and update the material requirements associated with a selected Work Order (See: Defining Material Requirements).
  1. Optionally you can view or update the current Work Order's associated Asset Number's items list by choosing Select Materials. The current Asset Number's associated Asset Bill of Material items are available to add to the required material. See: Setting Up Asset Bills of Material.
  2. Optionally choose Direct Item to select direct items from supplier catalogs, create requisitions, and add them to your items list. Direct Items are one time non-inventoried items that are purchased directly from a supplier. Oracle Self Service Purchasing defaults the Work Order Number and Operation Number, as well as the class code information for correct expensing. After you choose Direct Item, the current Work Order and operation reference values are passed to the requisition created using Self Service Purchasing. If the Work Order is project related, then the project and task information is captured in the purchase requisition (See: Overview of Direct Item Procurement for eAM Work Orders, page 5-1). You can exit Self Service Purchasing and return to the Maintenance Workbench by selecting Return To Portal.

**Note:** Upon re-inquiry of this Work Order, the Direct Items region reflects any Requisition and Purchase Order details.

**Note:** You must have Oracle Self Service Purchasing installed for this functionality. You can purchase direct items from a Requisition or Purchase Order window if you have Oracle Purchasing installed (See: Entering Purchase Orders for Direct Items, page 7-15).

3. Choose Copy to Asset to dynamically update the BOM associated to the Asset Group with any items list changes (See: Setting Up Asset Bills of Material, page 2-54).
7. Optionally choose Resources to view, update, add, or delete resource requirements for a selected Work Order (See: Defining Resource Requirements, page 3-31).
  - Optionally choose Instances to view or update a list of specific people or equipment assigned to this resource. The Person tab displays persons grouped in specific roles. The Equipment tab displays similar types of equipment grouped by resource. You can define specific machines to any of your machine type resources and you can define specific employees to any of your labor type resources. When a resource has instances defined, you can view the resource capacity and load in the Scheduling Workbench (See: Using the Scheduler Workbench, page 5-6).

For example, you can define all machines belonging to the resource, GRINDERS. An individual grinder machine can then be a specific resource requirement and scheduled, and can have a unique capacity definition.

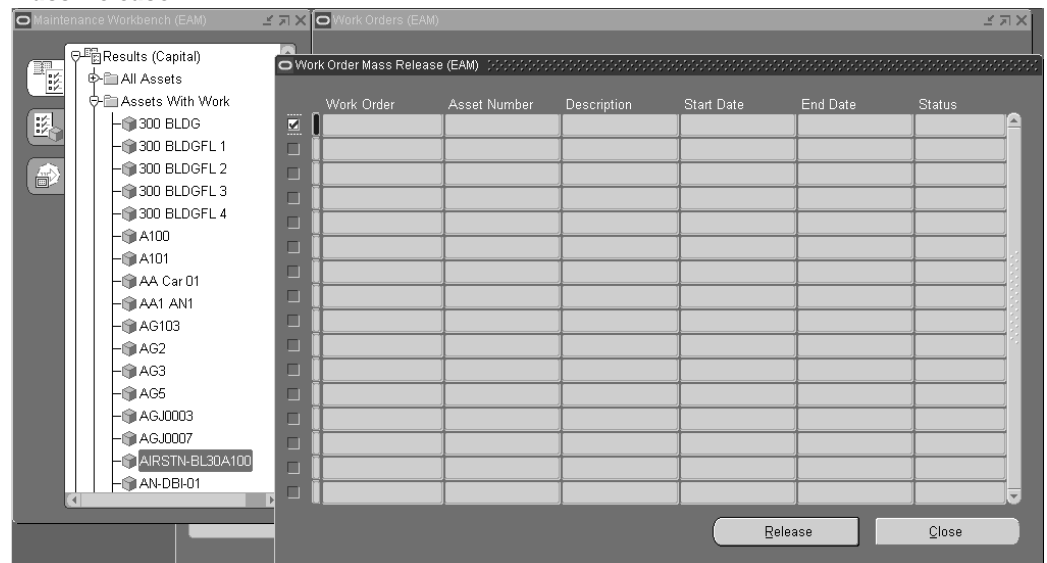
This information defaults from your current resource definition. You can only add persons and equipment that are associated with the current resource.

8. Optionally choose Complete to complete a selected Work Order (See: Work Order Completion, page 3-41).
9. Optionally choose Open to open the Work Order details of a specified Work Order See: eAM Work Orders, page 3-2).
10. Optionally choose Requests to view all open Service and Work Requests for the current Asset Number.

**Note:** You can view Work Requests for assets, but not rebuildable spares. The Results (Capital) tab must be selected to view Work Requests.

11. Optionally choose Mass Release to release multiple Work Orders at once. Work orders at an Unreleased status appear.

### Mass Release



Select the check boxes next to the Work Orders to release, then choose Release. Because you cannot complete mass Work Orders that have mandatory meter readings and mandatory quality plans associated, you cannot release the Work Order if these conditions exist.

12. Optionally choose Mass Complete to complete multiple Work Orders at once (See: Work Order Completion, page 3-41 and eAM Work Order Statuses, page 3-16). Choose Complete to complete all Work Orders selected.

[illegible]

- ## Related Topics

3-56 Oracle Enterprise Asset Management User's Guide



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# Preventive Maintenance

This chapter covers the following topics:

- Introduction
- Preventive Maintenance Overview
- Meters
- Entering Meter Readings
- Preventive Maintenance Scheduling
- Generating Work Orders

## Introduction

This chapter discusses how Work Orders are created automatically using preventive maintenance schedules. The following topics are necessary when setting up preventive maintenance:

- Preventive Maintenance Overview, page 4-1
- Meters, page 4-2
- Preventive Maintenance Scheduling, page 4-5

## Preventive Maintenance Overview

eAM generates Work Orders automatically based on meter readings, runtime and/or calendar days. An example of meter-based preventive maintenance is your car's oil changes. Most car manufacturers recommend that you change your engine oil every 3,000 miles or six months, whichever comes first.

To set up the above scenario, define your car's odometer as a meter. Next, associate that meter to an asset (your car), using the Asset Meter Association window. After you have associated the meter to the asset, associate the Maintenance Activity (oil change) that should occur, based on the meters you defined. This is performed via Preventive Maintenance Scheduling.

Preventive Maintenance includes the following topics:

- Meters, page 4-2
- Project and Task Setup, page 2-85
- Defining Meter Templates, page 2-85

- Defining Meters, page 2-87
- Associating Meter Templates with Asset Groups, page 2-88
- Associating Meters with Asset Numbers, page 2-89
- Entering Meter Readings, page 4-2
- Preventive Maintenance Scheduling, page 2-91
- Defining Set Names, page 2-90
- Defining a Preventive Maintenance Template, page 2-91
- Entering Preventive Maintenance Schedule Definitions, page 2-96
- Generating Work Orders, page 4-5

## Meters

Meters are defined and associated with Asset Numbers to measure an asset or rebuildable item's usage. Examples include odometers or counters. Meters are used in Preventive Maintenance Scheduling to schedule and generate Preventive Maintenance Work Orders.

Meter related tasks include the following topics:

- Project and Task Setup (Setting Up chapter)
- Oracle Seiban Setup (Setting Up chapter)
- Defining Meter Templates, page 2-85
- Defining Meters, page 2-87
- Associating Meter Templates with Asset Groups, page 2-88
- Associating Meters with Asset Numbers, page 2-89
- Entering Meter Readings, page 4-2

## Entering Meter Readings

After a Work Order is completed, meter readings are required for all meters, associated with the Work Order's current Asset Number, that appear in the Runtime Interval rules in the Preventive Maintenance Scheduling Definition window (See: Entering Preventive Maintenance Schedule Definitions, page 2-96 and Work Order Completion, page 3-41). You can enter standalone meter readings at any time.

**Note:** To enable the Preventive Maintenance Scheduler process, an initial meter reading needs to have already been entered. This might have been performed by entering an initial reading during the Meter's definition.

### To enter a standalone meter reading:

1. Navigate to the Meter Readings window.

### Meter Readings Window

**Asset Number**

Asset Type:

Asset Number:

Asset Group:

Reading Date:

**Meter Readings**

Current | Latest | Comments

Meter	Type	UOM	Value	Change	Direction	Value Beto Reset
NG Hour Meter	Absolute	HR			Ascending	

Readings History

2. For optimal performance, select an Asset Type. Valid values are Capital or Rebuildable Inventory. This field works in conjunction with the Asset Number field.
3. Select an Asset Number.  
If you previously populated the Asset Type field with Capital, the Asset Number list of values contains all Asset Numbers. If you previously populated Asset Type with Rebuildable Inventory, the Asset Number list of values contains all Rebuildable Serial Numbers.
4. Enter a Reading Date. You can optionally select a past date to view past meter readings. You cannot enter a future date.
5. The Asset Group value automatically defaults as the Asset Group associated with the Asset Number entered in Step 3.
6. Choose Find to display meter reading data for this Asset Number. Meter readings with a Reading Date falling within the meter effective dates appear in the Meter Readings region.
7. Within the Meter Readings region, select the Current tab to add meter reading data.
8. The meter Type is disabled and defaults from the current meter's definition.
9. You can enter a Value for new meter readings. The Change field indicates the difference between the last reading and the current reading; it defaults when the Value field is populated.
10. The Change field indicates the difference between the last reading and the current reading. The Change value is used to calculate the Life To Date Reading, within the Latest tabbed region.

11. The Direction field is disabled. The value defaults from the meter definition.
12. If you select the Reset check box, you are resetting the Current meter value to any value that you enter in the Value field. For example, if a motor is replaced, you can reset the meter reading value of the pump, associated with the motor. The Value field is mandatory, and the Change field is disabled.

**Note:** You cannot reset past meter readings if a meter reading is entered after the reading date.

13. Select the Latest tab. The Life To Date field displays the accumulated meter readings, which is usually the same as the current meter reading. The Current meter reading and Life To Date meter reading are different if you have previously reset the Value within the Current tabbed region.

For example, before the reset, both the Current meter reading and the Life To Date meter reading were 17,000. You then reset the Current meter reading to 3,000. The Life To Date meter reading continues to increase from 17,000, while the Current meter reading increases from 3,000.

The system uses the Life To Date meter reading to calculate the Usage Rate.

14. Select the Comments tab to enter any necessary comments.
15. Optionally, choose Readings History to view all meter readings for the selected meter and current Asset Number. This helps to make logical decisions when entering meter readings. For example, you can view the last meter reading, enabling you to make a logical choice when entering the next meter reading.

#### ***Meter Readings History***

Meter Name  Type

Show disabled readings ☐

Reading Value	Reading Date	Life To Date Reading	Comments	Reset	Disabled
1005	01-JUL-2004 00:38:48	1005		<input type="checkbox"/>	<input type="checkbox"/>
1001	01-JUL-2004 00:33:01	1001		<input type="checkbox"/>	<input type="checkbox"/>
10	01-JUL-2004 00:26:33	10		<input type="checkbox"/>	<input type="checkbox"/>
0	01-JUL-2004 00:19:36	0	initial reading	<input checked="" 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"/>

Disable Close

16. You cannot alter the existing meter reading record. Optionally, choose Disable to disable an existing meter reading. The disabled reading is saved for viewing, but is not used in Preventive Maintenance Scheduling.

17. Choose Close to return to the Meter Readings window.
18. Save your work.

## Preventive Maintenance Scheduling

eAM enables you to generate Work Orders automatically using a preventive maintenance schedule, based on Runtime Rules, Day Interval Rules, and List Dates. For example, a forklift might need servicing after 100 motor running hours, or 90 days, whichever comes first. Meters are used to keep track of asset usage.

Preventive Maintenance Scheduling tasks include the following topics:

- Defining Set Names, page 2-90
- Defining a Preventive Maintenance Template, page 2-91
- Creating Suppression Templates (Setting Up chapter)
- Entering Preventive Maintenance Schedule Definitions, page 2-96
- Generating Work Orders, page 4-5

## Generating Work Orders

After you have established Preventive Maintenance Scheduling definitions, you can generate Work Orders. There are two ways to generate Work Orders. You can execute the Generate Preventive Maintenance Work Orders process, or you can implement forecasted Work Orders from the Maintenance Workbench.

When executing the Generate Preventive Maintenance Work Orders process, the program creates suggested Work Orders, based on the day interval or runtime interval rules that are associated with the scheduling definitions you defined. See: Entering Preventive Maintenance Schedule Definitions, page 2-96. You should schedule this program to periodically execute, automatically. You can execute this program manually at any time, by accessing the menu option.

If you want to review and optionally select Work Orders that create using this process, you can access the Maintenance Workbench. This enables you to view the Work Orders before actually creating them. You can launch the Preventive Maintenance Scheduler to implement forecasted Work Orders. See: Using the Maintenance Workbench, page 3-51.

The following are instructions to invoke the process from the menu:

### **To generate work orders:**

1. Navigate to the Generate Preventive Work Orders window.

### Import Jobs and Schedules

The screenshot shows a dialog box titled "Generate Preventive Maintenance Work Orders (EAM)". It is divided into three main sections: "Run this Request...", "At these Times...", and "Upon Completion...".

- Run this Request...:** Contains fields for "Name" (Generate Preventive Maintenance Work Orders), "Parameters" (22-JUL-2004:29-JUL-2004:.....), and "Language" (American English). There are "Copy..." and "Language Settings..." buttons.
- At these Times...:** Contains a "Run the Job" field set to "As Soon as Possible" and a "Schedule..." button.
- Upon Completion...:** Contains a checked "Save all Output Files" checkbox, "Notify" and "Print to" fields (set to "noprint"), and an "Options..." button.

At the bottom are "Help (B)", "Submit", and "Cancel" buttons.

2. In the Parameters window, select a Start Date.
3. Select a Cut Off Date.

### Parameters Window

The screenshot shows a dialog box titled "Parameters". It contains a list of parameters with corresponding input fields:

- Start Date: 22-JUL-2004 (with a calendar icon and 22-JUL-04)
- Cut Off Date: (empty)
- Area: (empty)
- Asset Category: (empty)
- Owning Department: (empty)
- Asset Type: (empty)
- Asset Group: (empty)
- Asset Number: (empty)
- Project: (empty)
- Task: (empty)
- Parent Work Order: (empty)

At the bottom are "OK", "Cancel", "Clear", and "Help" buttons.

To further narrow down the data selection, you can enter any of the following parameters:

4. Optionally select an Area. Areas are where your assets reside.
5. Optionally select an Asset Category. This is the Class and Subclass code, such as CRANE.OVERHEAD or BUILDING.FLOOR.

6. Optionally select an Owning Department.
7. Optionally select an Asset Type from the list of values. Valid values are Capital and Rebuildable Inventory.
8. Optionally select an Asset Group if you previously selected an Asset Type.
9. Optionally select an Asset Number if you previously selected an Asset Type.
10. Optionally select a Project.
11. Optionally select a Task if you previously selected a Project.
12. Optionally select a Parent Work Order.
13. Choose OK.
14. On the Generate Preventive Maintenance window, choose Submit.

## **Related Topics**

Submitting a Request, *Oracle Applications User's Guide*





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# eAM Planning and Scheduling

This chapter covers the following topics:

- Introduction
- Overview of eAM Planning and Scheduling
- eAM Planning
- Launching the Planning Process
- Viewing Suggested Demand
- eAM Scheduling
- Using the Scheduler Workbench

## Introduction

Oracle Enterprise Asset Management utilizes Oracle Manufacturing Scheduling and Oracle Material Requirements Planning to ensure cost savings and work management efficiencies, by generating predictive work activities. These work activities use a planning process to balance the work load for resource management. This chapter contains the following topics:

- Overview of eAM Planning and Scheduling, page 5-1
- eAM Planning, page 2-104
- eAM Scheduling, page 2-105

## Overview of eAM Planning and Scheduling

Oracle Enterprise Asset Management utilizes Work Orders to create demand for asset maintenance. Work Order operations are completed using the Work Orders' associated material and resource requirements (See: Overview eAM Work Management, page 3-2). Cost savings and work management efficiencies are achieved by generating future, planned work activities, and then using a planning process to balance the work load for resource management.

First, a Master Demand Schedule is created. This Master Demand Schedule is attached to Material Requirements Planning (MRP) options. MRP is launched, creating planned Work Order suggestions. You can use the Planner Workbench to implement the suggestions into purchase requisitions or maintenance Work Orders. Using the Purchasing AutoCreate feature, purchase orders are automatically created from the

requisitions. After the purchase orders receive into inventory, you can issue material to a maintenance Work Order.

This section includes the following topics:

- eAM Planning, page 2-104
- eAM Scheduling, page 2-105

## eAM Planning

Oracle eAM utilizes Material Requirements Planning (MRP) to calculate net material requirements from gross material requirements by evaluating the following:

- the master schedule
- bills of material
- scheduled receipts
- on-hand inventory balances
- lead times
- order modifiers

Material Requirements Planning plans material replenishments by creating a set of recommendations to release or reschedule orders for material, based on net material requirements. MRP assumes infinite capacity is available to meet the material requirements plan.

The following illustration depicts how eAM uses Material Requirements Planning. First, a Master Demand Schedule (MDS) is created. This schedule is then attached to MRP Plan Options. Next, the MRP is launched, creating suggestions for purchasing requisitions. Finally, these suggestions are implemented, purchased, and then received into inventory. After the material is in inventory, you can issue it to a maintenance Work Order.

### ***eAM Material Requirements Planning***



eAM Planning includes the following topics:

- Defining a Master Demand Schedule Name, page 2-105
- Defining a Material Requirements Plan Name, page 2-106
- Defining Plan Options, page 2-107
- Launching the Planning Process, page 5-3
- Viewing Suggested Demand, page 5-4

## Launching the Planning Process

Launch the planning process for a material requirements plan (MRP) from a master demand schedule to generate planning recommendations for all planned items. You can launch the planning process for a material requirements plan (MRP) or a master production schedule (MPS). The planning process involves three phases for defining the MRP or MPS. The process uses the input from a master demand schedule or master production schedule to determine the quantities and timing of the items to purchase.

### To launch the planning process:

1. Navigate to the Launch MRP window.

The screenshot shows the 'Launch MRP (EAM)' window. The 'Run this Request...' tab is active, displaying the following fields: Name (Launch Planning Processes), Parameters (empty), and Language (American English). A 'Copy...' button is located to the right of the Name field, and a 'Language Settings...' button is to the right of the Language field. Below this, the 'Parameters' tab is visible, showing fields for Plan Name (with a dropdown arrow), Launch Snapshot (checkbox), Launch Planner (checkbox), Anchor Date (19-JUL-2004), and Plan Horizon (22-JAN-2006). A date range indicator shows '19-JUL-04' to '22-JAN-06'. At the bottom of the Parameters tab are buttons for OK, Cancel, Clear, and Help.

2. Enter the following parameters:

*Plan Name:* Select the MRP Plan Name to launch.

*Launch Snapshot:* Valid values are Yes and No. Select Yes to launch the Snapshot.

*Launch Planner:* You must launch the planner if you selected Yes to launch the Snapshot.

*Anchor Date:* Enter an Anchor Date, earlier or equal to the current date, that acts as a start date for repetitive planning periods.

*Plan Horizon:* Enter a date, greater than the current date, up to which the planning process creates an MRP or MPS. The default horizon is the current date plus the number of offset months set in the profile, MRP: Cutoff Date Offset Months (See: Implementing Profile Option Summary, *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*).

3. Choose OK.
4. Choose Submit.

## Related Topics

Submitting a Request, *Oracle Applications User's Guide*

## Viewing Suggested Demand

After the MRP is launched, you can view the purchase requisition suggestions created by the launched MRP plan.

### To view suggested purchase requisitions:

1. Navigate to the Supply/Demand window.

#### Supply/Demand

The screenshot shows the 'Supply/Demand (EAM)' window. At the top, there are tabs for 'Plan' (MaintMRP, Maintenance Only MRP) and 'Type' (MRP). Below the tabs, there is a 'Comprehensive' button and a table of suggested purchase requisitions. The table has columns: Item, Order Type, Sugg Due Date, Qty/Rate, Action, and Selected to. The table contains 10 rows of data. Below the table, there are buttons for 'Pegging', 'Resource Requirements', 'Release Details', 'Release', 'Select All For Release', and 'Horizontal Plan'.

Item	Order Type	Sugg Due Date	Qty/Rate	Action	Selected to
<input checked="" type="checkbox"/> jaiganesh-comp1	Non-standard job de	28-NOV-2003	-10	Demand	<input type="checkbox"/>
<input checked="" type="checkbox"/> jaiganesh-comp1	Non-standard job de	28-NOV-2003	-20	Demand	<input type="checkbox"/>
<input checked="" type="checkbox"/> Item 200	Non-standard job de	04-DEC-2003	-1	Demand	<input type="checkbox"/>
<input type="checkbox"/> av-item1	Non-standard job de	04-DEC-2003	-1	Demand	<input type="checkbox"/>
<input type="checkbox"/> av-item1	Non-standard job de	04-DEC-2003	-1	Demand	<input type="checkbox"/>
<input type="checkbox"/> Item11	Non-standard job de	05-DEC-2003	0	Demand	<input type="checkbox"/>
<input type="checkbox"/> av-item1	Non-standard job de	05-DEC-2003	-10	Demand	<input type="checkbox"/>
<input type="checkbox"/> Item11	Non-standard job de	09-DEC-2003	-1	Demand	<input type="checkbox"/>
<input type="checkbox"/> jaiganesh-comp1	Non-standard job de	23-DEC-2003	-10	Demand	<input type="checkbox"/>
<input type="checkbox"/> cap-comp1	Non-standard job de	26-DEC-2003	-1	Demand	<input type="checkbox"/>

2. Review the supply/demand details. See: Supply and Demand Fields, *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*

### To view the horizontal plan:

You can view bucketed horizontal planning information, based on your selected display preferences. MRP provides two ways of viewing this information: snapshot and current. Snapshot information is the information produced by your original planning execution. Current information includes all modifications after the planning execution.

1. Navigate to the Supply/Demand window.
2. Choose Horizontal Plan.

### Horizontal Material Plan

Item	Type	19-JUL-2004	26-JUL-2004	02-AUG-2004
<input type="checkbox"/> Item 200	Sales orders	0	0	
<input type="checkbox"/>	Forecast	0	0	
<input type="checkbox"/>	Dependent demand	14	0	
<input type="checkbox"/>	Gross requirements	14	0	
<input type="checkbox"/>	WIP+	0	0	
<input type="checkbox"/>	Purchase orders	0	0	
<input type="checkbox"/>	Requisitions	0	0	
<input type="checkbox"/>	Total supply	14	0	
<input type="checkbox"/>	Beginning on hand	0	0	
<input type="checkbox"/>	Projected available balance	0	0	

3. Indicate if you would like to view Snapshot or Current information.

## Related Topics

Reviewing Supply and Demand, *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*

Reviewing the Horizontal Plan, *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*

## eAM Scheduling

Oracle Enterprise Asset Management (eAM) shares the Scheduler Workbench, used in Oracle Manufacturing, to schedule Work Orders and operations.

The Scheduler Workbench enables a planner to graphically view and reschedule Work Orders. It provides you with a visual display of Work Orders, Operations, and Resources. You can interactively reschedule Work Orders, operations, and resources by dragging and dropping them at a new date and time. Any sequencing requirements defined for the Work Order are displayed and maintained during scheduling changes. Resource availability and requirements display so that you can graphically view the impact of scheduling changes.

**Important:** You have Oracle Manufacturing's Constraint Based Scheduling available to you, if your company has purchased the appropriate license. If you do NOT have this license, you automatically have the Infinite Scheduler available to you; this scheduler is not constraint-based.

A constraint-based scheduling engine schedules asset Work Orders and operations' scheduled dates, resources, and material constraints. The scheduling process calculates Work Order and operation scheduled

durations and dates, based on the forward or backward scheduling goal (See: Routine Work Orders, page 3-3), and Work in Process parameters. The concurrent program is triggered after a Work Order is released (See: eAM Work Order Statuses, page 3-16). The Work Order automatically transitions to a Pending Scheduling status, until the concurrent program finishes scheduling. At that time, the Work Order transitions back to a Released status.

This section includes the following topics:

- Defining Scheduling Rules for Work Order Relationships (Setting Up chapter)
- Using the Scheduler Workbench, page 5-6

## Related Topics

Constraint Based Scheduling, *Oracle Manufacturing Scheduling User's Guide*

## Using the Scheduler Workbench

Use the Scheduler Workbench to select specific work orders, expand, and collapse work orders and operations, using a tree hierarchy structure. A Gantt Chart graphically displays both firmed and unfirmed work orders (See: Routine Work Orders, page 3-3). You can view and update start and end dates for each resource. In manual mode, the constraints are operations; they do not surpass work order dates, operation dates, and resources.

In automatic mode, the Scheduler process creates start and end times for operations and resources. By default, you are in manual mode.

### To use the scheduler workbench:

1. Navigate to the Scheduler Workbench.
2. Choose Filter to limit the information displayed. You can display information by Department, Resource, Asset Information, filter by time, or a combination of this information. You can view information for work orders at Released, On Hold, Unreleased, Cancelled, and Complete statuses.

### Filter

The screenshot shows the 'Session Filter' dialog box with the following fields and options:

- Department:** DEP-MAINT
- Resource:** (empty)
- Workorder Status:**
  - ☒ Released
  - ☒ Unreleased
  - ☒ Draft
  - ☒ On Hold
  - ☐ Complete
  - ☐ Complete - No Charges
- Work Orders:** (empty)
- Work Order Type:** (empty)
- Activity:** (empty)
- Activity Type:** (empty)
- Activity Cause:** (empty)
- Project:** (empty)
- Task:** (empty)
- Asset Group:** (empty)
- Asset Number:** (empty)
- ☐ Show Child
- Asset Type:** (empty)
- Owning Department:** (empty)

**Filter By Time**

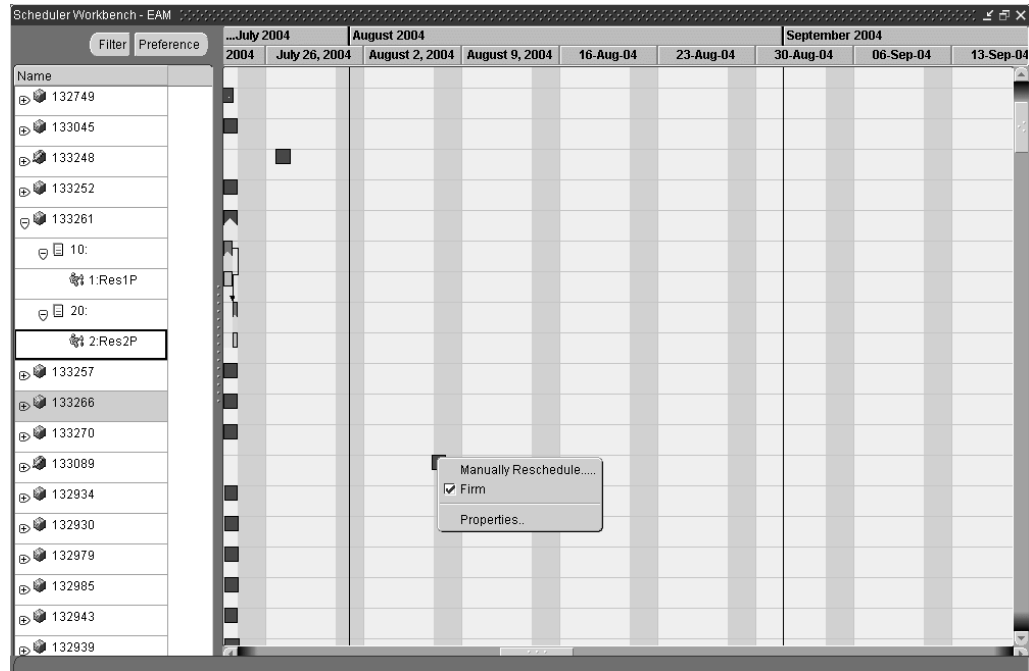
- ☐ Enable Date
- ☐ Date
  - Start:** 7/22/04 2:36 PM
  - End:** 7/22/04 2:36 PM
- ☐ Offset days from today
  - Start:** (empty)
  - End:** (empty)

**OK** **Cancel**

3. Choose OK to filter information entered (See: Filtering Jobs, *Oracle Manufacturing Scheduling User's Guide*).

Work Orders appear on the left side of the window, with their associated operations' resources, in a tree hierarchy format. On the right, bars spanning between calendar days represent associated schedules for the current operation resources. If dependent operations exist, you can see dependency links; the Scheduler process considers these dependencies. You can drag and drop the bars between different calendar days to dynamically adjust schedules.

## Scheduler Workbench



4. Optionally firm or unfirm Work Orders by selecting Create/Modify Work Orders from the Tools menu. The Find Work Orders window appears (See: Routine Work Orders, page 3-3). You can also right click on a schedule, symbolized by a bar.
  - You can view resource load versus capacity, using the Scheduler Workbench. For information on viewing work order properties, operation properties, and resource properties, See: Viewing a Property Window, *Oracle Manufacturing Scheduling User's Guide*.
  - For information on displaying resources and resource load versus capacity, See: Showing Select Resources and Resource Load Versus Capacity Panes, *Oracle Manufacturing Scheduling User's Guide*.
  - Normally, Work Order rescheduling takes place within the Work Order window, but you can also reschedule them within the Gantt Chart. For information on how to reschedule Work Orders, operations, and resources within the Gantt Chart, See: Rescheduling Jobs, Operations, and Resources in the Gantt Chart, *Oracle Manufacturing Scheduling User's Guide*.

## Related Topics

Overview of Workbench, *Oracle Manufacturing Scheduling User's Guide*

Launching the Workbench, *Oracle Manufacturing Scheduling User's Guide*

Filtering Jobs, *Oracle Manufacturing Scheduling User's Guide*



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## eAM Cost Management

This chapter covers the following topics:

- Introduction
- Overview of eAM Cost Management
- eAM Cost Estimation
- Viewing Cost Information
- Asset Cost Rollup
- Parent-Child Hierarchy Cost Rollup
- Alternate Cost Hierarchy Rollup
- Transferring Invoice Variances to Maintenance Work Orders
- Viewing Simulated Transfer Details
- Transferring Invoice Variances

### Introduction

Costs generate as maintenance work is executed and completed. These costs roll up through the Parent/Child hierarchies defined within eAM. This chapter contains the following topics:

- Overview of eAM Cost Management, page 6-1
- Transferring Invoice Variances to Maintenance Work Orders, page 6-14

### Overview of eAM Cost Management

Costs generate as maintenance work is executed and completed. These costs roll up through the Parent/Child hierarchies, defined within Enterprise Asset Management, and can roll up to any level within an asset hierarchy. Labor, Material, and Equipment charges further classify into several maintenance cost categories.

Enterprise Asset Management captures and retains all work. You can reference completed work to review operations, resources, and costs. This information provides the scope of work and the process by which it is completed.

Managing costs in eAM includes the following topics:

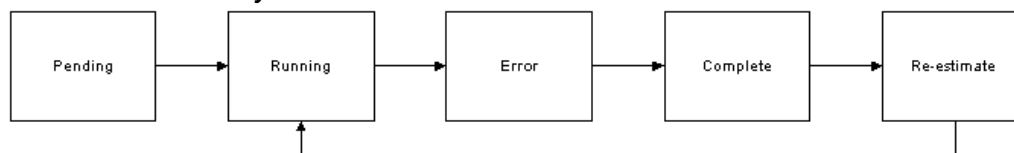
- eAM Costing Methods and Mappings, page 2-127

- Setting Up Cost Categories, page 2-129
- Setting Up eAM Cost Management, page 2-132
- eAM Cost Estimation, page 6-2
- Viewing Cost Information, page 6-3
- Asset Cost Rollup, page 6-9
- Parent-Child Hierarchy Cost Rollup, page 6-11
- Alternate Cost Hierarchy Rollup, page 6-13

## eAM Cost Estimation

Estimating the costs of maintenance Work Orders is often necessary for planning and assessing purposes. The Work Order Cost Estimate Processor estimates the costs of all materials and resources exploded or entered on a maintenance Work Order, enabling you to plan and assess your costs. A Work Order's estimated and actual costs might differ because all materials or resources, associated with a Work Order, might not actually be used when the Work Order executes. For example, a required material was not issued to the maintenance Work Order.

### Cost Estimation Lifecycle



The Work Order Cost Estimate Processor can continually execute or launch manually via a concurrent request. Work Orders have one of the following Estimation Statuses:

- *Pending - The Work Order is waiting to be selected by the Work Order Cost Estimate Processor.*
- *Running - The Work Order Cost Estimate Processor is currently estimating the costs of the Work Order.*
- *Error - The Work Order Cost Estimate Processor attempted to estimate the Work Order's costs, but there was an error.*
- *Complete - Work Order Cost Estimate Processor successfully completed estimating the Work Order's costs.*
- *Re-estimate - The Work Order is waiting to be picked up by the The Work Order Cost Estimate Processor, for re-estimation. In this case, the Work Order was estimated at least once.*
- *Running and Re-estimate - Changes were made to a Work Order's requirements, while the Work Order Cost Estimate Processor was executing. These Work Orders are then re-estimated by the Work Order Cost Estimate Processor.*

### To view the status of the Work Order Cost Estimation process:

1. Navigate to the Maintenance Work Orders window.

## Maintenance Work Orders

Select & Estimate	Work Order	Estimation Status	Asset Activity	Asset Group	Asset Number	Rebuild Item	Rebuild Serial Number
<input checked="" type="checkbox"/>	118067	Complete	av-act1	av-ag1	av-an-c		
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

Description:  Department:   
Class:  Status:

Accounting Information by Period  
From Period:  To Period:

2. Select the Work Orders to estimate/re-estimate by selecting the individual Select & Estimate check boxes. You can choose Select All to automatically select all Work Orders listed for re-estimation.
3. Choose Re-estimate Work Order to estimate/re-estimate all selected Work Orders. The Estimation Status field displays the status of the Work Order Cost Estimation process.

## Related Topics

Viewing Cost Information, page 6-3

## Viewing Cost Information

You can view the Material, Labor, and Equipment costs of Asset Numbers, Activities, and Work Orders. You can see detailed or summarized views of actual, estimated, or variance cost information. When viewing the parent Asset Number, you can view just the parent Asset Number's costs or the costs of the parent and child Asset Numbers that are rolled up to the Parent level.

Within both the forms application and Maintenance User profile, different costs are viewable. In the forms application, you can view Work Order and Activity costs. In the Maintenance User profile, you can view Work Order and Asset Number costs.

### To view cost information within the forms application:

1. Navigate to the Work Order window. Find a Work Order to view costs for.

## Work Order

Work Order (EAM)

Work Order: **118067**

Asset Number: **av-an-c**

Asset Group: **av-ag1**

Asset Activity: **av-act1**

Class: **EAMWAC**

Status: **Released**

Work Order Type:

Instance Number:

Parent Work Order:

Relationship Type:

Activity #1

Scheduled Dates

Start: **10-APR-2004 01:56:49**

Completion: **13-APR-2004 00:00:00**

Duration(hours): **70.053**

Actual Dates

Actual Start Date:

Actual Completion Date:

Main Activity Project Rebuild Maintenance Request Bill, Routing

Owning Department: **Dep1**

Priority:

Requested Start Date: **10-APR-2004 01:56:49**

Requested Due Date:

Shutdown Type:

☐ Firm

☐ Notification Required

☐ Tagout Required

☐ Planned

☒ Enable Material Issue Requests

Operations Materials Resources Relationships Asset Route Costs

2. Choose Costs.

## Maintenance Work Orders

Maintenance Work Orders (EAM)

Select & Estimate	Work Order	Estimation Status	Asset Activity	Asset Group	Asset Number	Rebuild Item	Rebuild Serial N
<input checked="" type="checkbox"/>	<b>118067</b>	<b>Complete</b>	<b>av-act1</b>	<b>av-ag1</b>	<b>av-an-c</b>		
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

Description: **Activity #1** Department: **Dep1**

Class: **EAMWAC** Status: **Released**

Select All

Re-estimate Work Order

Accounting Information by Period

From Period: **01-JUL-2004** To Period: **31-JUL-2004**

Value Summary

- Optionally re-estimate selected Work Orders' costs by choosing Re-estimate Work Order. After chosen, the Work Order Cost Estimation process executes to re-estimate the costs for all selected Work Orders. See: eAM Cost Estimation, page 6-2. You can optionally first choose Select All to automatically select all Work Orders to re-estimate.
- In the Accounting Information By Period region, choose the dates that identify the accounting period you want to view.
- Choose Value Summary.

### Maintenance Work Order Value Summary

Maintenance Work Order Value Summary (EAM) - 118067

Period From **01-JUL-2003** Period To **31-JUL-2004** Refresh

Asset Group	<b>av-ag1</b>	Completion Date	<b>13-APR-2004 00:00:00</b>
Asset Number	<b>av-an-c</b>	Work Order Status	<b>Released</b>
Asset Activity	<b>av-act1</b>	Parent Work Order	
Rebuild Item		Estimation Status	<b>Complete</b>
Rebuild Serial Number		Last Estimate Id	<b>3167155</b>
Owning Department	<b>Dep1</b>	Last Estimate Date	<b>19-MAY-2004 23:04:38</b>

Actual Costs Estimates Variances

Cost Category	Total	Material	Labor	Equipment
<b>Safety</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
Job Total	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

Details

- You can view total Material, Labor, and Equipment costs for the cost categories associated with the current Work Order. You can view totals for actual, estimated, or variance costs, depending on the tab you select.

*Actual Costs:* The Actual Costs tab displays the current Work Order's accumulation of material and resource transaction costs, based on the specified period(s).

**Note:** The Cost Manager process executes to provide updated, actual cost information.

*Estimated Costs:* The Estimates tab displays the current Work Order's material and resource requirements' estimated costs. The Work Order Cost Estimate Processor executes to provide updated, estimated cost information. You can also manually launch this process via a concurrent request. See: Viewing Cost , page 6-3

*Variance Costs:* The Variances tab displays the difference between the actual costs and estimated costs.

- For the selected cost category, choose Details to view the Material, Labor, and Equipment costs for individual operations on the current Work Order's routing. You can view totals for actual, estimated, or variance costs, depending on the tab you select.

**Note:** To see if there are any changes to the selected Work Order's costs, choose Refresh. For example, if the Work Order's Estimation Status is Reestimate, choosing Refresh indicates if the Work Order Cost Estimate Processor has picked up the Work Order and re-estimated the costs. If, after choosing Refresh, the Estimation Status is changed to Complete, the maintenance Work Order has the latest estimation costs.

### Costs Details By Operation

Cost Details By Operation (EAM) - 118067, Safety

Asset Group	av-ag1	Estimation Status	Complete
Asset Number	av-an-c	Completion Date	13-APR-2004 00:00:00
Asset Activity	av-act1	Owning Department	Dep1
Rebuild Item		Work Order Status	Released
Rebuild Serial Number		Parent Work Order	
Period From	01-JUL-2003	Period To	31-JUL-2004

Actual Costs   Estimates   Variances

Department Code	Operation Sequence Number	Total	Material	Labor	Equipment
Dep1	10	0.00	0.00	0.00	0.00
Total		0.00	0.00	0.00	0.00

Detailed Estimates   Distributions

- Choose Distributions to view the specific accounts charged for an individual operation.

### WIP Transactions Distributions

WIP Transaction Distributions (EAM) - 118067, 10

Account Location Currency Transaction Work Order Details Comments

Transaction Date	Account	Transaction Value	Item / Sub Element	Revision	Transaction Type

Work Order  Item/Sub Element  UOM

Asset Group  Revision  Quantity

Asset Number  Basis  Unit Cost

Account  Value

- Return to the Cost Details by Operation Window. Choose Detailed Estimates to display the details of the Work Order's required material and resources, and any direct items associated with the Work Order.

### Estimated Cost Details

Estimated Cost Details (EAM) - 118067, 10

**Material Cost**

Item	Required Quantity	Item Unit Cost	Total Item Cost
av-item1	10.00	150.00	1,500.00

**Resource Cost**

Resource	Usage	UOM	Resource Rate	Overhead Cost	Total Resource Cost
Res1P	10.00	HR	100.00	0.00	1,000.00

**Direct Item Cost**

Item Name	Item Description	Item Unit Cost	Quantity	Requisition Number	PO Number	Total Item Cost

**Total Estimated Cost**

Total Estimated Cost **2,500.00**

## To view cost information within Maintenance Super User:

1. Navigate to the Asset Numbers page, and query an Asset Number. See: Obtaining Asset Number Information, page 18-3.
2. Select the Asset Number, and then choose Costs.

### Costs Page

ORACLE® Asset Management

Diagnosics Home Logout Preferences Personalize Page

Home Assets Work Requests Work Orders Work Plan Stores

Capital | Rebuildable Inventory

Assets: Capital > Existing Work Requests: FL1010 > Current Organization : EM1

Asset Costs: FL1010

Work Requests Go

Asset Type Capital  
Asset Group Fork Lifts  
Asset Number FL1010  
Description Fork Lift 1010

Department W.Maint  
Category ForkLift.Electric  
Area Warehouse

Cost View Options  
+ indicates required data

\* View Estimated Costs  
Period From 02-03  
Include Child Assets  
Go

\* View Cost By Period  
Period To

Estimated Costs Including Child Assets

Export Work Order Cost Details

Period	Material (USD)	Labor (USD)	Equipment (USD)	Total (USD)
Jan-04	3,013.79	5.72	1.88	3,021.39
Feb-04	10.00	0.00	0.00	10.00
Mar-04	0.10	10.00	8.44	18.54
Apr-04	88.79	225.00	75.00	388.79
May-04	1,000.00	0.00	0.00	1,000.00
Jun-04	22.65	0.00	0.00	22.65

Cost Summary

Total Material Cost (USD) 4,135.33  
Total Labor Cost (USD) 240.72  
Total Equipment Cost (USD) 85.31  
Total Asset Maintenance Cost (USD) 4,461.36

Return To Search Work Requests Go

Home Assets Work Requests Work Orders Work Plan Stores Diagnosics Home Logout Preferences Personalize Page

3. In the Cost View Options region, you can narrow your selection criteria.

1. From the View drop down list, select the type of cost information to view. Valid values are Actual Costs, Estimated Costs, Variance Costs, and Cost Summary.

*Actual Costs:* The Actual Cost option displays the selected Asset Number's actual costs, by period, of the material and resource transactions.

**Note:** The Cost Manager process executes to provide updated, actual cost information.

*Estimated Costs:* The Estimated Costs option displays the estimated costs, by period, of the required material and resources associated with the selected Asset Number.

**Note:** The Work Order Cost Estimate Processor executes to provide updated, estimated cost information. You can also execute the Work Order Cost Estimate Processor manually via a concurrent request.

*Variance Costs:* The Variance Cost option displays the difference between the actual and estimated costs within a period.



*Cost Summary:* The Cost Summary option displays a summary of the actual, estimated, and variance cost information, associated with the Asset Number, for the specified period(s).

2. From the View Cost By drop down list, select how you would like to view your cost information. Valid values are Period and Cost Category.
  - If you select Cost Category, you can view cost information by the cost categories.
  - If you select Period, you can view cost information by periods. Optionally enter the Period From and Period To. Accounting Periods are defined within Oracle Inventory (See: Maintaining Accounting Periods, *Oracle Inventory User's Guide*).
4. Select the Include Child Assets check box to view the rolled up costs for the current Asset Number and its children. See: Defining Asset Numbers, page 2-47 to review how Asset Number hierarchies are created.
5. Choose Go to view cost element information. The information is broken down into the three cost elements: Material, Equipment, and Labor.
6. Optionally choose Export to save or export your cost information to a spreadsheet.

## Related Topics

Overview of Cost Management, *Oracle Cost Management User's Guide*

Submitting a Request, *Oracle Applications User's Guide*

## Asset Cost Rollup

You can optionally roll a child asset's costs into its parent asset, for reporting purposes.

### To view an asset hierarchy cost rollup:

1. Navigate to the Asset Numbers page.
2. Query an Asset.

## Asset Numbers

ORACLE® Asset Management

[Diagnostics](#) [Home](#) [Logout](#) [Preferences](#) [Personalize Page](#)

[Home](#) [Assets](#) [Work Requests](#) [Work Orders](#) [Work Plan](#) [Stores](#)

Capital | Rebuildable Inventory

Current Organization : **EAM**

[Save Search](#)

**Advanced Search**

Specify parameters and values to filter the data that is displayed in your results set.

☐ Search results where each must contain all values entered.

☒ Search results where each may contain any value entered.

Asset Number

Asset Group

Asset Route

Owning Department

Select Asset Number:

Select Asset Number	Description	Asset Group	Category	Area	Owning Department	Criticality
<input checked="" type="radio"/> AA Car 01		Cars				

[Save Search](#)

[Home](#) | [Assets](#) | [Work Requests](#) | [Work Orders](#) | [Work Plan](#) | [Stores](#) | [Diagnostics](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Personalize Page](#)

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3. Select the Asset to view its details.
4. Select Costs, and then choose Go.

## Asset Details

ORACLE® Asset Management

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[Home](#) [Assets](#) [Work Requests](#) [Work Orders](#) [Work Plan](#) [Stores](#)

Capital | Rebuildable Inventory

[Assets: Capital](#) >

Current Organization : **EAM**

Asset Costs: AA Car 01

Asset Type **Capital**  
Asset Group **Cars**  
Asset Number **AA Car 01**  
Description

Department  
Category  
Area

**Cost View Options**

\* indicates required data

\* View

Period From

\* View Cost By

Period To

☒ Include Child Assets

**Actual Costs**

Period	Material (USD)	Labor (USD)	Equipment (USD)	Total (USD)
Jul-04	0.00	0.00	0.00	0.00

**Cost Summary**

Total Material Cost (USD) **0.00**

Total Labor Cost (USD) **0.00**

Total Equipment Cost (USD) **0.00**

Total Asset Maintenance Cost (USD) **0.00**

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5. Select the Include Child Assets check box to roll the costs of the current asset's child assets.
6. Choose Go.

### Asset Costs

ORACLE Asset Management

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[Home](#) | **Assets** | [Work Requests](#) | [Work Orders](#) | [Work Plan](#) | [Stores](#)

**Capital** | [Rebuildable Inventory](#)

Assets: [Capital](#) >

Current Organization : **EAM**

Asset Costs: AA Car 01

Asset Type  
Asset Group  
Asset Number  
Description

**Capital**  
**Cars**  
**AA Car 01**

Department  
Category  
Area

Work Requests

Go

Cost View Options

\* indicates required data

+ View

Actual Costs

Period From

Q3-03

Period To

☒ Include Child Assets

Go

+ View Cost By

Period

Period To

Actual Costs Including Child Assets

Export

Work Order Cost Details

Period	Material (USD)	Labor (USD)	Equipment (USD)	Total (USD)
Jun-04	0.00	100.00	0.00	100.00
Jul-04	0.00	0.00	0.00	0.00

Cost Summary

Total Material Cost (USD)

0.00

Total Labor Cost (USD)

100.00

Total Equipment Cost (USD)

0.00

Total Asset Maintenance Cost (USD)

100.00

Return To Search

Work Requests

Go

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## Parent-Child Hierarchy Cost Rollup

You can optionally roll a child Work Order's costs into the parent Work Order, for reporting purposes.

### To view a parent-child hierarchy cost rollup:

1. Navigate to the Work Orders page.
2. Query a Work Order.

eAM Cost Management 6-11

## Work Orders

ORACLE® Asset Management

Home Logout Preferences Personalize Page Diagnostics

Home Assets Work Requests **Work Orders** Work Plan Stores

All | Requests

Work Orders: All >

Work Order: WO119857

Current Organization : EAM

Update Work Order

Work Order **WO119857**  
 Department **Dep1**  
 Activity  
 Scheduled Start Date **26-Apr-2004 01:58:50**  
 Project  
 Enable Material Issue Request **Yes**  
 Description **brakes not working**  
 Status **Draft**  
 Duration **0**  
 Scheduled Completion Date **26-Apr-2004 01:58:50**  
 Task  
 Work Order Attachments **None** [Add](#)

Asset Details

Asset Number **AA Car 01**  
 Asset Group **Cars**  
 Asset Type **Capital**  
 Area  
 Owning Dept

Operations Materials Resources Quality Plans Requests Purchasing **Work Relationships**

Select Work Order: [Update Dependencies](#) [Go](#) [Update Work Hierarchy](#) [Update Alternate Cost Hierarchy](#) [View Cost](#)

[Expand All](#) | [Collapse All](#)

Select Focus Work Order

		April	M
C	▼ WO119849		
C	⊕ ▼ WO119856	▶ WO119856	
C	WO119857	▶ WO119857	

▼ View All Relationships

Work Order	Description	Relation	Relation Status	Asset Type	Asset Group	Asset Number
WO119856	shaft out of order	Scheduling Parent	Valid	Capital	Cars	AA Car 01

Operations Materials Resources Quality Plans Requests Purchasing **Work Relationships**

[Return To Work Orders: All](#) [Update Work Order](#)

[Home](#) | [Assets](#) | [Work Requests](#) | [Work Orders](#) | [Work Plan](#) | [Stores](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Personalize Page](#) | [Diagnostics](#)

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3. Select the Work Relationships sub-tab to view all relationships, related to the current Work Order, in the View All Relationships region. See: Work Order Relationships, page 3-35.
4. Choose View Cost.

## Work Order Costs

ORACLE® Asset Management

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[Home](#) [Assets](#) [Work Requests](#) [Work Orders](#) [Work Plan](#) [Stores](#)

[All](#) | [Requests](#)

[Work Orders: All](#) > [Work Order: WO119857](#) >

Current Organization : **EAM**

**Work Order Costs**

+ indicates required data

+ Work Order

Period From

Go

Include Child Work Order

Period To

[Expand All](#) | [Collapse All](#)

Focus	Work Order	Asset Number	Asset Group	Asset Type	Actual Total Cost(USD)	Estimated Total Cost(USD)	Variance Total Cost(USD)	Cumulative Actual Cost(USD)	Cumulative Estimated Cost(USD)	Cumulative Variance Cost(USD)
	WO119857	AA Car 01	Cars	Capital	0	0	0	0	0	0

[Return To Work Order: WO119857](#)

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5. Select Yes from the Include Child Work Order list of values to view costs for all children rolled up to the current Work Order.
6. Choose Go.

## Alternate Cost Hierarchy Rollup

You can view parent-child Work Order hierarchy costs, rolled up to the parent level. You might want to view costs for Work Orders outside of the hierarchy network.

### To view an alternate hierarchy cost rollup:

1. Navigate to the Work Orders page.
2. Query a Work Order.

## Work Orders

ORACLE® Asset Management

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Home Assets Work Requests **Work Orders** Work Plan Stores

All | Requests

Work Orders: All >

Work Order: WO119857

Current Organization : EAM

Asset Details

Asset Number	AA Car 01
Asset Group	Cars
Asset Type	Capital
Area	
Owning Dept	

Work Order: **WO119857** Description: **brakes not working**

Department: **Dep1** Status: **Draft**

Activity: **26-Apr-2004 01:58:50** Duration: **0**

Scheduled Start Date: **26-Apr-2004 01:58:50** Scheduled Completion Date: **26-Apr-2004 01:58:50**

Project: **26-Apr-2004 01:58:50** Task: **26-Apr-2004 01:58:50**

Enable Material Issue Request: **Yes** Work Order Attachments: **None** [Add](#)

[Update Work Order](#)

Operations Materials Resources Quality Plans Requests Purchasing **Work Relationships**

Select Work Order: [Update Dependencies](#) [Go](#) [Update Work Hierarchy](#) [Update Alternate Cost Hierarchy](#) [View Cost](#)

[Expand All](#) | [Collapse All](#)

Select Focus Work Order

▼	WO119849	April	M
▼	WO119856	▶	WO119856
▼	WO119857	▶	WO119857

▼ View All Relationships

Work Order	Description	Relation	Relation Status	Asset Type	Asset Group	Asset Number
WO119856	shaft out of order	Scheduling Parent	Valid	Capital	Cars	AA Car 01

Operations Materials Resources Quality Plans Requests Purchasing **Work Relationships**

[Return To Work Orders: All](#) [Update Work Order](#)

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3. Select the Work Relationships sub-tab to view all relationships, related to the current Work Order, in the View All Relationships region. See: Work Order Relationships, page 3-35.
4. Choose Update Alternate Cost Hierarchy to view Work Order costs outside of the hierarchy network.
5. Choose Import Work Hierarchy.
6. Choose View Cost.

## Transferring Invoice Variances to Maintenance Work Orders

You can transfer variances, between purchase order price and invoice price, to a maintenance Work Order, from your user-defined adjustment account. This process (Transfer Shop Floor Invoice Variance) is available for both direct items and outside services and enables you to value your maintenance costs at the actual costs.

Transferring invoice variance tasks include the following:

- Viewing Simulated Transfer Details, page 6-15
- Transferring Invoice Variances, page 6-15

## Related Topics

Overview of Direct Item Procurement for eAM Work Orders, page 5-1

Overview of eAM Contractor Services, page 8-1

Defining WIP Accounting Classes, *Oracle Work in Process User's Guide*

## Viewing Simulated Transfer Details

You can generate the Simulate Transfer Shop Floor Invoice Variance report to display the details of each invoice variance and a summary total of the variance amount that may transfer. The report format is similar to the Shop Floor Invoice Variance Report. View this report to determine if you want to execute the variance transfer. Complete this task before you execute the Shop Floor Invoice Variance Report.

## Related Topics

Simulate Transfer Shop Floor Invoice Variance, page 20-12

## Transferring Invoice Variances

The Transfer Shop Floor Invoice Variance process transfers the invoice variance from your specific adjustment account (See: *Defining WIP Accounting Classes, Oracle Work in Process User's Guide*) to the maintenance Work Orders. This process generates account distribution entries that add the invoice variance amount back to the maintenance Work Order WIP accounts. This transfer executes for one organization, and one adjustment account at a time. For each execution, the process creates a unique batch number.

When the process completes successfully, you can generate the Shop Floor Invoice Variance Report to view your transfer details (See: *Shop Floor Invoice Variance Report*, page 20-13). Each execution completed by the transfer process is identified by a batch id number, generated by the process itself.

The accounting distribution created by the process is as follows:

### ***Account Distributions Generated***

<b>Account</b>	<b>Debit</b>	<b>Credit</b>
WIP accounting class valuation accounts	XXX	-
Invoice variance adjustment account	-	XXX

### **To execute the Transfer Shop Floor Invoice Variance process:**

1. Navigate to the Shop Floor Invoice Variance window.
2. Select Transfer Shop Floor Invoice Variance from the Name list of values.

## Report Parameters

### **Transfer Description**

Optionally enter a description for the invoice transfer.

### **Specific Work Order**

Optionally view the variance transfer details for a Specific Work Order. Maintenance Work Orders with statuses of Cancelled, Closed, and Complete - No Charges are not available.

### **IPV Item Type**

You can transfer invoice variances for:

- *Direct Shop Floor Delivery items only*
- *Outside Processing and Direct Shop Floor Delivery items*
- *Outside Processing items only*

#### **Item Range**

If you chose *Outside Processing items only* as the value for the IPV Item Type parameter, you can specify an item range for your transfer.

#### **Specific Item**

If you chose *Outside Processing items only* as the value for the IPV Item Type parameter, you can specify an item for your transfer.

#### **Category Set**

If you chose *Outside Processing items only* as the value for the IPV Item Type parameter, you can specify a Category Set for your transfer.

#### **Specific Category**

If you previously selected *Outside Processing items only* as the value for the IPV Item Type parameter and a value in the Category Set parameter, you can specify a specific category from the previously selected category set.

#### **Specific Project**

You can choose to transfer invoice variances for items associated to a specific project.

#### **Adjustment Account**

You can enter an adjustment account from which the invoice variance is transferred.

#### **Invoice Cutoff Date**

Enter a date. Approved and posted invoices through this date are included in your transfer.

3. Choose OK.
4. Choose Submit.

## **Related Topics**

Submitting a Request, *Oracle Applications User's Guide*



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# Direct Item Procurement for eAM Work Orders

This chapter covers the following topics:

- Introduction
- Overview of Direct Item Procurement for eAM Work Orders
- Enabling Direct Item Procurement
- Automatically Creating Requisitions for Direct Items
- Manually Entering Requisitions for Direct Items
- Creating Purchase Orders from Requisitions
- Manually Entering Purchase Orders for Direct Items
- eAM Direct Procurement Accounting

## Introduction

Enterprise Asset Management (eAM) Direct Item Procurement enables you to order items directly to your maintenance organization. This chapter contains the following topics:

- Overview of Direct Item Procurement for eAM Work Orders, page 5-1
- Enabling Direct Item Procurement, page 7-3
- Automatically Creating Requisitions for Direct Items, page 7-4
- Manually Entering Requisitions for Direct Items, page 7-8
- Creating Purchase Orders from Requisitions, page 7-12
- Manually Entering Purchase Orders for Direct Items, page 7-15
- eAM Direct Procurement Accounting, page 7-18

## Overview of Direct Item Procurement for eAM Work Orders

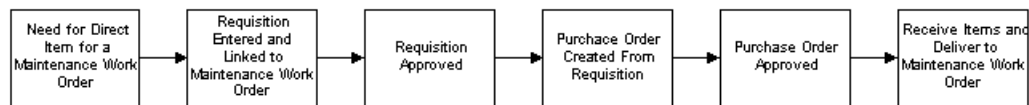
One of the most important features included in Enterprise Asset Management (eAM) is Work Management (See: Overview of eAM Work Management, page 3-2). Work Management enables you to create Work Requests when an asset is problematic. After the Work Request is approved, a Work Request can associate with a Work Order. A Work Order includes a listing of all maintenance activities performed on an asset. Material requirements for a Work Order (See: Defining Material Requirements, page 3-26)

may include stocked, non-stocked direct items, and direct items (description-based items). Stocked items are those that are either used frequently, or the criticality of short lead time to obtain replacement parts mandates that they be stocked in inventory. Non-stock direct items can be included in the internal catalog, but the decision is made to not maintain an inventory balance. These items are not transactable, not stockable, but you can procure them. Direct items are either non-stock or description-based. Non-Stock Direct Items can represent items that are not stocked in inventory, or services that need to be purchased from a supplier. Non-Stock Direct Items are not stocked in inventory but are defined in the Item Master as an inventory item, purchaseable, and purchase but not stockable (See: Inventory Attribute Group, *Oracle Inventory User's Guide*). Direct Items are contrived as "one-off", bought directly from a vendor for a specific Work Order and Operation. They are delivered directly to the Shop Floor from maintenance Work Order execution. You can add Planned Direct Items to a Work Order's Bill of Material (BOM) or an Activity BOM. Planned Direct Items must first be created in the Item Master as Non-Stockable and Purchasable inventory items (See: Non-Stock Direct Item Setup, page 2-83). A purchase requisition is optionally automatically created for these items, when the Work Order is released.

If you have Oracle iProcurement installed, all item types may be included in your internal catalog. A planner can procure Direct Items from the Maintenance Workbench (See: Using the Maintenance Workbench, page 3-51). Purchase requisitions and purchase orders of such items capture the Work Order for which they are required. If the Work Order is project related, then the project and task information is captured in the purchase requisition. You can procure Non-Stock and Description-based Direct Items, without accessing iProcurement, as well.

The following diagram illustrates the integration between Enterprise Asset Management and Procurement. First, a maintenance Work Order is created. If the Asset and/or Maintenance BOM that is associated with the asset includes Direct Items, those Direct Items are automatically part of the Work Order's material requirements. You can also manually add Direct Items (Non-Stock and Description-based) to a Work Order. When the Work Order is released, a purchasing requisition is created for the Direct Items that are included in the material requirements and that have the Auto Request Material check box selected. This check box setting defaults from the Asset and/or Maintenance BOM setup, but you can update it on the Work Order. The requisition is linked to the Work Order, and then approved. A purchase order is created from the requisition, and then approved. You can create a purchase order manually, without first creating a requisition. In both cases, the purchase order needs approval. The items are received using a standard receipt routing, and delivered to the maintenance Work Order. The cost on the Work Order records as the actual purchase order price.

**Direct Item Procurement for eAM Work Orders Process**



This section includes the following topics:

- Enabling Direct Item Procurement, page 7-3
- Automatically Creating Requisitions for Direct Items, page 7-4
- Manually Entering Requisitions for Direct Items, page 7-8

- Creating Purchase Orders from Requisitions, page 7-12
- Manually Entering Purchase Orders for Direct Items, page 7-15
- eAM Direct Procurement Accounting, page 7-18

## Enabling Direct Item Procurement

To enable direct item (both supplier catalog and non-catalog items) procurement for eAM Work Orders directly from an eAM Work Order, set the *PO: Enable Direct Delivery To Shop Floor* profile option to Yes. When this value is set to Yes, you can create an eAM-related requisition or purchase order. You can enter eAM specific information, such as Work Order and operation reference numbers, as well as identify a requisition line as having a Shop Floor destination. Requisitions are created automatically for Direct Items (Non-Stock and Description-based), after a Work Order with those Direct Items on its material requirements listing is released.

### To enable direct item procurement:

1. Navigate to the Personal Profile Values window.

#### *Personal Profile Values*

The screenshot shows a window titled "Personal Profile Values" with a table of profile options. The table has three columns: "Profile Name", "Default Value", and "User Value". The first row is highlighted and shows "PO: Enable Direct Delivery To Shop Floor" in the Profile Name column, "Yes" in the Default Value column, and "Yes" in the User Value column. There are several empty rows below it.

Profile Name	Default Value	User Value
PO: Enable Direct Delivery To Shop Floor	Yes	Yes

2. Select *PO: Enable Direct Delivery To Shop Floor* from the Profile Name list of values.
3. Select Yes from the Default Value list of values.
4. Save your work.

## Related Topics

Purchasing Profile Options, *Oracle Purchasing User's Guide*

## Automatically Creating Requisitions for Direct Items

First, a maintenance Work Order is created. If the Asset and/or Maintenance BOM that is associated with the Work Order's asset includes Direct Items, those Direct Items are automatically part of the Work Order's material requirements. You can also manually add Direct Items (Non-Stock and Description-based) to a Work Order. When the Work Order is Released, a purchasing requisition is created for the Direct Items that are included in the material requirements and that have the Auto Request Material check box selected. This check box setting defaults from the Asset and/or Maintenance BOM setup, but you can update it on the Work Order. The requisition is linked to the Work Order, and then approved. A purchase order is created from the requisition, and then approved. You can also create a purchase order manually, without first creating a requisition. In both cases, the purchase order needs approval.

### To automatically create requisitions:

1. Navigate to the Find Work Orders window.
2. Choose New.

The header information displays general information about the Asset Number and the type of work required.

3. The Work Order number is assigned, but you can update it.
4. Enter an Asset Number requiring maintenance. The Asset Group defaults (See: Defining Asset Numbers, page 2-47).
5. Select an Asset Activity. Asset Activities associated with this Asset Number are available.

**Note:** If this Work Order was previously created, you can add an Asset Activity, as long as the Work Order is at an Unreleased or Draft status, or an Asset Activity was not previously defined. If any tasks, material, or resource requirements exist, these must be deleted before adding an Asset Activity to a pre-existing Work Order.

After selecting an Asset Activity, the associated maintenance BOM (material) (See: Setting Up Maintenance Bills of Material, page 2-71) and maintenance route (resources), associated with the Activity (See: Defining Maintenance Routes, page 2-68), attach to the Work Order. After an Asset Activity is saved to a Work Order, you can no longer change or delete it.

6. Enter a WIP accounting Class code to represent the charge (expense) accounts associated with the Asset Number. This defaults from the Asset Number (See: Defining Asset Numbers, page 2-47); you can update it.
7. Enter the Status. For example, Unreleased, Released, On Hold, and Draft. Certain transactions update this status automatically, including Work Order Completion, for example (See: eAM Work Order Statuses, page 3-16).
8. Optionally select a Work Order Type. Work Order Types enable you to differentiate Work Orders, for example, Routine, Preventive, Rebuild, Emergency, or Facilities. Maintenance management can use this information to sort and monitor work activities for reporting and budgeting. Work Order Types are referenced in the Work Order. For information on how to create valid values, See: Work Order Types, page 2-31.

9. The Instance Number field tracks the instances associated with the current Work Order. This field is disabled.
10. If this is a child Work Order in a Work Order network and Parent Child is populated in the Relationship Type field, the Parent Work Order is populated in this field.
11. In the Scheduled Dates region, enter the Work Order's scheduled Start date if it is based on a forward schedule. The scheduling process uses this date as a starting point to calculate the scheduled end date and duration for allocated resources and material. If the material/resources are not available by this date, the scheduling process moves the start date forward (See: eAM Scheduling, page 2-105).
12. Enter a scheduled Completion date for backward scheduling. This date indicates the requested end by date for the work. The scheduling process uses this date as a starting point to calculate the scheduled start date and duration for allocated resources and material. If the material and resources are not available by that date, the scheduling process moves the start date backwards to ensure completion by the required end date (See: eAM Scheduling, page 2-105).
13. Within the Main tab, the Owning Department defaults from the selected Asset Number (See: Defining Asset Numbers, page 2-47). This indicates the persons or department responsible for this Asset Number.
14. Optionally select a Priority. For example, High, Medium, or Low.
15. The Shutdown Type defaults from the Activity. This helps the planner group Work Orders that may require shutdowns, so that they are planned together.
16. If the Firm check box is selected, planning and scheduling does not adjust the schedule, regardless of material or resource availability (See: Overview of Planning and Scheduling). This check box defaults as selected or cleared, depending on the Auto Firm On Release check box setting, established in the Enterprise Asset Management Parameters setup for the current organization (See: Defining eAM Parameters, page 2-8). This defaults after the Work Order is released.  
  
If the check box is selected, the end date is calculated, based on the Work Order duration. The scheduler automatically calculates the duration based on the operations (resource duration setup) on the Work Order. You can update this check box for Work Orders at Draft, Released, Unreleased, On-Hold, or Cancel statuses (See: eAM Work Order Statuses, page 3-16).
17. Optionally select the Notification Required check box.
18. Optionally select the Tagout Required check box to indicate that the Area needs to be secured for operations required to execute this Work Order. Tags are generally printed and placed on an asset, warning the plant that it is shutdown and should not be started. This check box helps the planner isolate those jobs that require a tagout.

**To store tagout documents using the Attachments feature**

19. Select the paperclip Attachments icon to attach relevant tagout documents. You can attach URL, file, or text attachments. See: Defining Work Order Documents, page 3-18.
20. The Planned check box is selected if the current Work Order was created from forecasted Work Orders (See: Preventive Maintenance Work Orders, page 3-8).
21. Optionally select the Enable Material Issue Requests check box to enable eAM to manage material availability for the current Work Order. Material is physically available to a Work Order via the material request and verification process. This

check box is selected by default if it is selected on the eAM Parameters window. This check box is disabled when the Work Order is at a Released status.

22. Optionally select the Activity tab.
  1. Optionally select an Activity Type. This code indicates the type of maintenance for this Activity and is used when defining a job or a standard job, for example, Inspection, Overhaul, Lubrication, Repair, Servicing, or Cleaning. This value defaults from the Activity (See: Defining Activities, page 2-57).
  2. Optionally select an Activity Cause to specify what situation caused this work to generate, for example, Breakdown, Vandalism, Normal Wear, or Settings. This value defaults from the Activity (See: Defining Activities, page 2-57).
  3. Optionally select an Activity Source to specify reasons Activities need execution, for example, Warranty Compliance, OSHA Compliance, or Military Specification Requirements. This value defaults from the Activity (See: Defining Activities, page 2-57).
23. Optionally select the Project tab. This tab is enabled if Project Manufacturing is installed and enabled.
  1. Optionally select a Project.
  2. Optionally select a Task.
24. You can select the Rebuild tab if this Work Order is created for a rebuildable item. See: Rebuild Work Orders, page 3-9.
25. Optionally select the Maintenance Request tab to display Service and Work Requests associated with this Work Order. You can add Service and/or Work Requests to a Work Order by selecting a Service Request and/or Request Number, respectively. Work Requests at an Awaiting Work Order status and Maintenance Type Service Requests at an Open status are available for association. You may associate multiple Work Requests to a single Work Order, and one Work Order can associate with a Service Request. You can associate a Service Request to multiple Work Orders. You can dissociate a Work/Service Request from a Work Order.
26. Select the Bill, Routing tab to select alternate, predefined BOMs and Routings. See: Setting Up Maintenance Bills of Material, page 2-71 and Defining Maintenance Routes, page 2-68.

After the alternate BOM and Routing are selected, the system uses the associated items and assigns the associated resources needed to execute the Work Order.
27. Optionally choose Operations to prepare necessary operations. These operations default from the maintenance route (See: Defining Maintenance Routes, page 2-68) associated with the current Activity, but you can update and add to them (See: Preparing Work Order Operations, page 3-21).
28. Optionally choose Materials to view or update the material requirements for this purchase order (See: Defining Material Requirements, page 3-26). When this Work Order is Released, purchase orders or requisitions are created for the material requirements' Direct Items if the Auto Request Material check box is selected (viewed by scrolling right). These items defaulted from the Maintenance BOM; they are referenced in the Direct Items region. The Supplier and Price information was established within the Bills of Material window when adding the Direct Items to the Asset and/or Maintenance BOMs. This information defaults into the Work Order.

29. Optionally choose Resources to view, add, or update the resources assigned to each operation. See: Defining Resource Requirements, page 3-31.
30. Optionally choose Relationships to manage Work Order schedules and view Work Order details. See: Work Order Relationships, page 3-35.
31. Optionally choose Asset Route to view the Asset Route associated with the current Work Order's Asset Group. You might need to perform one Activity on multiple Asset Numbers. To eliminate the possibility of creating multiple Work Orders for the same Activity, you can define Asset Routes. See: Defining Asset Routes, page 2-53.

You can choose Asset Route if an Asset Route is associated with the current Asset Number.

32. Optionally choose Costs to view the costs of Work Orders falling in the specific accounting periods, specified in the Accounting Information by Period region. Accounting Periods are defined within Oracle General Ledger. See: Defining Period Types, *Oracle General Ledger User's Guide* and Defining Calendars, *Oracle General Ledger User's Guide*.
  1. Optionally select a Work Order, then choose Value Summary to view a summary of the actual, estimated, and variance costs for labor hours, equipment hours, and material against the current Work Order.
    - *Actual Costs*: This is the accumulation of all costs for material and resource transactions for the Asset Number's associated maintenance Work Orders, based on a specified period.
    - *Estimates*: A BOM (material parts list) and routing (resources) can associate with a Work Order. When you select the Estimates tab, the estimated costs of all material and resources associated with a Work Order appear, enabling you to budget costs. Direct Items that are included in the material requirements are considered.
    - *Variances*: The difference between the actual costs recorded and estimated costs.
    - *Material*: All material and material overhead transaction costs.
    - *Labor*: All employee resource and resource overhead transaction costs.
    - *Equipment*: All material resource and resource overhead transaction costs.
  2. Optionally choose Details to view actual, estimated, and variance costs for labor hours, equipment hours, and material for specific operations of the current Work Order.
33. Save your work.

#### **To view the purchasing requisition created:**

1. Navigate to the Find Requisitions window.
2. Select the maintenance Work Order number from the Reference Num list of values.
3. Choose Find. The maintenance Work Order appears. The Source reads EAM.

### Requisition Headers Summary

Number	Source	Approval Status	Creation Date	Currency	Total	Preparer	Cancelled	
100005	WIP	Approved	09-AUG-2004 1	USD	20.00	Smith, Mr. Jonath	<input type="checkbox"/>	
100006	WIP	Approved	09-AUG-2004 1	USD	10.00	Smith, Mr. Jonath	<input type="checkbox"/>	
100007		Approved	10-AUG-2004 1	USD	1,400.00	Stock, Ms. Pat	<input type="checkbox"/>	
100008		Approved	10-AUG-2004 1	USD	10.00	Stock, Ms. Pat	<input type="checkbox"/>	
100009	WIP	Approved	13-AUG-2004 1	USD	10.00	Smith, Mr. Jonath	<input type="checkbox"/>	
100010	EAM	Approved	13-AUG-2004 1	USD	20.00	Smith, Mr. Jonath	<input type="checkbox"/>	
100011	EAM	Approved	13-AUG-2004 1	USD	0.00	Smith, Mr. Jonath	<input type="checkbox"/>	
100012	EAM	Approved	13-AUG-2004 1	USD	0.00	Stock, Ms. Pat	<input type="checkbox"/>	
100013	CTO	Approved	16-AUG-2004 1	USD	72.00	Vaidyanathan, Mi	<input type="checkbox"/>	
100014		Approved	16-AUG-2004 1	USD	1,000.00	Smith, Mr. Jonath	<input type="checkbox"/>	

**Note:** You can also create requisitions automatically using the web-based user interface, See: Work Orders, page 18-24.

## Manually Entering Requisitions for Direct Items

You can manually create requisitions for Direct Items within iProcurement or Purchasing. If you have Oracle iProcurement installed, you can access supplier catalog items directly from an eAM Work Order. If you create a requisition within iProcurement, the Work Order and operation information generates as you proceed to checkout. You can access a link to Direct Items using the Maintenance Workbench (See: Using the Maintenance Workbench, page 3-51), or within the Work Order window. You can procure Non-Stock and Description-based Direct Items, without accessing iProcurement, as well. You can also create requisitions using the web-based user interface. See: Work Orders, page 18-24.

### To enter requisitions for direct items using Oracle iProcurement:

1. Navigate to the Work Orders window.
2. Select a Work Order number (See: eAM Work Order Statuses, page 3-16).
3. Choose Find.
4. Choose Materials to view or update the material requirements for this purchase order (See: Defining Material Requirements, page 3-26). After purchase orders or requisitions related to Direct Items are created for this Work Order, they are referenced in the Direct Items region.

**Note:** Purchase orders and requisitions are not referenced within the forms application. You can reference them using the Maintenance Super User responsibility. See: Work Orders, page 18-24.



## Material Requirements Window

Material Requirements (EAM) - WO99229

**Inventory Items**

Main Quantities Supply Comment ATP

	Material	Op	Department	Date Required	Material Description
<input type="checkbox"/>	AG_RB1	10	CA-Maint	29-MAR-2004	Rebuildable item1
<input type="checkbox"/>	Electrical Switch	10	CA-Maint	29-MAR-2004	Electrical Switch
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Select All Check ATP Select Materials Direct Item Copy To Asset

**Create Direct Items**

	Op	Item Type	Item	Description	UOM	Required Qty	Purchasing Category	Need By Date	Supp
<input type="checkbox"/>	10	Non Stock	av-nonsto	Non Stock It	Ea	2	MISC.MISC	29-MAR-2004	
<input type="checkbox"/>	10	Description		Test	Ea	1	MISC.MISC	29-MAR-2004	
<input type="checkbox"/>									

- Choose Direct Item to purchase items directly from supplier and non-supplier catalogs, using Oracle iProcurement, or enter the direct items to purchase within the Create Direct Items region (See: Defining Direct Item Material Requirements, page 3-29).

## Purchasing

ORACLE Asset Management

Home Assets Work Requests Work Orders Work Plan Stores

All Requests

Work Orders: All

Work Order: wo-ditem

Update Work Order

Work Order	Department	Description	Status
wo-ditem	W-Maint		Draft

Activity	Scheduled Start Date	Duration	Scheduled Completion Date
	20-Oct-2004 01:55:32	0	20-Oct-2004 01:55:32

Enable Material Issue Request: No

Work Order Attachments: None (Add)

Operations Materials Resources Quality Plans Requests Purchasing Work Relationships

**Direct Items**

Direct Item Type	Item Description	Operation	UOM	Requisition Qty	Purchase Order Qty	Received Qty	Purchase Order	Requisition Number
No data exists.								

**Outside Processing**

Resource	Operation	Resource Seq Num	UOM	Requisition Qty	Purchase Order Qty	Received Qty	Purchase Order	Requisition Number
No data exists.								

Operations Materials Resources Quality Plans Requests Purchasing Work Relationships

Return To Work Orders: All

Update Work Order

Home Assets Work Requests Work Orders Work Plan Stores Home Logout Preferences Diagnostics

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All procured Non-Stock and/or Description-based Direct Items appear. The related requisition or purchase order numbers appear in the Direct Items region.

6. Save your work.

### To manually enter requisitions for direct items via Oracle Purchasing:

In addition to procuring Direct Items directly from a Work Order (See: Defining Direct Item Material Requirements, page 3-29), you can access Direct Item procurement functionality using Purchasing. This functionality is available if you have Enterprise Asset Management installed.

You can enter a requisition within both the forms application and Maintenance User. When entering a requisition within the forms application, this is performed directly within the Requisitions window, and not from the eAM Work Order, as in Maintenance User. See: Work Orders, page 18-24

1. Navigate to the Requisitions window.

#### Requisitions Window

Requisitions (Vision Operations) - [New]

Number: [ ] Type: Purchase Reqt Preparer: Smith, Mr. Jonathan  
 Description: Brake Lining Status: Incomplete Total: USD 10.00

Lines Source Details Details Currency

Num	Type	Item	Rev	Category	Description	UOM	C
1	Goods			060.21...	Brake Lining	EA	1

Destination Type: Shop Floor Requester: Smith, Mr. Jonathan  
 Organization: EAM Location: EAM-REDWOOD Subinventory: [ ]  
 Source: Supplier Supplier: [ ] Site: [ ]  
 Contact: [ ] Phone: [ ]

Outside Services Catalog... Distributions Approve...

2. Optionally enter a requisition Description.
3. Select the Items tab.
4. Select Goods from the item Type list of values.
5. Optionally select an Item to purchase. Items that are defined in Inventory, with the Stockable check box cleared, are available for selection. See: Inventory Attribute Group, *Oracle Inventory User's Guide*
6. Select the purchasing Category of the item you want to purchase. See: Defining Categories, *Oracle Inventory User's Guide*. You can specify labor or equipment, as well as material accounts, to charge on a Work Order by assigning the category to the requisition line. This enables you to bypass the outside processing setup if the outside resource service is a one-time situation. The purchase order can include several cost elements.

7. Enter the item's Description. This description should be meaningful because it is used to procure the item. If this item is not inventoried, this is how an internal person understands what item you are attempting to procure.
8. Select a UOM. The unit of measure qualifies the quantity you enter on the purchase order line. When you choose a line type, its default unit of measure populates this field. If you choose an item, its default unit of measure overwrites the line type default. You can change the UOM until the item is received, billed, or encumbered.
9. Enter a Quantity to purchase.
10. Select a Need-By date.
11. Select Shop Floor from the Destination Type list of values, for all direct item and non-stock item, eAM related requisitions. You can select a destination type of Shop Floor for all purchasable items that are not selected as Stockable in the Item Master (See: Defining Items, *Oracle Inventory User's Guide*).

When you select a destination type of Shop Floor, eAM recognizes this as a requirement to deliver the direct item to the maintenance Work Order.

12. The Destination Organization list of values displays those organizations where the item is non-stockable, if the Destination Type is Shop Floor.

**Note:** For information on all remaining fields on this window, See: Entering Requisition Lines, *Oracle Purchasing User's Guide*.

13. Choose Outside Services. You can access this window from the Requisition, Purchase Order, and Release windows. This is enabled if the Destination Type previously specified is Shop Floor.

**Outside Services**

Outside Processing (1) - Line 1

Job	W099229	Line	
Assembly			
<b>Operation</b>		<b>Resource</b>	
Sequence	10	Sequence	
Code		UOM	
Department	CA-Maint	Resource Qty	
Unit Type		Assembly Qty	
		Done	Cancel

14. Select a Work Order from the Job list of values. Released maintenance Work Orders are available. After you select a Work Order, any eAM project and task information associated with the Work Order is copied to the corresponding Project and Task fields, within the Project tab in the requisitions or purchase order Distributions window.

15. Select an Operation Sequence. The purchased material is associated with this operation on the current Work Order. Purchasing displays the operation Code and the Department.

16. Choose Done.

**Note:** For information on all remaining fields on the Outside Processing window, See: Entering Outside Processing Information, *Oracle Purchasing User's Guide*.

17. Save your work.

18. The requisition needs approval (See: Creating Process Definitions in Oracle Workflow Builder, *Oracle Workflow Guide*). After the requisition is approved, it appears on the eAM Work Order and is viewed in Purchasing.

## Related Topics

Entering Requisition Headers, *Oracle Purchasing User's Guide*

Entering Requisition Lines, *Oracle Purchasing User's Guide*

Entering Requisition Distributions, *Oracle Purchasing User's Guide*

## Creating Purchase Orders from Requisitions

After a requisition is created and approved, you can execute an AutoCreate process to create purchase orders.

### To create purchase orders:

1. Navigate to the Find Requisition Lines window.

**Find Requisition Lines (Vision Operations)**

Approved	<b>Yes</b>	Buyer	
Requisition	<b>6774</b>	Requester	
Emergency PO Number		Preparer	
Supplier Sourcing		Supplier List	
Supplier		Supplier Site	
Document Type		Document	
<input type="checkbox"/> Global		Negotiation Number	
<input type="checkbox"/> VMI Only		Minimum Amount	
<input type="checkbox"/> Show External Locations		Currency	
Ship-To		Rate Type	

Line	Status
------	--------

Item, Rev		
Job		
Category		
Description		
Line Type		

Clear
Find

- ## AutoCreate Documents

Choose Automatic.

### New Document

The screenshot shows the 'New Document' window with the following fields and values:

Field	Value
Global Agreement	
Document	
Release	
Supplier	23 Acme Supply
Purchasing Org	Vision Operations
RFQ Type	
Release Date	
Supplier Site	
Supplier List Name	
<b>Currency</b>	
Source	Default
Requisition	
Currency	USD
Rate Date	27-JUL-2004
Line	
Rate Type	
Rate	

Buttons: Create, Cancel

5. Select a Supplier.
6. Choose Create, and then make a note of the purchase order number created.
7. Verify that the item is of Type Goods.
8. Choose Shipments.
9. Choose Receiving Controls.
10. Select a Receipt Routing. This is the receipt routing to which you are assigning the procured items: Direct Delivery, Standard Receipt, or Inspection Required. See: Receiving Controls, Options, and Profiles, *Oracle Purchasing User's Guide*.
11. Choose OK.
12. From the Shipments window, choose Distributions. Verify that the destination Type field is populated with Shop Floor, and the Subinventory is blank.
13. Choose Outside Services. Verify the Job and Operation Sequence.

**Note:** For information on all remaining fields within the Outside Processing window, See: Entering Outside Processing Information, See: Entering Outside Processing Information, *Oracle Purchasing User's Guide*.
14. Choose Done.
15. Save your work.
16. Choose Approve.
17. Within the Approve Document window, choose OK. After the purchase order is approved, the purchase order is received within Purchasing.

## Related Topics

Entering Purchase Order Distributions, *Oracle Purchasing User's Guide*

## Manually Entering Purchase Orders for Direct Items

You can create purchase orders for direct items within Purchasing.

### To enter purchase orders for direct items via Oracle Purchasing:

1. Navigate to the Purchase Orders window.

**Purchase Orders**

Purchase Orders (Vision Operations) - [New]

PO, Rev	0	Type	Standard Purchase Order	Created	27-JUL-2004 15:50:37
Supplier	Acme Supplies	Site	TROY	Contact	Smith, Chris
Ship-To	Seattle Maintenance	Bill-To	Seattle Maintenance	Currency	USD
Buyer	Smith, Mr. Jonathan	Status	Incomplete	Total	10.00
Description					
P-Card					

Lines Price Reference Reference Documents More Agreement Temporary Labor

Num	Type	Item	Rev	Job	Category	Description	UOM	Quantity	Price
1	Goods				060.21...	Brake Liner	EA	1	10

Item Brake Liner

Catalog... Currency... Terms Shipments Approve...

2. If you did not choose automatic purchase order generation in the purchasing options (Numbering tab), enter a unique PO (purchase order) number. Otherwise, the number generates when you save your work. See: Defining Purchasing Options, *Oracle Purchasing User's Guide*. The Rev (revision) appears to the right of the number.
3. Select Standard Purchase Order from the Type list of values. You can modify the document type names in the Document Types window (See: Defining Document Types, *Oracle Purchasing User's Guide*).
4. Optionally select a Supplier. A supplier must be provided for approval.
5. Select the supplier Site. A site must be provided for approval. After the purchase order is approved, you can change the supplier site if the PO: Change Supplier Site profile option is set to Yes (See: Purchasing Profile Options, *Oracle Purchasing User's Guide*).
6. Optionally select a Contact. This is the name of the contact at the supplier site.
7. Optionally enter the Ship-To and Bill-To locations for the purchase order. If you entered a supplier site, the location values you assigned to the supplier or supplier

site default into these fields. See: Purchase Order Defaulting Rules, *Oracle Purchasing User's Guide*

8. If the Enforce Buyer Name option in the Purchasing Options is set to yes, your name appears as the Buyer. Otherwise, you can enter the name of any buyer. See: Defining Control Options, *Oracle Purchasing User's Guide*
9. Enter a Description for the purchase order. This description does not print on the purchase order, and is for internal use. If you want to add unlimited notes, use the attachments feature (See: Attaching Notes to Purchasing Documents, *Oracle Purchasing User's Guide*)
10. Select the Items tab. For new purchase order lines, Purchasing displays the next sequential line Num (number) available. You can accept this number or enter any line number that does not already exist. This number is used for all tabs in this window.
11. Select the Goods line Type. Purchasing automatically copies the corresponding defaults, based on the selected line type. See: Defining Line Types, *Oracle Purchasing User's Guide*.
12. Optionally select an Item to purchase. Items that are defined in Inventory, with the Stockable check box cleared, are available. See: Inventory Attribute Group, *Oracle Inventory User's Guide*.
13. Select the purchasing Category of the item you want to purchase. See: Defining Categories, *Oracle Inventory User's Guide*.
14. Enter the Description of the item. This description should be meaningful, because it is used to procure the item. If this item is not inventoried, this how an internal person understands what item you are attempting to procure.
15. Enter the Quantity you are purchasing.
16. Select a UOM. The unit of measure qualifies the quantity you enter on the purchase order line. When you choose a line type, its default unit of measure populates this field. If you previously chose an item, its default unit of measure overwrites the line type default. You can change the UOM until the item is received, billed, or encumbered.
17. Enter the unit Price for the item.
18. Choose Shipments to enter multiple shipments for standard and planned purchase order lines, and to edit shipments Purchasing automatically created for you (See: Entering Purchase Order Shipments, *Oracle Purchasing User's Guide*).
  1. Select the More tab.



## Shipments Window

Num	Receipt Close Tolerance (%)	Invoice Close Tolerance (%)	Match Approval Level	Invoice Match Option	Accrue at Receipt
1	0	0	3-Way	PO	<input checked="" type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

Line Num **1** Item **Brake Liner**

**Receiving Controls** **Distributions**

2. Select the Accrue at Receipt check box to indicate that the items on this purchase order line accrue at receipt.
19. Choose Distributions to enter distribution information for purchase order shipments, or to view distributions that Purchasing automatically created for you. You can enter multiple distributions per shipment line, and enter information regarding paper requisitions (See: *Entering Purchase Order Distributions, Oracle Procurement User's Guide*).
20. Choose Outside Services to associate this purchase order with a maintenance Work Order.
21. Select a maintenance Work Order from the Job list of values. After a Work Order is selected, any eAM project and task information associated with the Work Order copies to the corresponding Project and Task fields within the Project tab in the requisitions or purchase order Distributions window.
22. Select an Operation Sequence. The purchased material is associated with this operation on the current Work Order. Purchasing displays the operation Code and the Department.
23. Choose Done.
24. Save your work.
25. The purchase order needs to be approved (See: *Creating Process Definitions in Oracle Workflow Builder, Oracle Workflow Guide*). After the purchase order is approved, it will appear on the eAM Work Order, and is viewed in Purchasing.

## Related Topics

Entering Purchase Order Headers, *Oracle Purchasing User's Guide*

Entering Outside Processing Information, *Oracle Purchasing User's Guide*

Entering Purchase Order Lines, *Oracle Purchasing User's Guide*

## eAM Direct Procurement Accounting

You can charge Direct Items (Non-Stock and Description-based) to a selected appropriate Purchasing Cost Elements by selecting a Purchasing Order Category. To bypass the outside processing setup because the outside resource service is a one-time event (See: Setting Up Outside Service Processing, page 2-119), you can charge labor, equipment, and material accounts to a Work Order by assigning a category to the requisition line (See: Setting Up Purchase Order Category Associations for Direct Items, page 2-130).

For all requisition or purchase order distribution lines with a destination type of Shop Floor (not related to outside processing), the amount (quantity \* purchase price \* exchange rate) charges to the eAM Work Order Material account.

The receiving process creates the following accounting entries:

### ***Receiving Process Entries***

<b>Account</b>	<b>Debit</b>	<b>Credit</b>
Receiving Inspection	XXX	-
Accounts Payable Accrual	-	XXX

The material delivery process creates the following entries:

<b>Account</b>	<b>Debit</b>	<b>Credit</b>
Work Order Material	XXX	-
Receiving Inspection	-	XXX

---

## Contractor Services

This chapter covers the following topics:

- Introduction
- Overview of eAM Contractor Services
- Setting Up Outside Service Processing

### Introduction

Enterprise Asset Management (eAM) integrates with Outside Service Processing, enabling your maintenance environment to track outside service purchasing transaction and costing information for maintenance Work Orders. This chapter contains the following topics:

- Overview of eAM Contractor Services, page 8-1
- Setting Up Outside Service Processing, page 2-119

### Overview of eAM Contractor Services

Contractor services are defined as work services provided by an organization or person who is not an employee of your company. Contractors are paid for their work based on an agreed upon contract or agreement. For example, a contractor service may be a painting service. It is also important to associate the purchasing transactions, such as the requisition and purchase order, to the Work Order. In order for this to be executed, the appropriate steps must be completed in Purchasing and Enterprise Asset Management.

Outside Service Processing provides the functionality to create items that are contractor services, such as landscaping, include these items on a Work Order, and execute the related purchasing transactions as the Work Order is released. By creating a contract service as an Outside Service Processing item, the purchasing requisition is created when the Work Order is Released. The additional purchasing transaction, including the creation of the purchase order, the approval, and invoicing process, are then managed by Purchasing. This optional process ensures that the actual charges are applied to the Work Order.

The other option is to enable Standard Rate. This applies pre-determined standard rates, for contractor services, to the Work Order, without invoking the purchasing transaction.

Outside Processing Setup tasks for Enterprise Asset Management include the following:

- Setting Up Outside Service Processing, page 2-119

## Setting Up Outside Service Processing

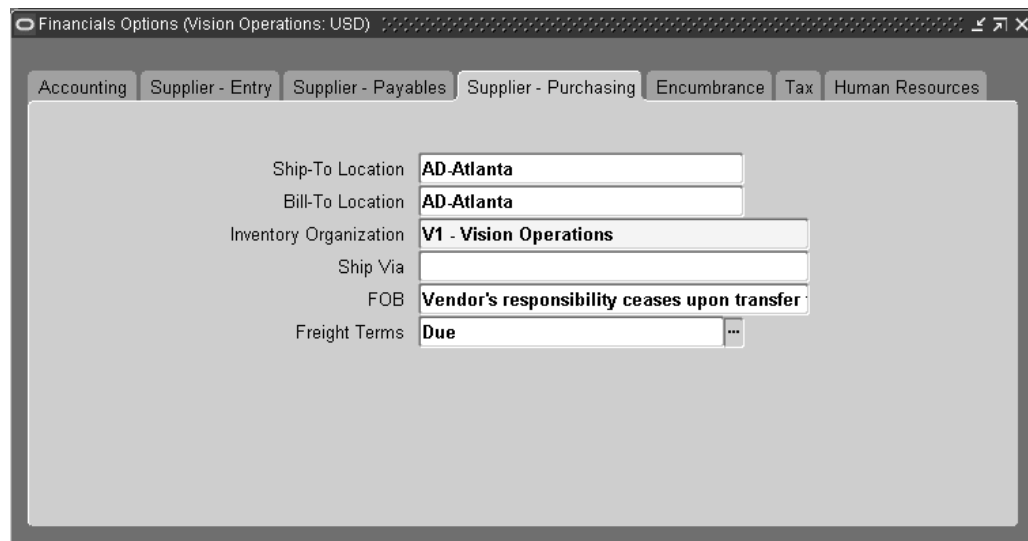
Purchasing recognizes items, while eAM recognizes resources. As a result, the contractor service item must be linked to a resource for the purchase order to be tied to the Work Order. This is associated via the Resources window. Additionally, the resource must be associated with a department. The department must specify the location where the services are to be delivered. This must be a valid location for the organization.

For each contractor service resource, you can determine whether the rate charged to the Work Order will be a standard rate or the actual amount, based on the purchase order price. This is set up within the Resources window, and may vary for each resource.

### To set up purchasing information:

1. Navigate to the Financials Options window.
2. Select the Supplier-Purchasing tab.

#### Financials Options



The screenshot shows the 'Financials Options (Vision Operations: USD)' window with the 'Supplier - Purchasing' tab selected. The window contains the following fields and values:

Field	Value
Ship-To Location	AD-Atlanta
Bill-To Location	AD-Atlanta
Inventory Organization	V1 - Vision Operations
Ship Via	
FOB	Vendor's responsibility ceases upon transfer
Freight Terms	Due

The options you define in this region, except for Inventory organization, are used as default values for the Purchasing region of the Suppliers window (See: Suppliers, *Oracle Payables User's Guide*). The supplier values default to new supplier sites for the supplier, which default to new purchasing documents for the supplier site.

3. Select Ship-To and Bill-To Locations. These are the names of the ship-to/bill-to location for the system default values. If the name you want does not appear in the list of values, use the Location window to select a new location (See: Setting Up Locations, *Using Oracle HRMS - The Fundamentals*).
4. Select an Inventory Organization. You can associate each of your purchasing operating units with one inventory item master organization. Your eAM Organization should point to this item master. When you associate your purchasing operating unit with an inventory organization, items you define in this organization are available in Purchasing. You can choose an inventory organization that uses the same set of books as your Purchasing operating unit. Do not change the inventory organization after you have already assigned one to Purchasing.

5. Optionally, select a Ship Via code. This is the freight carrier you use with suppliers. If the type of freight carrier you want is not available, use the Freight Carriers window to define a new shipping method. The value you enter is the value in the Description field of the Freight Carriers window, within Purchasing.
6. Select an FOB. If the type of FOB you want is not available, use the Oracle Purchasing Lookups window to define a new FOB.
7. Select a Freight Terms code. The freight terms for a supplier identify whether you or your supplier pay for freight charges on goods you receive. You can define new freight terms in the Oracle Purchasing Lookups window.
8. Save your work.

### To set up outside services as items:

Create an item for each outside service, such as landscaping services.

1. Navigate to the Master Item window.

**Master Item**  
Master Item (V1)

Organization: **V1** Vision Operations  
Item: **TM Rebuild**  
Description: **Truck Motor Rebuild Services** [ ... ]

Display Attributes: ☒ Master ☐ Org ☐ All

Main | Inventory | Bills ... | Asset... | Costing | Purch... | Recei... | Physi... | Gener... | MPS/M... | Lead ...

**Unit of Measure**  
Primary: **Each**  
Tracking: **Primary**  
Pricing: **Primary**  
Secondary:   
Defaulting:   
Deviation Factor +: **0**  
Deviation Factor -: **0**

**Conversions**  
☐ Standard  
☐ Item specific  
☒ Both

User Item Type: **Outside Processing**  
Item Status: **Active**

Long Description

2. Enter the item Name for the contractor service. For example, Landscape Service.
3. Select Copy From within the Tools menu.
4. Select @Outside Processing Item from the Template list of values.
5. Choose Apply.
6. Choose Done.
7. Within the Purchasing tab, ensure that the Outside Processing Item check box is selected.
8. Select the Resource Unit Type.

*Resource:* Costs are based on the resource standard rate.

9. Select a Default Buyer.
10. Enter a List Price for this contractor service.
11. Select Each for the Unit of Issue. This is the unit of measure you use to issue the item from inventory.
12. Within the Receiving tab, select Direct from the Receipt Routing list of values.
13. Save your work.
14. Select the Organization Assignment tab on the left side of the window, and then assign this item to the eAM organization.
15. Save your work.

### To link outside service items to resources

You must define outside resources and link them to outside items in order to automatically generate purchase requisitions for outside services. When you assign outside resources to a department, you also specify a usage rate or amount that determines the quantity you are requisitioning and/or charging to Work Orders.

16. Navigate to the Resources window.

**Resources**

Resources (EM1)

Resource: **TMREBUILD** Inactive On:

Description: **Truck Motor Rebuild - Outside Services**

Type: **Miscellaneous** UOM: **Ea**

Charge Type: **PO Move** Basis: **Item**

Expenditure Type:

Supply Subinventory:  Supply Locator:

☒ Outside Processing

Item: **TM Rebuild**

Truck Motor Rebuild Services

☒ Costed

Activity:  ☐ Standard Rate

Absorption Account: **01-000-2215-0000-000**

Variance Account: **01-520-5210-0000-000**

Overheads Rates

☐ Batchable

Minimum Batch Capacity:  Batching Window:

Maximum Batch Capacity:  UOM:

Batch Capacity UOM:

Competence:

Skill Level:

Qualification:

Employees Equipment Setups

17. Select Miscellaneous from the Type list of values.
18. Select a UOM. This value is the default unit of measure for all transactions, for the current resource.
19. Select the PO Receipt Charge Type.

20. Verify that the Enabled check box is enabled for outside processing.
21. Enter the outside services Item that was entered in Inventory (See: To set up outside services as items;, page 8-3), and associate it with the eAM resource.
22. Select the Costed check box to include this outside resource in your Work Order cost. When you define a resource with a charge type of PO Receipt, Cost Management automatically defaults Outside Processing as the cost element.
23. Enter an Absorption Account. You must define an absorption account for each outside resource. The absorption account defaults from the organization's receiving account, which is debited when an outside processing item is received and is subsequently credited when the item is delivered to eAM. The debit goes to the outside processing account associated with the accounting class of the Work Order when the item is delivered to eAM.
24. Optionally enter a Variance Account. You must define a purchase price variance account for each outside resource you define. This account defaults from the organization's purchase price variance account.  
  
If you select the Standard Rate check box while performing the next step, the Variance Account is mandatory.
25. Optionally select the Standard Rate check box to charge the standard, non-purchase order amount to the Work Order. Clear the Standard Rate check box to charge the Work Order with the actual purchase order amount.
  1. If you selected the Standard Rate check box, choose Rates to enter your standard rates.

#### Resource Costs

Cost Type	Description	Resource Unit Cost [ ]
AvgRates	Resource & Overhead Rates used unit	2,550.000

2. Enter a Cost Type of Value. This is dependent on the costing method defined for your eAM organization.
3. Enter a Resource Unit Cost.

4. Save your work and close the window.

**To link the outside service resource to a department:**

1. Navigate to the Departments window.

**Departments**

Departments (EM1)

Department	F-Maint	
Description	Fleet Services Maintenance	
Cost Category	Maintenance	
Class	Maint Dept	Maintenance Departments
Location	Seattle Mainte	Seattle Manufacturing Maintenance Organization
Project Expenditure Org		
Inactive On		[ ]

Rates Resources

2. Select the Department to associate with the outside service resource.
3. Select a Cost Category for this department. If this is left blank, then the costs related to this department are charged, based on the eAM parameter settings (See: Defining eAM Parameters, page 2-8).
4. Select a valid Location.
5. Choose Resources.



## Resources

Resources (EM1) - F-Maint

**Owned**

Main Planning

Resource	Description	Available 24 Hours	Share	UOM	Units	Check CTP	Group	Schedule by Instance
ATTK	Automotive Tool Kit	<input type="checkbox"/>	<input type="checkbox"/>	HR	3	<input type="checkbox"/>		<input checked="" type="checkbox"/>
Mechanic1	Fleet Services Mechanic	<input type="checkbox"/>	<input type="checkbox"/>	HR	1	<input type="checkbox"/>		<input type="checkbox"/>
RES1		<input checked="" type="checkbox"/>	<input type="checkbox"/>	HR	2	<input type="checkbox"/>		<input checked="" type="checkbox"/>
TMREBUILD	Truck Motor Rebuild - Outsid	<input type="checkbox"/>	<input type="checkbox"/>	Ea	1	<input type="checkbox"/>		<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		<input type="checkbox"/>

Instances Tolerance Fences Shifts

**Borrowed**

Resource	Description	Owning Department	UOM	Units	Check CTP	Group
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	

6. Select the outside service Resource.
7. Optionally, indicate whether this resource is Available 24 Hours a day. You cannot assign shifts to a resource that is available 24 hours a day.
8. Optionally, indicate whether this department can share this resource and capacity with other departments.
9. Enter the number of capacity Units (resource units) available for this department.
10. Save your work.

### To define WIP parameters:

1. Navigate to the Work in Process Parameters window.

## Work in Process Parameters

Work in Process Parameters (EM1)

Discrete Costing Move Trans... Backflush ... Intraoperation Outside Pr... Scheduling Mobile Serial Other

Shop Floor Status for PO Move Resources

Requisition Creation Time **At Job/Schedule Release**

**Job Roles for Notifications**

Production Scheduler

Shipping Manager

**Job Change Controls for Purchasing Documents**

Propagate Job Change to Purchasing **Automatic**

**Need-By Date Tolerance**

Days Early  Days Late

2. Select the Outside Processing tab.
3. Select a value for Requisition Creation Time.

*At Job/Schedule Release* - This enables automatic creation of a purchase order requisition, for contractor services, when the Work Order is Released.

*Manual* - Choose Manual to manually create requisitions. With this selection, requisitions are not automatically created.

*At Operation* - Oracle recommends that you do not select At Operation. Within eAM, At Operation is equivalent to selecting Manual.

4. Save your work.

## Related Topics

Supplier - Purchasing Financials Options, *Oracle Payables User's Guide*

Defining a Resource, *Oracle Bills of Material User's Guide*

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## eAM Property Manager

This chapter covers the following topics:

- Introduction
- Overview of eAM Property Manager
- Property Manager Integration

### Introduction

The eAM and Property Manager integration enables properties defined in Property Manager to import as assets in eAM. This chapter contains the following topics:

- Overview of eAM Property Manager, page 9-1
- Property Manager Integration, page 9-2

### Overview of eAM Property Manager

The eAM and Property Manager integration enables eAM assets to correspond with locations defined in Property Manager. The information transferred from Property Manager are the three-level land or building hierarchies, and the associated Location Codes within Property Manager. eAM also provides user-defined Area codes, enabling you to logically sort assets by where they are physically located. Area codes in eAM do not equal locations in Property Manager. See: Setting Up Areas, page 2-11.

A concurrent request process transfers locations defined in Property Manager into eAM assets, associating eAM assets with locations. During this process, the Organization ID, Asset Group, and the Owning Department parameters are specified. These entities are set up before the process is executed.

This seamless, one-way integration from Property Manager into eAM is invoked within the Property Manager concurrent process. The eAM and Property Manager integration includes the following topics:

- Property Manager Integration Setup, page 2-142
- Executing the Export Process
- Executing the Asset Number Interface, page 2-144
- Property Manager Integration, page 9-2

## Property Manager Integration

Property Manager can store three-level land or building hierarchies, providing a parent/child location hierarchy. eAM provides a parent/child asset hierarchy. The integration enables locations defined in Property Manager to import into eAM as Asset Numbers. The process also imports the land or building hierarchy, while respecting its current structure.

Locations are set up in Property and exported to Enterprise Asset Management (eAM) via a two-step process, enabling you to modify data before it exports to eAM. First, push the location records from Property Management to eAM. (See: Executing the Export Process). After submission of the concurrent process, the Property Management Location information is entered into the EAM Asset Interface table and are accessed via the Pending Asset Number window within eAM. You can update all relevant information, including Asset Group, Asset Number, Owning Department, and WIP Accounting Class, for this information, before submitting the interface process (See: Executing the Asset Number Interface, page 2-144). You can use this window to update the information multiple times.

You can view this integration when viewing assets. Location information imports into fields within the Define Asset Number window.

**Note:** If you make changes to locations within Property, run the export process again. You can run the export process to push location records to eAM multiple times. See: Executing the Export Process.

### To view and update assets:

1. Navigate to the Find Asset Numbers window.
2. Within the Others tab, select a Location Code. This location code was exported from Property Manager into eAM.
3. Choose Find. The Define Asset Number window appears. Notice that the asset is the same as the location code.

### Define Asset Number

Define Asset Number (EAM)

Asset Type: Capital

Asset Group: HQ BLD 300

Asset Number: WCP.0001.0001

Asset Category:

Easter Shutdown:

Main Production Others

**Fixed Asset**

Category:

Number:

**Property Management**

Location Name: 0001

Location Code: WCP.0001.0001

Location Details

Attributes Resource Usage Associate Activity

4. Optionally associate this Asset Number with an Asset Category. This is the Class and Subclass code, such as CRANE.OVERHEAD or BUILDING.FLOOR. See: Setting Up Category Codes, page 2-33.
5. Within the Main tab, optionally select a Criticality code, indicating the importance of the asset to the organization. This field is for information purposes.
6. You can optionally select a WIP Accounting Class to identify the Expense cost elements associated with the work performed, such as material, labor, and resources.
7. Optionally select the Area where this Asset Number resides. This is a user defined listing of logical areas of work. For example, North Plant, East Wing, or Area 1 (See: Setting Up Areas, page 2-11).
8. Indicate if this Asset Number is Maintainable. If the Maintainable check box is selected, you can create Work Requests, Service Requests, and Work Orders for this asset.
9. Within the Others tab, optionally enter the Fixed Asset region information if Oracle Fixed Assets is installed. This is eAM's integration with Fixed Assets.
  1. To associate the asset/location with a fixed asset, select a Category, which is a grouping of fixed assets, defined within Oracle Fixed Assets. This category is associated with a set of books, and must be the same set of books that is assigned to the current eAM organization. See: Setting Up Category Codes, page 2-33.
  2. Optionally enter the Number if Oracle Fixed Assets is installed. This represents a fixed asset number that belongs to a fixed asset category, associated with the asset.

10. The Property Management fields, Location Name, and Location Code, default from a Property Manager export process (Export Locations to Enterprise Asset Management) if Oracle Property Management is installed. These fields are disabled. The Location Code and Asset Number fields display the same number, and cannot be changed.

**Note:** Before the above information can pass from Property Manager into eAM, Asset Groups are first established. See: Defining Asset Groups, page 2-36 and Property Manager Integration Setup, page 2-142.

11. Optionally choose Location Details to view the current location's details.

#### ***Locations Inquiry***

The screenshot shows a window titled "Locations Inquiry". Inside, there is a table with the following columns: "Operating Unit", "Location Type", "Location Name", and "Location Code". The first row of the table is highlighted and contains the values "Vision Operations", "Section", "0001", and "WCP.0001.0001". Below the table, there are four buttons: "Assignments", "Section", "Parcel", and "Open".

Operating Unit	Location Type	Location Name	Location Code
Vision Operations	Section	0001	WCP.0001.0001

Assignments      Section      Parcel      Open

12. Choose Open. Location attributes are visible with Enterprise Asset Management. You can view Occupancy, Area, and Usage information.

### Section

Details	
Name	0001
Alias	.0001
Location Code	WCP.0001.0001
From	01-JAN-0001
To	

Area	
Rentable	1000
Usable	1000
Common Flag	<input type="checkbox"/>
Common	100
Assignable	900
Secondary Circulation	0
Vacant	900

Occupancy	
Maximum	100
Optimum	100
Utilized	0
Vacancy	100

Usage	
Space Type	Construction
Function Type	
Standard Type	

13. Close the window to return to the Define Asset Number window.
14. You can select Resource Usage if the fields in the Production Equipment region are populated. This enables you to view production work orders and resources associated with this equipment.
15. Optionally select Attributes to directly apply an attribute group template to this asset. See: *Setting Up Attributes*, page 2-43  
Existing, enabled attribute groups appear (See: *Setting Up Attributes*, page 2-43). These attribute templates are optional; you do not need to enter values for all existing attribute groups. From this window, you cannot generate attribute groups.
16. Optionally select Associate Activity to directly associate this Asset Number with an Activity. See: *Activity Association Templates*, page 2-42.
17. Optionally create file, URL, or text attachments to this asset by selection the paperclip Attachments icon.
18. Save your work.

### Related Topics

*Defining Asset Numbers*, page 2-47

*Properties Overview*, *Oracle Property Manager User's Guide*

*Setting Up Oracle Property Manager*, *Oracle Property Manager User's Guide*





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## Process and Discrete Manufacturing Integration

This chapter covers the following topics:

- Introduction
- Overview of the Process and Discrete Manufacturing Integration
- Viewing Resource Usage
- Production Equipment Downtime

### Introduction

Enterprise Asset Management (eAM) integrates with process and discrete manufacturing, enabling your maintenance environment to identify eAM asset relationships with production equipment. This chapter contains the following topics:

- Overview of the Process and Discrete Manufacturing Integration, page 10-1
- Viewing Resource Usage, page 10-2
- Production Equipment Downtime, page 10-5

### Overview of the Process and Discrete Manufacturing Integration

Enterprise Asset Management integrates with Process and Discrete Manufacturing, enabling your maintenance environment to identify Enterprise Asset Management asset relationships with production equipment. This feature associates an asset or many assets to the production equipment located in a discrete or process manufacturing organization. After establishing, you can view the resource usage (jobs, batches, or FPOs) emanating from production, associated with a maintainable asset. In discrete manufacturing organizations, you can view maintenance equipment downtime requirements and their affect on capacity during production planning and scheduling.

Oracle Process Manufacturing (OPM) retrieves maintenance downtime information for a resource from maintenance Work Orders. OPM loads this information into OPM's resource calendar; it is visible within Advanced Planning and Scheduling and Manufacturing Planning.

This integration includes the following topics:

- Organization Setup, page 2-136

- Associating Assets with Production Equipment, page 2-137
- Viewing Resource Usage, page 10-2
- Production Equipment Downtime, page 10-5

## Viewing Resource Usage

You can view the resource usage, associated with a specific Asset Number, created by discrete work orders, batches, or FPOs. You can view resource usage in both forms and Maintenance User applications.

### To view resource usage from the forms application:

1. Navigate to the Define Asset Number window.
2. Choose the flashlight icon (Find) to display the Find Asset Number window.
3. Find an Asset Number to view that has associated production equipment.
4. Choose Find to display the Define Asset Number window.

**Define Asset Number**

Define Asset Number (EAM)

Asset Type	Capital	
Asset Group	av-ag1	Asset Group #1
Asset Number	av-an1	Caterpillar machine
Asset Category	Maintenance Supply.Supply	Maintenance Supplies

[ - ]

Main Production Others

Production Organization EAM

Equipment Item cap-eqpt

Equipment Serial Number cap-eqp001

Attributes Resource Usage Associate Activity

5. Choose Resource Usage.

### Resource Usage

**Production Equipment**

Production Org:  Item:   
Serial Number:

**Resources**

Resource	Description	UOM	Resource Group	Department	Owning Department
DRILL		HR		BL1	BL1

**Work Order**

Work Order	Scheduled Start Date	Scheduled Completion Date	Status	Entity Type

Ok

This window enables you to view resource demand (discrete work orders, batches, or FPOs) associated with the current Asset Number. All Work Orders that use the asset as a resource appear.

6. Choose OK to return to the Define Asset Number window.

### To view resource usage from the Asset Numbers page:

You can view resource demand within Maintenance Super User.

1. Navigate to the Asset Management page, and query an Asset Number. See: Obtaining Asset Number Information, page 18-3.
2. Choose Go.
3. In the Results region, select the radio button next to your Asset Number, then select Details from the *Select Asset Number:* list of values to view associated Asset Number, Attributes, and Activity details.

## Capital | Rebuildable Inventory

[Assets: Capital](#) >

## Asset Details: HPPresario

Asset Number	<b>HPPresario</b>		
Asset Number Description	<b>HP Presario</b>		
Asset Group	<b>sj-computer</b>		
Asset Group Description	<b>computer at home</b>		
Current Org	<b>EAM</b>		
Parent Asset Number			
Parent Asset Group			
Category		Criticality	<b>High</b>
Owning Department	<b>sj-home</b>	Maintainable	<b>Yes</b>
Area		Asset Route	<b>No</b>
Accounting Class	<b>EAMWAC</b>	Equipment Serial Number	
Attachments	<b>None</b>		

## Attributes

Attribute Group	Description
No data exists.	

## Activities

Activity	Start Date	End Date	Activity Type	Activity Cause	Activity Source	Owning Department	Priority	Last Status
No data exists.								

[Return to Search](#)
[Home](#) | [Assets](#) | [Work Requests](#) | [Work Orders](#) | [Work Plan](#) | [Stores](#) | [Diagnostics](#)

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[About this Page](#)

- Optionally select View Equipment Details if the current Asset Number has associated equipment details. This link is next to the Equipment Serial Number field, and is available if there are associated equipment details. You can view all equipment details in the production organization to which this Asset Number is linked.

You can also view resource demand (Work Orders) associated with the Asset Number. This information is the integration with Process and Discrete Manufacturing.

5. Optionally select the View Resource Usage glasses icon to view all Work Orders created against the current Asset Number for the current equipment resource. This enables you to view resource demand (discrete work orders, batches, or FPOs) associated with the Asset Number. This information is eAM's integration with Process and Discrete Manufacturing.

## Production Equipment Downtime

You can view equipment downtime, associated with a specific resource, caused by maintenance Work Orders. To view resource downtime, execute the Load Production Equipment Maintenance Downtime process to load downtime information into a simulation set. Resource downtime is viewed within the Department Resource Capacity Change window.

### To generate production equipment downtime:

**Note:** If your manufacturing and maintenance organizations are separate, execute this process within the manufacturing organization.

1. Navigate to the Load Production Equipment Maintenance Downtime window.

### Load Production Equipment Maintenance Downtime

**Load Production Equipment Maintenance Downtime (EAM)**

**Run this Request...**

Name: **Load Production Equipment Maintenance Downtime**

Parameters:

Language: **American English**

**Parameters**

Simulation Set: **cap-sim** caps

Run Option: **Load Maintenance Downtime**

Include Unreleased Maintenance Orders: **Yes**

Firm Maintenance Orders Only: **No** ...

Department:

Resource:

At these Times:

Run:

Upon Completion:

Help (H) Submit OK

2. Enter the following parameters:
  - *Simulation Set*: Select a Simulation Set.
  - *Run Option*: You can optionally load or purge maintenance downtime information.
  - *Include Unreleased Maintenance Work Orders*: Select whether to include Unreleased maintenance Work Orders. Valid values are Yes and No.
  - *Firm Maintenance Work Orders Only*: Select whether to include firmed maintenance work Orders. Valid values are Yes and No.
  - *Department*: Optionally select a Department to indicate that Work Orders associated with the selected department are included. See: Defining Departments and Resources, page 2-12.
  - *Resource*: Optionally select a Resource to indicate that Work Orders associated with the selected Resource are included. See: Defining Departments and Resources, page 2-12.
3. Choose OK.
4. Choose Submit.

## Related Topics

Submitting a Request, *Oracle Applications User's Guide*





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## eAM Project Manufacturing

This chapter covers the following topics:

- Introduction
- Overview of eAM Project Manufacturing
- Project Definition
- Associating a Work Order with a Project
- Creating Requisitions or Purchase Orders
- Viewing the Requisition within the Maintenance Work Order
- Updating the Commitments for a Project
- Viewing Commitments

### Introduction

Enterprise Asset Management integrates with Project Manufacturing, enabling a seamless, integrated business solution for program management, configuration management, financial project management and reporting, project supply chain management and execution, and business intelligence. This chapter contains the following topics:

- Overview of eAM Project Manufacturing, page 11-1
- Project Definition, page 2-139
- Associating a Work Order with a Project, page 11-5
- Creating Requisitions or Purchase Orders, page 11-6
- Viewing the Requisition within the Maintenance Work Order, page 11-11
- Updating the Commitments for a Project, page 11-13
- Viewing Commitments, page 11-14

### Overview of eAM Project Manufacturing

Enterprise Asset Management supports a variety of ways to define work breakdown structures. The methods include, using third party project management systems (with on-line integration), project templates, Seiban number wizard, copy, and manual entry. Work breakdown structures are commonly needed for program management. To support financial project management and reporting, the combination of Oracle

Projects and Oracle Project Manufacturing enables budgeting, project costing and tracking, project billing, project revenue recognition, project cash forecasting, and project cost collection, including multi-currency and tax regulations.

To support project supply chain management and execution, Project Manufacturing provides functionality for project sales management, project advanced supply chain planning, project procurement, project execution, and project quality management.

The following diagram illustrates the eAM Project Manufacturing process. First, a maintenance Work Order is linked to a project or task. If a requisition or purchase order is created for that Work Order, the commitments for the Work Order's associated project or task are updated. The Project Cost Collector process (See: Project Cost Collector, *Oracle Cost Management User's Guide*) then passes the costs to the Work Order's associated project WIP accounting class accounts, rather than the WIP accounting class associated with the eAM asset or eAM organization.

#### **eAM Project Manufacturing**



This section includes the following topics:

- Project Definition, page 2-139
- Associating a Work Order with a Project, page 11-5
- Creating Requisitions or Purchase Orders, page 11-6
- Viewing the Requisition within the Maintenance Work Order, page 11-11
- Viewing Commitments, page 11-14
- Updating the Commitments for a Project, page 11-13

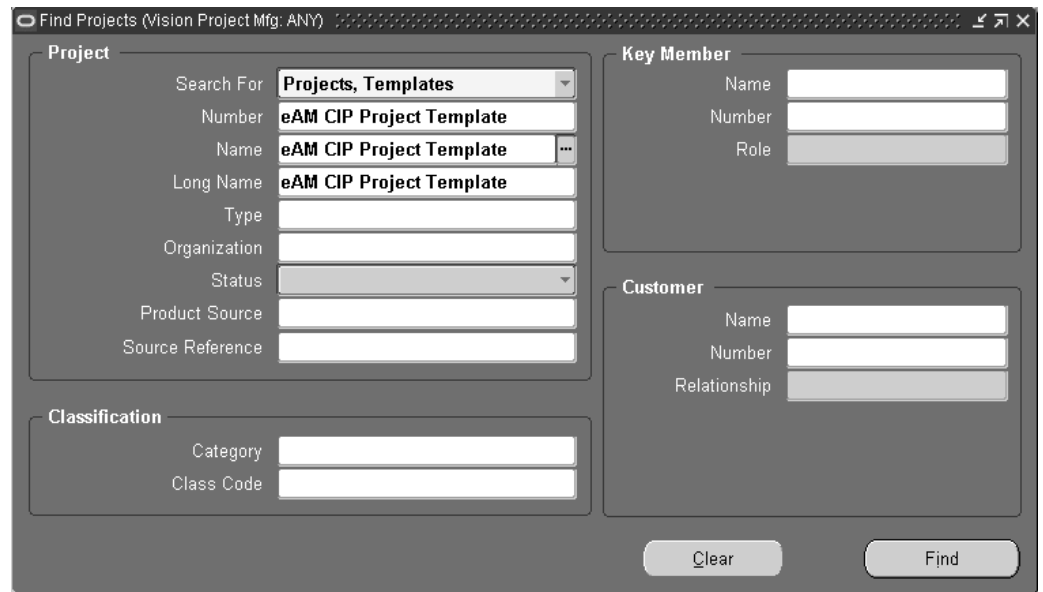
## **Project Definition**

You can inquire on an existing, or copy a new project from a template or existing project. To create a new project, See: Project Definition (Assigning Project Parameters), *Oracle Project Manufacturing User's Guide*. You need to associate this project number with a planning group, a cost group, and a default WIP accounting class.

### **To inquire on an existing project:**

1. Navigate to the Find Projects window.

### Find Projects



The 'Find Projects' dialog box is used to search for projects and templates. It contains several input fields and buttons.

**Project**

- Search For: **Projects, Templates**
- Number: **eAM CIP Project Template**
- Name: **eAM CIP Project Template**
- Long Name: **eAM CIP Project Template**
- Type:
- Organization:
- Status:
- Product Source:
- Source Reference:

**Key Member**

- Name:
- Number:
- Role:

**Customer**

- Name:
- Number:
- Relationship:

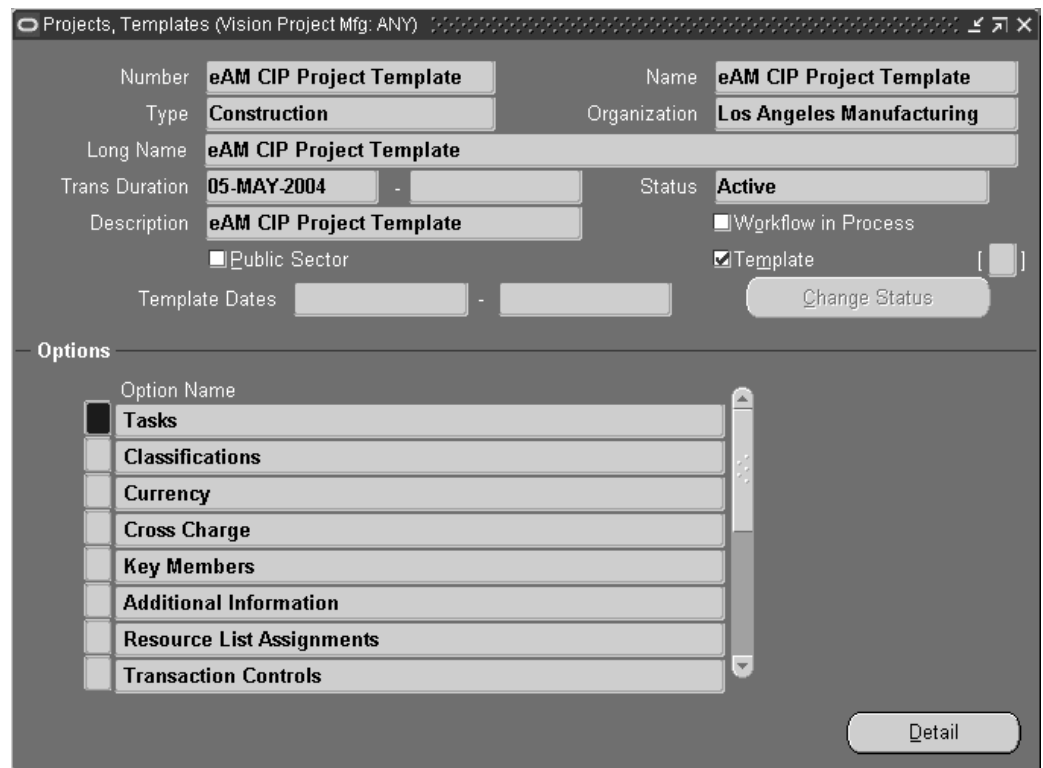
**Classification**

- Category:
- Class Code:

**Buttons:** Clear, Find

2. Select a project Number.
3. Choose Find.
4. Choose Open.

### Projects, Templates



The 'Projects, Templates' dialog box displays the details of a selected project or template. It includes fields for project information, status, and options.

**Project Information:**

- Number: **eAM CIP Project Template**
- Name: **eAM CIP Project Template**
- Type: **Construction**
- Organization: **Los Angeles Manufacturing**
- Long Name: **eAM CIP Project Template**
- Trans Duration: **05-MAY-2004**
- Status: **Active**
- Description: **eAM CIP Project Template**
- Public Sector: ☐
- Template: ☒
- Template Dates:

**Options:**

- Option Name: **Tasks**
- Classifications
- Currency
- Cross Charge
- Key Members
- Additional Information
- Resource List Assignments
- Transaction Controls

**Buttons:** Change Status, Detail

- Optionally, you can view detailed task information by choosing Detail (See: Viewing Project Details, *Oracle Project Manufacturing User's Guide*)

### To assign project parameters:

- Navigate to the Project Parameters window.

**Project Parameters**

Project Number **eAM CIP 1** Project Name **eAM CIP 1**  
 Planning Group

General Invoice Transfer Task AutoAssignment Other

— Default WIP Classes —

Organization	Planning Group	Cost Group	Standard	Maintena
<b>Los Angeles Manufacturing</b>		<b>eAM</b>		<b>Maintena</b>

WIP Classes by Task

- Select a valid Project Number.
- Optionally, select the name of the Planning Group with which you want to associate your project.

If you plan material requirements by a group of projects, rather than each individual project, you need to define a planning group and assign all projects to this planning group. If you plan material requirements by a single project, you do not need to associate the project with any planning group (See: Defining Planning Group Lookups, *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*).

- Select an eAM enabled Organization.
- Select a Cost Group.

If the current organization contains Average as its primary costing method, in the Organization Parameters window, the Cost Group field is required. The Common Cost Group and user defined cost groups are available. The list of user defined cost groups includes those cost groups with valid accounts and with Project selected in the Cost Group window (See: Project Cost Groups, *Oracle Cost Management User's Guide*). You must assign the project to its own Cost Group to keep weighted average costing at the project level.

If the current organization contains Standard as its primary costing method, in the Organization Parameters window, the Cost Group field is disabled.

6. Optionally, select a Maintenance WIP Accounting Class.

If the current organization is a Standard costing organization, you can choose any discrete WIP accounting class.

If the current organization is an Average costing organization, you can choose any WIP accounting class that has been associated with the selected cost group in the WIP Accounting Classes for Cost Groups window within Cost Management (See: Defining Project Cost Groups, *Oracle Cost Management User's Guide*).

When you create maintenance Work Orders for a project, this WIP accounting class is defaulted. It can be overwritten, but with another accounting class that is assigned to the cost group.

7. Select the Other tab.
8. Save your work.

## Related Topics

Associating a Work Order with a Project, page 11-5

Creating Purchase Orders from Requisitions, page 11-6

Updating the Commitments for a Project, page 11-13

Viewing Commitments, page 11-14

Project Definition, *Oracle Project Manufacturing User's Guide*

Assigning Project Parameters, *Oracle Project Manufacturing User's Guide*

Project Cost Groups, *Oracle Cost Management User's Guide*

Defining Project Cost Groups, *Oracle Cost Management User's Guide*

WIP Accounting Classes, *Oracle Work in Process User's Guide*

Project Manufacturing Parameters, *Oracle Project Manufacturing User's Guide*

## Associating a Work Order with a Project

You can create a maintenance Work Order for a project. The project number enables the correct cost group and default WIP accounting class to associate with the Work Order.

### Creating a project maintenance work order:

1. Navigate to the Work Order window.

## Work Order

**Work Order (EM1)**

Work Order: WO90005  
Asset Number: FL1010  
Asset Group: Fork Lifts  
Asset Activity:   
Class: MaintWAC  
Status: Draft  
Work Order Type:   
Instance Number:   
Fork Lift 1010  
Scheduled Dates  
Start: 29-MAR-2004 17:48:26  
Completion:   
Duration(hours):   
Activity Type:   
Activity Cause:   
Activity Source: [ ]

**Project** | Main | Rebuild | Work Request | Service Request | Bill, Routing

Project: AM\_PROJ\_1  
Task: 3.0  
AM\_PROJ\_1  
Production

Operations | Materials | Resources | Asset Route | Costs

2. Enter necessary work order information. See: eAM Work Orders, page 3-2.
3. Select the Project tab.
4. Select a Project. You can associate a Work Order to a project at any status of the Work Order (See: eAM Work Order Statuses, page 3-16).
5. Optionally, select a specific Task.
6. Save your work.

## Creating Requisitions or Purchase Orders

You can create a requisition or purchase order for a project, maintenance Work Order. You can update the commitments for the Work Order's associated project or task. You can create requisitions and purchase orders using either Oracle iProcurement, if you have it installed, or Oracle Purchasing.

### To create a requisition using Oracle Purchasing:

1. Navigate to the Requisitions window.

## Requisitions

Requisitions (Vision Project Mfg) - [New]

Number  Type **Purchase Reqt** Preparer **Kingston, Mr. Max**  
 Description **Crane** Status **Incomplete** Total **ANY** **1,500.00000**

Items Source Details Details Currency

Num	Type	Item	Rev	Category	Description	UOM	C
<b>1</b>	<b>Goods</b>			<b>MISC.MISC</b>	<b>Crane</b>	<b>EA</b>	<b>1</b>

Destination Type **Shop Floor** Source **Supplier**  
 Requestor **Kingston, Mr. Max** Supplier   
 Organization **SS** Site   
 Location **SS ORG LOCATION** Contact   
 Subinventory  Phone

Outside Services Catalog... Distributions Approve...

2. If automatic requisition number generation is active, you do not need to enter a requisition Number. See: Defining Numbering Options, *Oracle Purchasing User's Guide*. Otherwise, enter a unique requisition Number.
3. The Type will default as Purchase Requisition. The requisition lines are usually satisfied from an outside supplier by means of a purchase order.
4. Select the Items tab.
5. Select the line Type of Goods for the requisition line. Line types help you to define how you want to categorize your items. The default for this field is the Line Type from the Purchasing Options window (See: Defining Default Options, *Oracle Purchasing User's Guide*). If you change this field, defaults from the Line Types window appear in the Category, UOM, and Price fields (See: Defining Line Types, *Oracle Purchasing User's Guide*).
6. Select the purchasing Category.
7. Enter the item Description. This description should be detailed because this is how someone in your organization will know what is being requested.
8. Enter the Quantity you want to request for the item. You can enter decimal quantities, but you must enter a value greater than zero.
9. Enter the UOM you want to use for your requisition line. If you change this value, the quantity is rounded again if appropriate, and the price is recalculated. If you enter a line type that is amount based, Purchasing uses the unit of measure that you assign to that line type in the Line Types window (See: Defining Line Types, *Oracle Purchasing User's Guide*).
10. Enter the unit Price for the item. You can enter the price in decimal format. You must enter a value greater than or equal to zero. Unit prices are in functional currency.

11. Enter the Need By date for the requested item. This is required for planned items. You must enter a date greater than or equal to the requisition creation date.
12. The Charge Account rolls up from a single distribution after the distribution is created. If more than one distribution is created for the line, Multiple appears.
13. Select Shop Floor from the Destination Type list of values for all direct item and non-stock item, eAM related requisitions. You can select a destination type of Shop Floor for all purchasable items that are not selected as Stockable in the item master (See also: *Defining Items, Oracle Inventory User's Guide*).  
  
When you select a destination type of Shop Floor, eAM recognizes this as a requirement to deliver the direct item to the maintenance work order.
14. Enter the name Requestor (employee) who is requesting the item. You must provide a Requestor before the requisition can be approved. The default is the requisition creator.
15. Enter the Organization.
16. Enter the delivery Location for the requested items. Purchasing defaults the deliver-to location that you assign to the employee.
17. Enter the Source type. The source type determines the source of the requisitioned items. The choices you have for this field is dependent on the PO: Legal Requisition Type profile option (See: *Purchasing Profile Options, Oracle Purchasing User's Guide*).
  - For the Supplier source type, enter the suggested Supplier, Supplier Site, Contact, and Phone.
18. Choose Outside Services to select the work order you previously created.

### Outside Processing

The screenshot shows a window titled "Outside Processing (102) - Line 1". It contains several input fields and buttons:

- Job:** A text field containing "AM\_PJM\_WO\_2" with a dropdown arrow.
- Line:** A text field.
- Assembly:** A text field.
- Operation:** A group box containing:
  - Sequence:** A text field containing "10".
  - Code:** A text field.
  - Department:** A text field containing "MAINTNANCE".
- Resource:** A group box containing:
  - Sequence:** A text field.
  - UOM:** A text field.
  - Resource Qty:** A text field.
- Unit Type:** A text field.
- Assembly Qty:** A text field.
- Buttons:** "Done" and "Cancel" buttons at the bottom right.

1. Select the maintenance project work order, you previously created, from the Job list of values.
2. Select a specific Operation Sequence from the Sequence list of values. This enables you to procure directly to the operation on the maintenance work order. The Department will default from the department associated with the work order selected.



3. Choose Done.
19. Select a requisition line number, then choose Distributions to associate project and task information with that requisition line. You can charge the cost of this requisition line to multiple Accounting Flexfields or update the default values you provided in the Requisition Preferences window (See: Entering Requisition Preferences, *Oracle Purchasing User's Guide* and Entering Requisition Distributions, *Oracle Purchasing User's Guide*).
1. Select the Accounts tab.

### Distributions (Accounts tab)

Num	Quantity	Charge Account	Recovery Rate	GL Date	Budget Account
1	10	101.0000.404.111000.0000.000			

**Account Description**

Charge	Vision Project Manufactur.No Locatio	Budget	
Accrual	Vision Project Manufactur.No Locatio	Variance	Vision Project Manufactur.No Locatio

- Enter the Quantity you want to distribute. Purchasing displays the quantity you have not yet assigned to an Accounting Flexfield. Multiple distribution quantities must total to the requisition line quantity.
- The Charge Account will default from the WIP accounting class of the cost group, associated with the project. Purchasing uses the Account Generator to create the following accounts for each distribution:
  - *Accrual*: AP accrual account
  - *Variance*: invoice price variance account
  - If you are using encumbrance control (See: Financials Options, *Oracle Payables User's Guide*), Purchasing also creates the following account for each distribution:
    - *Budget*: encumbrance budget account
- Change or accept the default Recovery Rate for taxable items. The recovery rate is the percentage of tax your organization can reclaim for credit. This rate defaults in based on the Tax Code on the line in the Requisitions window and the setup in the Financial Options window (See also: Recoverable Tax, *Oracle Payables User's Guide*).
- If you are using encumbrance control for requisitions (See: Financials Options, *Oracle Payables User's Guide*), enter the GL Date that you want to use to reserve funds.

- Save your work.
2. Select the Project tab. Oracle Project Manufacturing must be installed with the Enable Project References check box selected in the Project Manufacturing Parameters window (See also: Project Manufacturing Parameters, *Oracle Project Manufacturing User's Guide*).

### **Distributions (Project tab)**

The screenshot shows the 'Distributions (Project tab)' window. It has a title bar 'Distributions (Vision Project Mfg) - [New]'. Inside, there are two tabs: 'Accounts' and 'Project'. The 'Project' tab is active. Below the tabs is a table with the following columns: Num, Project, Task, Award, Type, Org, and D. The first row is populated with '1', 'AM\_PROJ\_1', '2.0', and empty fields for Award, Type, Org, and D. Below the table is a section titled 'Account Description' with fields for Charge, Accrual, Budget, and Variance, all containing the text 'Vision Project Manufactur.No Locatio'.

Num	Project	Task	Award	Type	Org	D
1	AM_PROJ_1	2.0				

**Account Description**

Charge	Vision Project Manufactur.No Locatio	Budget	
Accrual	Vision Project Manufactur.No Locatio	Variance	Vision Project Manufactur.No Locatio

3. Select the Project.
4. Select a Task.
20. Save your work.
21. Choose Approve to submit the requisition for approval.

### Approve Document

The screenshot shows a window titled "Approve Document (Vision Project Mfg) - 4254". Inside the window, there are several controls: a checked checkbox labeled "Submit for Approval", an unchecked checkbox labeled "Forward", a text field labeled "Forward From" with a dropdown arrow, a text field labeled "Note" with a dropdown arrow, and an unchecked checkbox labeled "Print". At the bottom of the window are "OK" and "Cancel" buttons. A smaller "Note" dialog box is overlaid on top of the main window. The dialog box has a title bar "Note" and a close button. It contains a clipboard icon and the text: "Document has been submitted for Approval. To determine the next approver or the action taken please navigate to the Action History window from the Summary form." There is an "OK" button in the bottom right corner of the dialog box.

22. Choose OK.

23. Choose OK.

## Related Topics

Entering Requisition Headers, *Oracle Purchasing User's Guide*

Entering Requisition Lines, *Oracle Purchasing User's Guide*

Requisitions, *Oracle iProcurement Implementation Guide*

Setting Up Project Manufacturing Costing, *Oracle Cost Management User's Guide*

## Viewing the Requisition within the Maintenance Work Order

After the purchase requisition is created and associated with a maintenance Work Order, the requisition appears on the maintenance Work Order.

### To view purchase requisition information on a maintenance work order:

1. Navigate to the Find Work Orders window, and select the project, maintenance Work Order number, you previously created.
2. Choose Find.

## Work Orders

Work Order (EM1)

Work Order	WO90005	
Asset Number	FL1010	Fork Lift 1010
Asset Group	Fork Lifts	
Asset Activity		
Class	MaintWAC	
Status	Draft	
Work Order Type		
Instance Number		

**Scheduled Dates**

Start	29-MAR-2004 17:48:26
Completion	
Duration(hours)	

Activity Type

Activity Cause

Activity Source  [ ]

Main Project Rebuild Work Request Service Request Bill, Routing

Project AM\_PROJ\_1 AM\_PROJ\_1

Task 3.0 Production

Operations Materials Resources Asset Route Costs

- Choose Materials to display the requisition created in the Material Requirements window.

## Material Requirements

Material Requirements (EM1) - WO90005

**Inventory Items**

Main Quantities Supply Comment ATP

Material

☐ ☐ ☐ ☐ ☐ ☐

Select All Check ATP Select Materials Direct Item Copy To Asset

**Direct Items**

Operation	Requisition Number	PO Number	Item Description	UOM	Quantity Ordered
10	4250	30064	CNC Machine for Drill	EA	10
10	4251		Crane	EA	20
10	4252		Crane	EA	10

The requisition number appears in the Direct Items region. After a purchase order is created from this requisition, the PO Number field populates with that related purchase order number.

## Updating the Commitments for a Project

After the requisition is created and approved, the project's accounting commitments can be updated. This is performed by executing the Refresh Project Summary Amounts concurrent process. This process is normally set up to automatically execute, periodically.

### To update project commitments:

1. Navigate to the Find Requests window using the Project Manufacturing responsibility. Choose Submit a New Request.
2. Choose OK to run a Single Request.

#### Submit Request

The screenshot shows the 'Submit Request' dialog box. The 'Run this Request...' section has 'Name' set to 'PRC: Refresh Project Summary Amounts' and 'Language' set to 'American English'. The 'At these Times...' section has 'As Soon as' selected. The 'Upon Completion...' section has 'Save all C' checked, 'Notify' set to 'noprint', and 'Print to' set to 'noprint'. The 'Parameters' sub-dialog is open, showing 'From Project Number' as 'AM\_PROJ\_1', 'To Project Number' as an empty field, and 'Through Date' as an empty field. The 'Submit Request' dialog has buttons for 'Copy...', 'Languages...', 'Help (B)', 'Submit', and 'Cancel'. The 'Parameters' dialog has buttons for 'OK', 'Cancel', 'Clear', and 'Help'.

3. Select PRC: Refresh Project Summary Amounts from the Name list of values.
4. Enter the following parameters:
  1. Optionally, enter a From and To Project Number to execute the process over a range of projects.
  2. Optionally, enter a Through Date to narrow the data selection based on a specific end date.
5. Choose OK.
6. Choose Submit.

## Related Topics

Submitting a Request, *Oracle Applications User's Guide*

## Viewing Commitments

You can view commitments for specific projects. After the Refresh Project Summary Amounts process executes (See: Updating the Commitments for a Project, page 11-13), the commitment amounts for your project increase.

### To view commitments for a project:

1. Navigate to the Find Project Status window.

#### ***Find Project Status***

The screenshot shows the 'Find Project Status' window. The title bar reads 'Find Project Status (Vision Project Mfg: ANY)'. The window is divided into several sections:

- Project**: Contains fields for Number (AM\_PROJ\_1), Name (AM\_PROJ\_1), Type, Organization, Status (a dropdown menu), Product Source, and Source Reference.
- Classification**: Contains fields for Category and Class Code.
- Key Member**: Contains fields for Name, Number, and Role.
- Customer**: Contains fields for Name, Number, and Relationship.

At the bottom right of the window, there are two buttons: 'Clear' and 'Find'.

2. Select your project Number.
3. Choose Find.

### Project Status

Project Status (Vision Project Mfg: ANY)

Current Period: JUL-W4-02

Project	Project Name	Ovr Bgt	ITD - Rev Bgt	ITD - Act Rev	ITD - Cst Bgt	ITD - Act
AM_PROJ_1	AM_PROJ_1		0	0	2663419	

Navigation buttons: Totals, Events, Invoices, Commitments, Project, Resource Status, Task Status

This window displays the commitments by a specific project number. The Commit Amt (commitment amount) field has increased in value in comparison to before you entered the requisition.

4. Optionally, choose Totals to add up commitment totals for multiple projects.
5. Choose Commitments, and then choose Find to view commitment details for the current project. All requisitions and purchase orders associated with the current project appear.

### Commitment Details

Commitment Details (Vision Project Mfg: ANY) - AM\_PROJ\_1

Supplier Name	Commitment Date	Commitment Type	Commitment Number	Quantity	UOM
Advanced Netw	30-JUL-2002	Requisition	4251	20	EA
Advanced Netw	30-JUL-2002	Requisition	4252	10	EA
	29-JUL-2002	Purchase Orders	30065	10	EA

- The Commitment Number is the requisition or purchase order number. After a purchase order has been created from a requisition, the Commitment Number field value changes from the requisition number to the purchase order number.
  - The Project Raw Cost is the cost of the individual requisition or purchase order. The Project Raw Costs are added together to obtain the total commitment amount for the project.
6. Close this window, and then choose Task Status to display commitment information at the task level. All tasks associated with the current project appear.

### Task Status

Task Status (Vision Project Mfg: ANY) - AM\_PROJ\_1

Task	Task Name	Ovr Bgt	ITD - Rev Bgt	ITD - Act Rev	ITD - Cst Bgt
1.0	Engineering D		0	0	0
2.0	Prototype	*	0	0	0
3.0	Production		0	0	2663419
4.0	Shipping	*	0	0	0
5.0	Installation		0	0	0

Events Commitments Actuals Task **Resource Status**

7. Select a Task, then choose Commitments.
8. Choose Find to view the commitment details for the specific task.



### Commitment Details

Commitment Details (Vision Project Mfg: ANY) - AM_PROJ_1, 3.0					
Supplier Name	Commitment Date	Commitment Type	Commitment Number	Quantity	UOM
Advanced Netw	30-JUL-2002	Requisition	4252	10	EA

### Related Topics

Viewing Project Details, *Oracle Project Manufacturing User's Guide*

Setting Up Project Manufacturing Costing, *Oracle Cost Management User's Guide*

Project Cost Collector, *Oracle Cost Management User's Guide*



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## Integration with Oracle Time and Labor

This chapter covers the following topics:

- Introduction
- Integration with Oracle Time and Labor Overview
- Setting Up the Integration
- Time and Expenses
- Entering Timecard Information
- Extracting Information to Enterprise Asset Management
- Executing the Cost Manager Process

### Introduction

This chapter provides the necessary information to set up and use the integration between Oracle Enterprise Asset Management and Oracle Time and Labor.

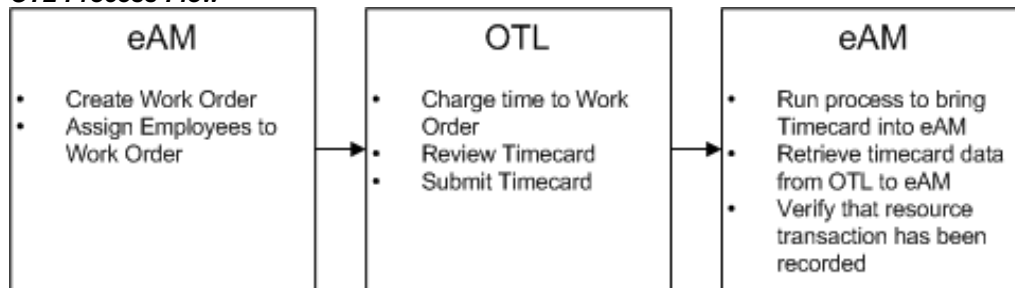
### Integration with Oracle Time and Labor Overview

Oracle Time and Labor (OTL) is the repository in which time is entered by employees working in a particular organization. Employees working on Oracle Enterprise Asset Management (eAM) work orders enter their time using OTL Self-Service. Information collected is stored in OTL Time Store, and is composed of a series of business rules and processes. eAM extracts information from the Time Store and charges eAM work orders for the time spent by employees that work on them.

There are multiple steps within the integration flow. First, timecard information is entered for a specific Work Order, within Oracle Time Store (a piece of Oracle Time and Labor). That information is then extracted from Oracle Time Store to Oracle Enterprise Asset Management. This extraction dynamically creates a resource transaction within Oracle Enterprise Asset Management. Finally, the Cost Manager process is executed. This process charges the resource transaction. After this process executes, you can view the actual costs for the period that you charged, within the Work Order.

The process is as follows:

#### OTL Process Flow



This chapter contains the following topics:

- Setting Up the Integration, page 12-2
- Time and Expenses

## Setting Up the Integration

There are two required setup procedures for this integration. The first is to establish employees needing to use this functionality as Persons within Oracle Human Resources (See: *Oracle Human Resources User's Guide*). Once established, those Persons are assigned to respective Users, within Enterprise Asset Management. The second setup procedure consists of creating Preference Values, and then linking those values to eligibility criteria.

This section contains the following topics:

- Defining Persons as Users, page 2-149
- Creating Eligibility Criteria, page 2-150

## Time and Expenses

There are multiple steps within the integration flow. First, timecard information is entered for a specific Work Order, within Oracle Time Store (a piece of Oracle Time and Labor). That information is then extracted from Oracle Time Store to Oracle Enterprise Asset Management. This extraction dynamically creates a resource transaction within Oracle Enterprise Asset Management. Finally, the Cost Manager process is executed. This process charges the resource transaction. After this process executes, you can view the actual costs for the period that you charged, within the Work Order.

This section includes the following topics:

- Entering Timecard Information, page 12-2
- Extracting Information to Enterprise Asset Management
- Executing the Cost Manager Process, page 12-4

## Entering Timecard Information

You can enter timecard information and expenses to a work order. When you enter time on a Work Order, the information is stored in Oracle Time Store, a piece of Oracle Time and Labor (OTL). Oracle Enterprise Asset Management (eAM) extracts this information and applies it to the appropriate Work Order.

**To enter timecard information:**

1. Navigate to the Timecard. All timecards that the current user has entered and submitted appear.
2. Select a Period. The current period defaults.

**Note:** You cannot submit time for a future period.

3. Choose GO.
4. Select a Work Order. Work Orders with a status of Released or Complete, and that have operations assigned to a department that the current user (you) is assigned to, appear. If you are not assigned to a Work Order's operation but are a resource associated to the department on the Work Order's operation, you can see the Work Order in the list of values. After you charge time and submit the timecard, and the retrieval process is executed, you are assigned to the Work Order's operation.
5. The Asset Number associated with the current Work Order defaults in the Asset Number field.
6. Select an Operation. Operations associated with the current Work Order are available.
7. Select a Resource. Resources associated with the current operation are available.
8. Optionally, select a Charge Department. For example, if the current resource is borrowed, you might want to charge the department that owns the resource. The value defaults with the current operation's assigned department.
9. Use the remaining date fields to enter your time in hours.
10. Optionally, choose Calculate to view the Total hours calculated for both the period, and specific days.
11. Optionally, to quickly remove information entered, choose Delete.
12. Optionally, choose Save For Later.

For example, you might need to work again on Friday. Save For Later enables you to do this. If this is chosen, the Timecard is given a Working status. Oracle Enterprise Asset Management cannot extract the information, within timecards with a Working status, from Oracle Time and Labor.
13. When you are ready to submit the current timecard, choose Review.
14. To submit the current timecard, choose Submit. The current timecard has a Submitted status.
15. Optionally, choose Return to Activities to view your timecards. All timecards that are at Working and Submitted statuses appear.
16. Optionally, select the Update icon to make changes to the current timecard.
17. Optionally, select the Delete icon to delete a specific timecard.
18. Optionally, select the Details icon to review the current timecard information.

## Extracting Information to Enterprise Asset Management

You can extract all timecard information at a Submitted status from Oracle Time and Labor (OTL) to Oracle Enterprise Asset Management (eAM). A concurrent process

executes in the background and performs time charge extractions. After extracted, a resource transaction dynamically generates within eAM. Most organizations set this process to periodically execute, automatically.

### To extract information from OTL to eAM:

1. Navigate to the Submit Request window.

**Retrieve Timecard Data from OTL to EAM**

EAM\_REPORTS (EM1)

**Run this Request...**

Copy...

Name: Retrieve Timecard Data from OTL to EAM

Parameters:

Language: American English Languages...

**At these Times...**

Run the Job: As Soon as Possible Schedule...

**Upon Completion...**

☒ Save all Output Files

Notify:

Print to: adsprinter Options...

Help (H) Submit Cancel

2. Select Retrieve Timecard Data from OTL to EAM.
3. A range of dates must be entered in the Parameters window to specify information to extract from OTL.

**Note:** The decision to extract timecard information once is defined in OTL preferences. By default, the preference is set to NO. The US OTL Administrator can change this preference to YES in the OTL Preferences window (for example, a timecard is submitted with erroneous charges).

4. Choose OK.
5. Choose Submit. A resource transaction has dynamically created in eAM. The timecard information is now in the Resource Transaction Interface table.
6. Choose No to return to the menu.

## Executing the Cost Manager Process

Finally, you need to execute the Cost Manager process. Most organizations set this process to periodically execute, automatically. This process charges the resource

transaction. After this process runs, you can see the actual costs for the period that you charged, within the Work Order.

**Note:** You need to set up the Cost Manager Interface Manager to execute in the background, before executing the Cost Manager process. See: Windows and Navigation Paths, page A-1 for information on how to access this process.

### To execute the Cost Manager process:

1. Navigate to the Submit Request window.
2. Select Cost Manager.
3. Choose Submit. The previously created resource transaction is now charged, and you can view the actual resource costs within the Work Order that the timecard was initially charged to; the information exists in the cost tables. To view the resource cost information from within the Work Order, See: Viewing Cost Information, page 6-3.

#### Cost Manager Process

**Submit Request**

Run this Request...

Name: **Cost Manager**

Parameters:

Language: **American English**

Copy...

At these Times...

Run the Job: **As Soon as Possible**

Upon Completion...

☒ Save all Output Files

Notify:

Print to: **adsprinter**

Help (H)

Submit

Cancel

Decision: Request submitted. (Request ID = 2525006) Submit another request?

Yes No

4. Choose No to return to the menu.





This chapter covers the following topics:

- Introduction
- Quality Setup
- Using eAM Quality
- Adding Collection Plan Attachments
- Triggering a Work Request
- Triggering a Work Order
- Entering Quality Results

## Introduction

eAM integrates with Quality, enabling you to collect quality results on your assets. If an asset is not up to the required standards, a Work Request can automatically generate. This chapter contains the following topics:

- Quality Setup, page 13-1
- Using eAM Quality, page 13-2
- Adding Collection Plan Attachments, page 13-2
- Triggering a Work Request, page 13-4
- Triggering a Work Order, page 13-6
- Entering Quality Results, page 13-9

## Quality Setup

A maintenance Work Order transitions through various steps in its lifecycle (See: eAM Work Order Statuses, page 3-16). One of the steps in the lifecycle is Completion. Certain quality plans might apply to the transaction, depending on the quality plan's setup and its association to transactions and triggers. A list of quality collection plans that applies to the completion transaction appears during the completion process. If a quality plan is specified as mandatory, results are entered before the transaction can finish. Otherwise, results entry is optional or can defer.

While creating a collection plan, you have the option of adding collection triggers to the plan. Triggers are restrictions that you define for a collection plan. For example, Work

Orders for assets that belong to the TRUCK Asset Group require quality results entry for the collection plan. Data collection is initiated if all collection trigger conditions are satisfied.

Quality Setup tasks for Enterprise Asset Management include the following:

- Creating eAM Collection Elements, page 2-110
- Creating eAM Quality Collection Plans, page 2-113
- Creating eAM Quality Collection Plans for a Supplier, page 2-117

## Related Topics

Creating eAM Quality Collection Plans, page 2-113

Creating Collection Elements, page 2-110

Creating eAM Quality Collection Plans for a Supplier, page 2-117

## Using eAM Quality

You can attach illustrative or explanatory files in the form of text, images, word processing documents, spreadsheets, video, graphics, OLE objects, and so on, to collection plans and specifications.

For each collection element, you can specify that Quality initiates an action based on the quality data that you collect. The condition that you specify and the resulting action comprise an Action Rule. Action Rules are evaluated and executed during the quality data collection process. For example, eAM enables you to specify that a Work Request or a Work Order is created automatically, based on certain conditions of the asset, determined by the quality data collected. The Action Rule is defined within the collection plan definition.

This section includes the following topics:

- Adding Collection Plan Attachments, page 13-2
- Triggering a Work Request, page 13-4
- Triggering a Work Order, page 13-6
- Entering Quality Results, page 13-9

## Adding Collection Plan Attachments

You can attach illustrative or explanatory files in the form of text, images, word processing documents, spreadsheets, video, graphics, OLE objects, and so on, to collection plans and specifications. You can also attach files to quality results, as you enter them.

You can view collection plan attachments as you enter, view, and update quality results. You can view specification attachments as you enter quality results. You can view quality results line attachments as you update and view quality results. See *Viewing Attachments Associated with Quality Results, Oracle Quality User's Guide*.

### To add collection plan attachments:

1. Navigate to the Collection Plans or Specifications (See: Overview of Specifications, *Oracle Quality User's Guide*) window. See: Creating eAM Quality Collection Plans, page 2-113 and Defining Specifications, *Oracle Quality User's Guide*.

**Note:** You must save the collection plan or specification before you can add an attachment to it.

2. Choose the Attachments icon or choose attachments from the View menu. The Attachments window appears.

**Attachments**

Attachments - EAM PICKUP BRAKES

Main Source

Seq	Category	Description	Data Type	May Be Changed
10	Miscellaneous		File	<input checked="" type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

Entity Name: Quality Collection Plans

Magnification 100%

Open Document...

☐ Include Related Documents

Document Catalog...

### To add attachments to quality results lines:

1. Navigate to the Enter Quality Results window. See: Entering Quality Results Directly, *Oracle Quality User's Guide*.
2. Select a quality results line.
3. Choose the Attachments icon or choose attachments from the View menu. The Attachments window appears.

## Related Topics

Working With Attachments, *Oracle Applications User's Guide*

Attachments for Collection Plans, Specifications, and Results Lines, *Oracle Quality User's Guide*

## Triggering a Work Request

For each collection element, you can specify that Quality initiates an action based on the quality data that you collect. The condition that you specify and the resulting action comprise an Action Rule. Action Rules are evaluated and executed during the quality data collection process. For example, eAM enables you to specify that a Work Request is created automatically, based on certain conditions of the asset, determined by the quality data collected. The Action Rule is defined within the collection plan definition.

A Work Request is used to request work on an asset. A Work Request is not a Work Order, but is referenced by the Work Order that is ultimately created because of the Work Request.

### To set up work request triggers:

1. Navigate to the Collection Plans window.

**Collection Plans**  
Collection Plans (EM1)

Collection Plan: **FORK LIFT FAILURE ANALYSIS** Views...

Description: **Fork Lift Failure Analysis**

Effective: **13-NOV-2002** -

Plan Type: **Failure** **Failure Analysis** [ ]

Copy Elements... Transactions Specifications...

**Quality Collection Elements**

Name	Seq	Prompt	Mandatory	Enabled	Read-Only	Displayed	[ ]
<input checked="" type="checkbox"/> <b>Fork Lift Failure</b>	<b>10</b>	<b>Failure</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> <b>Fork Lift Failure Cause</b>	<b>20</b>	<b>Cause</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> <b>Fork Lift Failure Remedy</b>	<b>30</b>	<b>Remedy</b>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> <b>Fork Lift Failure Comment</b>	<b>40</b>	<b>Comment</b>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Valges Actions

2. Select a valid Collection Plan. To create a new collection plan, See: Creating Collection Plans, *Oracle Quality User's Guide*.
3. In the Quality Collection Elements region, select the collection element to create an action rule for. Choose Actions.

## Quality Actions

Quality Actions (EAM) - EAM PICKUP BRAKES, Asset Number

**Action Rules**

Seq	Element	Condition	Value	Spec Limit	From	To
10	Asset Number	equals (=)	<input checked="" type="radio"/>	<input checked="" type="radio"/>	av-rsn50	
			<input type="radio"/>	<input type="radio"/>		
			<input type="radio"/>	<input type="radio"/>		

Defaults...

**Actions this Rule Invokes**

- ☒ Create a work request

**Action Details**

Message to Display or Log for this Action

- In the Action Rules region, enter the Sequence number for the action rule. See: Action Rule Sequencing, *Oracle Quality User's Guide*.

The sequence number establishes the order in which action rules are evaluated as data is collected. The sequence number can be from 0 to 99999.

- Select the Condition that must be met to invoke the action. For example, when the brake pad thickness wears to less than .2, a Work Request is automatically created. See: Query Operators, *Oracle Quality User's Guide*.

- Choose either Value or Spec Limit to specify the evaluation method.

*Value:* If you choose Value, as quality data is collected, the action rule is evaluated using the results value and the value entered. If you have defined a list of values for the collection element, you must choose a value from this list. If you have not defined a list of values for the collection element, you can enter any value.

*Spec Limit:* If you choose Spec Limit, as quality data is collected, the action rule is evaluated using the quality results value and either the specification limit target value (collection element level), the upper or lower user-defined range limits, or the upper or lower specification range limits. Specification limits are defined at the collection element level.

Spec Limits can be used to define action rules that evaluate numeric results.

- If the selected Condition requires a range of values, enter both the From and To value. If the selected Condition requires a single value, enter the From value.

**Note:** Some conditions (for example, is entered and is empty) do not require values.

If you have chosen the Values, and a list of values has been defined for the collection element, you can select values from this list. If you have not defined a list of collection element values, you can enter any value. See: Defining Collection Element Values, *Oracle Quality User's Guide*.

8. In the Actions this Rule Invokes region, select *Create a work request*.
9. In the Action Details region, enter a Message to Display or Log for this Action. See: Message Actions, *Oracle Quality User's Guide*

If the selected action requires a status code, enter the status code in the Action Details region. See: Application Specific Actions, *Oracle Quality User's Guide*.

10. Save your work.

## Related Topics

Associating Output Variables with Actions, *Oracle Quality User's Guide*

Defining a Launch a Workflow Action, *Oracle Quality User's Guide*

Defining Collection Plan Element Alert Actions, *Oracle Quality User's Guide*

Defining Collection Element Actions, *Oracle Quality User's Guide*

Quality Actions, *Oracle Quality User's Guide*

## Triggering a Work Order

For each collection element, you can specify that Quality initiates an action based on the quality data that you collect. The condition that you specify and the resulting action comprise an Action Rule. Action Rules are evaluated and executed during the quality data collection process. For example, eAM enables you to specify that a Work Order is created automatically, based on certain conditions of the asset, determined by the quality data collected. The Action Rule is defined within the collection plan definition.

### To set up work request triggers:

1. Navigate to the Collection Plans window.

## Collection Plans

Collection Plans (EM1)

Collection Plan: **FORK LIFT FAILURE ANALYSIS** Views...

Description: **Fork Lift Failure Analysis**

Effective: **13-NOV-2002** -

Plan Type: **Failure** **Failure Analysis** [ ]

Copy Elements... Transactions Specifications...

**Quality Collection Elements**

Name	Seq	Prompt	Mandatory	Enabled	Read-Only	Displayed	[ ]
<input checked="" type="checkbox"/> Fork Lift Failure	10	Failure	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Fork Lift Failure Cause	20	Cause	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Fork Lift Failure Remedy	30	Remedy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/> Fork Lift Failure Comment	40	Comment	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Values Actions

2. Select a valid Collection Plan. To create a new collection plan, See: Creating Collection Plans, *Oracle Quality User's Guide*.
3. In the Quality Collection Elements region, select the collection element to create an action rule for. Choose Actions.

## Quality Actions

Quality Actions (EAM) - EAM PICKUP BRAKES, Asset Number

**Action Rules**

Seq	Element	Condition	Value	Spec Limit	From	To
10	Asset Number	equals (=)	<input checked="" type="radio"/>	<input type="radio"/>	av-rsn50	
			<input type="radio"/>	<input type="radio"/>		
			<input type="radio"/>	<input type="radio"/>		

Defaults...

**Actions this Rule Invokes**

<input checked="" type="checkbox"/> Create a Maintenance Work Order
<input type="checkbox"/>
<input type="checkbox"/>

**Action Details**

4. In the Action Rules region, enter the Sequence number for the action rule. See: Action Rule Sequencing, *Oracle Quality User's Guide*.

The sequence number establishes the order in which action rules are evaluated as data is collected. The sequence number can be from 0 to 99999.

5. Select the Condition that must be met to invoke the action. For example, when the brake pad thickness wears to less than .2, a Work Request is automatically created. See: Query Operators, *Oracle Quality User's Guide*.
6. Choose either Value or Spec Limit to specify the evaluation method.

*Value:* If you choose Value, as quality data is collected, the action rule is evaluated using the results value and the value entered. If you have defined a list of values for the collection element, you must choose a value from this list. If you have not defined a list of values for the collection element, you can enter any value.

*Spec Limit:* If you choose Spec Limit, as quality data is collected, the action rule is evaluated using the quality results value and either the specification limit target value (collection element level), the upper or lower user-defined range limits, or the upper or lower specification range limits. Specification limits are defined at the collection element level.

Spec Limits can be used to define action rules that evaluate numeric results.

7. If the selected Condition requires a range of values, enter both the From and To value. If the selected Condition requires a single value, enter the From value.

**Note:** Some conditions (for example, is entered and is empty) do not require values.

If you have chosen the Values, and a list of values has been defined for the collection element, you can select values from this list. If you have not defined a list of collection element values, you can enter any value. See: Defining Collection Element Values, *Oracle Quality User's Guide*.

8. In the Actions this Rule Invokes region, select Create a Maintenance Work Order or Create a Maintenance Work Order.
9. In the Action Details region, enter a Message to Display or Log for this Action. See: Message Actions, *Oracle Quality User's Guide*.

If the selected action requires a status code, enter the status code in the Action Details region. See: Application Specific Actions, *Oracle Quality User's Guide*.

10. Save your work.

## Related Topics

Associating Output Variables with Actions, *Oracle Quality User's Guide*

Defining a Launch a Workflow Action, *Oracle Quality User's Guide*

Defining Collection Plan Element Alert Actions, *Oracle Quality User's Guide*

Defining Collection Element Actions, *Oracle Quality User's Guide*

Quality Actions, *Oracle Quality User's Guide*



## Entering Quality Results

You might need to enter Quality results when completing a Work Order, Operation, or Supplier Operation. Quality results entry is mandatory if you selected the Mandatory check box, when creating the collection plan (See: *Creating eAM Quality Collection Plans*, page 2-113).

### To enter quality results when completing a Work Order:

1. Navigate to the Work Order Completion window.

#### Work Order Completion

Work Order Completion (EAM)

Work Order	WO140816
Asset Number	TR100
Asset Group	PICKUP-TRUCK
Asset Activity	PR-PICKUP-BRAKES
Activity Type	Replacement
Activity Cause	
Transaction Type	Complete Job
Transaction Date	12/08/2004 12:31:46
Reconciliation Code	

PREDICTIVE PM FOR PICKUP BRAKES

**Duration**

Duration (hours)	0
Actual Start Date	12/08/2004 12:27:26
Actual End Date	12/08/2004 12:27:26

**Shutdown History**

Start Date	
End Date	

Meter Readings

2. Select the Work Order.
3. Save your work. If the collection plan that is triggered requires quality results entry, the Quality Results Entry window appears. If not, select Enter Quality Results from the Tools menu or select the Enter Quality Results icon. A collection plan is triggered if its Transaction Description reads, *EAM Work Order Completions (Oracle Enterprise Asset Management)*. See: *Creating eAM Quality Collection Plans*, page 2-113.

### Enter Quality Results

Enter Quality Results (EAM)

Collection Plan

— Results —

Work Order	Asset Number	Asset Activity	PR_DATE_INSPE	PR_PAD_THICKNE	PR_D.
WO140816	TR100	PR-PICKUP-BRAKES			

Spec Name  UOM  Upper Limit   
Target  Lower Limit

Child Plan

4. Enter the required information.
5. Save your work.

#### To enter quality results when completing an operation:

1. Navigate to the Work Order window.
2. Select a Work Order.
3. Choose Operations.
4. Complete an Operation. See: Operation Completion, page 3-39.
5. Save your work. If the collection plan that is triggered requires quality results entry, the Quality Results Entry window appears. If not, select Enter Quality Results from the Tools menu or select the Enter Quality Results icon. A collection plan is triggered if its Transaction Description reads, *EAM Operation Completions (Oracle Enterprise Asset Management)*. See: Creating eAM Quality Collection Plans, page 2-113.
6. Enter the required information.
7. Save your work.

#### To enter quality results via iSupplier Portal:

eAM enables you to create Quality collection plans that are optionally mandatory for a supplier to enter crucial Quality data, via iSupplier Portal, before the supplier can complete an Outside Service operation. A supplier will complete an Outside Service operation when the outside service is performed or shipped to the eAM organization.

1. Navigate to the iSupplier Portal.

2. Select the Orders tab.
3. Select Work Orders sub-tab.
4. Query a Work Order by PO, Work Order, From/To Need by Date, or From/To Promise Date.
5. Select a Work Order. The Work Order Detail page appears.
6. Choose Complete Operations.
7. Enter necessary information and Quality Results.

## **Related Topics**

Entering Quality Results, *Oracle Quality User's Guide*



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## Work Order Billing

This chapter covers the following topics:

- Introduction
- Setting Up Work Order Billing
- Billing Work Orders
- Creating a Billable Work Order
- Associating Items and Activities to a Price List
- Initiating Billing
- Creating an Invoice

### Introduction

While maintaining an asset or servicing a customer request, you can bill a third party customer for the work that they performed. This chapter discusses Work Order Billing, including the following topics:

- Setting Up Work Order Billing, page 14-1
- Billing Work Orders, page 2-153
- Creating an Invoice, page 14-9

### Setting Up Work Order Billing

While maintaining an asset or servicing a customer request, you can bill a third party customer for the work that they performed. The cost of the work performed is based on the material and resource requirements (Bill of Material) of the Work Order, or the cost of the Activity associated with the Work Order.

This section includes the following topics:

- Work Order Billing Setup, page 2-153
- Setting Up Parameters, page 2-153
- Setting Up Costs for the Cost Plus Billing Basis, page 2-154
- Setting Up Prices for the Price List Billing Basis, page 2-157
- Service Attribute Setup, page 2-158
- Setting Up Billable Material, page 2-159

- Setting Up a Billable Resource, page 2-160
- Setting Up a Billable Activity, page 2-162

## Billing Work Orders

After the setup tasks are complete (See: Setting Up Work Order Billing, page 14-1), you can bill third parties and customers the work performed, while maintaining an asset or servicing a customer request. The cost of the work performed is based on the Work Order's material and resource requirements (Asset Bills of Material and Asset Routes), or the cost of the Activity that is associated with the Work Order.

This section includes the following topics:

- Creating a Billable Work Order, page 14-2
- Associating Items and Activities to a Price List, page 14-3
- Initiating Billing, page 14-4

## Creating a Billable Work Order

Work Order Billing requires completed, billable Work Orders. First, create a Work Order that is associated with billable material, resources, and/or a billable Activity. After the Work Order is released, you can apply material and resources to it. Finally, after the Work Order is completed, the status is changed to Complete - No Charges. The Work Order is ready to bill.

### To set up a billable work order:

1. Navigate to the Work Orders window and create a Work Order.

**Work Orders**

Work Order (EM1)

Work Order	57673	All Fork Lift Daily Maintenance
Asset Number	Fork Lift Daily Maintenance	Daily maint for all fork lifts / propane and el
Asset Group	Fork Lifts	
Asset Activity	Fork Lift Daily Maintenance	
Class	MaintWAC	
Status	Released	
Work Order Type		
Instance Number		

**Scheduled Dates**

Start	09-NOV-2002 23:00:00
Completion	11-NOV-2002 07:36:00
Duration(hours)	32.6

Activity Type

Activity Cause

Activity Source  [ ]

**Main Project Rebuild Work Request Service Request Bill, Routing**

Owning Department	W-Maint	<input checked="" type="checkbox"/> Firm
Priority		<input type="checkbox"/> Notification Required
Requested Start Date	09-NOV-2002 23:00:00	<input type="checkbox"/> Tagout Required
Requested Due Date		<input checked="" type="checkbox"/> Planned
Shutdown Type		<input type="checkbox"/> Enable Material Issue Requests

**Operations Materials Resources Asset Route Costs**

2. If you are billing by requirements, add the previously defined billable material to the current Work Order's Bill of Material, as operation 10. See: Setting Up Billable Material, page 2-159 and Defining Inventory Material Requirements, page 3-26. Add the previously defined billable resource to the current Work Order's routing, as operation 10. See: Setting Up a Billable Resource, page 2-160 and Defining Resource Requirements, page 3-31.
3. If you are billing by activity, add the previously defined Activity to this Work Order. See: Setting Up a Billable Activity, page 2-162.
4. Release the current Work Order. See: eAM Work Order Statuses, page 3-16.
5. Issue some material (not all) and charge some resources (not all) to the current Work Order (See: Transacting Material, page 3-45 and Transacting Resources, page 3-45, respectively).
6. Complete the current Work Order. See: Work Plans, page 18-45.
7. Update the status of the Work Order to Complete - No Charges. See: eAM Work Order Statuses, page 3-16. You can bill Work Orders at a Closed status, as well.
8. Save your work.

## Associating Items and Activities to a Price List

Material, Resources, and Activities require association with a price list, before you can bill them.

### To add items and activities to a price list:

1. Navigate to the Advanced Pricing - Price Lists window.

#### Advanced Pricing - Price Lists

**Price List**

Name:  ☐ Mobile Download ☒ Active

Description:

Currency:  Multi-Currency Conversion:  Round To:

Effective Dates:  -

Payment Terms:

Freight Terms:  Freight Carriers:

Comments:  [ ]

**List Lines** | Secondary Price List | Qualifiers

Product Context	Product Attribute	Product Value	Product Description	U
Item	Item Number	WB-MaintTech	Work Order Billing Facilities I	E
Item	Item Number	WB-Mechanic1	Work Order Billing Fleet Serv	E
Item	Item Number	WB-PrdMaint	Work Order Billing Production	E
Item	Item Number	Lubricate Fork Lift M	Lubricate Fork Lift Mast	E
Item	Item Number	Front Wheels - Elect	Front Wheels Electric Fork Lif	E

Price Breaks Pricing Attributes

2. Add your material and resource items and/or your Activities to the price list.
3. Save your work.

## Related Topics

Setting Up Item Costs and Prices, page 2-153

## Initiating Billing

If a Work Order is at a Complete - No Charges or Closed status, you can select it for billing.

### To bill by requirements:

1. Navigate to the Find Work Orders window.

**Find Work Orders**

Find Work Orders (EM1)

Work Order:

Maintained Item:

Maintained Unit:

Asset Activity:

Start Date:  -

Completion Date:  -

Owning Department:

Project:

Task:

Work Request:

**Status**

☒ Completed No Charge

☒ Closed

☐ Previously Billed

Reference Invoice:

☐ Internal Customer

Customer:

**Work Orders**

Work Order	Maintained Item	Maintained Unit	Asset Activity	Status	Project	Task
57673	Fork Lifts	Fork Lift Daily M	Fork Lift Daily M	Complete - No		

2. Select the Work Order you wish to bill.
3. Choose Find.
4. Choose Bill by Requirements.



## Work Order Billing

Work Order Billing (EM1) - EM181738

☐ Internal Customer

Customer: **Global Enterprises**

Bill To: **5400, Walsh Drive SAINT**  
**San Jose**  
**CA 95106**  
**US**

Billing Basis: **Price List**  
Price List: **Corporate** **USD**  
Cost Type:   
Markup %:   
Project:   
Task:

Organization Currency: **USD**  
Billing Currency: **USD**

**Currency Conversion**  
Type:   
Date:

**Calculate Amounts**

---

**—Bill by Requirements—**

Op Sequence

Op Sequence	Item/Resource	Type	UOM	Applied Quantity	Previous Billed Quantity	Item	UOM	Quantity	Cost/Price	Mark %
10	Shop Rags	Material	Ea	2	0	Shop Rags	Ea	2		
10	Fork Lift Battery	Material	Ea	1	0		Ea	1		

Calculated Total: **0.00**  
Billed Total: **0.00**

**Cancel** **View Past Details** **Initiate Billing**

5. Within the Work Order Billing window, select a Customer.
6. Select a Bill To for the current customer.
7. Select a Billing Basis. Valid values are Price List and Cost Plus.
  - If you select Cost Plus, select a Cost Type and Markup %. For example, choose a Frozen Cost Type, if you defined a frozen cost for the material and resource items. See: Setting Up Item Costs and Prices, page 2-153. The Markup % defaults with a 0% value, but you can optionally update it.
  - If you select the Price List Billing Basis, select a Price List. All billable items appear on the selected price list, if they are Customer Order enabled (See: Setting Up Item Costs and Prices, page 2-153).
8. Choose Calculate Amounts. The unit rates are calculated for each billable item. The total amount of each billable item is a function of the unit rate, and the billed quantity.
  - If you previously chose a Cost Plus Billing Basis, the unit rate is calculated from the item cost and markup.
  - If you previously chose a Price List Billing Basis, the unit rate is retrieved from the price list that is associated with the item (See: Associating Items and Activities to a Price List, page 14-3). If multiple rates exist for the item, the system defers to the Price List setup (See: Setting Up Item Costs and Prices, page 2-153).
9. Within the Bill by Requirements region, enter the Quantity to bill, for each billable item. This quantity should be no greater than the difference between the Applied Quantity and Previous Billed Quantity.

The Applied Quantity is what the Work Order used; for material, the Applied Quantity is the material issued to the Work Order. For resources, the Applied Quantity equals the resources charged to the Work Order.
10. Optionally enter the Markup %, for each billable item.

11. To indicate the lines that you want to bill, for each billable item, you can optionally select the individual Bill check boxes. To bill all lines, select the top check box; this automatically selects all check boxes.
12. Choose Initiate Billing to execute the billing process and populate the billing information within the Accounts Receivables interface tables.
13. Choose OK on the confirmation note, indicating that billing has successfully completed.

### To bill by an activity:

1. Navigate to the Find Work Orders window.

**Find Work Orders**

Find Work Orders (EM1)

Work Order:

Maintained Item:

Maintained Unit:

Asset Activity:

Start Date:  -

Completion Date:  -

Owning Department:

Project:

Task:

Work Request:

**Status**

☒ Completed No Charge

☒ Closed

☐ Previously Billed

Reference Invoice:

☐ Internal Customer

Customer:

**Work Orders**

Work Order	Maintained Item	Maintained Unit	Asset Activity	Status	Project	Task
57673	Fork Lifts	Fork Lift Daily M	Fork Lift Daily M	Complete - No		

2. Select the Work Order you wish to bill.
3. Choose Find.
4. Choose Bill by Activity.

## Work Order Billing

Work Order Billing (EM1) - 57673

☐ Internal Customer

Customer: **ABC Corporation America**

Bill To: **300 ABC Parkway**  
**San Francisco**  
**CA 94111**  
**US**

Billing Basis: **Price List**  
Price List: **EAM M1 Maintenan** **USD**  
Cost Type:   
Markup %:   
Project:   
Task:   
Organization Currency: **USD**  
Billing Currency: **USD**

**Currency Conversion**  
Type:   
Date:   
Calculate Amounts

**—Bill by Activity—**

Asset Activity: **Fork Lift Daily Maintenan** **All Fork Lift Daily Maintenan**

Activity Type:   
Activity Source:   
Activity Cause:   
**Billing Details**  
Activity: **Fork Lift Daily Maintenan**  
UOM: **Ea**  
Quantity: **1**  
Calculated Amount:   
Billed Amount:   
Cancel View Past Details Initiate Billing

5. Within the Work Order Billing window, select a Customer.
6. Select a Bill To for the current customer.
7. Select a Billing Basis. Valid values are Price List and Cost Plus.
  - If you select Cost Plus, select a Cost Type and Markup %. For example, choose a Frozen Cost Type, if you defined a frozen cost for the material and resource items. See: Setting Up Item Costs and Prices, page 2-153. The Markup % defaults with a 0% value, but you can optionally update it.
  - If you select the Price List Billing Basis, select a Price List. All billable items appear on the selected price list, if they are Customer Order enabled (See: Setting Up Item Costs and Prices, page 2-153).
8. Choose Calculate Amounts. The unit rates are calculated for each billable item. The total amount of each billable item is a function of the unit rate and the billed quantity.

## Work Order Billing

Work Order Billing (EM1) - 57673

☐ Internal Customer

Customer: **ABC Corporation America**

Bill To: **300 ABC Parkway**  
**San Francisco**  
**CA 94111**  
**US**

Billing Basis: **Price List**  
Price List: **EAM M1 Maintenance** USD  
Cost Type:   
Markup %:   
Project:   
Task:   
Organization Currency: **USD**  
Billing Currency: **USD**

**Currency Conversion**  
Type:   
Date:   
Calculate Amounts

**—Bill by Activity—**

Asset Activity: **Fork Lift Daily Maintenance** **All Fork Lift Daily Maintenance**

Activity Type:   
Activity Source:   
Activity Cause:   
Billing Details:  
Activity: **Fork Lift Daily Maintenance**  
UOM: **Ea**  
Quantity: **1**

Calculated Amount: **37.50**  
Billed Amount: **37.50**

Cancel View Past Details Initiate Billing

9. Choose Initiate Billing.

## Billing Initiated

Work Order Billing (EM1) - 57673

☐ Internal Customer

Customer: **ABC Corporation America**

Bill To: **300 ABC Parkway**  
**San Francisco**  
**CA 94111**  
**US**

Billing Basis: **Price List**  
Price List: **EAM M1 Maintenance** USD  
Cost Type:   
Markup %:   
Project:   
Task:   
Organization Currency: **USD**  
Billing Currency: **USD**

**Currency Conversion**  
Type:   
Date:   
Calculate Amounts

**—Bill by Activity—**

Asset Activity: **Fork Lift Daily Maintenance** **All Fork Lift Daily Maintenance**

Activity Type:   
Activity Source:   
Activity Cause:   
Billing Details:  
Activity: **Fork Lift Daily Maintenance**  
UOM: **Ea**  
Quantity: **1**

Calculated Amount: **37.50**  
Billed Amount: **37.50**

Cancel View Past Details Initiate Billing

**Note**  
This billing transaction was successfully completed.  
OK

10. Choose OK.
11. Optionally choose View Past Details to view what was billed.

### Past Invoice Details

Past Invoice Details (EM1) - 57673

Reference Invoice Number	Reference Line Number	Invoice Number	Invoice Line Number	Invoice Date	Customer
61	1				ABC Corporation A

Close

If you billed by Activity, one line appears. If you billed by requirements, multiple lines may appear.

12. Choose Close to return to the Find Work Orders window.

## Creating an Invoice

After billing is initiated, you can create invoices. First, a source is defined in Oracle Receivables to identify where your invoicing activity originates. The batch source also controls invoice defaults and invoice numbering. Next, ensure that a Work Order Billing flexfield code exist. Finally, you can run the AutoInvoice concurrent process to create invoices. You can set this program to automatically run, or execute it from the menu.

### To ensure a batch source exists:

1. Navigate to the Transaction Sources window.

### Transaction Sources

Transaction Sources (Order Management Super User, Vision Operations (USA))

Operating Unit: **Vision University**

Name: **Work Order Billing** Type: **Imported**

Batch Source | AutolInvoice ... | Customer Inf... | Accounting I... | Other Inform... | Sales Credit ...

Description: **Work Order billing Batch Source**

☒ Active Effective Dates: **23-APR-2004** -

☐ Automatic Batch Numbering Last Number:

☒ Automatic Transaction Numbering Last Number: **1**

☐ Copy Document Number to Transaction Number

Reference Field Default Value: **interface\_header\_attribute1**

Standard Transaction Type:

Credit Memo Batch Source: [ ]

2. Query on Work Order Billing in the Name field, to ensure that it exists. If it does not exist, perform the following steps:
  1. Enter Work Order Billing in the Name field.
  2. Select Imported from the Type list of values. Because this is an Imported transaction batch source, the system automatically numbers the batch with the batch source name - request ID.
  3. Enter a Description.
  4. Enter the range of Effective Dates. The start date defaults as the current date, but you can change it. If you do not enter an end date, this transaction batch source is active indefinitely.
  5. To automatically number new transactions created using this source, check the Automatic Transaction Numbering check box and enter a Last Number. You can use automatic transaction numbering with both Imported and Manual sources.
  6. Optionally, to assign the same number to both the document and transaction, for transactions assigned to this source, check the Copy Document Number to Transaction Number check box.
  7. Save your work. For information on all remaining fields, See: Transaction Batch Sources, *Oracle Receivables User's Guide*.

#### To ensure a Work Order Billing flexfield code exists:

1. Navigate to the Descriptive Flexfield Segments window.

### Descriptive Flexfield Segments

Application: **Oracle Receivables** Title: **Line Transaction Flexfield**

☒ Freeze Flexfield Definition Segment Separator: **Period ( . )**

**Context Field**

Prompt: **Context Value** ☐ Required  
 Value Set:  ☒ Displayed  
 Default Value:   
 Reference Field:

**Context Field Values**

Code	Name	Description	Enabled
PROJECTS INVOICES-600	PROJECTS INVOICES-600	Project Mfg Accounting Invoices	<input checked="" type="checkbox"/>
Property-Projects	Property-Projects	Property Manager - Projects	<input checked="" type="checkbox"/>
SERVICE	SERVICE	Service Credit Memos	<input checked="" type="checkbox"/>
STP NETTING	STP NETTING	STP NETTING	<input checked="" type="checkbox"/>
VISION BUILD	VISION BUILD	Vision Build	<input checked="" type="checkbox"/>
Work Order Billing	Work Order Billing	Work Order Invoices	<input checked="" type="checkbox"/>

Compile Segments

2. Query on the Line Transaction Flexfield within the Oracle Receivables Application. If Work Order Billing does not exist as a Code within the Context Field Values region, perform the following steps:
  1. Enter Work Order Billing in the Code field.
  2. Enter Work Order Invoices in the Description field.
  3. Select the Enabled check box.
  4. Choose Segments.
  5. Ensure that, at least, the following segments are defined: Work Order, Work Order Id, Invoice Number, and Line Number.
  6. Save your work.

#### To create invoices:

1. Navigate to the Run AutoInvoice window.
2. Select AutoInvoice Master Program, from the Name list of values.

### Parameters

Parameters

Number of Instances: 1

Invoice Source: Work Order Billing

Default Date: 17-FEB-2003

Transaction Type:

(Low) Bill To Customer Number:

(High) Bill To Customer Number:

(Low) Bill To Customer Name: ABC Corporation Americas

(High) Bill To Customer Name: ABC Corporation Americas

(Low) GL Date:

(High) GL Date:

(Low) Ship Date:

(High) Ship Date:

(Low) Transaction Number:

(High) Transaction Number:

(Low) Sales Order Number:

(High) Sales Order Number:

(Low) Invoice Date:

OK Cancel Clear Help

3. Enter the Number of Instances. An instance refers to how AutoInvoice groups and processes your transactions. Submitting a greater number of instances enables you to import transactions into Receivables faster. You can submit a maximum of 15 instances.

**Tip:** Enter a number of instances based on how many CPUs are available. Use the following formula to determine the number of instances to enter:

$$(\text{Number of Available CPUs}) - 1 = \text{Number of Instances}$$

For example, if you have five CPUs, submit four instances of the AutoInvoice Master program.

4. Select the Work Order Billing Invoice Source.
5. Enter a Default Date. The Default Date must be in an open or future period. Depending on how you defined your transaction batch source, AutoInvoice uses the Default Date if the GL date is not provided or if the date provided is in a closed period. See: *Determining Dates, Oracle Receivables User's Guide*.
6. Choose OK.
7. Choose Submit.

## Related Topics

Transaction Batch Sources, *Oracle Receivables User's Guide*

Running AutoInvoice, *Oracle Receivables User's Guide*



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## Oracle Service Integration

This chapter covers the following topics:

- Introduction
- Oracle Service Integration Overview
- Creating Service Requests
- Service Requests and eAM Work Orders

### Introduction

If you have Oracle Service installed, you can use Service Requests to report and request maintenance service. This chapter contains the following topics:

- Oracle Service Integration Overview, page 15-1
- Service Request Statuses, page 15-1
- Creating Service Requests, page 15-2
- Service Requests and eAM Work Orders, page 15-3

### Oracle Service Integration Overview

Service Request functionality provides organizations that utilize call centers the tools necessary to capture and track maintenance Service Requests. You can create Service and Work Requests on both eAM capital assets and rebuildable inventory and both request types can simultaneously exist within one eAM organization.

Service Requests for eAM maintenance are classified as type Asset Maintenance and Service Requests that are created as an Asset Maintenance type are directed to, and viewable within eAM. You can view a maintenance Service Request's work in progress and associated eAM Work Orders' pertinent information within Oracle Service; use the Work Order tab within the Service Requests window. You can optionally customize a workflow to send Service Request notifications, such as sending a notification to a maintenance planner that a Service Request was created for an asset.

An eAM work page enables easy review of all eAM maintenance Service and Work Requests. You can create maintenance Work Orders from the Service and/or Work Requests, or associate the requests to existing Work Orders.

The following topics are pertinent to the Oracle Service integration:

- Service Integration Setup, page 2-145

- Service Request Statuses, page 15-1
- Creating Service Requests, page 15-2
- Service Requests and eAM Work Orders, page 15-3

## Service Request Statuses

You can assign Work Orders to Service Requests with any status, except Final. Enterprise Asset Management does not change a Service Request status, when assigning Work Orders to it.

## Creating Service Requests

Call center operators can create a Service Request within the Service Request window. Call center operators can also view the details of associated maintenance Work Orders, within the Work Orders tab. They can relay this information to the customer, as needed.

### To create a service request:

1. Navigate to the Service Request window.
2. From the Folder menu, select Open. Select the Folder that displays Enterprise Asset Management (eAM)-specific fields. See: Enabling eAM Specific Fields, page 2-147.

### Service Request

3. Select a Contact Type. Valid values are Customer and Employee.
4. Select a Customer Type.
5. Select an eAM enabled Inventory Organization. See: Enabling Organizations for Enterprise Asset Management, page 2-6.

6. Select a maintenance request Type. See: *Creating Maintenance Service Request Types*, page 2-146.
7. Select an Open Status. See: *Service Request Statuses*, page 15-1.
8. Select the request Severity.
9. Within the Workbench tab, enter the Problem Summary.
10. In the Notes region, optionally select a note Type.
11. Optionally enter the Description of the note type.
12. Save your work. See: *Oracle Service User's Guide*

## Service Requests and eAM Work Orders

Using the Maintenance Super User responsibility, you can create Work Orders from Service Requests, or associate a Service Request with an existing Work Order. Because more than one Work Order might be needed to complete a Service Request issue, a Service Request can associate with multiple Work Orders. Because Service and/or Work Requests can be used to report the same maintenance problem, Service and Work requests can associate with the same Work Order. The Show/Hide functionality enables you to display details of a Service Request.

### **To create a work order from a service request:**

1. Navigate to the Work Orders tab.
2. Select the Requests sub-tab.
3. Populate at least one of the following fields:
  1. Optionally, if you know the specific Service Request number to view, select a Request Number.
  2. To narrow your selection, optionally select an Asset Type. If you select Capital, Service and Work Requests that are created for Asset Numbers appear. If you select Rebuildable Inventory, Service and Work Requests that are created for Rebuildable Items appear.
  3. Optionally select an Assigned Department.
  4. Optionally select a Status.
  5. Optionally select an Asset Number to search for related Service Requests and Work Orders.
4. Choose Go.

## Requests

ORACLE® Asset Management

Diagnostics Home Logout Preferences Personalize Page

Home Assets Work Requests Work Orders Work Plan Stores

All | Requests

Organization EM1

Requests Save Search

Simple Search

Please note that the search is case insensitive

Asset Type  Request Number

Asset Group  Department

Asset Number  Reported Date

(example: 19/08/2004)

Go Clear

Details	Request Number	Description	View Assigned Work Orders	Status	Asset Group	Asset Type	Asset Number	Department	Expected Resolution Date	Create Work Order	Assign Work Order
<input type="checkbox"/> Hide	110504	Elevator Out of Service	1	Open	Office Building 100	Capital	Elevator 1	Fac Maint			

Originator Reported Date 05/05/2004 Request Type Service Request

Save Search

Home | Assets | Work Requests | Work Orders | Work Plan | Stores | Diagnostics | Home | Logout | Preferences | Personalize Page

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- To create a Work Order associated with the current Service Request, choose the Create Work Order icon.

## Create Work Order

ORACLE® Asset Management

Diagnostics Home Logout Preferences Personalize Page

Home Assets Work Requests Work Orders Work Plan Stores

All | Requests

Work Orders: Requests >

Create Work Order

Current Organization : EM1

\* indicates required data

\* Work Order

\* Asset Type

Asset Number

Asset Group

Asset Activity

Department

Request Type **Service Request**

Service Request Number **110504**

Rebuild Parent

Enable Material Issue Request

\* Description

\* Scheduled Start Date

(example 19/08/2004 13:30:50)

\* Duration (hours)

Status

Shutdown Type

Priority

Firm

Work Order Type

Activity Type

Activity Cause

Activity Source

Cancel Apply

Home | Assets | Work Requests | Work Orders | Work Plan | Stores | Diagnostics | Home | Logout | Preferences | Personalize Page

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6. Enter the required Work Order information (See: Routine Work Orders, page 3-3).
7. Choose Apply.
8. To assign an existing Work Order to the current Service Request, choose Assign Work Order.

### Assign Work Order

ORACLE Asset Management [Home](#) [Logout](#) [Preferences](#) [Personalize Page](#) [Diagnostics](#)

[Home](#) [Assets](#) [Work Requests](#) [Work Orders](#) [Work Plan](#) [Stores](#)

[Work Orders: Requests](#) > [Create Work Order](#) > [Requests](#) > Organization **EM1**

**Assign Work Order** [Create View](#)

Request Number	<b>110504</b>	Asset Type	<b>Capital</b>
Request Type	<b>Service Request</b>	Asset Group	<b>Office Building 100</b>
Description	<b>Elevator Out of Service</b>	Asset Number	<b>Elevator 1</b>
Department	<b>Fac Maint</b>	Resolution Date	

---

**Simple Search**

Please note that the search is case insensitive. [Advance Search](#)

Work Order	<input type="text"/>	Activity	<input type="text"/>
Asset Type	<input type="text" value="Capital"/>	Schedule Start Date	<input type="text"/>
Asset Group	<input type="text" value="Buildings"/>	<small>(example: 19/08/2004 19:45:00)</small>	
Asset Number	<input type="text" value="Building1"/>	Scheduled End Date	<input type="text"/>
Department	<input type="text"/>	Work Order Status	<input type="text"/>

[Go](#) [Clear](#)

---

Details	Work Order	Description	Status	Asset Number	Asset Group	Asset Type	Start Date	Department	Assign
<a href="#">▶ Show</a>	Building Wo	gs activity for eam	Unreleased	Building1	Buildings	Capital	12/03/2004	F-Maint	
<a href="#">▶ Show</a>	LS_WO_N		Released	Building1	Buildings	Capital	29/03/2004	F-Maint	

[Return to Requests](#) [Create View](#)

[Home](#) | [Assets](#) | [Work Requests](#) | [Work Orders](#) | [Work Plan](#) | [Stores](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Personalize Page](#) | [Diagnostics](#)  
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9. Query for existing Work Orders.
10. Choose the Assign icon next to the Work Order(s) you wish to associate with the current Service Request.

### To obtain service requests using the advanced search:

1. Navigate to the Work Orders tab.
2. Select the Requests sub-tab.
3. Choose Advanced Search.
4. Populate at least one of the following fields:
  1. To narrow your selection, optionally select an Asset Type. If you select Capital, Service and Work Requests that are created for Asset Numbers appear. If you select Rebuildable Inventory, Service Requests that are created for Rebuildable Items appear.
  2. Optionally select an Asset Group. An Asset Group is a grouping of similar Asset Numbers. See: Defining Asset Groups, page 2-36.
  3. Optionally select an Asset Number to search for related Service Requests and Work Orders.

4. Optionally select an Asset Category. This is the Class and Subclass code, such as CRANE.OVERHEAD or BUILDING.FLOOR. See: Setting Up Category Codes, page 2-33.
5. Optionally select an Add Another value.
  - Optionally select Area. This is a user-defined listing of logical areas of work. Areas are where the assets reside. For example, North Plant, East Wing, or Area 1. See: Setting Up Areas, page 2-11.
  - Optionally Assigned Department to view all Service Requests associated with a specific department.
  - Optionally if you know the specific Service Request number to view, select Request Number.
  - Optionally select Request By Date.
  - Optionally select a Status.
  - Optionally select a Priority. See: Work Order and Work Request Priority Codes, page 2-29.
  - Optionally select Request Type. Request Types describe and categorize Service Requests. For example, Manual, System, Routine, Capital, and Furniture. Service Request Types are user-defined (See: Work Request Types, page 2-28).
  - Optionally select Work Order to display all Service Requests associated with that Work Order. An unlimited number of Service Requests can associate with a Work Order.
  - Optionally select Creation Date to view Service Requests created on a specific date.
  - Optionally select Created By to view Service Requests created by a specific user.
  - Optionally select Requested For to view Service Requests requested for a specific user.
  - Optionally select *Include children from hierarchy*. If Asset Number is populated and Yes is selected, then Service Requests for the Asset Number and all of its children appear. If Asset Number is not populated and Yes is selected, all Service Requests in the system appear. If Asset Number is not populated, Yes is selected, and additional criteria are entered, this additional criteria is ignored; all Service Requests in the system appear.
5. Choose Go.

# Part 4

---

## Self-Service Work Requests User

The Self-Service Work Requests User is a person in an organization, often an employee (not involved in the maintenance department), who uses Work Requests to report maintenance problems. This person also uses Work Requests to check the statuses of problems that he/she has reported.

This part contains the following chapter:

- Chapter 16, "Self Service Work Requests", page 16-1



---

## Self Service Work Requests

This chapter covers the following topics:

- Overview of Work Requests
- Work Request Statuses
- Obtaining Work Request Information
- Creating and Updating Work Requests

### Overview of Work Requests

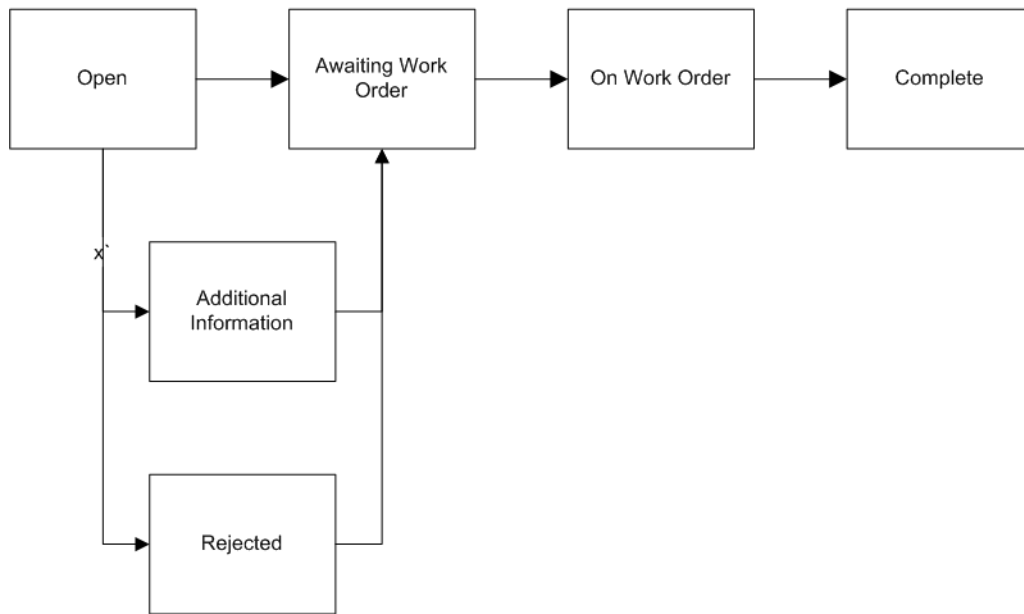
A Work Request serves a different function than a Work Order; it is a request for maintenance on an asset (Capital or Rebuildable Inventory). eAM enables operations and maintenance staff to report any problems with an asset. A supervisor can approve, request additional information, or reject a Work Request. A Work Request requires approval before it is generated into a Work Order. The Work Requests tab enables you to query existing, and create new Work Requests for an asset. This section's tasks include:

- Work Request Statuses, page 16-1
- Obtaining Work Request Information, page 16-2
- Creating and Updating Work Requests, page 16-6

### Work Request Statuses

A Work Request transitions through several statuses during its lifecycle. The Work Request lifecycle is as follows:

## Work Request Lifecycle



*Open* - A Work Request is created in an Open status.

*Awaiting Work Order* - The Work Request status changes from Open to Awaiting Work Order if the individual on the approval route has approved it. If the Auto-Approve Work Request functionality is enabled for the current organization, the status is automatically Awaiting Work Order (See: Defining eAM Parameters, page 2-8).

*On Work Order* - After a Work Request is associated with a Work Order, the status changes to On Work Order.

*Rejected* - The individual on the approval route rejected the Work Request.

*Additional Information* - If the Work Request's status is Additional Information, the originator needs to add the requested information.

*Complete* - The Work Request status transitions to Complete when the Work Order associated with the request is completed.

## Obtaining Work Request Information

Query for Work Requests using either the personalized, simple, or advanced search modes. The personalized mode enables you to select specific fields that you like to search with. The simple search mode displays commonly used fields that are normally used for searching. The advanced search mode provides more search criteria options. From the results table, you can view, update, and create Work Requests.

### To obtain work request information using the simple search:

1. Navigate to the Work Requests tab.

2. Choose Simple Search.

### Simple Search

ORACLE Asset Management [Diagnostics](#) [Home](#) [Logout](#) [Preferences](#) [Personalize Page](#)

[Home](#) [Work Requests](#)

All | Create Work Request

Current Organization : EM1

Work Requests [Save Search](#)

Simple Search

Please note that the search is case insensitive.

Request Number  Status

Asset Type  Asset Number

Assigned Department

[Go](#) [Clear](#)

[Create Work Request](#) [Export Work Requests](#)

Details	Number	Description	Asset Type	Asset Group	Asset Number	Status	Request By Date	Originator	Update
(No search conducted)									

[Save Search](#)

[Home](#) | [Work Requests](#) | [Diagnostics](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Personalize Page](#)

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3. Populate at least one of the following fields:
  1. Optionally, if you know the specific Work Request number to view, select a Request Number.
  2. To limit your selection, optionally select an Asset Type. If you select Capital, Work Requests that are created for Asset Numbers appear. If you select Rebuildable Inventory, Work Requests that are created for Rebuildable Items appear.
  3. Optionally select an Assigned Department.
  4. Optionally select a Status. See: Work Request Statuses, page 16-1.
  5. Optionally select an Asset Number to search for related Work Requests.
4. Choose Go.

## Related Work Request Search

ORACLE® Asset Management Diagnostics Home Logout Preferences Personalize Page

Home **Work Requests**

All | Create Work Request Current Organization : EM1

Work Requests Save Search

Simple Search

Please note that the search is case insensitive.

Request Number  Status

Asset Type  Asset Number

Assigned Department

Details	Number	Description	Asset Type	Asset Group	Asset Number	Status	Request By Date	Originator	Update
<a href="#">Show 3367</a>		great one	Capital	Fork Lifts	All Lifts	Awaiting Work Order	29/01/2004 08:07:49	PAHOBALA	
<a href="#">Show 3376</a>	1		Capital	Cap-ag	cap-wrart	Open	29/01/2004 10:01:46	PAHOBALA	
<a href="#">Show 3378</a>	1		Capital	Cap-ag	cap-an	Rejected	29/01/2004 10:17:22	PAHOBALA	
<a href="#">Show 3379</a>	1		Capital	Cap-ag	cap-wrart	Awaiting Work Order	29/01/2004 10:21:30	PAHOBALA	
<a href="#">Show 3829</a>		aaaaa	Capital	PM	PM-00-01	Awaiting Work Order	19/03/2004 02:01:13	PROJMFQ	
<a href="#">Show 4050</a>		Broken Wheel l@#%*%*0_+	Capital	Fork Lifts	FL1010	Awaiting Work Order	02/04/2004 01:50:30	BKOZLWOWS	
<a href="#">Show 4484</a>		my trash wasn't emptied last night and it stinks in here	Capital	EG:OFFICE	REFNORTH-2-2001	Rejected	15/04/2004 14:48:07	SGILLIAM	
<a href="#">Show 4485</a>		now i'm too cold	Capital	EG:OFFICE	REFNORTH-2-2001	On Work Order	14/04/2004 14:48:50	SGILLIAM	
<a href="#">Show 4496</a>		Hole in roof!!!	Capital	EG:BUILDING	BLDG-REFNORTH	On Work Order	14/04/2004 16:15:35	ABERTOLE	
<a href="#">Show 3689</a>		QA_WORK_REQUEST_LOG Machine Failed	Capital	gs-ag	gs-ag-an01	Awaiting Work Order	04/03/2004 01:44:23	SGUMMA	

Previous 1-10 Next 10

### To obtain work request information using the advanced search:

1. Navigate to the Work Requests tab.
2. Choose Simple Search.
3. Choose Advanced Search to narrow your selection criteria. Populate at least one of the following fields:
  1. To narrow your selection, optionally select an Asset Type. If you select Capital, Work Requests that are created for Asset Numbers appear. If you select Rebuildable Inventory, Work Requests that are created for Rebuildable Items appear.
  2. Optionally select an Asset Group. An Asset Group is a grouping of similar Asset Numbers. See: Defining Asset Groups, page 2-36.
  3. Optionally select an Asset Number to search for related Work Requests.
  4. Optionally select an Asset Category. This is the Class and Subclass code, such as CRANE.OVERHEAD or BUILDING.FLOOR. See: Setting Up Category Codes, page 2-33.
  5. Optionally select an Add Another value.
    - Optionally select Area. This is a user-defined listing of logical areas of work. Areas are where the assets reside. For example, North Plant, East Wing, or Area 1. See: Setting Up Areas, page 2-11.
    - Optionally select an Assigned Department to view all Work Requests associated with a specific department. See: Defining Departments and Resources, page 2-12.

- Optionally, if you know the specific Work Request number to view, select Request Number.
- Optionally select Request By Date.
- Optionally select a Status. See: Work Request Statuses, page 16-1.
- Optionally select a Priority. See: Work Order and Work Request Priority Codes, page 2-29.
- Optionally select Request Type. Request Types describe and categorize Work Requests. For example, Manual, System, Routine, Capital, and Furniture. Work Request Types are user-defined (See: Work Request Types, page 2-28).
- Optionally select Work Order to display all work requests associated with that Work Order. An unlimited number of Work Requests can associate with a Work Order.
- Optionally select Creation Date to view Work Requests created on a specific date.
- Optionally select Created By to view Work Requests created by a specific user.
- Optionally select Requested For to view Work Requests requested for a specific user.
- Optionally select *Include children from hierarchy*. If there are populated search criteria, they are applied (or effective) on the results of all the current Asset Number's Work Requests and its children. If Asset Number is not populated and Yes is selected, the *Include children from hierarchy* check box setting is neglected and other search criteria are considered.

4. Choose Go.

## Advanced Search

ORACLE® Asset Management

[Diagnostics](#) [Home](#) [Logout](#) [Preferences](#) [Personalize Page](#)

All | Create Work Request

Home Work Requests

Current Organization : EM1

Save Search

Advanced Search

Specify parameters and values to filter the data that is displayed in your results set.

☒ Search results where each must contain all values entered.  
☐ Search results where each may contain any value entered.

Asset Type is Capital

Asset Group is

Asset Number is

Asset Category is

Area is

Go Clear Add Another Request Number Add

Create Work Request Export Work Requests

Previous 1-10 Next 10

Details	Number	Description	Asset Type	Asset Group	Asset Number	Status	Request By Date	Originator	Update
<a href="#">▶ Show 3367</a>		great one	Capital	Fork Lifts	All Lifts	Awaiting Work Order	29/01/2004 08:07:49	PAHOBALA	<a href="#">✎</a>
<a href="#">▶ Show 3376</a>	1		Capital	Cap-ag	cap-wrart	Open	29/01/2004 10:01:46	PAHOBALA	<a href="#">✎</a>
<a href="#">▶ Show 3378</a>	1		Capital	Cap-ag	cap-an	Rejected	29/01/2004 10:17:22	PAHOBALA	<a href="#">✎</a>
<a href="#">▶ Show 3379</a>	1		Capital	Cap-ag	cap-wrart	Awaiting Work Order	29/01/2004 10:21:30	PAHOBALA	<a href="#">✎</a>
<a href="#">▶ Show 3829</a>		aaaaa	Capital	PM	PM-00-01	Awaiting Work Order	19/03/2004 02:01:13	PROJMF	<a href="#">✎</a>
<a href="#">▶ Show 4050</a>		Broken Wheel l@#%*%&*!_+	Capital	Fork Lifts	FL1010	Awaiting Work Order	02/04/2004 01:50:30	BKOZLOWS	<a href="#">✎</a>
<a href="#">▶ Show 4484</a>		my trash wasn't emptied last night and it stinks in here	Capital	EG:OFFICE	REFNORTH-2-2001	Rejected	15/04/2004 14:48:07	SGILLIAM	<a href="#">✎</a>

## Creating and Updating Work Requests

You can create a Work Request within the simple or advanced search pages.

### To create a work request:

1. Navigate to the Work Requests tab.
2. Select the Create Work Request Sub-tab.

## Create Work Request

ORACLE® Asset Management [Diagnostics](#) [Home](#) [Logout](#) [Preferences](#) [Personalize Page](#)

[Home](#) [Work Requests](#)

All | Create Work Request Current Organization : **EM1**

Create Work Request

\* Indicates required field [Cancel](#) [Apply](#)

**Request Details**

* Asset Number <input type="text"/>	* Assigned Department <input type="text" value="F-Maint"/>
* Priority <input type="text"/>	Work Request Type <input type="text"/>
* Request By Date <input type="text" value="17/08/2004 15:45:50"/> <small>(example 16/08/2004 15:45:50)</small>	Requested For <input type="text" value="MFG"/>

**Request Description**

\* Additional Description

**Creation Information**

Created By <b>MFG</b>	Notify User <b>No</b>
Phone Number <input type="text" value="212-445-3383"/>	E-mail <input type="text" value="dsmith@vision.com"/>
Contact Preference <input type="text"/>	

**Descriptive Information**

Context Value

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

[Home](#) | [Work Requests](#) | [Diagnostics](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Personalize Page](#)

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3. If it is indicated as a required field, select an Asset Number. Otherwise, optionally select an Asset Number. This determination is based on a setting in the eAM Parameters. See: Defining eAM Parameters, page 2-8 and Defining Asset Numbers, page 2-47.
4. Select a Priority. See: Work Order and Work Request Priority Codes, page 2-29.
5. Select a Requested By Date.
6. Select an Assigned Department. See: Defining Departments and Resources, page 2-12.
7. Optionally select a Work Request Type. See: Work Request Types, page 2-28.
8. Optionally select a Requested For value.
9. Enter an Additional Description for the Work Request.
10. Optionally enter your phone number.
11. Optionally select a Contact Preference. Valid values are E-mail or Phone Number.
12. Optionally enter your e-mail address.
13. Optionally select a Context Value.
14. Choose Apply.

## Confirmation

ORACLE® Asset Management

[Diagnostics](#) [Home](#) [Logout](#) [Preferences](#) [Personalize Page](#)

[Home](#) [Work Requests](#)

All | [Create Work Request](#)

### Confirmation

Work Request 6160 created. It currently has a status of Awaiting Work Order

[OK](#)

[Home](#) | [Work Requests](#) | [Diagnostics](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Personalize Page](#)  
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15. Choose OK.

### To update a work request:

1. Navigate to the Work Requests tab.



## Simple Search

ORACLE® Asset Management [Diagnostics](#) [Home](#) [Logout](#) [Preferences](#) [Personalize Page](#)

[Home](#) [Work Requests](#)

[All](#) | [Create Work Request](#) Current Organization : **EM1**

---

**Work Requests** [Save Search](#)

**Simple Search**

Please note that the search is case insensitive.

Request Number  Status

Asset Type  Asset Number

Assigned Department

[Go](#) [Clear](#)

---

[Create Work Request](#) [Export Work Requests](#)

Details	Number	Description	Asset Type	Asset Group	Asset Number	Status	Request By Date	Originator	Update
	(No search conducted)								

[Save Search](#)

[Home](#) | [Work Requests](#) | [Diagnostics](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Personalize Page](#)

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2. Populate at least one of the following fields:
  1. Optionally, if you know the specific Work Request number to view, select a Request Number.
  2. To limit your selection, optionally select an Asset Type. If you select Capital, Work Requests that are created for Asset Numbers appear. If you select Rebuildable Inventory, Work Requests that are created for Rebuildable Items appear.
  3. Optionally select an Assigned Department.
  4. Optionally select a Status. See: Work Request Statuses, page 16-1.
  5. Optionally select an Asset Number to search for related Work Requests and Work Orders.
3. Choose Go.

## Related Work Request Search

ORACLE® Asset Management Diagnostics Home Logout Preferences Personalize Page

Home **Work Requests**

All | Create Work Request Current Organization : EM1

Work Requests Save Search

Simple Search  
Please note that the search is case insensitive.

Request Number  Status

Asset Type  Asset Number

Assigned Department

Previous 1-10 Next 10

Details	Number	Description	Asset Type	Asset Group	Asset Number	Status	Request By Date	Originator	Update
<a href="#">Show 3367</a>		great one	Capital	Fork Lifts	All Lifts	Awaiting Work Order	29/01/2004 08:07:49	PAHOBALA	
<a href="#">Show 3376</a>	1		Capital	Cap-ag	cap-wrart	Open	29/01/2004 10:01:46	PAHOBALA	
<a href="#">Show 3378</a>	1		Capital	Cap-ag	cap-an	Rejected	29/01/2004 10:17:22	PAHOBALA	
<a href="#">Show 3379</a>	1		Capital	Cap-ag	cap-wrart	Awaiting Work Order	29/01/2004 10:21:30	PAHOBALA	
<a href="#">Show 3829</a>	aaaaa		Capital	PM	PM-00-01	Awaiting Work Order	19/03/2004 02:01:13	PROJMF	
<a href="#">Show 4050</a>		Broken Wheel l@#\$%^&*()_+	Capital	Fork Lifts	FL1010	Awaiting Work Order	02/04/2004 01:50:30	BKOZLWS	
<a href="#">Show 4484</a>		my trash wasn't emptied last night and it stinks in here	Capital	EG:OFFICE	REFNORTH-2-2001	Rejected	15/04/2004 14:48:07	SGILLIAM	
<a href="#">Show 4485</a>		now i'm too cold	Capital	EG:OFFICE	REFNORTH-2-2001	On Work Order	14/04/2004 14:48:50	SGILLIAM	
<a href="#">Show 4496</a>		Hole in roof!!!	Capital	EG:BUILDING	BLDG-REFNORTH	On Work Order	14/04/2004 16:15:35	ABERTOLE	
<a href="#">Show 3689</a>		QA_WORK_REQUEST_LOG Machine Failed	Capital	gs-ag	gs-ag-an01	Awaiting Work Order	04/03/2004 01:44:23	SGUMMA	

Previous 1-10 Next 10

- Select the Update icon next to the Work Request you wish to update.

## Update Work Request

ORACLE® Asset Management Diagnostics Home Logout Preferences Personalize Page

Home **Work Requests**

All | Create Work Request Current Organization : EM1

Work Requests: Create Work Request >

Update Work Request: 4485 Cancel Apply

\* Indicates required field

Asset Type **Capital** Department **CSPDEPT**  
Asset Group **EG:OFFICE** Category  
Asset Number **REFNORTH-2-2001** Area  
Description **Colorado Springs - high**

**Request Details**

Asset Number	<b>REFNORTH-2-2001</b>	Assigned Department	<b>CSPDEPT</b>
Request Number	<b>4485</b>	Status	<b>On Work Order</b>
Priority	<b>Medium</b>	Work Request Type	<b>Med Priority</b>
Request By Date	<b>14/04/2004 14:48:50</b>	Requested For	<b>SGILLIAM</b>

**Request Description**

Description History \*\*\* SGILLIAM (2004-04-13 14:49:10) \*\*\*  
now i'm too cold

Additional Description

**Creation Information**

Created By	<b>SGILLIAM</b>	Notify User	<b>No</b>
Phone Number	<input type="text" value="35840"/>	E-mail	<input type="text" value="suzanne.gilliam@oracle.com"/>
Contact Preference	<input type="text" value="Phone Number"/>	Date Filed	<b>13/04/2004 14:49:10</b>

**Descriptive Information**

Context Value

**Work Order**

Work Order	<b>EM1104058</b>	Scheduled Completion Date	<b>15/04/2004 15:14:59</b>
Status	<b>Released</b>	Description	<b>CSP ADJUST TEMPERATURE/FIX PROBLEM</b>

5. Optionally add an Additional Description.
6. Optionally update the values in the Creation Information region.
7. Choose Apply.

### Confirmation

ORACLE® Asset Management [Diagnostics](#) [Home](#) [Logout](#) [Preferences](#) [Personalize Page](#)

[Home](#) [Work Requests](#)

All | Create Work Request

Confirmation

Work Request 4485 updated. [OK](#)

[Home](#) | [Work Requests](#) | [Diagnostics](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Personalize Page](#)

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8. Choose OK.



# Part 5

---

## Maintenance User

The Maintenance User is a maintenance person who is generally responsible for completing tasks that are assigned on a Work Order. This person reports maintenance problems using Work Requests, troubleshoots on jobs, and works on a team with other maintenance workers.

This part contains the following chapter:

- Chapter 17, "Maintenance User Workbench", page 17-1

---

## Maintenance User Workbench

This chapter covers the following topics:

- Overview of the Maintenance User Workbench
- Viewing and Managing your Work

### Overview of the Maintenance User Workbench

You can quickly access your daily work information. After selecting Maintenance User Workbench, you are automatically logged into your own personalized user interface.

You can quickly access your daily work information, such as Work Orders and execution processes. After selecting the Maintenance User Workbench role, you are automatically logged into your own personalized user interface. The Maintenance User Workbench provides the information needed for you to evaluate the list of work that you need to complete, and to determine how to organize your workday.

A Key Performance Indicator dashboard displays a summary of your work today, overdue work, and open work. You can view your Open, Past Due, and/or yesterday's work, as well as your Work Orders lined up for tomorrow. You can also view all of your department's and/or Resource's unassigned Work Orders. You can view attachments, Work Order details, asset details, material requirements, and other employees assigned to your Operations. You can enter quality results, meter readings, complete Operations, Work Orders, charge resources, handover work, add notes, and assign yourself to Work Orders that are not yet assigned to an employee.

This section's tasks include:

- Viewing and Managing your Work, page 17-1

### Viewing and Managing your Work

You can view your current workload, including all Operations and Work Orders that you are assigned to. You can view your Open, Past Due, and-or yesterday's work, as well as your Work Orders lined up for tomorrow. You can also view all of your department's and-or Resource's unassigned Work Orders. You can view attachments, Work Order details, asset details, material requirements, and other employees assigned to your Operations. You can enter quality results, meter readings, complete Operations, Work Orders, charge resources, add notes, and assign yourself to Work Orders that are not yet assigned to an employee.

## To view your work:

1. Navigate to the My Work Queue page.
2. Select an Organization.
3. Choose Go.

### Work Queue

ORACLE Asset Management

Home > My Work Queue

Organization: EM1 Go

Date and Time: 26/08/2004 18:27:53

View: Open Work Go

Export Printable Page

Details	Work Order	Op	Description	Start Date	Due Date	Priority	Asset Number	Op Attachments	Charge Time	Complete Operation
▼ Hide	99-Sourcing Rule QA Test 7	10	Inspect	13/05/2004 21:53:49	14/05/2004 13:00:00		Greely Hall	+		

**Work Details**

Asset Group: Buildings Asset Type: Capital  
Asset Activity: Building and Utilities Inspect Work Order Status: Released  
Duration(hrs): 15.103 Assigned Department: Fac Maint  
Long Description:

**Material Requirements**

Material	Description	UOM	Required Qty	Open Qty
Oil Filter Electric	Oil Filter Electric Fork Lifts	Ea	1	1
Cleaning Cloths	Cleaning Cloths	Ea	1	0
Lawn Service	Lawn Service	Ea	1	0
99-Outside Services	Services using non-stocked item template	Ea	1	0

Export Printable Page

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Logged In As: Jonathan Smit

**Key Indicators**

Today's Work: 0 (0 hr)  
Overdue Work: 1 (15.1 hr)  
Open Work: 1 (15.1 hr)

**Shortcuts**

- Create Work Request
- Create Work Order

4. Optionally select a View value.
  - *Open Work*: View all open Work Orders that are assigned to you.
  - *Overdue Work*: View all Work Orders that are overdue, based on their scheduling rules.
  - *My Department's Work*: View all Work Orders that are assigned to your department.
  - *Today's Work*: View all Work Orders that are assigned to you for today.
  - *Tomorrow's Work*: View all Work Orders that are assigned to you for tomorrow.
  - *Yesterday's Work*: View all Work Orders that were assigned to you yesterday.
  - *Work Pending Completion*: View all Work Orders that you have worked on and that are pending completion.
5. Choose Go. All Work Orders appear, according to what is populated in the View field.
6. The Key Indicators region displays current workload personal performance indicators, such as Today's Work, Overdue Work, and Open Work. Optionally, select a link to display the respective Work Orders.



- The Shortcuts region enables you to quickly create a Work Request and-or Work Order. Optionally, select Create Work Request or Create Work Order, respectively. See: eAM Work Orders, page 18-24 and Creating and Updating Work Requests, page 16-6.
- In the My Work Queue region, you can optionally choose to Show or Hide Work Order Details, by selecting Show or Hide, respectively. You can view a summary of Operation details, including material requirements and material request statuses.
- Optionally select a Work Order number to view its details.

## Work Order

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[Home](#) > [Complete Operation](#) > [Home](#) Current Organization : **EM1**

**Work Order: EM1103371**

Work Order	<b>EM1103371</b>	Description	<b>Inspection of Building and Utilities</b>
Department	<b>Fac Maint</b>	Status	<b>Released</b>
Activity	<b>Building and Utilities Inspect</b>	Duration	<b>52.468</b>
Scheduled Start Date	<b>13-Apr-2004 05:31:55</b>	Scheduled Completion Date	<b>15-Apr-2004 10:00:00</b>
Project		Task	
Enable Material Issue Request	<b>Yes</b>	Work Order Attachments	<b>None</b> ( <a href="#">Add</a> )

[Operations](#) [Materials](#) [Resources](#) [Quality Plans](#) [Requests](#) [Purchasing](#) [Work Relationships](#)

Select Operation:  [Go](#)

Select Operation	Dept	Assigned	Description	Scheduled Start Date	Scheduled Duration (hours)	Actual Duration (hours)	Assigned Employees	Completed	Op Attachments
	10	Fac Maint	Inspect	13-Apr-2004 05:31:55	52.468		1		

**View Dependency**

[Expand All](#) | [Collapse All](#)

	April			
		T	W	T
▼ EM1103371				
10				

[Operations](#) [Materials](#) [Resources](#) [Quality Plans](#) [Requests](#) [Purchasing](#) [Work Relationships](#)

[Return To Complete Operation](#)

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The Operations sub-tab defaults as selected.

- This sub-tab enables you to view Operations on the current Work Order, and the operations' dependencies in the View Dependency region. Operations are scheduled to run in parallel, sequence, or through dependent steps.
  - It is important in asset management to capture both estimated and actual time spent on each operation of a Work Order. When resources are identified on a Work Order, there is a time estimate of how long it takes to perform the work. In many cases, the extent of the work load is unknown until the work starts. Resource charging enables you to post actual usage time for employees, equipment, and miscellaneous materials for specific operations on a Work Order.

To charge resources, select an Operation and then select Charge Time from the Select Operation list of values.

  - Choose Go.

## Charge Resource

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**Home**

Home > Complete Operation > Work Order: EM1103371 > Current Organization : EM1

Charge Time Cancel Apply

Work Order <b>EM1103371</b> Asset Number <b>Greely Hall HVAC 1</b> Asset Group <b>Greely Hall - HVAC</b> Operation Sequence <b>10</b> Assigned Department <b>Fac Maint</b>	Description <b>Inspection of Building and Utilities</b> Asset Description <b>HVAC for Greely Hall</b> Activity <b>Building and Utilities Inspect</b> Operation Description <b>Inspect</b>
--	--

---

\* indicates required data

* Resource Sequence <input type="text"/> * Resource <input type="text"/> * Unit of Measure <input type="text"/> * Quantity <input type="text"/> Work Performed Date <input type="text" value="13-Oct-2004 09:44:20"/> <small>(example 13-Oct-2004 09:44:20)</small>	Employee <input type="text"/> Equipment <input type="text"/> Charge Department <input type="text"/> Reason <input type="text"/> Reference <input type="text"/>
--	--

Cancel Apply

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- Select a Resource Sequence. The Resource, Unit of Measure, and Quantity (reflects the number charged, normally in hours) default, based on the selected resource sequence and the resources associated with the Work Order. For information on Resource Sequence, Resource, and Unit of Measure, See: Defining Resource Requirements, page 3-31
- Optionally select the Work Performed Date to indicate the actual date the work was performed.
- Optionally select the Employee that performed the work.
- Optionally select the Equipment used to perform the work.
- Optionally select the Charge Department to identify which department is charged for the employee or equipment usage.

You can display the list of values if the Employee name or Equipment serial number fields are populated. The list of values displays all departments that the person or equipment is assigned to (See: Defining Department Resources, page 2-12). If you enter a Charge Department manually, the system validates that the department matches the current operation's assigned department. If it does not, you will receive an error.

- Optionally select a Reason code to indicate the reason the resource is used.
  - Optionally enter a Reference.
  - Choose Apply to save your work and return to the Work Order page.
10. Optionally select the Materials sub-tab to view or add items from the associated Asset Number's items list. When you enter a Work Order for an Asset Number, the Asset Number's associated Activity attaches the required material (See: Setting

Up Maintenance Bills of Material, page 2-71) and resources to complete its operations. The Inventory and Direct Item requirements display. You can update, add, view, and delete material requirements for a specific operation.

1. You can optionally Request New Inventory Items.

### Request New Inventory Items

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Current Organization : **EM1**

#### One Step Material Issue

Here you may issue material directly to a work order.

\* Work Order  Material

Operation

---

Select Material(s):

Select	Details	Material	Operation	Issued Qty	Qty	UOM	Subinventory	Locator	Lot	From Serial	To Serial	Revision	Replaced Rebuild Details
<input type="checkbox"/>	<a href="#">Show</a>	Oil Filter Electric	10	0		Ea							<a href="#">Edit</a>
<input type="checkbox"/>	<a href="#">Show</a>												<a href="#">Edit</a>
<input type="checkbox"/>	<a href="#">Show</a>												<a href="#">Edit</a>
<input type="checkbox"/>	<a href="#">Show</a>												<a href="#">Edit</a>
<input type="checkbox"/>	<a href="#">Show</a>												<a href="#">Edit</a>
<input type="checkbox"/>	<a href="#">Show</a>												<a href="#">Edit</a>

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- Select an Item.
  - Enter a Required Quantity.
  - Select a Date Required. The system date and time defaults.
  - Optionally select a Supply type.
  - Optionally select whether an Auto Select Material value. If you select Yes, Requisitions/Purchase Orders are created automatically, for the current Inventory Item, when the Work Order is Released.
  - Optionally enter a Description.
  - Optionally enter a Comment.
  - Select whether to include this Inventory Item in the MRP Net.
  - Choose Apply to add the Inventory Item to the operation's material requirements.
2. Optionally choose One Step Material Issue. A one-step material issue is a substitute for the Material Issue Request and Material Issue Verification activities; a separate request is not created.

## One Step Material Issue

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[Home](#) > [Work Order: EM1103372](#) >

Current Organization : **EM1**

### One Step Material Issue

Here you may issue material directly to a work order.

\* Work Order

Operation

Material

---

Select Material(s):

Select	Details	Material	Operation	Issued Qty	Qty	UOM	Subinventory	Locator	Lot	From Serial	To Serial	Revision	Replaced Rebuild Details
<input type="checkbox"/>	Show	Oil Filter Electric	10	0		Ea							
<input type="checkbox"/>	Show	<input type="text"/>											
<input type="checkbox"/>	Show	<input type="text"/>											
<input type="checkbox"/>	Show	<input type="text"/>											
<input type="checkbox"/>	Show	<input type="text"/>											
<input type="checkbox"/>	Show	<input type="text"/>											

---

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- Optionally select the specific Operation to view results on existing One Step Material Issues that were issued to that operation. Operations existing within the selected Work Order are available.
- Optionally select a specific Material if your query is to view existing One Step Material Issues.
- Choose Go. All planned material appears in the Select Material(s) region. Planned material is material that exists in the Work Order's material requirements. See: Defining Inventory Material Requirements, page 3-26.
- Within the Select Material(s) region, optionally select unplanned Material (material not part of the Work Order's material requirements) to issue to the current Work Order.
- Select an Operation to issue the material. The UOM defaults to the current Material's UOM.
- Select the Quantity of the material that you are issuing to the Work Order.
- Optionally select a Subinventory to pull the material from in Inventory.
- If you previously selected a Subinventory requiring a Locator, select a Locator.
- If the current material is lot controlled, select a Lot.
- If the current material is serial controlled, select From and To Serial numbers.
- Optionally select a Revision.

- If the material is Rebuildable Inventory, optionally choose the Replaced Rebuild Details icon to specify the replacement Rebuildable Item information for the current Rebuildable Item. After selected, you can indicate the following within the Replaced Rebuild Details page:

*Rebuild Item* - defaults as the current Rebuild Item; you can update it.  
*Rebuild Serial Number* - optionally enter if you know what serial number is coming out (for serialized rebuilds).  
*Rebuild Activity* - the activity you want to associate with the created rebuild Work Order.  
*Rebuild Work Order* - the name of the Work Order created for the replaced Rebuildable Item. If you specify a replaced rebuildable item, a Work Order generates for the replaced rebuildable item because it is most likely problematic and you can have it repaired. If a serial number is provided for the replaced Rebuildable Item, it is removed from the asset's hierarchy and the configuration history updates. If nothing is specified within the Replaced Rebuild Details page, the replaced rebuild defaults as the same rebuild item that you are issuing. A Work Order is created for the replaced rebuild item.

- Optionally, select the Details Show/Hide toggle icon.

Optionally select a Reason for the current issue. Select the Date required for the material to the Work Order. Today's date and time defaults. Optionally enter a Reference.

- Select the Select check box next to the lines you are issuing to the current Work Order.
- Choose Issue.

3. You can optionally choose Request New Direct Items to add Direct Items to the operation's material requirements. Direct Items represent items with infrequent use or criticality; they are not included in the internal catalog as stocked items. These items are considered "one off", bought directly from a vendor for a specific Work Order and Operation. These items are delivered directly to the Shop Floor for maintenance Work Order execution. See: Defining Direct Item Material Requirements, page 3-29.

## Request New Direct Items

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Current Organization : **EM1**

**Request New Direct Items: EM1103372**

Work Order **EM1103372**  
 Asset Number **Greely Hall Furnace 1**  
 Asset Group **Greely Hall Furnace**  
 Operation Sequence **10**

Description **Inspection of Building and Utilities**  
 Asset Description **Greely Hall Furnace 1**  
 Asset Type **Rebuildable Inventory**  
 Assigned Department **Fac Maint**

---

\* indicates required data

Direct Item Type **Non Stock Item**

\* Item

\* Description

\* Quantity **1**

UOM

\* Need By Date **13-Oct-2004 10:03:46**  
(example 13-Oct-2004 10:03:46)

Purchasing Category

Supplier

Contact Name

Supplier Item

Supplier Site

Contact Phone

Price

Currency **USD**

Auto Request Material **Yes**

[Cancel](#) [Request Another](#) [Apply](#)

---

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- Select a Direct Item Type.
 

*Description Based Item:* This direct item type is not stored in Oracle Inventory. *Non Stock Item:* This direct item type is stored in Oracle Inventory. Its Master Item record's Stockable check box is cleared.
  - If you selected a Non Stock Item Type, select an Item. This field is disabled if a Description Based Item Type was previously selected.
  - Enter a Description, if you previously selected a Description Based Item Type.
  - Enter a UOM. If you previously selected a Non Stock Item Type, this value defaults from the Master Item.
  - Enter a Need By Date. The system date defaults.
  - Optionally enter a Purchasing Category. See: Setting Up Purchase Order Category Associations for Direct Items, .
  - Choose Apply.
4. Optionally select the Update icon to update the current material requirement information.
  5. Optionally select the Request More icon to request more of the current material requirement to the operation.
  6. Optionally choose Delete to delete the current material requirement.
  7. To access iProcurement, choose Search Catalog.

## Search Catalog

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**Shop** Requisitions Receiving Contractors

**Stores** | **Categories** | **Shopping Lists** | **Non-Catalog Request** | **Contractor Request**

Search   [Advanced Search](#)

**Information**  
Information - The current responsibility context has been switched to: iProcurement

**Stores**

<a href="#">StaplesStore</a>	<a href="#">StarGateLtdStores</a>	<a href="#">Office Supplies</a> Pen, paper, business cards
<a href="#">Wireless</a> Phones, pagers and services	<a href="#">Contractors</a> Temp Labor	<a href="#">Legal Services</a> Immigration, contract review
<a href="#">Copier</a> Supplies & Maintenance	<a href="#">Promotional Items</a> Gifts for customers	<a href="#">Main Store</a> Main Store
<a href="#">Punch-Store 1</a> Punch-Store 1	<a href="#">Punchout-Transparent-1</a> Punchout-Transparent-1	<a href="#">Tester's store</a>
<a href="#">SAQQARA</a> Saqqara - transparent punchout	<a href="#">Surs-Exch-PO</a> Surs-Exch-PO	<input type="button" value="x"/> This is the store's image. <a href="#">MG Punchout Store</a> <a href="#">MG Punchout Store</a>
<a href="#">RVStore</a> Raju Store for local catalog and info catalog	<a href="#">625 Store</a>	<a href="#">Surs-Trans-PO</a> Surs-Trans-PO
<a href="#">Exchange Portal Store</a> Exchange Portal Store	<a href="#">RVPunchoutStore</a>	<a href="#">Transparent Punchout</a>
<a href="#">InfoStore</a>	<a href="#">74 NCR Store</a> 74 NCR Template	<a href="#">625 Portal New Store</a> 625 Portal New Store
<a href="#">OEXDEV Store</a>		

**Shopping Cart**  
Your cart is empty.

**Purchasing News**  
✓ [Check frequently asked questions](#)  
✓ [Review purchasing policies](#)  
  
This is where the customer puts their own purchasing news items (this is an HTML plugin).

**My Requisitions** (Full List)

Requisition	Description	Total (USD)	Status	Copy	Change	Express Receive
100428		0.00	Approved			
100426		2,500.00	Approved			

- Optionally select the Resources sub-tab to view or update the current Work Order's employee and equipment resource requirements. When you enter a Work Order for an Asset Number, the Work Order's associated Activity attaches the required material (See: Setting Up Maintenance Bills of Material, page 2-71) and resources to complete its operations.

## Resources

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Current Organization

Work Order: EM1103372

Work Order	EM1103372	Description	Inspection of Building and Utilities
Department	Fac Maint	Status	Released
Activity	Building and Utilities Inspect	Duration	52.468
Scheduled Start Date	13-Apr-2004 05:31:55	Scheduled Completion Date	15-Apr-2004 10:00:00
Project		Task	
Enable Material Issue Request	Yes	Work Order Attachments	None <a href="#">Add</a>

Asset Details

Asset Number	Greely Furnace
Asset Group	Greely Furnace
Asset Type	Rebuild Invento
Area	
Owning Dept	Fac Ma

### Employee Resources

Resource	Resource Sequence	Operation	Dept	Qty	Required Units	Charged Units	UOM	Start Date	Completion Date	Charge Time	View Assigned Employees	Delete
MaintTech	1	10	Fac Maint	1			HR	13-Apr-2004 05:31:55	15-Apr-2004 10:00:00			

### Equipment Resources

Resource	Resource Sequence	Operation	Dept	Qty	Required Units	Charged Units	UOM	Start Date	Completion Date	Charge Equipment	Delete
No data exists.											

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For Employee Resources, you can optionally choose Charge Time to charge time to the current resource.

### 1. Charge Time

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Current Organization : EM1

Charge Time

Work Order	EM1103372	Description	Inspection of Building and Utilities
Asset Number	Greely Hall Furnace 1	Asset Description	Greely Hall Furnace
Asset Group	Greely Hall Furnace	Activity	Building and Utilities Inspect
Operation Sequence	10	Operation Description	Inspect
Assigned Department	Fac Maint		

\* indicates required data

* Resource Sequence	<input type="text" value="1"/>	Employee	<input type="text" value="Smith, Mr. Jonathan"/>
* Resource	<input type="text" value="MaintTech"/>	Equipment	<input type="text"/>
* Unit of Measure	<input type="text" value="HR"/>	Charge Department	<input type="text" value="Fac Maint"/>
* Quantity	<input type="text"/>	Reason	<input type="text"/>
Work Performed Date	<input type="text" value="13-Oct-2004 10:13:29"/>	Reference	<input type="text"/>

(example 13-Oct-2004 10:13:29)

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

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- Select a Resource Sequence. The Resource, Unit of Measure, and Quantity (reflects the number charged, normally in hours) default, based on the selected resource sequence and the resources associated with the Work Order. For information on Resource Sequence, Resource, and Unit of Measure, See: Defining Resource Requirements, page 3-31.
- Select a Resource to charge.
- Select a Unit of Measure. The value defaults as the current Resource's Unit of Measure.
- Enter a Quantity.
- Optionally select the Work Performed Date to indicate the actual date the work was performed.
- Optionally select the Employee that performed the work.
- Optionally select the Equipment used to perform the work.
- Optionally select the Charge Department to identify which department is charged for the employee or equipment usage.

You can display the list of values if the Employee name or Equipment serial number fields are populated. The list of values displays all departments that the person or equipment is assigned to. If you enter a Charge Department manually, the system validates that the department matches the current operation's assigned department. If it does not, you will receive an error.

- Optionally select a Reason code to indicate the reason the resource is used.
  - Optionally enter a Reference.
  - Choose Apply.
2. For Employee Resources, you can optionally choose the View Assigned Employees icon to view the specific employee numbers associated with the current resource.
  3. Optionally choose the Delete icon to delete the current resource requirement.
12. Optionally choose the Quality Plans sub-tab to view the current Work Order's Work Order and Operation specific Quality collection plans. Collection plans appear that are associated with the current Work Order's Asset Number. When a collection plan is created, it is specified whether the collection plan requires completion. Triggers might have been specified to make specific assets eligible for the collection plan. See: Quality Integration Setup, page 2-110.

## Quality Plans

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**Work Order: EM1103372**

Work Order: <b>EM1103372</b>	Description: <b>Inspection of Building and Utilities</b>	<b>Asset Details</b> Asset Number: <b>Greely Hall Furnace 1</b> Asset Group: <b>Greely Hall Furnace</b> Asset Type: <b>Rebuildable Inventory</b> Area: <b>Fac Maint</b> Owning Dept: <b>Fac Maint</b>
Department: <b>Fac Maint</b>	Status: <b>Released</b>	
Activity: <b>Building and Utilities Inspect</b>	Duration: <b>52.468</b>	
Scheduled Start Date: <b>13-Apr-2004 05:31:55</b>	Scheduled Completion Date: <b>15-Apr-2004 10:00:00</b>	
Project: <b>Enable Material Issue Request</b>	Task: <b>None</b> ( <a href="#">Add</a> )	

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**Work Order Quality Plans**

Previous 1-10 Next 10

Plan Name	Description	Mandatory	Results Entered	Enter Quality Results	View Quality Results	Quality Plan Attachments
EAM PLAN 1 test for ST						

**Operation Quality Plans**

View Quality Plans for Operation: 10

Plan Name	Description	Mandatory	Results Entered	Enter Quality Results	View Quality Results	Quality Plan Attachments
EAM PLAN 1 test for ST						
EAM PLAN						

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- Optionally select the Enter Quality Results icon. Required Data fields depend on the Collection Plan's collection element specifications. See: Quality Integration Setup, page 2-110.

## Enter Quality Results

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Enter Quality Results: EAM PLAN 1

\* Indicates required field

[Cancel](#) [Add Another Row](#) [Apply](#)

### Work Order Details

Work Order	EM1103372	Description	Inspection of Building and Utilities
Asset Group	Greely Hall Furnace	Asset Activity	Building and Utilities
Asset Number	Greely Hall Furnace 1		Inspect

### Data

* Comments	<input type="text"/>	* Maintenance Op Seq	<input type="text"/>	
time element	<input type="text"/>	Attachment	None	<a href="#">Add</a>

[Cancel](#) [Add Another Row](#) [Apply](#)

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- Optionally choose Add to attach any necessary files, URLs, or text to the current Quality results. Each results entry can have an unlimited number of attachments. Choose Apply.
  - Choose Apply to save the results entry.
2. Optionally select the View Quality Results icon to view or update existing Quality results already entered. Select Return to Work Order Details.
13. Optionally select the Requests sub-tab to view any Service and/or Work Requests associated with the current Work Order.

## Requests

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Current Organization : **EM1**

**Work Order: EM1103372**

Work Order	<b>EM1103372</b>	Description	<b>Inspection of Building and Utilities</b>
Department	<b>Fac Maint</b>	Status	<b>Released</b>
Activity	<b>Building and Utilities Inspect</b>	Duration	<b>52.468</b>
Scheduled Start Date	<b>13-Apr-2004 05:31:55</b>	Scheduled Completion Date	<b>15-Apr-2004 10:00:00</b>
Project		Task	
Enable Material Issue Request	<b>Yes</b>	Work Order Attachments	<b>None</b> ( <a href="#">Add</a> )

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**Asset Details**

Asset Number	<b>Greely Hall Furnace 1</b>
Asset Group	<b>Greely Hall Furnace</b>
Asset Type	<b>Rebuildable Inventory</b>
Area	
Owning Dept	<b>Fac Maint</b>

**Direct Items**

Direct Item Type	Item	Description	Operation	UOM	Qty	Requisition	Purchase Order Qty	Received Qty	Purchase Order	Requisition Number
Non Stock Item	Cleaning Cloths	Cleaning Cloths	10	Ea	1		0	0		<a href="#">5411</a>
Non Stock Item	Lawn Service	Lawn Service	10	Ea	1		0	0		<a href="#">5412</a>

**Outside Processing**

Resource	Operation	Resource Seq Num	Requisition UOM Qty	Purchase Order Qty	Received Qty	Purchase Order	Requisition Number
No data exists.							

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14. Optionally select the Purchasing sub-tab to Direct Items or Outside Services for the current Work Order.
  1. Optionally select a specific Requisition Number to view its details.

## Requisition

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Requisition 5411

OK

Description  
Created By **Freeman, Pam**  
Creation Date **14-Apr-2004 03:49:35**  
Deliver-To **3455 108th Ave Seattle, King, WA, 98101**  
Justification

Status Approved  
Change History **No**  
Urgent Requisition **No**  
Attachment **None**  
Note to Buyer

### Details

Line	Description	Need-By	Deliver-To	Unit	Quantity	Price	Amount (USD)	Details	Order	Purchasing Organization
1	Cleaning Cloths	13-Apr-2004 00:00:00	Seattle Maintenance	Each	1	20.00 USD	20.00			
Total							20.00			

[Return](#)

OK

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- Optionally view a specific Line's Details. Choose OK to return to the Requisition page.
- Choose OK.
- Optionally select the Work Relationships sub-tab to view Work Order schedules and Work Order details. Work Order Relationships enable you to manage a network of related Work Orders, enabling you to manage complex projects, such as planned or facility shutdowns. The different relationships provide separate scheduling rules that are used to manage large projects. A Gantt chart enables you to manage work by displaying Work Order schedules and a summary of Work Order details. See: Work Order Relationships, page 3-35.

## Work Relationships

**ORACLE** Asset Management

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Home

Shop Stores > Work Order: EM1103372 >

Current Organization : EM1

Work Order: EM1103372

Work Order	EM1103372	Description	Inspection of Building and Utilities
Department	Fac Maint	Status	Released
Activity	Building and Utilities	Duration	52.468
Project	Inspect		
Scheduled Start Date	13-Apr-2004 05:31:55	Scheduled Completion Date	15-Apr-2004 10:00:00
Enable Material Issue Request	Yes	Work Order Attachments	None (Add)

Operations Materials Resources Quality Plans Requests Purchasing Work Relationships

Expand All | Collapse All

Focus	Work Order	April
		T W T
	▼ 99-wo 1 Greely Hall Parent	
	▼ EM1103370	
	▼ EM1103040	
	▼ EM1103371	
	EM1103372	

▼ View All Relationships

Work Order	Description	Relation	Relation Status	Asset Type	Asset Group	Asset Number
EM1103371	Inspection of Building and Utilities	Scheduling Parent	Valid	Rebuildable Inventory	Greely Hall - HVAC	Greely Hall HVAC 1

Operations Materials Resources Quality Plans Requests Purchasing Work Relationships

Return To Work Order: EM1103372

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16. Optionally select the Op Attachments View icon to view the current Operation's existing attachments. This icon appears if there are existing attachments.

## Attachments

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Attachments

Search

Please note that the search is case insensitive.

Name  Go

► Show More Search Options

Add Attachments

File Name	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
WOAPL-flow.doc	File	w	Miscellaneous	MFG	03-Sep-2004	One-Time		
Undefined	Text	asdfsdfsad	Miscellaneous	MFG	03-Sep-2004	One-Time		
Undefined	Text	asdfsdf	Miscellaneous	MFG	03-Sep-2004	One-Time		
Undefined	Text	dasfsdf	Miscellaneous	MFG	03-Sep-2004	One-Time		
Undefined	Text	asdfsdfsd	Miscellaneous	MFG	03-Sep-2004	One-Time		
Undefined	Text	sdfgsdfgsdfgsdfg	Miscellaneous	MFG	03-Sep-2004	One-Time		

Return to My Work Queue

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1. Optionally view an attachment by selecting the File Name. If the attachment has a Text Type, the View Attachment page appears. Otherwise, the specific file type opens.
  - Optionally update an attachment by selecting the Update icon.

### Update Attachment

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[Home](#) > [Oracle Enterprise Asset Management Attachments](#) >

Update Attachment: WOAPI-flow.doc [Cancel](#) [Apply](#)

**Attachment Summary Information**

+ Indicates required field

+ Description

Category

**Define Attachment**

File  [Browse...](#)

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

[Home](#) | [Diagnostics](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#) | [Personalize Page](#)

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- After making changes, choose Apply to save them, or Cancel to return to the Attachments page.
2. Optionally delete an attachment by selecting the Delete icon.
  3. Optionally choose Add Attachments to attach any necessary files, URLs, or text to the current operation. Each operation can have an unlimited number of attachments.
  4. Choose Apply.
  5. Select Return to My Work Queue.
17. Optionally select the Op Attachments Add icon to attach any necessary files, URLs, or text to the current operation. Each operation can have an unlimited number of attachments.
  18. Optionally select the Charge Time icon to charge resource time to the current Operation. See: Transacting Resources, page 3-45.

## Charge Time

ORACLE® Asset Management Diagnostics Home Logout Preferences Personalize Page

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Home > Current Organization : EM1

Charge Time Cancel Apply

---

Work Order **99-Sourcing Rule QA Test 7** Description **try once more**  
 Asset Number **Greely Hall** Asset Description  
 Asset Group **Buildings** Activity **Building and Utilities Inspect**  
 Operation Sequence **10** Operation Description **Inspect**  
 Assigned Department **Fac Maint**

---

\* indicates required data

\* Resource Sequence  Employee    
 \* Resource  Equipment    
 \* Unit of Measure  Charge Department    
 \* Quantity  Reason    
 Work Performed Date  Reference    
 (example 08-Sep-2004 03:24:11)

Cancel Apply

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19. Optionally select the Complete Operation icon to complete the current Operation. See Operation Completion, page 3-39.

## Complete Operation

**Home**

Home > Current Organization : EM1

Complete Operation Cancel Complete Work Order (0) Apply

---

Work Order **99-Sourcing Rule QA Test 7** Asset Type **Capital**  
 Asset Number **Greely Hall** Asset Group **Buildings**  
 Operation **10** Description **Inspect**  
 Assigned Department **Fac Maint** Assigned Employees **1**

---

Enter completion information and hit 'Apply' to complete the operation.

**Completion Details**

\* indicates required data

Transaction Type **Complete Operation**  
 \* Actual Start Date and Time    
 (example 08-Sep-2004 04:02:25)  
 \* Actual Duration (hours)   
 Actual End Date and Time   
 Reconciliation Code    
 Reference   
 Attachments [View](#) [Add](#)  
 Context Value   
 \* segment1

**Quality Plans**

Plan Name	Description	Mandatory	Results Entered	Enter Quality Results	View Quality Results	Quality Plan Attachments
EAM PLAN 1	test for ST					
EAM PLAN						

► Prior Operations

Cancel Complete Work Order (0) Apply

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1. The Actual Start Date and Time defaults; you can optionally update it.
2. Actual Duration identifies the total elapsed time of the Work Order. It is automatically calculated as the difference between the operation's Scheduled Start and End Dates.
3. Optionally select a Reconciliation Code to describe why you are completing this operation. For example, Operation Completed or Operation Partially Completed.
4. Optionally select a Reconciliation Code to describe why you are completing or uncompleting this operation.
5. Optionally enter a Reference.
6. Optionally choose Add to attach any necessary files, URLs, or text to the current operation. Each operation can have an unlimited number of attachments.
7. Optionally select a Context Value.
8. Enter a segment1 flexfield value.
9. The Quality Plans region displays collection plans that are associated with the current Work Order's Asset Number. When a collection plan is created, it is specified whether the collection plan requires completion. Triggers might have been specified to make specific assets eligible for the collection plan. See: Quality Integration Setup, page 2-110. If results entry is required for the collection plan, you are prompted to enter Quality results upon completing the Operation.
10. Optionally select the Enter Quality Results icon. Required Data fields depend on the Collection Plan's collection element specifications. See: Quality Integration Setup, page 2-110.

### Enter Quality Results

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Enter Quality Results: EAM PLAN 1

\* Indicates required field

**Asset Details**

---

**Work Order Details**

Work Order	99-Sourcing Rule QA Test	Description	try once more
Asset Group	Buildings	Asset Activity	Building and Utilities
Asset Number	Greely Hall	Op Seq Num	10

**Data**

* Comments	<input type="text"/>	Attachment	None <input type="button" value="Add"/>
time element	<input type="text"/>		

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11. Optionally choose Add to attach any necessary files, URLs, or text to the current Quality results. Each results entry can have an unlimited number of attachments. Choose Apply.
12. Choose Apply to save the results entry or Cancel to return to the Complete Operation page.
13. Optionally select the View Quality Results icon to view or update existing Quality results already entered.


### View Quality Results

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[Home](#) > [Charge Time](#) > [Complete Operation](#) >

View Quality Results: EAM PLAN

Comments	Created By	Collection	Entry Date	Attachments	Update
Collect Results Entry.	MFG	51335	13-Oct-2004 09:27:53		

[Return to Complete Operation](#)

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- Optionally select the Update icon to Update the current quality results.
14. Select Return to Complete Operation.
  15. Choose Apply to complete the operation or Cancel to return to the Work Order page.
  20. If you belong to the resource department on the Work Order, you can assign the current Operation to you by selecting the Self Assign icon. This is useful if your maintenance organization schedules operations at the employee resource level and not the employee level.

## Related Topics

Defining Inventory Material Requirements, page 3-26

Defining Direct Item Material Requirements, page 3-29

# Part 6

---

## Maintenance Super User

The Maintenance Super User is generally a Maintenance Planner or Supervisor and is often defined as a "super user". A Maintenance Planner plans and schedules maintenance jobs, manages and balances work loads over time, manages preventive maintenance strategy and scheduling, manages material requirements, monitors availability, and coordinates strategies with other departments, such as Operations, Purchasing, and Inventory. A Supervisor manages a crew of maintenance workers, assigns jobs based on workers' abilities and availability, inspects and verifies work, communicates with other departments, knows the current status of all jobs and assets, and is responsible for environmental health and safety.

This person has extensive knowledge of the Enterprise Asset Management system and is responsible for creating and scheduling Work Orders, including Preventive Maintenance Work Orders. This person updates Work Orders, orders parts, and completes operations and Work Orders.

This part contains the following chapters:

- Chapter 18, "Maintenance Super User", page 18-1
- Chapter 19, "Stores", page 19-1
- Chapter 20, "Reports and Processes", page 20-1

---

## Maintenance Super User

This chapter covers the following topics:

- Introduction
- Home
- Assets
- Obtaining Asset Number Information
- Viewing Asset Number Information
- Work Requests
- Work Orders
- Viewing Work Orders
- Work Plans
- Viewing Capital Asset and Rebuildable Inventory Work Orders
- Stores

### Introduction

This chapter discusses eAM's Maintenance Super User role, and its web based user-interface.

Maintenance Super User is an internet based user-interface for maintenance personnel. It introduces you to an easier approach of entering and searching for information from any browser. Its step-by-step process requires minimal training and is intuitive enough for you to find and update information.

Maintenance Super User is designed for the casual maintenance user (for example, trades people, such as fitters, mechanics, and electricians), in a plant or facility. Responsibilities can be assigned by employee or by role. This determines the information you can view and update.

### Home

The Maintenance Super User's Home tab enables you to change organizations, as well as view and transact purchase order and work request notifications.

You can indicate whether Work Requests are automatically approved upon creation. Within the eAM Parameters, if the Auto Approve check box is selected, work

requests are created in an Awaiting Work Order (approved) status (See: Defining eAM Parameters, page 2-8). Otherwise, if the check box is not selected, work requests are created in an Open status. If an organization has selected Work Request Approval through Oracle Workflow Management, the system will notify all users that belong to that approval group to take action on the work request created (See: Defining Department Approvers, page 2-16). After an individual has taken action, the notification is removed from other approvers' notification lists belonging to that same approval group.

From the Home Page tab of Maintenance User, an approver can select a work request and view its details. You can see any notification routed for your responsibility (See: Defining Department Approvers, page 2-16).

### To select an organization to view notifications:

1. Navigate to the Home tab.

#### Home

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Home Assets Work Requests Work Orders Work Plan Stores

A maintenance organization must be selected to use this application. Choose an org using the flashlight in the Organization field and press the GO button to select it.

Choose Organization

A maintenance organization must be selected to use this application. Choose an org using the flashlight in the Organization field and press the GO button to select it.

Selected Organization **EM1**

Organization  Go

Full List

From	Type	Subject	Sent	Due
	MSD Demand Planning Cycle	Data is uploaded - the Cycle is complete for Plan Name JB-GLFC1	21-Sep-2004	
	MSD Demand Planning Cycle	Forecast complete and Measures populated for plan: JB-GLFC1	21-Sep-2004	
	MSD Demand Planning Cycle	Data has been loaded for JB-GLFC1	21-Sep-2004	
	OM Order Header	Order Number Placed on Credit Hold	14-Sep-2004	
Kingston, Mr. Max	OKE Communication Action	Contract communication comm1 for Award SA-Mar10-04	09-Sep-2004	
Workflow Administrator	FTE Load Tender Request	Tender 53910 sent to FTEIB_CAR1 has expired	12-Jul-2004	
Workflow Administrator	FTE Load Tender Request	Tender 51972 sent to FTEIB_CAR1 has expired	09-Jun-2004	
	MSD Demand Planning Cycle	Data has been loaded for VM01	08-Jun-2004	
SYSADMIN	OM Negotiation Header	Offer for Quote 40 has expired	08-Jun-2004	
Kingston, Mr. Max	OKE Communication Action	Contract communication BN67-E-mail for Award B422-HLD-A	07-Jun-2004	
	OM Order Header	Order Number 105 Placed on Credit Hold	26-May-2004	
	Supplier User Registration Workflow	Vision Enterprise Supplier Collaboration Network: Notification for Approval	25-May-2004	
	ECO Approval	ERES Approval Notification	13-May-2004	
	ASCP Exception WorkFlow in Source Instance	Material constraint on KS-STD-G at the FRESNO site of Advanced Network Devices	26-Apr-2004	
	ASCP Exception WorkFlow in Source Instance	Material constraint on KS-STD-D at the FRESNO site of Advanced Network Devices	26-Apr-2004	
	ASCP Exception WorkFlow in Source Instance	Material constraint on KS-STD-D at the FRESNO site of Advanced Network Devices	26-Apr-2004	

2. Within Subject column, select the Work Request or Purchase Order notification to open and view.
3. You can Approve, Reject, Reassign a notification, or you can Request Information from the originator by choosing the appropriate buttons, respectively.  
Choose Reassign to reassign the work request approval to another approval group.
4. Optionally close the approval request by choosing Return to Worklist.

**Note:** First choose an eAM organization before you can select additional tabs. See: Organization Setup, page 2-5.

## Assets

The Assets tab enables you to identify Asset Numbers via Capital and Rebuildable Inventory navigators. By obtaining detailed Asset Number information, you can either view details or launch pages to view current/historical configurations of the Asset Number. As Serialized Rebuildables are installed and removed from a particular asset, the genealogy automatically updates. This section's tasks include:

- Obtaining Asset Number Information, page 18-3
- Viewing Asset Number Information, page 18-6

## Obtaining Asset Number Information

You can query Asset Numbers that you would like to view associated details, hierarchal information, cost information, associated work and service requests, enter and view meter readings, and Quality information. You can use a Simple or Advanced Search to obtain your desired Asset Numbers.

### To obtain Asset Number Information:

1. Navigate to the Assets tab.

#### Assets (Views Mode)

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Home Assets Work Requests Work Orders Work Plan Stores

Capital | Rebuildable Inventory

Current Organization : EM1

Asset Numbers

Views

View Search AN-J-1 Go Personalize Simple Search

Export Asset Numbers

Select Asset Number	Description	Asset Group	Category	Area	Owning Department	Criticality
(No items found)						

Home | Assets | Work Requests | Work Orders | Work Plan | Stores | Diagnostics | Home | Logout | Preferences | Personalize Page

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2. Select either the Capital or the Rebuildable Inventory sub-tab to view information on Capital Asset Numbers or Serialized Rebuildable Asset Numbers, respectively.
3. If you have previously saved some search criteria, the Views mode appears. You might use this mode if you frequently search for Asset Number information with

specific criteria, such as Owning Department or Asset Group, among many. You can personalize a View to narrow your search criteria.

1. The View list of values contains already existing Views. You can optionally select an existing View.
2. Optionally choose Go to display the Asset Number information that applies to the current View's search criteria rules.
3. Optionally choose Personalize to update, delete, or duplicate an existing View. You can also create a new View.
4. Optionally select a View Name and then choose Duplicate to default all of the selected View's values to a new View.
5. Optionally choose Create View to create a new view.

### Create View

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#### Create View

Below is a list of attributes that can be edited to change the view and/or filter the data that is displayed in your table. [Cancel](#) [Revert](#) [Apply and View Results](#) [Apply](#)

\* Indicates required field

**General Properties**

+ View Name

Number of Rows Displayed  ☐ Set as Default

Description

**Search Query to Filter Data in your Table**

Specify parameters and values to filter the data that is displayed in your table.

☒ Search results where each must contain all values entered.

☐ Search results where each may contain any value entered.

Asset Number

Asset Group

Asset Route

Owning Department

Add Another  [Add](#)

[Cancel](#) [Revert](#) [Apply and View Results](#) [Apply](#)

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- Enter a View Name.
  - Optionally select the Number of Rows Displayed.
  - Optionally select the Set as Default check box to indicate that this view is the default view.
  - Optionally enter the View's Description.
  - Specify whether the search results for the current View must contain all of, or may contain any one of, the following values entered, by selecting the appropriate radio button, respectively.
  - Optionally enter an Asset Number.
  - Optionally select an Asset Group.



- Optionally select whether the Asset Numbers have an associated Asset Route.
  - Optionally select an Owning Department.
  - Optionally select additional search criteria from the Add Another list of values.
  - Choose Cancel, Revert, Apply and View Results, or Apply.
- The Display List value determines whether the current View exists within the View list of values.
  - Optionally select the Update icon to update the values for the current View.
  - Optionally select the Delete icon to delete the current View.
  - Optionally choose Cancel to exit the Personalize Views page, without selecting a View
  - Optionally select one or many Views to add to the Views drop down list, and then choose Apply to exit the Personalize Views page.
- Optionally choose Simple Search.

### Assets (Simple Search Mode)

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Capital | Rebuildable Inventory

Current Organization: EM1

Asset Numbers

Save Search

Simple Search

Please note that the search is case insensitive.

Advanced Search Views

Asset Number

Category ForkLift.Electric

Asset Route No

Go Clear

Select Asset Number: Work Requests Go Export Asset Numbers

Select Asset Number	Description	Asset Group	Category	Area	Owning Department	Criticality
<input checked="" type="radio"/> FL1010	Fork Lift 1010	Fork Lifts	ForkLift.Electric	Warehouse	W-Maint	Normal
<input type="radio"/> FL1020	Fork Lift 1020	Fork Lifts	ForkLift.Electric	Warehouse	W-Maint	Normal
<input type="radio"/> FL1030	Fork Lift 1030	Fork Lifts	ForkLift.Electric	Warehouse	W-Maint	Normal
<input type="radio"/> FL1040	Fork Lift 1040	Fork Lifts	ForkLift.Electric	Warehouse	W-Maint	Normal

Save Search

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- Optionally enter an Asset Number.  
You can enter a portion of an Asset Number and append a % (wildcard) to display multiple Asset Numbers with similar names.
- If the Capital sub-tab is selected, you can optionally select a Category to narrow your selection criteria.

7. If the Rebuildable Inventory sub-tab is selected, you can optionally select an Asset Group.
8. If the Capital sub-tab is selected, you can optionally select whether to display Asset Numbers with associated Asset Routes (tasks). Valid values are Yes and No. See: Defining Asset Routes, page 2-53.
9. Optionally choose Advanced Search to further narrow your selection criteria, to values such as Asset Group, Asset Route, Owning Department, Category, Area, Accounting Class, Fixed Asset Number, Criticality, Maintainable, Description, Attributes, Production Organization, Equipment Item, Equipment Serial Number, Property Location Code, and/or Property Location Name. For information on these values, See: Defining Asset Numbers, page 2-47.
10. Choose Go.

## Viewing Asset Number Information

You can display specific details about an Asset Number, such as an asset's configuration history, costs, hierarchy information, associated meter readings, Quality information, associated Work Orders, and associated Work Requests. You can also view the Asset Number's associated Asset Group, parent, parent group, Category, Owning Department, Area, Accounting Class, Criticality, maintainability, the associated equipment serial number, attachments, associated Activities, and asset attributes.

### To display Asset Number details:

1. Navigate to the Asset Numbers page, and query an Asset Number. See: Obtaining Asset Number Information, page 18-3.

## Asset Details

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Capital | Rebuildable Inventory

[Assets: Capital](#) >

Current Organization : **EM1**

Asset Details: FL1010

Work Requests

Asset Number **FL1010**  
Asset Number Description **Fork Lift 1010**  
Asset Group **Fork Lifts**  
Asset Group Description **Fork Lift Asset Group**  
Current Org **EM1**  
Parent Asset Number **All Lifts**  
Parent Asset Group **Fork Lifts**  
Category **ForkLift.Electric**  
Owning Department **W-Maint**  
Area **Warehouse**  
Accounting Class **MaintWAC**  
Criticality **Normal**  
Maintainable **Yes**  
Asset Route **No**  
Equipment Serial Number

Attachments **None**

### Attributes

Attribute Group	Description
<a href="#">Fork Lift Classifications</a>	Fork Lift Data
<a href="#">Warranty Data</a>	Warranty Data

### Activities

Activity	Start Date	End Date	Activity Type	Activity Cause	Activity Source	Owning Department	Priority	Last Service Start Date	Last Service End Date	Next Service Start Date	Next Service End Date
Change Fork Lift Battery	31-Oct-2002		Replacement	Normal Wear		W-Maint		01-Apr-2004 08:26:06	01-Apr-2004 09:26:06	10-Jan-2003 13:26:00	

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Work Requests

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2. Select an Asset Number to view.
3. You can select the specific Asset Number or you can Choose Details from the Select Asset Number list of values, to view associated Asset Number Information, Attributes, and Activities.
4. Optionally choose View Equipment Details if the current Asset Number has associated equipment details. This link is next to the Equipment Serial Number field, and is available if there are associated equipment details. You can view all equipment details in the production organization.
  - Optionally choose the View Resource Usage glasses icon to view all Work Orders created against the Asset Number for the current equipment resource. This enables you to view resource demand (Work Orders) associated with the Asset Number. This information is eAM's integration with Process Manufacturing.

### To display configuration history:

You can view specified parent and child information in a tabular format, as well as dynamically add parents and children to a hierarchy.

1. Navigate to the Asset Numbers page, and query an Asset Number. See: Obtaining Asset Number Information, page 18-3.
2. Select Configuration History from the Select Asset Number list of values.
3. Select an Asset Number.
4. Choose Go.

## Configuration History

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[Assets: Capital](#) > Current Organization : **EM1**

Configuration History: FL1010

Asset Type **Capital**  
Asset Group **Fork Lifts**  
Asset Number **FL1010**  
Description **Fork Lift 1010**

Department **W.Maint**  
Category **ForkLift.Electric**  
Area **Warehouse**

Configuration History View Options

Show ☐ Parents  
☒ Children

From Date   
(example 12-Oct-2004 19:58:00)

To Date

Asset group	Asset Number	Asset Type	Start Date	End Date	Update
ZAB Rebuildable	R2	Rebuildables	13-Apr-2004 16:14:20		
ZAB Rebuildable	R1	Rebuildables	13-Apr-2004 16:11:19		
Fork Lift Battery	Battery1008	Rebuildables	01-Apr-2004 11:00:35		
Fork Lift Battery	Battery1005	Rebuildables	01-Apr-2004 10:28:42		
Fork Lift Battery	Battery1001	Rebuildables	11-Jun-2003 21:20:40	01-Apr-2004 11:00:35	
Fork Lift Battery	Battery1000	Rebuildables	31-Oct-2002 16:16:49		
Fork Lifts	FLB1010	Asset	26-Sep-2002 09:07:05	29-Oct-2002 14:40:34	
Fork Lifts	FLM1010	Asset	26-Sep-2002 09:05:08		

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5. Select whether to show the current Asset Number's Parents or Children information. The page defaults showing Children information. If you select Parents, choose Go to display the associated information.
6. Optionally narrow your selection criteria by selecting a date range.
7. Optionally choose Associate Child or Associate Parent (depending on whether you are showing Parent or Children information) to dynamically add a Child or Parent to the current Asset Number's hierarchy.
  1. Select an Asset Number.
  2. Enter a Start Date that this new configuration is effective. The system date defaults.
  3. Optionally enter an End Date.
  4. Choose Apply to save your work.
  5. Choose Cancel to return to the Configuration History window.
8. Optionally select the Update icon to update configuration history information for the current Asset Number.
9. Optionally save and export your configuration results to a spreadsheet by selecting Export Configuration Results.

### To view asset cost information:

eAM integrates with Oracle Cost Management, honoring all costing rules set at the organization level, for example, the costing method used. You can view the costs of Material, Labor, and Equipment for maintenance Work Orders, associated

with the current Asset Number. You can view different types of transactional cost information, including actual, estimated, variance, and summary. eAM maintains the hierarchy integrity. For example, when viewing the parent Asset Number, you can view just the parent's costs, or the costs of the parent, including all child costs rolled up to the parent level.

1. Navigate to the Asset Numbers page, and query an Asset Number. See: Obtaining Asset Number Information, page 18-3.
2. Select Costs from the Select Asset Number list of values.
3. Select an Asset Number.
4. Choose Go.

## Asset Costs

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Capital | Rebuildable Inventory

Assets: Capital > Existing Work Requests: FL1010 > Current Organization : EM1

**Asset Costs: FL1010**

Asset Type: Capital  
Asset Group: Fork Lifts  
Asset Number: FL1010  
Description: Fork Lift 1010

Department: W.Maint  
Category: ForkLift.Electric  
Area: Warehouse

Cost View Options  
\* indicates required data

\* View: Estimated Costs  
Period From: Q2-03  
☒ Include Child Assets  
Go

\* View Cost By: Period  
Period To:

**Estimated Costs Including Child Assets**

Export Work Order Cost Details

Period	Material (USD)	Labor (USD)	Equipment (USD)	Total (USD)
Jan-04	3,013.79	5.72	1.88	3,021.39
Feb-04	10.00	0.00	0.00	10.00
Mar-04	0.10	10.00	8.44	18.54
Apr-04	88.79	225.00	75.00	388.79
May-04	1,000.00	0.00	0.00	1,000.00
Jun-04	22.65	0.00	0.00	22.65

Cost Summary

Total Material Cost (USD) **4,135.33**  
Total Labor Cost (USD) **240.72**  
Total Equipment Cost (USD) **85.31**  
Total Asset Maintenance Cost (USD) **4,461.36**

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5. In the Cost View Options region, you can narrow your selection criteria.
  1. From the View drop down list, select the type of cost information to view. Valid values are Actual Costs, Estimated Costs, Variance Costs, and Cost Summary.

*Actual Costs:* This is the accumulation of all cost for material and resource transactions for associated maintenance Work Orders, based on a specified period, or any specified selection criteria you entered in the Cost View Options region. When you select the Actual Costs from the list of values, the actual cost information for your specified criteria is provided. The Cost Manager process runs in the background to provide updated, actual cost information at user defined, periodic intervals, and/or when it is launched from the menu.

*Estimated Costs:* A BOM (material parts list) and routing (resources) can be associated with a Work Order. When you select Estimated Costs, the estimated costs of all materials and resources associated with a work order

display, enabling you to budget costs. The Work Order Cost Estimation process runs in the background to provide updated, estimated cost information at user defined, periodic intervals, and/or when it is launched from the menu. Estimated and actual costs might differ because all materials or resources associated with a Work Order might not actually be used when the Work Order is executed.

*Variance Costs:* When you select Variance Cost, the difference between the actual and estimated costs appear.

*Cost Summary:* When you select Cost Summary type, the cost information from all work orders associated with the current asset appear.

2. From the View Cost By drop down list, select how you would like to view your cost information. Valid values are Period and Cost Category.

- If you selected Cost Category, you can view cost information by defined categories, such as Maintenance, Contract, or Operations.

*Material:* All material and material overhead transaction costs appear

*Labor:* All employee resource and resource overhead transaction costs appear.

*Equipment:* All material resource and resource overhead transaction costs appear.

- If you selected Period, optionally enter the Period From and Period To. Accounting Periods are defined within Oracle Inventory (See: Maintaining Accounting Periods, *Oracle Inventory User's Guide*).

6. Select the Include Child Assets check box to roll up all costs for the current Asset Number and its children. See: Defining Asset Numbers, page 2-47 to review how hierarchies are created.
7. Choose Go to view cost element information. Summary totals, of material, labor, and equipment costs, appear.
8. Optionally save and export your cost information to a spreadsheet by choosing Export.
9. Optionally view asset cost information, broken down by specific Work Order, by choosing Work Order Cost Details.

## Work Order Cost Details

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Current Organization : **EM1**

### Work Order Cost Details

+ indicates required data

+ Asset Number   
Period From

Include Child Assets

Period To

Export							Previous 1-10 of 72 Next 10	
Work Order	Asset Number	Asset Group	Asset Type	Actual Cost(USD)	Estimated Cost(USD)	Variance Cost(USD)		
EM198049	FL1010	Fork Lifts	Capital	0	0	0		
av-wo100	FL1010	Fork Lifts	Capital	0	0	0		
ST-WO-2	FL1010	Fork Lifts	Capital	0	2980	2980		
av-wo-iproc1	FL1010	Fork Lifts	Capital	0	10	10		
MAT-REQ4	FL1010	Fork Lifts	Capital	0	0	0		
EM199035	FL1010	Fork Lifts	Capital	0	17.6	17.6		
EM199928	FL1010	Fork Lifts	Capital	0	17.5	17.5		
EM1100233	FL1010	Fork Lifts	Capital	0	17.6	17.6		
GF-1000	FL1010	Fork Lifts	Capital	0.1	17.6	17.5		
GF-3000	FL1010	Fork Lifts	Capital	0	17.6	17.6		
Export							Previous 1-10 of 72 Next 10	

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1. Optionally select the Actual Cost link to view the Work Order's actual cost details by Period/Cost Category.

## Work Order Actual Cost Details

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Current Organization : **EM1**

Work Order Cost: HO-OP-2

Work Order: **HO-OP-2**  
Asset Number: **All Lifts**  
Department: **W-Maint**

Description: **HO-OP-2**  
Asset Group: **Fork Lifts**  
Status: **Released**

Cost View Options  
View By:

Period From: **Q4-04** Period To: **Q4-04**

Period	Material(USD)	Labor(USD)	Equipment(USD)	Total(USD)
No data exists.				

Total Asset Maintenance Cost

Total Material Cost(USD) 0  
Total Labor Cost(USD) 0  
Total Equipment Cost(USD) 0  
Total Asset Maintenance Cost(USD) 0

[Return To: Work Order Cost Details](#)

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2. Optionally choose View Transactions to view the transaction details.

### Actual Cost Distributions

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Current Organization: EM1

Work Order Transaction Cost Details: HO-OP-2

Work Order: HO-OP-2  
Asset Number: All Lifts  
Department: W.Maint

Description: HO-OP-2  
Asset Group: Fork Lifts  
Status: Released

Cost Distribution

Period From: Q4-04 Period To: Q4-04

Export

Details	Transaction Date	Operation	Account	Accounting Line Type	Transaction Type	Quantity	Unit Cost	UOM	Item	Resource	Transaction Value(USD)
No data exists.											

Return To Work Order Cost: HO-OP-2

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- Optionally select the Estimated Cost link to view the Work Order's estimated cost details by Period/Cost Category.

### Work Order Estimated Cost

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Assets: Capital > Asset Costs: All Prod Equip > Work Order Cost Details >

Current Organization: EM1

Work Order Cost: HO-OP-2

Work Order: HO-OP-2  
Asset Number: All Lifts  
Department: W.Maint

Description: HO-OP-2  
Asset Group: Fork Lifts  
Status: Released

Cost View Options

View By: Period Go

Period From: Q4-04 Period To: Q4-04

Export

Period	Material(USD)	Labor(USD)	Equipment(USD)	Total(USD)
No data exists.				

Total Asset Maintenance Cost

Total Material Cost(USD) 0  
Total Labor Cost(USD) 0  
Total Equipment Cost(USD) 0  
Total Asset Maintenance Cost(USD) 0 View Estimated Cost Details

Return To Work Order Cost Details

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- Optionally select View Estimated Cost Details to view the Work Order's estimated cost details by Period/Cost Category.



## Work Order Estimate Details

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**Work Order Estimate Details: ST-WO-2**

Work Order: **ST-WO-2**  
Asset Number: **FL1010**  
Department: **W Maint**

Description: **Fork Lifts**  
Asset Group: **Released**  
Status: **Released**

**Cost Estimate Details**

Period From: **Q2-03** Period To: **Q2-03**  
Total Estimated Cost(USD): **2980.0**

**Inventory Item Cost**

Total Inventory Item Cost(USD): **0.0**

[Export](#)

Item	Required Quantity	Item Unit Cost(USD)	Total Item Cost(USD)
No data exists.			

**Resource Cost**

Total Resource Cost(USD): **0.0**

[Export](#)

Resource	Resource Type	Usage	Basis Type	UOM	Resource Rate(USD)	Overhead Cost(USD)	Total Resource Cost(USD)
No data exists.							

**Direct Item Cost**

Direct Item Cost(USD): **2980.0**

[Export](#)

Item	Description	Unit Cost	Quantity	Requisition Number	Purchase Order Number	Total Cost of Direct Items(USD)
	General		0			0
JP-NS1	Non-Stock Item		0			0
JP-NS1	Non-Stock Item		8		5623	800
	Another Wiret		100	4210	5619	2000
	General		10	4214		100
JP-NS1	Non-Stock Item		10	4215		80

[Return To Work Order Estimate Details: ST-WO-2](#)

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5. Select Return To Work Order Estimate Details to exit.
6. Optionally select the Variance Cost link to view the variance between the estimated and actual costs.

## Variance Cost

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**Work Order Cost: HO-OP-2**

Work Order: **HO-OP-2**  
Asset Number: **All Lifts**  
Department: **W Maint**

Description: **HO-OP-2**  
Asset Group: **Fork Lifts**  
Status: **Released**

**Cost View Options**

View By: **Period** [Go](#)

Period From: **Q4-04** Period To: **Q4-04**

[Export](#)

Period	Material(USD)	Labor(USD)	Equipment(USD)	Total(USD)
No data exists.				

**Total Asset Maintenance Cost**

Total Material Cost(USD): **0**  
Total Labor Cost(USD): **0**  
Total Equipment Cost(USD): **0**  
Total Asset Maintenance Cost(USD): **0**

[Return To: Work Order Cost Details](#)

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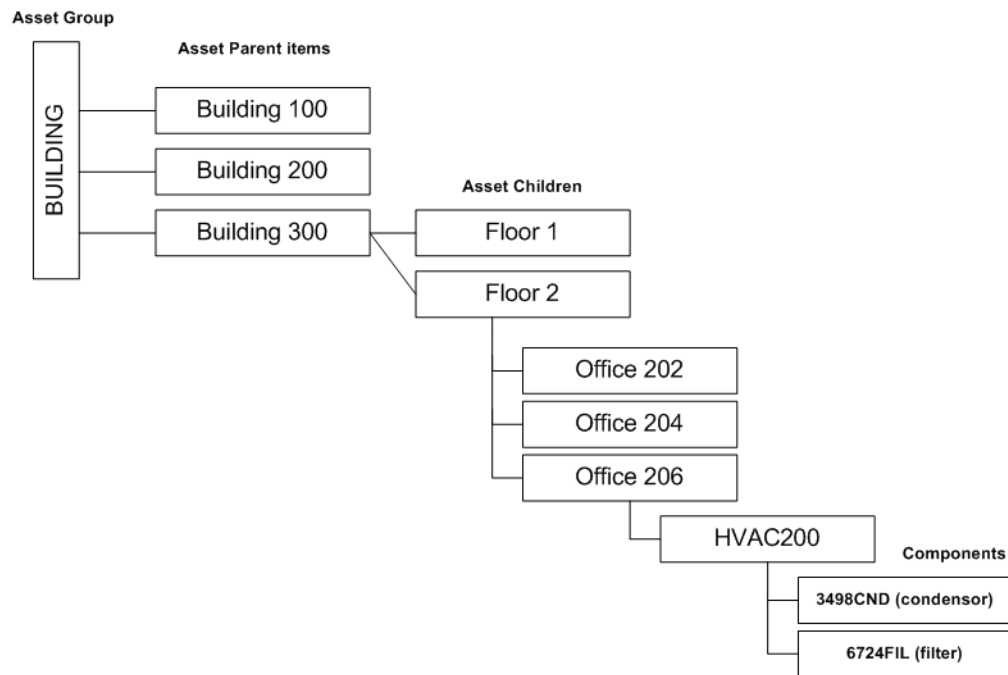
### To display the asset hierarchy:

You can view Asset Number hierarchy information, enabling you to identify Asset Numbers using a navigator and the details of each Asset Number belonging to the hierarchy.

As Serialized Rebuildables are added and removed from a particular hierarchy, the asset genealogy is dynamically updated.

1. Navigate to the Asset Numbers page, and query an Asset Number. See: Obtaining Asset Number Information, page 18-3.
2. Select the Asset Number, and then select Hierarchy from the Select Asset Number list of values.
3. Choose Go. The associated hierarchy for the current Asset Number appears in the shaded region.

#### ***Asset Hierarchy Example***



4. Optionally select any Asset Number in the hierarchy to view its details.

## Hierarchy

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Hierarchy

Serial Number **REB-S-METER11**

Rebuild Item **REB-S-METER**

Description **Rebuild Item with Meter**

Current Org **EM1**

Parent Asset Number **Battery1000**

Parent Asset Group **Fork Lift Battery**

Current Status **Issued out of stores**

Owning Department

Accounting Class

Area

Subinventory **Jyoti**

Locator

Criticality

Maintainable **Yes**

TIP: Click on the Parent Asset Number to go one level up the Hierarchy.

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5. Optionally select the Parent Asset Number to view the complete hierarchy at the parent level.
6. Choose Return to Search to exit.

### To enter or view meter readings:

Meters are defined and associated with Asset Numbers to measure an asset or rebuildable item's usage. Examples include odometers or counters. Meters are used in Preventive Maintenance Scheduling to schedule and generate Preventive Maintenance Work Orders.

You can enter and view Meter Readings for the current Asset Number.

1. Navigate to the Asset Numbers page, and query an Asset Number. See: Obtaining Asset Number Information, page 18-3.
2. Select the Asset Number, and then select Meter Readings from the Select Asset Number list of values.
3. Choose Go. Meters that are associated with the current Asset Number appear. See: Associating Meters with Asset Numbers, page 2-89.

## Enter Asset Meter Readings

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**Capital** | Rebuildable Inventory

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Enter Asset Meter Readings: FL1010

Asset Type **Capital** Department **W-Maint**  
 Asset Group **Fork Lifts** Category **ForkLift.Electric**  
 Asset Number **FL1010** Area **Warehouse**  
 Description **Fork Lift 1010**

**Search**

Meter Name

Meter Name	UOM	Type	Meter Direction	Latest Reading Date	Latest Reading Value	Change Reading	Reading Date	Comments	Reset	Reading History
New1	HR	Change		31-Mar-2004 14:48:56.0			12-Oct-2004 21:25:32			
FL1010 Hour Meter	HR	Change/Ascending		01-Apr-2004 10:56:26	3000		12-Oct-2004 21:25:32			

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4. Enter a Value or Change Reading value for new meter readings, depending on the meter type. If the meter is an Absolute type, the Value column is enabled. If the meter is a Change type, the Change column is enabled.
5. Optionally enter any necessary Comments.
6. If you select the Reset icon, you are resetting the current meter value to any value that you enter in the Value field. For example, if a motor needs to be replaced, you can reset the meter reading value of the pump, associated with the motor. The Value field is mandatory.
7. Choose Apply to save your work.
8. Optionally select the Reading History icon to view all meter readings for the selected meter and current Asset Number. This helps you to make logical decisions when entering and updating meter readings. For example, you can view the last meter reading, enabling you to make a logical choice when entering the next meter reading.

## Meter Reading History

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Current Organization : **EM1**

### Meter Reading History: FL1010 Hour Meter

Meter Name **FL1010 Hour Meter**  
Meter Description  
Meter Direction **Ascending**  
Meter Type **Change**

UOM **HR**  
Usage Rate **8**  
Latest Reading **3000**






#### Search

Reading Date From    
(example: 27-Sep-2004 19:45:00)

Reading Date To  

☐ Show Disabled Readings

☐ Show Average Meter Reading in Date Range

<input type="button" value="Create Reading"/> <input type="button" value="Export"/>						
Status	Reset	Reading Date	Reading	Life To Date	Description	Disable
Enabled	No	01-Apr-2004 10:56:26	3000	5090		
Enabled	No	20-Jan-2004 14:40:14	2090	2090		
Enabled	No	20-Jan-2004 14:40:07	2089	2089		
Enabled	No	31-Oct-2002 16:26:03	2088	2088		
Enabled	No	24-Oct-2002 14:35:48	2080	2080		

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9. Optionally select the Disable icon to disable a past meter reading for the current Reading. If meter readings are entered before resetting the meter, you cannot disable those meter readings. The most current reading before the meter is reset cannot be disabled, unless the meter reset reading entry is disabled.

**Note:** Preventive Maintenance Scheduling does not use any disabled information. After a meter reading is disabled, you cannot re-enable it.

### To view quality information:

You can view a list of Quality collection plans and enter quality results for the current Asset Number.

1. Navigate to the Asset Numbers page, and query an Asset Number. See: Obtaining Asset Number Information, page 18-3.
2. Select the Asset Number, and then select Quality from the Select Asset Number list of values.
3. Choose Go.

## Quality Plans

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Quality Plans

Asset Details

Asset Group **Fork Lifts** Category **ForkLift.Electric**  
 Asset Number **FL1010** Area **Warehouse**  
 Description **Fork Lift 1010** Owning Department **W.Maint**

Previous 1-10 of 13 Next 3

Collection Plan	Description	Type	Enter Quality Results	View Quality Results	Attachment	Visited
FORK LIFT FAILURE ANALYSIS	Fork Lift Failure Analysis	Failure				No
GS_MAINTAINENCE_PLAN	EAM ISUPPORT Collection Plan	OQ COLLECTION				No
EAM PLAN 1	test for ST	Receiving Inspection				No
EM PLAN 3		Receiving Inspection				No
EM PLAN 2		Receiving Inspection				No
GS OP COMP PLAN 1		OQ COLLECTION				No
GS1		OQ COLLECTION				No
GS2		OQ COLLECTION				No
GS3		OQ COLLECTION				No
GS4		OQ COLLECTION				No

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4. A list of collection plans, associated with the current Asset Number and requiring completion, appear (See: Creating eAM Quality Collection Plans, page 2-113). When the collection plan was created, it was specified whether the collection plan required completion. Also, during the eAM collection plan creation process, triggers are specified to make specific Asset Numbers eligible for the collection plan (See: Creating eAM Quality Collection Plans, page 2-113). See: Quality Integration Setup, page 2-110.
5. Optionally enter quality results by selecting the Enter Quality Results icon. You can enter quality results for a collection plan or update a collection plan's quality results multiple times.
  1. Required fields depend on the Collection Plan's collection element specifications (See: Creating eAM Quality Collection Plans, page 2-113).
  2. Optionally choose Add to attach any necessary files, URLs, or text to the chosen collection plan. Each collection plan can have an unlimited number of attachments.
  3. Choose Apply to save your work or Cancel to return to the Quality Plans page.
6. Select the View Quality Results icon to view or update any results entered for the current collection plan.
  1. Select either the *Search results where each must contain all values entered* or *Search results where each may contain any values entered* radio button.
    - *Search results where each must contain all values entered:* Quality results containing all of the following entered parameters appear in the results set table.

- Search results where each may contain any values entered: Quality results containing any of the following parameters appear in the results set table.
2. Optionally specify parameters to filter the data displayed. The parameters are the collection elements defined for the current collection plan. See: Creating eAM Quality Collection Plans, page 2-113.
  3. Optionally select an additional parameter from the Add Another list of values. Choose Add.
  4. Choose Go to view the entered parameters' results. Optionally choose Clear to enter new parameters.

### View Quality Results

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**View Quality Results: GS1**

**Advanced Search**

Specify parameters and values to filter the data that is displayed in your results set.

☐ Search results where each must contain all values entered.

☒ Search results where each may contain any value entered.

Work Order

Maintenance Op Seq

Comments

Work Order	Maintenance Op Seq	Comments	Created By	Collection	Entry Date	Attachment	Update
57807		10 Something	KHSHAH	33546	19-Apr-2004 16:35:31		
57807		10 Something	KHSHAH	33546	19-Apr-2004 16:35:25		

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5. Optionally select the Attachments icon to attach any necessary files, URLs, or text to the chosen collection element (result entry). Each collection element in the collection plan can have an unlimited number of attachments.
6. Optionally select the Update icon to update the current entry.
7. Select Return To List Of Plans Page at the bottom of the page to return to the list of quality collection plans.
7. The Visited column indicates whether the associated collection plan has been updated.

**Note:** Quality results are entered at Work Order Completion for an Asset Number's required collection plans.

You can view an asset's associated Work Requests, create new Work Requests, or update existing Work Requests for the current asset.

- ### Existing Work Requests

4. Optionally select a work request Number to view its details, such as the log explaining the issue reported and priority code.



## View Work Request

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[Assets: Capital](#) > [Existing Work Requests: FL1010](#) > [Work Order: WO1005](#) > Current Organization : **EM1**

**View Work Request: 4207**

[Create](#) [Update](#)

Asset Type	<b>Capital</b>	Department	<b>W-Maint</b>
Asset Group	<b>Fork Lifts</b>	Category	<b>ForkLift.Electric</b>
Asset Number	<b>FL1010</b>	Area	<b>Warehouse</b>
Description	<b>Fork Lift 1010</b>		

**Request Details**

Asset Number	<b>FL1010</b>	Assigned Department	<b>W-Maint</b>
Request Number	<b>4207</b>	Status	<b>On Work Order</b>
Priority	<b>Medium</b>	Work Request Type	
Request By Date	<b>03-Apr-2004 13:01:43</b>	Requested For	<b>ABINSLEY</b>

**Request Description**

Description History \*\*\* ABINSLEY (2004-04-02 13:02:10) \*\*\*  
needs paint job

**Creation Information**

Created By	<b>ABINSLEY</b>	Notify User	<b>No</b>
Phone Number		E-mail	
Contact Preference		Date Filed	<b>02-Apr-2004 13:02:10</b>

**Descriptive Information**

Context Value

**Work Order**

Work Order	<b>WO1005</b>	Scheduled Completion Date	<b>23-Apr-2004 03:58:23</b>
Status	<b>Released</b>	Description	

[Return to Work Order: WO1005](#)

[Create](#) [Update](#)

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5. Optionally choose Update if you are within the details of the Work Request, or you can select the Update icon on the Existing Work Requests page.
  1. Update fields as needed.
  2. Choose Apply to save your work.
  3. Choose Cancel to return to the Existing Work Requests page, without updating the Work Request.
6. Optionally choose Create Work Request to create a new Work Request, or choose Create if viewing an existing request's details.

## Create Work Request

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**Capital** | Rebuildable Inventory

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### Create Work Request

\* Indicates required field

Asset Type <b>Capital</b> Asset Group <b>Fork Lifts</b> Asset Number <b>FL1010</b> Description <b>Fork Lift 1010</b>	Department <b>W-Maint</b> Category <b>ForkLift.Electric</b> Area <b>Warehouse</b>	<a href="#">Cancel</a> <a href="#">Apply</a>
---	---	--

---

#### Request Details

* Asset Number <input type="text" value="FL1010"/> * Priority <input type="text" value="Medium"/> * Request By Date <input type="text" value="13-Oct-2004 22:51:26"/> <small>(example 12-Oct-2004 22:51:26)</small>	* Assigned Department <input type="text" value="W-Maint"/> Work Request Type <input type="text" value=""/> Requested For <input type="text" value="MFG"/>
--	---

---

#### Request Description

\* Additional Description

---

#### Creation Information

Created By <b>MFG</b> Phone Number <input type="text" value="212-445-3383"/> Contact Preference <input type="text" value="E-mail"/>	Notify User <b>No</b> E-mail <input type="text" value="dsmith@vision.com"/>
---	--

---

#### Descriptive Information

Context Value

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

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1. If required, select an Asset Number. Depending on the current organization's parameter, defining an Asset Number on Work Requests is required or optional. See: Defining eAM Parameters, page 2-8.
  2. Select a Priority, for example High, Medium, or Low.
  3. Select a Request By Date. The system date defaults.
  4. Select an Assigned Department. The current Asset Number's associated Assigned Department defaults. See: Defining Asset Numbers, page 2-47.
  5. Optionally select a Work Request Type.
  6. Optionally select the user the Work Request is Requested For. The current user defaults.
  7. Enter the detailed information about the work requested in the Additional Description field.
  8. Enter your Creation Information, such as Phone Number, E-Mail address, and Contact Preference.
  9. Optionally select a Context Value.
  10. Choose Apply to create the Work Request.
  11. Choose Cancel to return to the Existing Work Requests page, without creating a Work Request.
7. Optionally select Show in the Details column to display Work Orders linked to the current Work Request.

1. Optionally select the Work Order number to view the Work Order's associated information.

### Work Order

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**Capital** | Rebuildable Inventory

[Assets: Capital](#) > [Existing Work Requests: FL1010](#) >

Current Organization : **EM1**

Work Order: **WO1005**

Asset Type	<b>Capital</b>	Category	<b>Electrical.Panels</b>
Asset Number	<b>1st Floor Electrical Panel</b>	Activity	
Asset Group	<b>Office Building 100</b>	Area	<b>BLG 100</b>

**Work Order Information**

Work Order	<b>WO1005</b>	Description	
Status	<b>Released</b>	Type	
Owning Department	<b>Fac Maint</b>	Priority	
Shutdown Type		Accounting Class	<b>MaintWAC</b>
Activity Type		Activity Cause	
Firm	<b>No*</b>	Requested Start Date and Time	<b>18-Apr-2004 10:47:35</b>
Scheduled Start Date and Time	<b>18-Apr-2004 10:47:35</b>	Scheduled Completion Date and Time	<b>23-Apr-2004 03:58:23</b>
Notification Required	<b>No*</b>	Tagout Required	<b>No*</b>

[Return to Existing Work Requests: FL1010](#)

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2. Choose Return to Existing Work Requests to return to the previous page.
8. Optionally save and export the Work Request information to a spreadsheet, by selecting Export Work Requests.

## Related Topics

Viewing Resource Usage, page 10-2

Defining Asset Numbers, page 2-47

Meters, page 4-2

Entering Meter Readings, page 4-2

Overview of Cost Management, *Oracle Cost Management User's Guide*

Submitting a Request, *Oracle Applications User's Guide, Oracle Applications User's Guide*

Overview of Collection Plans, *Oracle Quality User's Guide*

Overview of Quality Self-Service, *Oracle Quality User's Guide*

## Work Requests

A Work Request serves a different function than a Work Order; it is a request for maintenance on an asset (Capital or Rebuildable Inventory). eAM enables operations and maintenance staff to report any problems with an asset. A supervisor can

approve, request additional information, or reject a Work Request. A Work Request requires approval before it is generated into a Work Order. The Work Requests tab enables you to query existing, and create new Work Requests for an asset. See: Overview of Work Requests, page 18-23.

## Work Orders

The Work Orders tab enables you to query and create Work Orders, view and update Work Order details, and create relationships among Work Orders (See: Work Order Relationships, page 18-24). You can query Service and Work Requests, view the requests' associated Work Orders, and create/assign Work Orders to the requests. This section's tasks include:

- Viewing Work Orders, page 18-24

## Viewing Work Orders

To view Work Orders, you can use either the Simple or Advanced search modes. You can also save search criteria to personalize your search.

### **To obtain a list of work orders:**

1. Navigate to the Work Orders tab. The All sub-tab is selected.
2. The Simple Search mode defaults. Optionally select an Asset Type. Valid values are Capital and Rebuildable Inventory. This field works in conjunction with the Asset Number field.
3. Optionally select an Asset Number to search for its related Work Orders.
4. Optionally select an Asset Group. The current Asset Number's associated Asset Group defaults.
5. Optionally select a specific Work Order.
6. Optionally select Date From and To values to display Work Orders that fall within the specified date range.
7. Choose Go to display all Work Orders associated with the current search criteria.

## Work Orders

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All | Requests

Current Organization : EM1

### Work Orders

[Save Search](#)

#### Simple Search

Please note that the search is case insensitive.

Asset Type   
Asset Number   
Date From   
(example 13-Oct-2004 00:01:31)  
[Go](#) [Clear](#)

Asset Group   
Work Order   
Date To   
[Go](#)

[Advanced Search](#)

[Personalized Search](#)

Select Work Order: <div><div></div></div> <div>Go</div>   <div>Create Work Order</div> <div>Export Work Order</div>												
Select	Work Order	Asset Number	Asset Group	Asset Type	Description	Scheduled Start Date	Duration (hours)	Owning Department	Status	Work Order Completion	Request All Materials	Update Work Order
<input checked="" type="radio"/>	<a href="#">EM1100559</a>	FL1020	Fork Lifts	Capital	Paint my Fork Truck	01-Apr-2004 15:25:03	0	W-Maint	Draft			
<input type="radio"/>	<a href="#">EM1105844</a>	FL1020	Fork Lifts	Capital		21-Apr-2004 23:19:41	0	W-Maint	Released			
<input type="radio"/>	<a href="#">EM1112947</a>	FL1020	Fork Lifts	Capital		29-Apr-2004 08:05:52	0	W-Maint	Released			
<input type="radio"/>	<a href="#">EM1112949</a>	FL1020	Fork Lifts	Capital		29-Apr-2004 08:20:07	0	W-Maint	Released			
<input type="radio"/>	<a href="#">EM1112948</a>	FL1020	Fork Lifts	Capital		29-Apr-2004 08:18:29	0	W-Maint	Released			

[Save Search](#)

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8. Optionally select a Work Order number to view its details.

## Work Order

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All | Requests

Current Organization : EM1

[Work Orders: All](#) > [Work Order: EM1100559](#) > [Work Order: EM1105844](#) > [Operation: 10](#) >

Work Order: EM1112947

[Update Work Order](#)

Work Order	EM1112947	Description	
Department	W-Maint	Status	Released
Activity		Duration	0
Scheduled Start Date	29-Apr-2004 08:05:52	Scheduled Completion Date	29-Apr-2004 08:05:52
Project		Task	
Enable Material Issue Request	Yes	Work Order Attachments	None <a href="#">Add</a>
<a href="#">Operations</a> <a href="#">Materials</a> <a href="#">Resources</a> <a href="#">Quality Plans</a> <a href="#">Requests</a> <a href="#">Purchasing</a> <a href="#">Work Relationships</a>			

Select Operation: <input type="text" value="Complete/UnComplete"/> <a href="#">Go</a>   <a href="#">Add</a>											
Select	Operation	Assigned Dept	Description	Scheduled Start Date	Scheduled Duration (hours)	Actual Start Date	Actual Duration (hours)	Assigned Employees	Completed	Attachments	Op Update Delete
<input checked="" type="radio"/>	10	W-Maint	Default Operation for Work Order	29-Apr-2004 08:05:52	0			0			

#### View Dependency

<a href="#">Expand All</a>   <a href="#">Collapse All</a>
April
T
EM1112947
10

[Operations](#) [Materials](#) [Resources](#) [Quality Plans](#) [Requests](#) [Purchasing](#) [Work Relationships](#)

[Return To Operation: 10](#)

[Update Work Order](#)

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9. The Operations sub-tab defaults as selected.

This sub-tab enables you to view Operations on the current Work Order, and the operations' dependencies in the View Dependency region. Operations are scheduled to run in parallel, sequence, or through dependent steps.

1. It is important in asset management to capture both estimated and actual time spent on each operation of a Work Order. When resources are identified on a Work Order, there is a time estimate of how long it takes to perform the work. In many cases, the extent of the work load is unknown until the work starts. Resource charging enables you to post actual usage time for employees, equipment, and miscellaneous materials for specific operations on a Work Order.

To charge resources, select an Operation, and then select Charge Time from the Select Operation list of values.

2. Choose Go.

### Charge Resource

ORACLE Asset Management

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Work Orders: All > Work Order: EM1112947 > Current Organization : EM1

Charge Resource

Update Work Order

Work Order	EM1112947	Description	
Asset Number	FL1020	Asset Description	Fork Lift 1020
Asset Group	Fork Lifts	Activity	
Operation Sequence	10	Operation Description	Default Operation for Work Order
Assigned Department	W.Maint		

\* indicates required data

\* Resource Sequence

\* Resource

\* Unit of Measure

\* Quantity

Work Performed Date   
(example 13-Oct-2004 01:43:50)

Employee

Equipment

Charge Department

Reason

Reference

Update Work Order

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- Select a Resource Sequence. The Resource, Unit of Measure, and Quantity (reflects the number charged, normally in hours) default, based on the selected resource sequence and the resources associated with the Work Order. For information on Resource Sequence, Resource, and Unit of Measure, See: Defining Resource Requirements, page 3-31
- Optionally select the Work Performed Date to indicate the actual date the work was performed.
- Optionally select the Employee that performed the work.

- Optionally select the Equipment used to perform the work.
- Optionally select the Charge Department to identify which department is charged for the employee or equipment usage.

You can display the list of values if the Employee name or Equipment serial number fields are populated. The list of values displays all departments that the person or equipment is assigned to. If you enter a Charge Department manually, the system validates that the department matches the current operation's assigned department. If it does not, you will receive an error.

- Optionally select a Reason code to indicate the reason the resource is used.
- Optionally enter a Reference.
- Choose Update Work Order to save your work and return to the Work Order page.

- Operations are often started but not finished by the assigned crew. A Handover enables a supervisor to re-assign a task to another supervisor for the continuation of work. This transaction adds an additional operation line and sequence to the Work Order. When the operation is handed over, the current operation is automatically completed, and a new operation is created.

To handover work, select an Operation, and then select Handover from the Select Operation list of values.

- Choose Go.

### Handover

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Work Orders: All > Work Order: EM1112947 > Current Organization : EM1

**Handover** Cancel Apply

Work Order <b>EM1112947</b> Asset Number <b>FL1020</b> Asset Group <b>Fork Lifts</b> Asset Activity	Description Asset Description <b>Fork Lift 1020</b> Asset Type <b>Capital</b>
--	---

Enter new operation data and click apply to handover.

**Original Operation**

Operation <b>10</b> Assigned Department <b>W-Maint</b>	Description <b>Default Operation for Work Order</b> Completed <b>N</b>
---	---

**New Operation**

Operation Details

\* indicates required data

New Operation **11**

Description

\* Assigned Department

\* Start Date and Time   
(example 13-Oct-2004 02:05:12)

\* Duration (hours)

Reconciliation Code

Shutdown Type

Attachments **None** [Add](#)

**Resource Details**

Please specify the resources to be carried over and their start time and duration.

Select Resource Sequence	Resource	Quantity Open	UOM	Start Date and Time	Duration (hours)	Employee
No data exists.						

Cancel Apply

- Optionally enter a Description for this new handover operation.

- Select a new Assigned Department. You cannot select the same department that the current operation exists in. Those departments, having all the resources used for the current operation, are available.
  - Optionally update the Start Date and Time for the new operation. The current system date and time defaults.
  - Optionally enter an estimated Duration in hours that the new operation requires.
  - Optionally select a Reconciliation Code describing how the operation was completed. See: Work Order Reconciliation Codes, page 2-30.
  - Optionally select a Shutdown Type to indicate whether a shutdown is necessary to handover the operation.
  - Optionally choose Add to add file, URL, or text attachments.  
You can add a Description, such as "This operation could not complete due to a delay in delivered items". Choose Apply to display the Handover page.
  - Indicate whether to carry over resource usage information by selecting the Select check box for the associated resource.  
Optionally update the Start Date and Time. The current date and time defaults. Optionally enter the Duration of resource usage in hours.
  - Select the resources you want to handover to another department by selecting the Select check box next to the desired resources. You can handover all resources by choosing Select All.
  - Choose Apply to save your work, or cancel to return to the Operations page.
5. Operations are scheduled to run in parallel, sequence, or through dependent steps. For example, Operation 20 is dependent on Operation 10; Operation 20 cannot be performed until Operation 10 is complete. Operations 30 and 40 run in parallel to each other. Operation 40 is independent; it can be performed at any time.  
To add an operation dependency, select an Operation, and then select Add Dependency from the Select Operation list of values. After the dependency is added, you can view the dependency within
  6. Choose Go.



## Operation Dependency

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[Work Orders: All](#) > [Work Order: EM1112947](#) >

Current Organization : **EM1**

### Operation Dependency

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

Work Order **EM1112947**  
Asset Number **FL1020**  
Asset Group **Fork Lifts**  
Operation Sequence **10**  
Scheduled Start Date **29-Apr-2004 08:05:52**

Description  
Asset Description **Fork Lift 1020**  
Asset Activity  
Assigned Department **W-Maint**  
Scheduled End Date **29-Apr-2004 08:05:52**

Dependent Operation	Description	Dependency Type	Scheduled Start Date	Scheduled End Date	Delete
20	Lubricate Machine	Prior	29-Apr-2004 08:05:52	29-Apr-2004 08:05:52	
<a href="#">Add Another Row</a>					

[Return To Work Order: EM1112947](#)

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

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- Select the Dependent Operation.
  - Select the Dependency Type.
  - Optionally delete existing dependencies by selecting the Delete icon.
  - Choose Apply to create the dependency or Cancel to return to the Work Order page.
7. To access iProcurement, select an Operation, and then select Search Catalog from the Selection Operation list of values.
  8. Choose Go.

## Search Catalog

**ORACLE® Asset Management** [Return to EAM](#) [Shopping Cart](#) [Home](#) [Logout](#) [Preferences](#) [Help](#) [Personalize Page](#) [Diagnostics](#)

**Shop** Requisitions Receiving Contractors

**Stores** | Categories | Shopping Lists | Non-Catalog Request | Contractor Request

Search   [Advanced Search](#)

**Information**  
Information - The current responsibility context has been switched to: iProcurement

**Stores**

[StaplesStore](#)  
Wireless  
Phones, pagers and services  
Copier  
Supplies & Maintenance  
Punch-Store 1  
Punch-Store 1

[StarGateLtdStores](#)  
Contractors  
Temp Labor  
Promotional Items  
Gifts for customers  
Punchout-Transparent-1  
Punchout-Transparent-1

[Office Supplies](#)  
Pen, paper, business cards  
Legal Services  
Immigration, contract review  
Main Store  
Main Store  
Tester's store

[SAQQARA](#)  
Saqqara - transparent punchout

[RVStore](#)  
Raju Store for local catalog and info catalog

[Exchange Portal Store](#)  
Exchange Portal Store

[InfoStore](#)

[QEXDEV Store](#)

[Surs-Exch-PO](#)  
Surs-Exch-PO

[625 Store](#)

[RVPunchoutStore](#)

[74 NCR Store](#)  
74 NCR Template

[MG Punchout Store](#)  
MG Punchout Store

[Surs-Trans-PO](#)  
Surs-Trans-PO

[Transparent Punchout](#)

[625 Portal New Store](#)  
625 Portal New Store

**Shopping Cart**  
Your cart is empty.

**Purchasing News**  
✓ Check frequently asked questions  
✓ Review purchasing policies  
This is where the customer puts their own purchasing news items (this is an HTML plugin).

**My Requisitions** [Full List](#)

Requisition	Description	Total (USD)	Status	Copy	Change	Express Receive
100428		0.00	Approved			
100426		2,500.00	Approved			

- You can Complete and Uncomplete operations. After an operation is complete, you can perform an Operation Uncompletion. If an operation is dependent upon another operation, you cannot uncomplete that operation's dependency if the current operation is complete. For example, operation 20 is dependent on operation 10 completing. You cannot uncomplete operation 10 after operation 20 is complete.

To Complete or Uncomplete an operation, select an Operation, and then select Complete/Uncomplete from the Select Operation list of values.

- Choose Go.

## Complete Operation

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Work Orders: All > Work Order: EM1112947 > Current Organization : EM1

**Complete Operation** Cancel Apply

Work Order **EM1112947** Asset Type **Capital**  
Asset Number **FL1020** Asset Group **Fork Lifts**  
Operation **10** Description **Default Operation for Work Order**  
Assigned Department **W-Maint** Assigned Employees **0**

Enter completion information and hit 'Apply' to complete the operation.

**Completion Details**  
\* indicates required data  
Transaction Type **Complete Operation**  
\* Actual Start Date and Time    
(example 13-Oct-2004 00:52:34)  
\* Actual Duration (hours)   
Actual End Date and Time   
Reconciliation Code   
Reference   
Attachments **None** Add  
Context Value   
\* segment1

**Quality Plans**

Plan Name	Description	Mandatory	Results Entered	Enter Quality Results	View Quality Results	Quality Plan Attachments
EAM PLAN 1	test for ST					
EAM PLAN						

**Prior Operations**

- The Actual Start Date and Time defaults; you can optionally update it.
- Optionally enter a Reconciliation Code to describe why you are completing this operation. For example, Operation Completed or Operation Partially Completed.
- Actual Duration identifies the total elapsed time of the Work Order. It is automatically calculated as the difference between the operation's Scheduled Start and End Dates.
- Optionally select a Reconciliation Code to describe why you are completing or uncompleting this operation.
- Optionally enter a Reference.
- Optionally choose Add to attach any necessary files, URLs, or text to the current operation. Each operation can have an unlimited number of attachments.
- Optionally select a Context Value.
- Enter a segment1.
- The Quality Plans region displays collection plans that are associated with the current Work Order's Asset Number. When a collection plan is created, it is specified whether the collection plan requires completion. Triggers might have been specified to make specific assets eligible for the collection plan. See: Quality Integration Setup, page 2-110. If results entry is required for the collection plan, you are prompted to enter Quality results upon completing the Operation.

Optionally select the Enter Quality Results icon. Required Data fields depend on the Collection Plan's collection element specifications. See: Quality Integration Setup, page 2-110.

### Enter Quality Results

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Work Orders: All > Work Order: EM1112947 > Complete Operation >

Enter Quality Results: EAM PLAN 1

\* Indicates required field

Cancel Add Another Row Apply

Asset Details

Work Order Details

Work Order	EM1112947	Description
Asset Group	Fork Lifts	Asset Activity
Asset Number	FL1020	Op Seq Num 10

Data

+ Comments		Attachment	None	Add
time element				

Cancel Add Another Row Apply

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- Optionally choose Add to attach any necessary files, URLs, or text to the current Quality results. Each results entry can have an unlimited number of attachments. Choose Apply.
  - Choose Apply to save the results entry or Cancel to return to the Complete Operation page.
  - Optionally select the View Quality Results icon to view or update existing Quality results already entered. Select Return to Complete Operation.
  - Choose Apply to complete the operation or Cancel to return to the Work Order page.
  - Optionally update the operations for the current Work Order. These operations default from the maintenance route (See: Defining Maintenance Routes, page 2-68) associated with the current Activity, but you can update and add to them (See: Preparing Work Order Operations, page 3-21).
10. Optionally select the Materials sub-tab to view or add items from the associated Asset Number's items list. When you enter a Work Order for an Asset Number, the Asset Number's associated Activity attaches the required material (See: Setting Up Maintenance Bills of Material, page 2-71) and resources to complete its operations. The Inventory and Direct Item requirements display. You can update, add, view, and delete material requirements for a specific Work Order.
    1. You can optionally Request New Inventory Items.

## Request New Inventory Items

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Shop: Stores > Work Order: EM1112947 > Current Organization: EM1

Request New Inventory Items: EM1112947

Cancel Request Another Apply

<p>Work Order <b>EM1112947</b></p> <p>Asset Number <b>FL1020</b></p> <p>Asset Group <b>Fork Lifts</b></p> <hr/> <p>* indicates required data</p> <p>* Operation <input type="text" value="10"/> </p> <p>* Item <input type="text" value="Fork Lift Lubrication"/> </p> <p>* Required Quantity <input type="text" value="1"/></p> <p>UOM <b>Ea</b></p> <p>* Date Required <input type="text" value="01-Oct-2004 03:26:14"/> </p> <p><small>(example 13-Oct-2004 03:26:14)</small></p> <p>Supply <input type="text" value="Push"/></p> <p>Auto Request Material <input type="text" value="Yes"/></p>	<p>Description <b>Fork Lift 1020</b></p> <p>Asset Description <b>Fork Lift 1020</b></p> <p>Asset Type <b>Capital</b></p> <hr/> <p>Department <input type="text" value="W-Maint"/></p> <p>Description <input type="text" value="Lubrication for Masts"/></p> <p>Comment <input type="text"/></p> <p>MRP Net <input type="text" value="Yes"/></p>
--	---

Cancel Request Another Apply

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- Select an Operation.
  - Select an Item.
  - Enter a Required Quantity.
  - Select a Date Required. The system date and time defaults.
  - Optionally select a Supply Type.
  - Optionally select whether an Auto Select Material value. If you select Yes, Requisitions-Purchase Orders are created automatically, for the current Inventory Item, when the Work Order is Released.
  - Optionally enter Comments.
  - Select whether to include this Inventory Item in the MRP Net.
  - Choose Apply to add the Inventory Item to the Work Order's material requirements.
2. Optionally choose Request All Materials to deliver all required material from Stores to the Work Order. A Material Issue Request is generated (Move Order in Inventory) to request the material to a Work Order. This process is automated upon Work Order release, by selecting a check box in the Enterprise Asset Management Parameters (See: Defining eAM Parameters, page 2-8).

## Request All Materials

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[Shop Stores](#) > [Work Order: EM1112947](#) > Current Organization : **EM1**

**Request All Materials: EM1112947**

Work Order	<b>EM1112947</b>	Description	
Asset Number	<b>FL1020</b>	Asset Description	<b>Fork Lift 1020</b>
Asset Group	<b>Fork Lifts</b>	Asset Type	<b>Capital</b>
Asset Activity			

Only open material requirements are displayed and you can request any amount upto the open quantity. For the most optimal allocation, leave the Source Subinventory blank.

Select Materials: [Request](#)

[Select All](#) | [Select None](#)

Select Material	Op	Date Required	Request Qty	Open Qty	Required Qty	Issued Qty	Allocated Qty	UOM	Source Subinv	Update Material Requirement
<input checked="" type="checkbox"/>	Forks	10	29-Apr-2004	1	1	1	0	Each	ASSET	

[Return To Work Order: EM1112947](#)

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- Choose Request to allocate the material requirements to the Work Order.
3. Optionally choose Copy From Asset BOM to update the BOM associated with the Asset Group with any items list changes (See: Setting Up Asset Bills of Material, page 2-54)

# Copy From Asset BOM

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Shop: Stores > Work Order: EM1112947 > 

Current Organization : EM1

Copy From Asset BOM

Cancel

Apply

Work Order **EM1112947**

Asset Number **FL1020**

Asset Group **Fork Lifts**

Description **Fork Lift 1020**

Asset Type **Capital**

\* indicates required data

\* Operation 

10

Select All | Select None

Select Material	Material Description	Quantity	UOM	Supply Type
<input type="checkbox"/> Motor - Electric Fork Lift	Electric Fork Lift Motor	1	Ea	Push
<input type="checkbox"/> Battery - Electric Fork Lift	Power Battery For Electric Fork Lifts	1	Ea	Push
<input type="checkbox"/> Trans Electric Fork Lift	Transmission / Drive Train Electric Fork lifts	1	Ea	Push
<input type="checkbox"/> Oil Filter Electric	Oil Filter Electric Fork Lifts	1	Ea	Push
<input type="checkbox"/> Mast	All Lift Masts for All Fork Lifts	1	Ea	Push
<input type="checkbox"/> Rear Wheels - Electric	Rear Wheels Electric Fork Lifts	2	Ea	Push
<input type="checkbox"/> Front Wheels - Electric	Front Wheels Electric Fork Lifts	2	Ea	Push
<input type="checkbox"/> Forks	Forks for all Fork Lifts	1	Ea	Push
<input type="checkbox"/> Fork Lift Lubrication	Lubrication for Masts	1	Ea	Push

Cancel

Apply

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- Select the necessary Material, and then choose Apply.
4. Optionally choose One Step Material Issue. A one-step material issue is a substitute for the Material Issue Request and Material Issue Verification activities; a separate request is not created.

## One Step Material Issue

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Shop: Stores > Work Order: EM1112947 > Current Organization : EM1

### One Step Material Issue

Here you may issue material directly to a work order.

+ Work Order:

Operation:

Material:

---

Select Material(s):

Select All | Select None

Select	Details	Material	Operation	Issued Qty	Qty	UOM	Subinventory	Locator	Lot	From Serial	To Serial	Revision	Replaced Rebuild Details
<input type="checkbox"/>	Show	Oil Filter Electric	10	0		Ea	<input type="text"/>						
<input type="checkbox"/>	Show	Forks	10	0		Ea	<input type="text"/>						
<input type="checkbox"/>	Show	<input type="text"/>					<input type="text"/>		<input type="text"/>				
<input type="checkbox"/>	Show	<input type="text"/>					<input type="text"/>		<input type="text"/>				
<input type="checkbox"/>	Show	<input type="text"/>					<input type="text"/>		<input type="text"/>				
<input type="checkbox"/>	Show	<input type="text"/>					<input type="text"/>		<input type="text"/>				
<input type="checkbox"/>	Show	<input type="text"/>					<input type="text"/>		<input type="text"/>				

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- Select the Work Order that you wish to issue material. It must be enabled for material issue requests. The current Work Order defaults. See: Routine Work Orders, page 3-3.
- Optionally select the specific Operation to view results on existing One Step Material Issues that were issued to that operation. Operations existing within the selected Work Order are available.
- Optionally select a specific Material if your query is to view existing One Step Material Issues.
- Choose Go. All planned material appears in the Select Material(s) region. Planned material is material that exists in the Work Order's material requirements. See: Defining Inventory Material Requirements, page 3-26.
- Within the Select Material(s) region, optionally select unplanned Material (material not part of the Work Order's material requirements) to issue to the current Work Order.
- Select an Operation to issue the material. The UOM defaults to the current Material's UOM.
- Select the Quantity of the material that you are issuing to the Work Order.
- Optionally select a Subinventory to pull the material from in Inventory.
- If you previously selected a Subinventory requiring a Locator, select a Locator.
- If the current material is lot controlled, select a Lot.
- If the current material is serial controlled, select From and To Serial numbers.



- Optionally select a Revision.
- If the material is Rebuildable Inventory, optionally choose the Replaced Rebuild Details icon to specify the replacement Rebuildable Item information for the current Rebuildable Item. After selected, you can indicate the following within the Replaced Rebuild Details page:

*Rebuild Item*- defaults as the current Rebuild Item; you can update it.

*Rebuild Serial Number* - optionally enter if you know what serial number is coming out (for serialized rebuilds).

*Rebuild Activity* - the activity you want to associate with the created rebuild Work Order

*Rebuild Work Order* - the name of the Work Order created for the replaced Rebuildable Item

- If you specify a replaced rebuildable item, a Work Order generates for the replaced rebuildable item because it is most likely problematic and you can have it repaired. If a serial number is provided for the replaced Rebuildable Item, it is removed from the asset's hierarchy and the configuration history is updated. If nothing is specified within the Replaced Rebuild Details page, the replaced rebuild defaults as the same rebuild item that you are issuing. A Work Order is created for the replaced rebuild item.

- Optionally, select the Details Show-Hide toggle icon.

Optionally select a Reason for the current issue. Select the Date required for the material to the Work Order. Today's date and time defaults. Optionally enter a Reference.

- Select the Select check box next to the lines you are issuing to the current Work Order.
- Choose Issue.

5. You can optionally choose Request New Direct Items to add Direct Items to the Work Order's material requirements. Non-stock direct items can be included in the internal catalog, but the decision is made to not maintain an inventory balance. These items are not transactable, not stockable, but you can procure them. Direct items are either non-stock or description-based. Non-Stock Direct Items can represent items that are not stocked in inventory, or services that need to be purchased from a supplier. Non-Stock Direct Items are not stocked in inventory but are defined in the Item Master as an inventory item, purchaseable, and purchase but not stockable (See: Inventory Attribute Group, *Oracle Inventory User's Guide*). Direct Items are contrived as "one-off", bought directly from a vendor for a specific Work Order and Operation. They are delivered directly to the Shop Floor from maintenance Work Order execution. See: Defining Direct Item Material Requirements, page 3-26. You can add Planned Direct Items to a Work Order's Bill of Material (BOM) or an Activity BOM. Planned Direct Items must first be created in the Item Master as Non-Stockable and Purchasable inventory items (See: Non-Stock Direct Item Setup, page 2-83). A purchase requisition is optionally automatically created for these items, when the Work Order is released. Inventory Attribute Group, *Oracle Inventory User's Guide*

## Request New Direct Items

ORACLE Asset Management

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Shop Stores > Work Order: EM1112947 > Current Organization : EM1

Request New Direct Items: EM1112947

Cancel Request Another Apply

Work Order	EM1112947	Description	
Asset Number	FL1020	Asset Description	Fork Lift 1020
Asset Group	Fork Lifts	Asset Type	Capital

---

\* indicates required data

+ Operation	<input type="text"/>	Department	<input type="text"/>
Direct Item Type	Non Stock Item	Supplier	<input type="text"/>
+ Item	<input type="text"/>	Contact Name	<input type="text"/>
+ Description	<input type="text"/>	Supplier Item	<input type="text"/>
		Supplier Site	<input type="text"/>
+ Quantity	1	Contact Phone	<input type="text"/>
UOM	<input type="text"/>	Price	<input type="text"/>
+ Need By Date	13-Oct-2004 04:26:24	Currency	USD
	(example 13-Oct-2004 04:26:24)	Auto Request Material	Yes
Purchasing Category	<input type="text"/>		

Cancel Request Another Apply

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- Select an Operation.
  - Select a Direct Item Type.
 

*Description Based Item:* This direct item type is not stored in Oracle Inventory.

*Non Stock Item:* This direct item type is stored in Oracle Inventory. Its Master Item record's Stockable check box is cleared.
  - If you selected a Non Stock Item Type, select an Item. This field is disabled if a Description Based Item Type was previously selected.
  - Enter a Description, if you previously selected a Description Based Item Type.
  - Enter a UOM. If you previously selected a Non Stock Item Type, this value defaults from the Master Item.
  - Enter a Need By Date. The system date defaults.
  - Optionally enter a Purchasing Category. See: Setting Up Purchase Order Category Associations for Direct Items, page 2-130.
  - Choose Apply.
- Optionally select Check ATP from the Select Material(s) list of values to check available to promise information for all selected Material.
    - Choose Go.
  - Optionally select Copy To Asset BOM from the Select Material(s) list of values to copy any selected Material to the current Asset Number's Asset BOM.
    - Choose Go.

8. Optionally select the Update icon to update the current material requirement information.
9. Optionally select the Request More icon to request more of the current material requirement to the Work Order.
10. Optionally choose Delete to delete the current material requirement.
11. Optionally select the Resources sub-tab to view or update the current Work Order's employee and equipment resource requirements. When you enter a Work Order for an Asset Number, the Work Order's associated Activity attaches the required material (See: Setting Up Maintenance Bills of Material, page 2-71) and resources to complete its operations.

## Resources

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Work Order: EM1112947 [Update Work Order](#)

Work Order	<b>EM1112947</b>	Description	
Department	<b>W-Maint</b>	Status	<b>Released</b>
Activity		Duration	<b>0</b>
Scheduled Start Date	<b>29-Apr-2004 08:05:52</b>	Scheduled Completion Date	<b>29-Apr-2004 08:05:52</b>
Project		Task	
Enable Material Issue Request	<b>Yes</b>	Work Order Attachments	<b>None</b> <a href="#">Add</a>

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### Employee Resources

[Add Employee Resources](#)

Resource	Sequence	Operation	Dept	Qty	Required Units	Charged Units	UOM	Start Date	Completion Date	Charge Time	View Assigned Employees	Update	Delete
PrdMaint	10	20	Prd	0.5			HR	29-Apr-2004 08:05:52	29-Apr-2004 08:05:52				

### Equipment Resources

[Add Equipment Resources](#)

Resource	Sequence	Operation	Dept	Qty	Required Units	Charged Units	UOM	Start Date	Completion Date	Charge Equipment	Update	Delete
No data exists.												

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1. For Employee Resources, you can optionally choose Charge Time to charge time to the current resource.

## Charge Time

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Shop Stores > Work Order: EM1112947 > Current Organization : **EM1**

### Charge Time

Cancel Apply

Work Order <b>EM1112947</b> Asset Number <b>FL1020</b> Asset Group <b>Fork Lifts</b> Operation Sequence <b>20</b> Assigned Department <b>Prd Maint</b>	Description Asset Description <b>Fork Lift 1020</b> Activity Operation Description <b>Lubricate Machine</b>
--	--

---

\* indicates required data

* Resource Sequence <input type="text" value="10"/> * Resource <input type="text" value="PrdMaint"/> * Unit of Measure <input type="text" value="HR"/> * Quantity <input type="text"/> Work Performed Date <input type="text" value="13-Oct-2004 04:51:38"/> <small>(example 13-Oct-2004 04:51:38)</small>	Employee <input type="text"/> Equipment <input type="text"/> Charge Department <input type="text"/> Reason <input type="text"/> Reference <input type="text"/>
---	--

Cancel Apply

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- Select a Resource Sequence. The Resource, Unit of Measure, and Quantity (reflects the number charged, normally in hours) default, based on the selected resource sequence and the resources associated with the Work Order. For information on Resource Sequence, Resource, and Unit of Measure, See: Defining Resource Requirements, page 3-31
- Optionally select the Work Performed Date to indicate the actual date the work was performed.
- Optionally select the Employee that performed the work.
- Optionally select the Equipment used to perform the work.
- Optionally select the Charge Department to identify which department is charged for the employee or equipment usage.

You can display the list of values if the Employee name or Equipment serial number fields are populated. The list of values displays all departments that the person or equipment is assigned to (See: Defining Departments and Resources, page 2-12). If you enter a Charge Department manually, the system validates that the department matches the current operation's assigned department. If it does not, you will receive an error.

- Optionally select a Reason code to indicate the reason the resource is used.
  - Optionally enter a Reference.
  - Choose Apply.
2. For Employee Resources, you can optionally choose the View Assigned Employees icon to view the specific employee numbers associated with the current resource.

- Optionally choose the Update icon to update the current resource information.

### Update Employee Resource

ORACLE Asset Management

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Shop: Stores > Work Order: EM1112947 > Current Organization: EM1

Update Employee Resource: PrdMaint

Work Order: **EM1112947**  
 Asset Number: **FL1020**  
 Asset Group: **Fork Lifts**  
 Asset Activity:

Description: **Fork Lift 1020**  
 Asset Description: **Fork Lift 1020**  
 Asset Type: **Capital**

\* indicates required data

Operation: **20**  
 Resource Sequence: **10**  
 UOM: **HR**

\* Assigned Units: **1**

Schedule Sequence: **10**

\* Start Date: **29-Apr-2004 08:05:52**  
 (example 13-Oct-2004 04:57:31)

☒ Standard Rate

Department: **Prd Maint**

\* Resource Code: **PrdMaint**

\* Usage Rate or Amount: **0.5**

\* Basis: **Item**

\* Scheduled: **Yes**

\* End Date: **29-Apr-2004 08:05:52**

\* Charge Type: **Manual**

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- Optionally choose the Delete icon to delete the current resource requirement.
- Optionally choose Add Employee Resources or Add Equipment Resources to add employee and/or equipment resources, respectively.
- Optionally choose the Quality Plans sub-tab to view the current Work Order's Work Order and Operation specific Quality collection plans. Collection plans appear that are associated with the current Work Order's Asset Number. When a collection plan is created, it is specified whether the collection plan requires completion. Triggers might have been specified to make specific assets eligible for the collection plan. See: Quality Integration Setup, page 2-110.
- Optionally select the Enter Quality Results icon. Required Data fields depend on the Collection Plan's collection element specifications. See: Quality Integration Setup, page 2-110.

## Enter Quality Results

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Shop Stores > Work Order: EM1112947 >

**Enter Quality Results: FORK LIFT FAILURE ANALYSIS**

\* Indicates required field

Cancel Add Another Row Apply

**Work Order Details**

Work Order	<b>EM1112947</b>	Description
Asset Group	<b>Fork Lifts</b>	Asset Activity
Asset Number	<b>FL1020</b>	

**FORK LIFT FAILURE ANALYSIS**

\* Failure

\* Cause

\* Remedy

Comment

QA\_SS\_JRAD\_ATTACHMENT **None** Add

Cancel Add Another Row Apply

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- Optionally choose Add to attach any necessary files, URLs, or text to the current Quality results. Each results entry can have an unlimited number of attachments. Choose Apply.
  - Choose Apply to save the results entry.
2. Optionally select the View Quality Results icon to view or update existing Quality results already entered. Select Return to Complete Operation.
  3. Choose Update Work Order to update the current Work Order.
13. Optionally select the Requests sub-tab to view any Service and/or Work Requests associated with the current Work Order.

## Requests

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Work Order: EM1112947

Current Organization: EM1

Update Work Order

Work Order	<b>EM1112947</b>	Description	
Department	<b>W-Maint</b>	Status	<b>Released</b>
Activity		Duration	<b>0</b>
Scheduled Start Date	<b>29-Apr-2004 08:05:52</b>	Scheduled Completion Date	<b>29-Apr-2004 08:05:52</b>
Project		Task	
Enable Material Issue Request	<b>Yes</b>	Work Order Attachments	<b>None</b> (Add)

Operations Materials Resources Quality Plans **Requests** Purchasing Work Relationships

Assign to Work Order

Request Number	Description	Status	Request Type	Asset	Dept	Delete Assignments
No data exists.						

Operations Materials Resources Quality Plans **Requests** Purchasing Work Relationships

Return To Shop Stores

Update Work Order

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- Choose Assign to Work Order to associate the selected requests to the current Work Order.
14. Optionally select the Purchasing sub-tab to view purchase requisitions, Direct Items, and OSP items for the current Work Order.
  15. Optionally select the Work Relationships sub-tab to manage Work Order schedules and view Work Order details. Work Order Relationships enable you to manage a network of related Work Orders, enabling you to manage complex projects, such as planned or facility shutdowns. The different relationships provide separate scheduling rules that are used to manage large projects. A Gantt chart enables you to manage work by displaying Work Order schedules and a summary of Work Order details. The Gantt Chart's drag and drop functionality enables you to manage schedules with ease. See: Work Order Relationships, page 3-35.

## Work Relationships

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Current Organization : **EM1**

Work Order: EM1112947 Update Work Order

Work Order	<b>EM1112947</b>	Description	
Department	<b>W-Maint</b>	Status	<b>Released</b>
Activity		Duration	<b>0</b>
Scheduled Start Date	<b>29-Apr-2004 08:05:52</b>	Scheduled Completion Date	<b>29-Apr-2004 08:05:52</b>
Project		Task	
Enable Material Issue Request	<b>Yes</b>	Work Order Attachments	<b>None</b> <span>Add</span>

[Operations](#) [Materials](#) [Resources](#) [Quality Plans](#) [Requests](#) [Purchasing](#) **[Work Relationships](#)**

Select Work Order: Update Dependencies Go | Update Work Hierarchy Update Alternate Cost Hierarchy View Cost

[Expand All](#) | [Collapse All](#)

⊕

Select Focus Work Order April T

⊖	EM1112947
---	-----------

▼ View All Relationships

Work Order	Description	Relation	Relation Status	Asset Type	Asset Group	Asset Number
No data exists.						

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1. Optionally choose Update Work Hierarchy to view and or update the Scheduling Relationship.
  - Select Create Child Work Order from the Select Work Order list of values to create a Parent Child Relationship. See: Work Order Relationships, page 3-35.
  - Select Add Existing Work Orders from the Select Work Order list of values to add Scheduling children to the current Work Order.



## Update Work Hierarchy

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All | Requests

[Shop Stores](#) > [Work Order: EM1112947](#) > Current Organization : **EM**

**Confirmation**  
1 work order(s) successfully added as Scheduling children.

Update Work Hierarchy

Select Work Order:

[Expand All](#) | [Collapse All](#)

Select	Focus	Work Order	Description	Asset Number	Status	Scheduled Start Date	Scheduled Completion Date	Duration (hours)	Firm	Scheduling Relationship Status	Shift Dates
<input type="radio"/>		EM1112947		FL1020	Released	29-Apr-2004 08:05:52	29-Apr-2004 08:05:52	0	Yes		
<input type="radio"/>		EM195297		FL1020	Draft	12-Mar-2004 06:11:23	12-Mar-2004 06:11:23	0	No	Invalid	

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- Choose Apply.
  - Optionally choose Shift Dates to shift the scheduling dates.
  - Optionally choose Remove to remove the selected Work Order from the hierarchy.
2. Optionally choose Update Alternate Cost Hierarchy to view and or update the Cost Relationship. See: Work Order Relationships, page 3-35. You can optionally create child work orders, add existing work orders, and view cost information for the current Cost Relationship.
  3. Optionally choose View Costs to view the current Work Order's cost information.

## Related Topics

Defining Inventory Material Requirements, page 3-26

Defining Direct Item Material Requirements, page 3-29

## Work Plans

The Work Plan tab is designed for users, such as Crew Supervisors, who execute work plans generated by a Planner. The Work Plan tab enables you to manage operations on a Work Order. You can skill search across departments, assign employees to a Work Order, adjust crew schedules, complete operations, hand work over to another department, complete a Work Order, request material, and enter quality plan information, such as inspection data. This section's tasks include:

- Viewing Capital Asset and Rebuildable Inventory Work Orders, page 18-46

## Viewing Capital Asset and Rebuildable Inventory Work Orders

Using the simple or advanced search modes, a supervisor can query on existing Work Orders, assigned to a department or employee, to view, update, or manage operations. Managing Operations enables you to search on skills, assign employees to Work Orders, hand over work to other departments, charge resources, and complete or uncomplete an operation.

### **To view work orders:**

1. Navigate to the Work Plan tab.
2. Optionally select an Asset Type. Valid values are Capital and Rebuildable Inventory.
3. Optionally select an Asset Number. This field works in conjunction with the Asset Type field.
4. Optionally narrow your search criteria by selecting a Date Range.
5. Optionally narrow your search criteria by selecting an Assigned Department.
6. Optionally select a Resource. Defining Departments and Resources, page 2-12.
7. Optionally select an Asset Group. Asset Groups, associated with the specified Asset Number, are available.
8. Optionally select a Work Order.
9. Optionally narrow your search criteria by selecting an Assigned Employee.
10. Optionally, further narrow your search criteria by selecting Advanced Search.  
This search method enables you to enter specific Asset information, Work Order information, and Operation information.
11. Choose Go to display all Work Orders associated with the specified data selection.

## Work Plans

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Current Organization : **EM1**

### Work Plan

[Save Search](#)

#### Simple Search

Please note that the search is case insensitive.

Asset Type   
Asset Number   
Date From   
Assigned Department   
Resource   
[Go](#) [Clear](#)

Asset Group   
Work Order   
Date To   
Assigned Employee

[Advanced Search](#)

[Personalized Search](#)

Released work orders will be displayed.

Select Work Order: [Manage Operations](#) [Export Work Order](#)

Select	Work Order	Asset Number	Asset Group	Asset Type	Description	Scheduled Start Date	Duration (hours)	Owning Department	Status	Work Order Completion	Request All Materials
<input checked="" type="radio"/>	EM1112947	FL1020	Fork Lifts	Capital		29-Apr-2004 08:05:52	0	W-Maint	Released		

[Save Search](#)

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12. Optionally select a Work Order number to view its details. See: Work Orders, page 18-24.
13. To Complete or Uncomplete (re-open) a Work Order, choose the Work Order Completion icon (See: eAM Work Order Statuses, page 3-16). Planners or Crew Supervisors can complete or uncomplete Work Orders using the Maintenance Workbench (See: Using the Maintenance Workbench, page 3-51), or via the Work Plan tab. Uncompleting a Work Order transitions the Work Order to Released. The operations within a Work Order do not need to be complete to complete a Work Order. The date you complete a Work Order must be greater than (later) or equal to the end date of the operation that has the latest end date. Likewise, the date you start a Work Order must be earlier than or equal to the start date of the operation with the earliest start date. See: Work Orders, page 18-24.
14. Optionally choose Request All Materials to add materials to the current Work Order's material requirements. See: Work Orders, page 18-24.
15. Optionally choose Manage Operations to manage all Activities related to an operation. The supervisor can search on skills, assign employees to operations and resources, hand over work to other departments, charge resources, and complete or uncomplete an operation.

## Operations

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Current Organization : **EM1**

**Operations**

Work Order  
Asset Number  
Asset Group  
Asset Activity

**EM1112947**  
**FL1020**  
**Fork Lifts**

Description  
Asset Description  
Asset Type

**Fork Lift 1020**  
**Capital**

**Work Order Operations**

Select Operation:

Select Operation	Assigned Department	Description	Scheduled Start Date and Time	Scheduled Actual Start Date and Time	Actual Duration (hours)	Completed	Attachments
<input checked="" type="radio"/>	10 W-Maint	Default Operation for Work Order	29-Apr-2004 08:05:52	29-Apr-2004 08:05:52	0		
<input type="radio"/>	20 Prd Maint	Lubricate Machine	29-Apr-2004 08:05:52		0		

[Return To Work Plan](#)

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### To charge resources:

It is important in asset management to capture both estimated and actual time spent on an each operation of a Work Order. When resources are identified on a Work Order the time to perform the work is estimated. In many cases, the extent of the work load is unknown until the work starts. Resource Charging enables you to post actual usage time for employees, equipment, and miscellaneous materials for specific operations on a Work Order.

1. Select an Operation, and then select Charge Resource from the Select Operation list of values.
2. Choose Go.

## Charging Resource

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All | Requests

Work Orders: All > Work Order: EM1112947 > Current Organization : EM1

Charge Resource Update Work Order

Work Order	EM1112947	Description	
Asset Number	FL1020	Asset Description	Fork Lift 1020
Asset Group	Fork Lifts	Activity	
Operation Sequence	10	Operation Description	Default Operation for Work Order
Assigned Department	W-Maint		

\* indicates required data

* Resource Sequence	<input type="text"/>	Employee	<input type="text"/>
* Resource	<input type="text"/>	Equipment	<input type="text"/>
* Unit of Measure	<input type="text"/>	Charge Department	<input type="text"/>
* Quantity	<input type="text"/>	Reason	<input type="text"/>
Work Performed Date	<input type="text" value="13-Oct-2004 01:43:50"/> <small>(example 13-Oct-2004 01:43:50)</small>	Reference	<input type="text"/>

Update Work Order

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3. Select a Resource Sequence. The Resource, Unit of Measure, and Quantity (reflects the number charged, normally in hours) default, based on the selected resource sequence, and the resources associated with the Work Order. For information on Resource Sequence, Resource, and Unit of Measure, See: Defining Resource Requirements, page 3-31
4. Optionally select the Work Performed Date to indicate the actual date the work was performed.
5. Optionally identify the Employee that performed the work.
6. Optionally identify the Equipment used to perform the work.
7. Optionally select the Charge Department to choose which department is charged for the employee or equipment usage.

You can display the list of values if the Employee name or Equipment serial number fields are populated. The list of values displays all departments that the person or equipment is assigned to (See: Defining Departments and Resources, page 2-12.

If you manually enter a Charge Department, the system validates if the department matches the operation's assigned department. If it does not, you will receive an error.

8. Optionally select a Reason code to indicate the reason a resource is used.
9. Optionally, enter a Reference.
10. Choose Apply.

## To re-assign work to another department:

Operations are often started but not finished by the assigned crew. A Handover enables a supervisor to re-assign a task to another supervisor for the continuation of work. This transaction adds an additional operation line and sequence to the Work Order. When the operation is handed over, the current operation is automatically completed, and a new operation is created.

1. To handover work, select an Operation, and then select Handover from the Select Operation list of values.
2. Choose Go.

### Handover

ORACLE Asset Management

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Work Plan > Operations > Handover Current Organization : EM1

Cancel Apply

Work Order **EM1112947**  
Asset Number **FL1020**  
Asset Group **Fork Lifts**  
Asset Activity

Description  
Asset Description **Fork Lift 1020**  
Asset Type **Capital**

Enter new operation data and click apply to handover.

**Original Operation**

Operation **10**  
Assigned Department **W.Maint**

Description **Default Operation for Work Order**  
Completed **N**

**New Operation**

Operation Details

\* indicates required data

New Operation **11**

Description

\* Assigned Department

\* Start Date and Time   
(example 13-Oct-2004 06:09:39)

\* Duration (hours)

Reconciliation Code

Shutdown Type

Attachments **None** [Add](#)

Resource Details

Please specify the resources to be carried over and their start time and duration.

Select Resource Sequence	Resource	Quantity Open	UOM	Start Date and Time	Duration (hours)	Employee
No data exists.						

Cancel Apply

3. Optionally enter a Description for this new handover operation.
4. Select a new Assigned Department. You cannot select the same department that the current operation exists in. Those departments, having all the resources used for the current operation, are available.
5. Optionally update the Start Date and Time for the new operation. The current system date and time defaults.
6. Optionally enter an estimated Duration in hours that the new operation requires.
7. Optionally select a Reconciliation Code describing how the operation was completed. See: Work Order Reconciliation Codes, page 2-30.
8. Optionally select a Shutdown Type to indicate whether a shutdown is necessary to handover the operation.

## To assign employees to an operation:

Work Orders are typically planned and scheduled by a planner. The work assignment is normally executed by a supervisor. It is common that work is not assigned at the employee level. If the supervisor intends to assign each task to an employee, the system can display whether employees are currently assigned to an operation, and the supervisor can assign additional personnel, if needed. If a supervisor is required to find another resource from another crew, he or she can do that with a skill search, leveraging Oracle Human Resources competencies.

1. Select an Operation, and then select Assign Employee from the Select Operation list of values.
2. Choose Go.

### Resources

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Work Plan > Operations >

Resources(EM1)

Work Order **EM1112947**

Asset Number **FL1020**

Asset Group **Fork Lifts**

Description

Asset Description **Fork Lift 1020**

Activity

Click the eyeglasses to see the employees for that resource. [Add Resources](#)

Employee Resources

Operation	Department	Resource Sequence	Resource	Quantity	UOM	Time	Start Date and Time	Completion Date and Time	Update	Delete	View Employees	Outside Processing
20	Prd Maint	10	PrdMaint	0.5	HR		29-Apr-2004 08:05:52	29-Apr-2004 08:05:52				

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3. In the Employee Resources region, optionally choose the Update icon to update the current resource.
  - Enter the number of Assigned Units to indicate the Required quantity of this resource to use. This information defaults from the Usage Rate-Amount information.
  - Optionally enter a Schedule Sequence. This information defaults from the current operation's setup. See: Preparing Work Order Operations, page 3-21.
  - Select a Start Date, or accept today's date and time to indicate when this resource is assigned to the operation.
  - Select an End Date, or accept today's date and time to indicate an expiration date that this resource is assigned to the operation.

- Optionally select the Standard Rate check box to indicate that the cost applied to this resource does not change.
- Select a Resource Code. the UOM defaults based on the Resource definition. See: Defining Departments and Resources, page 2-12 You can update this if the *BOM: Update Resource UOM* profile option is set to Yes.

The UOM must be time-based for this Work Order to be scheduled. It must be the same as the site level profile option, *BOM: Hour UOM*. See: Bills of Material Profile Options, *Oracle Bills of Material User's Guide*.

- Enter the Usage Rate or Amount Value for the resource. You can post usage time for employees, equipment, and miscellaneous materials.
- Select a Basis by which to charge and schedule the resource. This defaults, based on the Resource definition. See: Defining a Resource, *Oracle Bills of Material User's Guide*.

*Item:* Charge and schedule the resource where the resource usage quantity is the amount required per assembly unit you make.

*Lot:* Charge and schedule the resource where the resource usage quantity is the amount required per job or schedule.

- Select Yes in the Scheduled field to indicate that this resource can be scheduled.
- Select a Charge Type.

*Manual:* You can manually enter the cost.

*PO receipt:* The cost defaults as the cost on the purchase order receipt.

- Choose Apply.
4. Optionally choose the Delete icon to delete the current resource from the current operation.
  5. Optionally choose the View Employees icon to view current assigned employees.



## View Assigned Employees

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[Home](#) [Assets](#) [Work Requests](#) [Work Orders](#) [Work Plan](#) [Stores](#)

[Work Plan](#) > [Operations](#) > [Resources](#) > Current Organization : **EM1**

**View Assigned Employees: EM1112947**

Work Order **EM1112947**  
Department **Prd Maint**  
Operation **20**

Description  
Activity  
Resource **PrdMaint**

[Add Employees](#)

Employee Number	Employee Name	Charged Units	UOM	Remove Employee
No data exists.				

[Return to Resources](#)

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6. Optionally choose Add Employees to search for employees.
  - Optionally select an Employee Name.
  - Optionally select a Competency Type.
  - Optionally, select a Competency.
  - Choose Go to display a list of competent employees.
  - Choose Apply to assign the selected employees and return to the View Assigned Employees page.
  - Choose Return to Resources.
7. Optionally, if the current resource is enabled for outside processing (See: Setting Up Outside Service Processing, page 2-119), you can choose the Outside Processing icon to update or view the usage rate or amount, used to determine the quantity you are requisitioning and/or charging to the current Work Order.
8. Optionally, choose Add Resources to add resources to any operation of the current Work Order.

## Add Employee Resources

ORACLE® Asset Management

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Home Assets Work Requests Work Orders **Work Plan** Stores

Work Plan > Operations > Resources > Current Organization : EM1

Add Employee Resources: EM1112947

Work Order **EM1112947**

Asset Number **FL1020**

Asset Group **Fork Lifts**

Asset Activity

---

\* indicates required data

\* Operation

\* Resource Sequence

UOM

\* Assigned Units

Schedule Sequence

\* Start Date

(example 13-Oct-2004 06:33:19)

☒ Standard Rate

Description

Asset Description **Fork Lift 1020**

Asset Type **Capital**

---

Department

\* Resource Code

\* Usage Rate or Amount

\* Basis

\* Scheduled

\* End Date

\* Charge Type

Cancel Add another resource Apply

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- Select an Operation. Valid operations associated with the routing appear. See: Preparing Work Order Operations, page 3-21. The Department defaults as the area the current resource is assigned to. See: Defining Departments and Resources, page 2-12
- Enter a Resource Sequence. You can have multiple resources for an operation.
- Enter the number of Assigned Units to indicate the Required quantity of this resource to use. This information defaults from the Usage Rate-Amount information.
- Optionally enter a Schedule Sequence. This information defaults from the current operation's setup. See: Preparing Work Order Operations, page 3-21.
- Select a Start Date or accept today's date and time to indicate when this resource is assigned to the operation.
- Select an End Date, or accept today's date and time to indicate an expiration date that this resource is assigned to the operation.
- Optionally select the Standard Rate check box to indicate that the cost applied to this resource does not change.
- Optionally select a Department.
- Select a Resource Code. The UOM defaults, based on the Resource definition. See: Defining Departments and Resources, page 2-12. You can update this if the *BOM: Update Resource UOM* profile option is set to Yes.

The UOM must be time-based for this Work Order to be scheduled. It must be the same as the site level profile option, *BOM: Hour UOM*. See: Bills of Material Profile Options, *Oracle Bills of Material User's Guide*,.

- Enter the Usage Rate or Amount Value for the resource. You can post usage time for employees, equipment, and miscellaneous materials.
- Select a Basis by which to charge and schedule the resource. This value defaults based on the Resource definition. See: *Defining a Resource, Oracle Bills of Material User's Guide*.

*Item:* Charge and schedule the resource where the resource usage quantity is the amount required per assembly unit you make.

*Lot:* Charge and schedule the resource where the resource usage quantity is the amount required per job or schedule.

- Select Yes in the Scheduled field to indicate that this resource can be scheduled.
- Select a Charge Type.

*Manual:* You can manually enter the cost.

*PO receipt:* The cost defaults as the cost on the purchase order receipt.

- Choose Apply.

9. Select Return to Operations.

#### **To complete or uncomplete an operation:**

Operations are at Complete or Uncomplete statuses. When completing an operation, operation dependencies are considered. For example, if operation 20 is dependent on operation 10's completion, you cannot uncomplete 10 if operation 20 is already completed.

1. Select an Operation, then select Complete-Uncomplete Operation from the Select Operation list of values.
2. Choose Go.

## Operation Completion

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Work Plan > Operations > Complete Operation Current Organization : EM1

Work Order: EM1112947 Asset Type: Capital  
 Asset Number: FL1020 Asset Group: Fork Lifts  
 Operation: 10 Description: Default Operation for Work Order  
 Assigned Department: W.Maint Assigned Employees: 0

Enter completion information and hit 'Apply' to complete the operation.

**Completion Details**  
 \* indicates required data

Transaction Type: Complete Operation  
 \* Actual Start Date and Time: 29-Apr-2004 08:05:52  
 (example 13-Oct-2004 06:41:53)  
 \* Actual Duration (hours): 0  
 Actual End Date and Time: 29-Apr-2004 08:05:52  
 Reconciliation Code:  
 Reference:  
 Attachments: None (Add)  
 Context Value:  
 \* segment1:

**Quality Plans**

Plan Name	Description	Mandatory	Results Entered	Enter Quality Results	View Quality Results	Quality Plan Attachments
EAM PLAN 1	test for ST					
EAM PLAN						

► Prior Operations

Cancel Apply

- Enter an Actual Start Date and Time that the operation started.
- Enter the Actual Duration in hours that it took to complete the operation. It is automatically calculates as the difference between the Estimated Start Date and Estimated End Date.
- Optionally select a Reconciliation Code, describing how the operation was completed. For example Completed, Handover, or Partially Completed. These codes enable you to evaluate jobs by percentage completed or delayed. For example, if the operation was delayed, this code can provide the reason. A code such as Handover suggests that an operation was not finished within a shift and was assigned to another crew.
- Optionally choose Add to add necessary attachments, such as file, URL, or text attachments.
- Optionally select a Context Value.
- Enter a segment1.
- Optionally select the Enter Quality Results icon to enter quality results for the associated Quality Plan. Required Data fields depend on the Collection Plan's collection element specifications. See: Quality Integration Setup, page 2-110.
- Optionally select the View Quality Results icon to view or update existing Quality results already entered, for the associated Quality Plan.
- Choose Apply to save your work.

## Stores

Material issue to Work Orders and returns to Inventory are typical store room functions.

The Stores tab provides Material Issue Request and Verification functionality, and is used to manage a Work Order's material availability. A Work Order's material requirements are defined on its Maintenance Bill of Material, and are available to the Work Order via the Material Issue Request and Verification process.

There are two activities involved in delivering material from stores to a Work Order. First, a Material Issue Request is generated (Move Order in Oracle Inventory) to request the material to a Work Order. This process is automated upon Work Order release, by selecting a check box in the Enterprise Asset Management Parameters (See: Defining eAM Parameters, page 2-8). The second activity involves Material Issue Verification (Move Order in Oracle Inventory), and is generated when you access the Stores tab and select material for a Work Order, based on available, unprocessed move orders. A one-step material issue is a substitute for these two activities; a request is not created.

You can return material to Inventory from a maintenance Work Order. If excess or defective material is issued to a Work order, it needs to return.

## Related Topics

Stores, page 18-57



This chapter covers the following topics:

- Stores
- Delivering Material from Stores to a Work Order
- Returning Material to Inventory

## **Stores**

Material issue to Work Orders and returns to Inventory are typical store room functions and are provided by the Stores tab.

There are two activities involved in delivering material from stores to a Work Order. First, a Material Issue Request is generated to request the material to a Work Order. This process is automated upon Work Order release, by selecting a check box in the Enterprise Asset Management Parameters (See: Defining eAM Parameters, page 2-8). The second activity involves Material Issue Verification, and is generated when you access the Stores tab and select material for a Work Order, based on available, unprocessed move orders. A one-step material issue is a substitute for these two activities; a request is not created.

There are two primary methods used to issue material to a Work Order: One Step Issue and Two Step Issue. The One Step Issue method is used to issue one-off or ad hoc material to a work order; this does not involve the prior requesting of material and can execute for both planned and unplanned material. The Two Step Issue method involves two steps. The first step involves the maintenance planner or user requesting material from stores, and the second step involves the stores room person delivering the material to the Work Order.

You can return material to Inventory from a maintenance Work Order. If excess or defective material is issued to a Work order, it needs to return.

The section includes the following topics:

- Delivering Material from Stores to a Work Order, page 19-1
- Returning Material to Inventory, page 19-9

## **Delivering Material from Stores to a Work Order**

There are two activities involved in delivering material from stores to a Work Order. First, a Material Issue Request is generated (Move Order in Oracle Inventory) to request the material to a Work Order. You may automate this process upon Work Order

release by selecting the *Enable Material Issue Requests* and *Auto Request Material* check boxes in the Enterprise Asset Management Parameters (See: Defining eAM Parameters, page 2-8). You may override these settings at the Work Order level. The *Auto Request Material* check box is located in the Material Requirements window. (See: Routine Work Orders, page 3-3). The second activity involves Material Issue Verification (Move Order in Oracle Inventory), and is generated when you access the Stores tab and select material for a Work Order, based on available, unprocessed move orders. A one-step material issue is a substitute for these two activities; a request is not created.

If the Material Issue Request process is not automated, you can perform a manual request within the Request all Materials page, located on the Work Orders tab.

### To perform the required setup steps for the two-step material delivery process:

First, define a *Default Pick Slip Grouping Rule* within the WIP Parameters window. This information is used when pick slips are created for the material issue requests, detailing subinventory and locator information. Next, decide if your organization wants to Allocate Serial Numbers. If the answer is no, the quantity of the material issued is allocated and no serial numbers are allocated. The picker enters the picked serial numbers and is not partial to any specific serial numbers. If the answer is yes, serial numbers are allocated during the material request, and then are not available for any other transaction.

1. Navigate to the Work In Process Parameters window.
2. Select the Other tab.

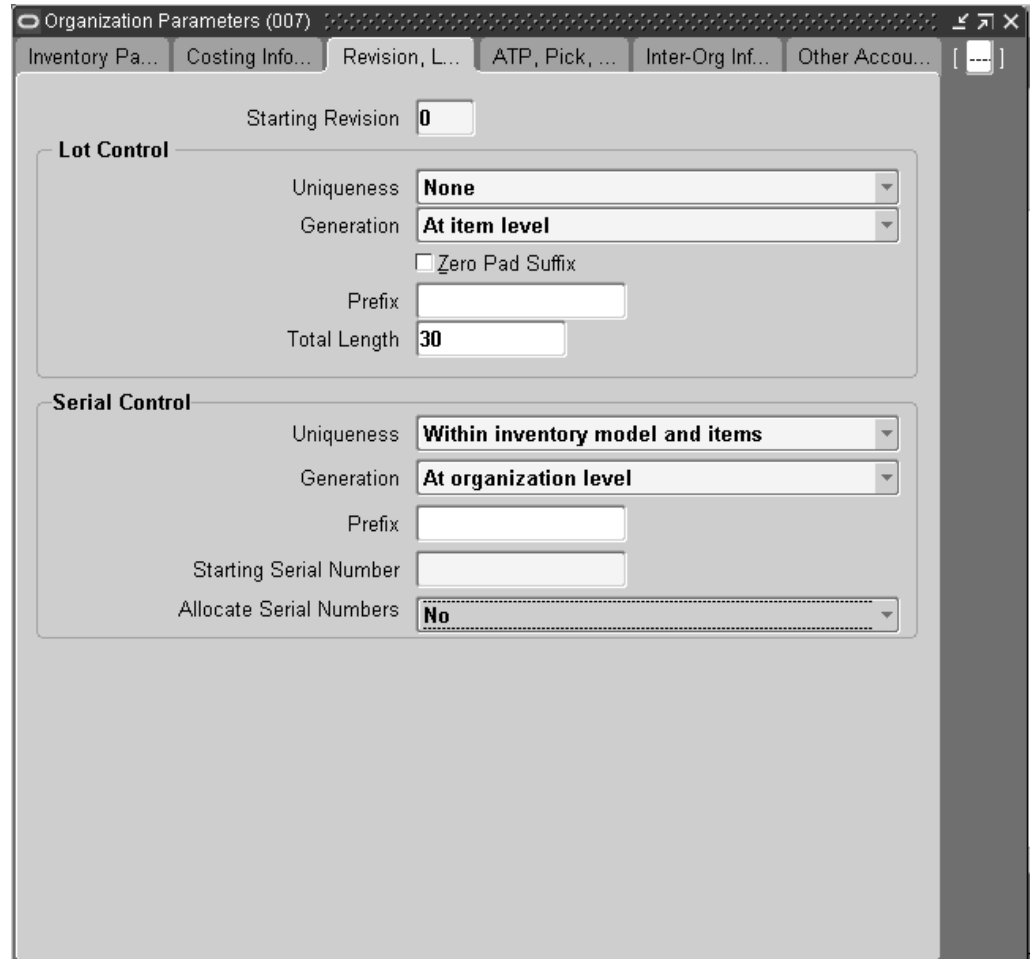
#### Work in Process Parameters

3. Select a Default Pick Slip Grouping Rule. This information is used when pick slips are created for the material issue requests, detailing subinventory and locator information.



4. Save your work.
5. Navigate to the Organization Parameters window.
6. Select the Revision, Lot, Serial tab.

### Organization Parameters



Organization Parameters (007)

Inventory Pa... Costing Info... Revision, L... ATP, Pick, ... Inter-Org Inf... Other Accou... [ ... ]

Starting Revision

**Lot Control**

Uniqueness

Generation

☐ Zero Pad Suffix

Prefix

Total Length

**Serial Control**

Uniqueness

Generation

Prefix

Starting Serial Number

Allocate Serial Numbers

7. Select an Allocate Serial Numbers value. If you select No, the quantity is allocated, but individual serial numbers are not. If you select Yes, you can allocate serial numbers when material requests are created. These serial numbers are not available to any other transaction.

Organizations typically select No, enabling the picker to enter the picked serial numbers. In most cases, the requestor is not partial to specific serial numbers.

8. Save your work.

### To generate a Material Issue Verification:

Assuming that you have set the eAM Parameters to automatically create a Material Issue Request upon Work Order release, the following procedures execute the Material Issue Request; they physically allocate material to a Work Order.

1. Navigate to the Stores tab.

## Material Issue

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**Material Issue** | [One Step Material Issue](#) | [Return Material To Inventory](#) Current Organization : **EM1**

**Material Issue**  
Here you can issue material against existing material allocations . If you issue a partial quantity, the remaining allocation will be saved unless you check the [Save Search](#) "Delete Remaining Allocation" box. The "Replaced Rebuild Details" icon allows you to specify an existing rebuild to be replaced.

**Simple Search**  
Search for Material Allocations by Material Request Number or other fields. [Advanced Search](#)

Material Request Number  Material   
Work Order  Subinventory

---

**Material with no Lot or Serial Control**

Select	Details	Material	Description	Material Request Number	Material Request Line Number	Allocated Qty	Issue Qty	Reason	Reference	Delete Remaining Allocation	Replaced Rebuild Details	Delete
		No search conducted.										

---

**Material with Lot or Serial Control**

Select	Details	Material	Description	Material Request Number	Material Request Line Number	Allocated Qty	Delete
		No search conducted.					

[Save Search](#)

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2. The system defaults the Simple search mode. Enter at least one of the following fields in both the Simple and Advanced search modes.
  - Optionally enter a Material Request Number to narrow your results to that request.
  - Optionally enter a Work Order Number to narrow your results to only requests belonging to one Work Order.
  - Optionally enter a specific Material to narrow your results to only Material Issue Requests requiring that Material.
  - Optionally enter a Subinventory to narrow your results to a specific Subinventory.
  - Using the Advanced search mode (Advanced button), optionally enter a material request Line Number to narrow your results to only specified lines on a request.
  - Optionally enter an Operation number to narrow your results to only requests belonging to a specific operation on a Work Order.
  - Optionally select a value from the Add Another list of values, and then choose Add.
    - Optionally enter a Locator if a Subinventory was selected and requires a Locator.
    - Optionally entered a Created By value. This is the person that created the material request.
3. Choose Go to display Material Issue Request information in the Results region.

## Material Issue

### Advanced Search

Specify parameters and values to filter the data that is displayed in your results set.

☒ Search results where each must contain all values entered.  
☐ Search results where each may contain any value entered.

Material Request Number
 is

Line Number
 is

Work Order
 is

Operation
 is

Material
 is  Shop Rags

Material

Material with no Lot or Serial Control

Select Material(s):  990x592

Select	Details	Material	Description	Material Request Number	Material Request Line Number	Allocated Qty	Issue Qty	Reason	Reference	Delete Remaining Allocation	Replaced Rebuild Details	Delete
<input type="checkbox"/>	<input type="button" value="Hide"/>	Shop Rags	Shop Rags for Clean up	42786	1	2	2			<input type="checkbox"/>	<input type="button" value="Pencil"/>	<input type="button" value="Trash"/>
<div> Work Order GF-3000  Subinventory FklRStore  Date Required 01-Apr-2004 </div> <div> Operation 10  Locator  Created By GFRANSSO </div>												
<input type="checkbox"/>	<input type="button" value="Show"/>	Shop Rags	Shop Rags for Clean up	42355	1	1	1			<input type="checkbox"/>	<input type="button" value="Pencil"/>	<input type="button" value="Trash"/>
<input type="checkbox"/>	<input type="button" value="Show"/>	Shop Rags	Shop Rags for Clean up	46539	1	1	1			<input type="checkbox"/>	<input type="button" value="Pencil"/>	<input type="button" value="Trash"/>
<input type="checkbox"/>	<input type="button" value="Show"/>	Shop Rags	Shop Rags for Clean up	51150	1	5	5			<input type="checkbox"/>	<input type="button" value="Pencil"/>	<input type="button" value="Trash"/>

Material with Lot or Serial Control

Select	Details	Material	Description	Material Request Number	Material Request Line Number	Allocated Qty	Delete
<input type="checkbox"/>	<input type="button" value="Show"/>	No data exists.					

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The results region is divided between *Material with no Lot or Serial Control* and *Material with Lot or Serial Control*.

- The Issue Qty value defaults from the material requirements. You can update it.
- Optionally select a Reason for the Material Issue.
- Optionally enter a Reference.
- Optionally select the Delete Remaining Allocation check box to delete the remaining, unissued quantity, if the Issue Qty is lower than the allocated amount within the material requirements. Otherwise, it will save.
- For results within the *Material with no Lot or Serial Control* region, optionally select the Replace Rebuild Details pencil icon to specify a Serialized Rebuildable to issue to the current Work Order. This icon is enabled if the associated Work Order is for Rebuildable Inventory maintenance. After selected, you can indicate the following within the Replaced Rebuild Details page:
  - Rebuild Item* - defaults as the current Rebuild Item; you can update it.
  - Rebuild Serial Number* - optionally enter if you know what serial number is coming out (for serialized rebuilds only).
  - Rebuild Activity* - the activity you want to associate with the created rebuild Work Order
  - Rebuild Work Order* - the name of the Work Order created for the replaced Rebuildable Item

Stores 19-5

If you specify a replaced rebuildable item, a Work Order generates for the replaced rebuildable item because it is most likely problematic and you can have it repaired. If a serial number is provided for the replaced Rebuildable Item, it is removed from the asset's hierarchy and the configuration history is updated.

If nothing is specified within the Replaced Rebuild Details page, the replaced rebuild defaults as the same rebuild item that you are issuing. A Work Order is created for the replaced rebuild item.

9. Optionally select the Delete icon to delete the current material allocation. You might want to use this feature if you wish to free material and use it within the One-Step process.
10. Optionally for results within the *Material with Lot or Serial Control* region, select the Enter Serial Numbers pencil icon to specify a specific serial number to issue to the current Work Order.
11. Select the Select check box on the rows that you want to verify (allocate the material to the current Work Order), then choose Export. The material is now available for the Work Order.

**Note:** Ensure that the requested material is available in subinventories that are enabled for picking. Enabled subinventories might be governed by picking rules. See: *Defining Picking Rules, Oracle Inventory User's Guide*

#### **To perform a one step material issue:**

A one-step material issue is a substitute for the Material Issue Request and Material Issue Verification activities; a separate request is not created. This is performed if the Enable Material Issue Requests check box is not selected in the eAM Parameters (See: *Defining eAM Parameters*, page 2-8).

1. Navigate to the Stores tab.
2. Select the One Step Material Issue sub-tab.

## One Step Material Issue

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Material Issue | One Step Material Issue | Return Material To Inventory


Stores: One Step Material Issue >


Current Organization : EM1

### One Step Material Issue

Here you may issue material directly to a work order.

\* Work Order  



















Operation  

Material  

---

Select Material(s):

Select All | Select None

Select	Details	Material	Operation	Issued Qty	Qty	UOM	Subinventory	Locator	Lot	From Serial	To Serial	Revision	Replaced Rebuild Details
<input checked="" type="checkbox"/>	 Show	Water	10	0		GAL							
<input type="checkbox"/>	 Show	Fork Lift Lubrication	10	0		Ea							
<input type="checkbox"/>	 Show	Filled Propane Tanks	10	0		Ea							
<input checked="" type="checkbox"/>	 Show	Shop Rags	10	0	2	Ea	FacStores						
<input type="checkbox"/>	 Show												
<input type="checkbox"/>	 Show												
<input type="checkbox"/>	 Show												
<input type="checkbox"/>	 Show												
<input type="checkbox"/>	 Show												

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3. Select the Work Order that you wish to issue material. It must be enabled for material issue requests. See: Routine Work Orders, page 3-3.
4. Optionally select the specific Operation to view results on existing One Step Material Issues that were issued to that operation. Only operations existing within the selected Work Order are available.
5. Optionally select a specific Material if your query is to view existing One Step Material Issues.
6. Choose Go. All planned material appears in the Select Material(s) region. Planned material is material that exists in the Work Order's material requirements. See: Defining Inventory Material Requirements, page 3-26.
7. Within the Select Material(s) region, optionally select unplanned Material (material not part of the Work Order's material requirements) to issue to the current Work Order.
  - Select an Operation to issue the material. The UOM defaults to the current Material's UOM.
8. Select the Quantity of the material that you are issuing to the Work Order.
9. Optionally select a Subinventory to pull the material from in Inventory.
10. If you previously selected a Subinventory requiring a Locator, select a Locator.
11. If the current material is lot controlled, select a Lot.
12. If the current material is serial controlled, select From and To Serial numbers.
13. Optionally select a Revision.

14. If the material is Rebuildable Inventory, optionally choose the Replaced Rebuild Details icon to specify the replacement Rebuildable Item information for the current Rebuildable Item. After selected, you can indicate the following within the Replaced Rebuild Details page:

- *Rebuild Item* - defaults as the current Rebuild Item; you can update it.
- *Rebuild Serial Number* - optionally enter if you know what serial number is coming out (for serialized rebuilds only).
- *Rebuild Activity* - the activity you want to associate with the created rebuild Work Order
- *Rebuild Work Order* - the name of the Work Order created for the replaced Rebuildable Item

If you specify a replaced rebuildable item, a Work Order generates for the replaced rebuildable item because it is most likely problematic and you can have it repaired. If a serial number is provided for the replaced Rebuildable Item, it is removed from the asset's hierarchy and the configuration history is updated.

If nothing is specified within the Replaced Rebuild Details page, the replaced rebuild defaults as the same rebuild item that you are issuing. A Work Order is created for the replaced rebuild item.

15. Optionally select the Details Show/Hide toggle icon.
1. Optionally select a Reason for the current issue.
  2. Select the Date required for the material to the Work Order. Today's date and time defaults.
  3. Optionally enter a Reference.
16. Select the Select check box next to the lines you are issuing to the current Work Order.
17. Choose Issue.

One Step Material Issue Confirmation

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Material Issue | **One Step Material Issue** | [Return Material To Inventory](#)

[Stores: One Step Material Issue](#) > Current Organization : **EM1**

Confirmation

1. 1 material lines were successfully issued.

2. Information - OPERATION : 10,MATERIAL : Shop Rags, QUANTITY: 2 has been issued

One Step Material Issue

Here you may issue material directly to a work order.

+ Work Order

57807

Material

Operation

Go

Clear

Select Material(s): [Issue](#)

[Select All](#) | [Select None](#)

Select	Details	Material	Operation	Issued Qty	Qty	UOM	Subinventory	Locator	Lot	From Serial	To Serial	Revision	Replaced Rebuild Details
<input type="checkbox"/>	<a href="#">Show</a>	Water	10	0		GAL							<a href="#">Pencil</a>
<input type="checkbox"/>	<a href="#">Show</a>	Fork Lift Lubrication	10	0		Ea							<a href="#">Pencil</a>
<input type="checkbox"/>	<a href="#">Show</a>	Filled Propane Tanks	10	0		Ea							<a href="#">Pencil</a>
<input type="checkbox"/>	<a href="#">Show</a>	Shop Rags	10	2		Ea							<a href="#">Pencil</a>
<input type="checkbox"/>	<a href="#">Show</a>												<a href="#">Pencil</a>
<input type="checkbox"/>	<a href="#">Show</a>												<a href="#">Pencil</a>
<input type="checkbox"/>	<a href="#">Show</a>												<a href="#">Pencil</a>
<input type="checkbox"/>	<a href="#">Show</a>												<a href="#">Pencil</a>
<input type="checkbox"/>	<a href="#">Show</a>												<a href="#">Pencil</a>

Add 5 Rows

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Related Topics

Overview of Move Orders, *Oracle Inventory User's Guide*

Returning Material to Inventory

You can return material to Inventory from a maintenance Work Order. If excess or defective material is issued to a Work order, it needs to be returned. Only material issued to Work Orders can return to Inventory. The quantity returned cannot exceed the quantity issued; it must be one if the material is serial controlled.

To return material to Inventory:

- 1. Navigate to the Stores tab.
- 2. Select the Return Material To Inventory sub-tab.

## Return Material to Inventory

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Material Issue | One Step Material Issue | Return Material To Inventory

Current Organization : EM1

### Return Material To Inventory

Only materials issued to work orders are available for return. Quantity to return can never exceed quantity issued and has to be 1 if the material is under serial control.

Work Order

Material

Lot Number

Operation

Serial Number

---

Select Material(s):

Select	Work Order	Op	Material	Description	Serial	Lot	Revision	Issued Qty	Qty	UOM	Subinv	Locator	Date	Reason
<input checked="" type="checkbox"/>	57807	10	Shop Rags	Shop Rags for Clean up				2	1	Ea	ASSET		24-Sep-2004 00:25:24	

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3. Optionally select a Work Order to narrow your results to one Work Order.
4. Optionally select a Material to narrow your results to all Work Orders containing it as a material requirement.
5. Optionally select a Lot Number to narrow your results to all Work Order containing the previous Material with the current Lot Number.
6. Optionally select a specific Operation contained in the previously selected Work Order.
7. Optionally select a Serial Number to narrow your selection criteria to only Work Orders containing it as part of their material requirements.
8. Choose Go.
9. For each Work Order that you wish to return material from, enter a Quantity to return.
10. Select the Subinventory to return the material.
11. If the previous Subinventory requires a Locator, select a Locator.
12. Optionally select a Date to return the material. Today's date and time defaults.
13. Optionally select a Reason code to indicate the Reason the material is not needed.
14. Optionally enter Reference information.
15. Select the Select check box next to all Work Order rows from which material is being returned.
16. Choose Return to Inventory.



Return Material to Inventory Confirmation

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Current Organization : **EM1**

Confirmation

WorkOrder : 57807,Operation: 10,Material: Shop Rags,Quantity : 1 has been returned

Return Material To Inventory

Only materials issued to work orders are available for return. Quantity to return can never exceed quantity issued and has to be 1 if the material is under serial control.

Work Order

57807

Operation

Material

Serial Number

Lot Number

Go

Clear

Select Material(s): [Return to Inventory](#)

[Select All](#) | [Select None](#)

	Work Order	Op	Material	Description	Serial	Lot	Revision	Issued Qty	Qty	UOM	Subinv	Locator	Date	Reason	Re
<input type="checkbox"/>	57807	10	Shop Rags	Shop Rags for Clean up				1		Ea			24-Sep-2004 00:25:24		

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## Reports and Processes

This chapter covers the following topics:

- Activity Cause Report
- Department Actual Cost Report
- Work Order Cost Report
- EAM Weekly Schedule Report
- Load Production Equipment Maintenance Downtime
- Maintenance Work Order Detail Report
- Material Issue Request Pick List Report
- Retrieve Timecard Data from OTL to EAM
- Simulate Transfer Shop Floor Invoice Variance
- Shop Floor Invoice Variance Report

### Activity Cause Report

Use the Activity Cause Report to report on reasons for your assets' failures, reported by Department, or Asset Number. An Activity Cause is a reason for an asset's failure, for example, Preventive, Normal Wear, Rework, and Breakdown. This information enables you to understand the dynamics that affect an asset's ability to perform. They establish critical data that can be used for reporting and analysis of asset failure causes and the frequency of such conditions. Asset Cause Codes are referenced when setting up an Activity (See: Defining Activities, page 2-57 and Activity Causes, page 2-19).

#### Report Submission:

1. In the Submit Requests window, select Activity Cause Report from the Name list of values.

### Report Parameters

#### Report Type

Select By Department or By Item Type (Capital Asset or Rebuildable Inventory) to indicate whether the report displays information relative to the Owning Department or Asset Group, respectively.

#### Period From

Enter the beginning period, for a data range, to indicate the starting point of time for which the report encompasses information. See: *Period Types, Oracle General Ledger User's Guide*, *Defining Period Types, Oracle General Ledger User's Guide*, and *Adding Periods to a Calendar, Oracle General Ledger User's Guide*.

**Period To**

Enter an ending period, for a data range, to indicate the ending point of time for which the report encompasses information. See: *Period Types, Oracle General Ledger User's Guide*, *Defining Period Types, Oracle General Ledger User's Guide*, and *Adding Periods to a Calendar, Oracle General Ledger User's Guide, Oracle General Ledger User's Guide*.

**Currency**

Select the Currency. See: *Defining Currencies, Oracle General Ledger User's Guide*.

**Exchange Rate**

Select the Exchange Rate. See: *Understanding Multiple Reporting Currencies, Oracle General Ledger User's Guide*.

**Department From**

Optionally, select a beginning department, for a data range, to indicate the beginning department for which the report encompasses information. This parameter is enabled if you selected By Department in the Report By parameter.

**Department To**

Optionally, select an ending department for a data range to indicate the ending department for which the report encompasses information. This parameter is enabled if you selected By Department in the Report By parameter.

**Item Type**

Select an Item Type. Valid values are Asset Items only, Rebuild Items only, and Asset and Rebuild Items.

**Maintained Item From**

Optionally select the Maintained Item From field to display a System Items window that provides Low and High fields. You can enter the Asset Item data range within the Low and High fields, which populates the Asset Item From and Asset Item To fields, respectively.

**Maintained Item To**

Optionally select the Maintained Item To field to display a System Items window that provides Low and High fields. You can enter the Asset Item data range within the Low and High fields, which populates the Maintained Item From and Maintained Item To fields, respectively.

**Maintained Unit From**

Optionally, select a beginning Maintained Group, for a data range, to indicate the beginning Maintained Group for which the report encompasses information.

**Maintained Unit To**

Optionally, select an ending Maintained Group, for a data range, to indicate the ending Maintained Group for which the report encompasses information.

2. Choose OK.
3. Choose Submit.

## Related Topics

Submitting a Request, *Oracle Applications User's Guide*

## Department Actual Cost Report

Use the Department Actual Cost Report to determine the actual costs charged to an Owning Department for a specified period of time.

### Report Submission:

1. In the Submit Requests window, select EAM Weekly Schedule report from the Name list of values.

## Report Parameters

### Report Type

Select Summary or By Department Total.

- *Summary:* The one report total reflects the actual cost for all Departments within the selected Department data range (Department From and Department To fields). If Departments were not selected within the Department From and Department To fields, the report total reflects the actual cost for all Departments.
- *Department Total:* The report reflects actual cost totals for all Departments, separately, within the selected Department data range (Department From and Department To fields). If Departments were not selected within the Department From and Department To fields, the report totals reflect the actual costs for all Departments.

### Department From

Optionally select a beginning department, for a data range, to indicate the beginning department for which the report encompasses information.

### Department To

Optionally select an ending department for a data range to indicate the ending department for which the report encompasses information.

### Period From

Enter the beginning period, for a data range, to indicate the starting point of time for which the report encompasses information. See: *Period Types, Oracle General Ledger User's Guide*, *Defining Period Types, Oracle General Ledger User's Guide*, and *Adding Periods to a Calendar, Oracle General Ledger User's Guide*.

### Period To

Enter an ending period, for a data range, to indicate the ending point of time for which the report encompasses information. See: *Period Types, Oracle General Ledger User's Guide*, *Defining Period Types, Oracle General Ledger User's Guide*, and *Adding Periods to a Calendar, Oracle General Ledger User's Guide*.

### Include OSP

Select No or Yes. If you select Yes, Outside Service Processing information is included in the report.

**Currency**

Select the Currency. See: Defining Currencies, *Oracle General Ledgers User's Guide*.

**Exchange Rate**

Select the Exchange Rate. See: Understanding Multiple Reporting Currencies, *Oracle General Ledger User's Guide*.

2. Choose OK.
3. Choose Submit.

## Related Topics

Submitting a Request, *Oracle Applications User's Guide*

## Work Order Cost Report

Use the Work Order Cost Report to determine the costs charged to Work Orders for a specified period of time, and optionally, a Department range.

**Report Submission:**

1. In the Submit Requests window, select Work Order Cost Report from the Name list of values.

## Report Parameters

**Report Type**

Accept the default, High Cost Work Orders.

**Department From**

Optionally select a beginning department, for a data range, to indicate the beginning department for which the report encompasses information.

**Department To**

Optionally select an ending department for a data range to indicate the ending department for which the report encompasses information.

**Cost Ceiling**

Optionally enter an amount to indicate a work order cost limit for which the report encompasses.

**Period From**

Enter the beginning period, for a data range, to indicate the starting point of time for which the report encompasses information. See: Period Types, *Oracle General Ledger User's Guide*, Defining Period Types, *Oracle General Ledger User's Guide*, and Adding Periods to a Calendar, *Oracle General Ledger User's Guide*.

**Period To**

Enter an ending period, for a data range, to indicate the ending point of time for which the report encompasses information. See: Period Types, *Oracle General Ledger*

*User's Guide, Defining Period Types, Oracle General Ledger User's Guide, and Adding Periods to a Calendar, Oracle General Ledger User's Guide.*

#### **Include OSP**

Select No or Yes. If you select Yes, Outside Service Processing information is included in the report.

#### **Currency**

Select the Currency. See: Defining Currencies, *Oracle General Ledger User's Guide*.

#### **Exchange Rate**

Select the Exchange Rate. See: Understanding Multiple Reporting Currencies, *Oracle General Ledger User's Guide*

2. Choose OK.
3. Choose Submit.

## **Related Topics**

Submitting a Request, *Oracle Applications User's Guide*

## **EAM Weekly Schedule Report**

Use the EAM Weekly Schedule Report to display Work Order details, by specific owning department, within your crew's calendar week's starting dates. This report includes details, such as Work Order number, status, work description, start date, operation, department, resources, instance, priority, duration, estimated completion date, and the distribution of hours on a weekly basis.

#### **Report Submission:**

1. In the Submit Requests window, select EAM Weekly Schedule report from the Name list of values.

## **Report Parameters**

#### **Owning Department**

Select an Owning Department to report for one Owning Department. This is the department that owns the responsibility for the Asset Number. This parameter is mandatory.

#### **Assigned Department**

Optionally, select an Assigned Department to narrow selection criteria to schedule information for one Assigned Department. This is the department that is currently assigned to the Asset Number.

#### **Week Starting**

Optionally select the starting date from which the user requires this report. The report displays information for seven days from the selected date. If this parameter is left blank, the report displays information starting from the first date of the current week.

#### **Area**

Optionally select an Area to narrow selection criteria to where a Asset Number is located.

**Asset**

Optionally select an Asset to narrow selection criteria to only the Work Orders that are assigned to the selected Asset.

**Rebuild Item**

Optionally select a serialized Rebuildable Item to narrow selection criteria to only Work Orders that are assigned to the selected Rebuildable Item.

**Shutdown Type**

Optionally select a Shutdown Type to narrow selection criteria to only Work Orders that have the selected Shutdown Type required for its operations.

**Resource**

Optionally select a resource associated with the operations of the current Work Order. This parameter is optional.

**Instance**

The Person or Equipment used as the resource for an operation. This parameter is optional.

**Sort By**

Select a Sort By value to indicate how you want to display your schedule information. If you select Workorder, for example, the report displays scheduling information, sorted by Work Order number.

2. Choose OK.
3. Choose Submit.

## Related Topics

Submitting a Request, *Oracle Applications User's Guide*

## Load Production Equipment Maintenance Downtime

Enterprise Asset Management (eAM) integrates with Process and Discrete Manufacturing, enabling your maintenance environment to identify Enterprise Asset Management asset relationships with production equipment. This feature associates an asset or many assets to the production equipment located in an Outside Processing organization. After establishing, you can view the resource usage (maintenance Work Orders, batches, or FPOs) emanating from production, associated with a maintainable asset. You can also use the Load Production Equipment Maintenance Downtime process to view or purge your maintenance production equipment downtime.

**Report Submission:**

1. In the Submit Requests window, select Load Production Equipment Maintenance Downtime from the Name list of values.



## Report Parameters

### Simulation Set

Select a valid Simulation Set.

### Run Option

Select a Run Option. Valid values are Load Maintenance Downtime and Purge Maintenance Downtime.

- *Load Maintenance Downtime:* The process reports all production equipment downtime.
- *Purge Maintenance Downtime:* The process purges all production equipment downtime records from the appropriate tables.

### Include Unreleased Maintenance Orders

Select Yes or No. If you select Yes, the report process includes Work Orders at an Unreleased Status when reporting or purging production equipment downtime records.

### Firm Maintenance Work Orders Only

Select Yes or No. If you select Yes, only Work Orders that are firm (the dates on the Work Order cannot automatically re-schedule) are considered.

### Department

Optionally, select an Owning Department. Only Work Orders belonging to the selected Department are considered.

### Resource

Optionally select a Resource. Only Work Orders containing the selected Resource are considered.

2. Choose OK.
3. Choose Submit.

## Related Topics

Submitting a Request, *Oracle Applications User's Guide*

## Maintenance Work Order Detail Report

Use the Maintenance Work Order Detail Report to view and analyze all information related to a maintenance work order. You can create a report that displays user-defined values. For example, you can view all unreleased work orders for a specified date range, or see material requirements for work orders in a specified area. You can filter reporting information according to work orders, start and end dates, assigned department, work statuses, asset area, and asset. You can display details on the report, including operations, resources, employees, materials, direct items, work requests, meters, and attachments.

### Report Submission:

1. In the Submit Requests window, select Maintenance Work Order Detail Report from the Name list of values.

## Report Parameters

All report parameters are optional.

### **Work Order From**

Enter the starting work order number to display a range of work orders.

### **To**

Enter the ending work order number to display a range of work orders.

### **Scheduled Start Dates From**

Enter the beginning scheduled date for a data range. This is the starting point to calculate the scheduled end date and duration for allocated resources and materials.

### **To**

Enter the ending date for a date range. This indicates the requested end by date of the work. The scheduling process uses this date as a starting point to calculate the scheduled start date and duration for allocated resources and materials.

### **Work Order Status**

Enter the status of the work order. Only work orders at this status appear on the report.

### **Assigned Department**

Enter the assigned department (crew). This is the department associated with the asset on the work order.

### **Asset Area from**

Enter the beginning asset area for a range of areas.

### **Asset Area to**

Enter the ending asset area for a range of areas.

### **Asset Number**

Enter an asset if you want to view only work order information associated with a specific asset.

### **Operations to be displayed**

*No* - Operation level information does not appear.

*Yes* - Operation level information appears.

### **Resources to be displayed**

*No* - Resource level information does not appear.

*Yes* - Resource level information appears.

### **Employee to be displayed**

*No* - Employee specific information does not appear.

*Yes* - Employee specific information appears.

Materials to be displayed

*No* - Material level information does not appear.

*Yes* - Material level information appears.

**Direct Items to be displayed**

*No* - Material level information does not appear.

*Yes* - Material level information appears.

**Work Request to be displayed**

*No* - Work orders' associated work requests do not appear.

*Yes* - Work orders' associated work requests appear.

**Meters to be displayed**

*No* - Assets associated meters do not appear.

*Yes* - Assets associated meters appear.

**Attachments to be displayed**

*No* - Attachments do not appear.

*Yes* - Attachments appear.

2. Choose OK.
3. Choose Submit.

**Related Topics**

Submitting a Request, *Oracle Applications User's Guide*

**Material Issue Request Pick List Report**

Stocked inventory items may be necessary to perform work on maintenance Work Orders. Use the Material Issue Request Pick List Report to display all reserved stock for maintenance Work Orders, so that you can easily retrieve the necessary material.

**Report Submission:**

1. In the Submit Requests window, select Material Issue Request Pick List Report from the Name list of values.

**Report Parameters**

All report parameters are optional.

**Request Number From**

Optionally select a beginning Request Number, for a data range, to indicate the beginning Request Number for which the report encompasses information.

**Request Number To**

Optionally select an ending Request Number, for a data range, to indicate the ending Request Number for which the report encompasses information.

**Date Required From**

Optionally select a beginning date, for a data range, to indicate the starting date for which the report encompasses information.

**Date Required To**

Optionally select an ending date, for a data range, to indicate the ending date for which the report encompasses information.

**Source Subinventory**

Optionally select a Source Subinventory to indicate an exact subinventory for which to issue the material.

**Source Locator**

If you previously selected a subinventory that contains a Locator, select a Source Locator to indicate an exact Locator from which to issue the material.

**Work Order**

Optionally select a Work Order to indicate a specific Work Order for which to issue material.

**Material**

Optionally narrow your selection criteria by selecting a Material.

**Requestor**

Optionally select a Requestor.

**Sort By**

Optionally select a Sort By option to indicate how the report is sorted. Valid values are Request Number and Date Required.

2. Choose OK.
3. Choose Submit.

**Related Topics**

Submitting a Request, *Oracle Applications User's Guide*

**Retrieve Timecard Data from OTL to EAM**

Oracle Time and Labor (OTL) is the repository in which time is entered by employees working in a particular organization. Employees working on Oracle Enterprise Asset Management (eAM) Work Orders enter their time using OTL Self-Service. Information collected is stored in OTL Time Store, and is composed of a series of business rules and processes. eAM extracts information from the Time Store and charges eAM work orders for the time spent by employees that work on them.

There are multiple steps within the integration flow. First, timecard information is entered for a specific Work Order, within Oracle Time Store (a piece of Oracle Time and Labor). That information is then extracted from Oracle Time Store to Oracle Enterprise Asset Management. This extraction dynamically creates a resource transaction within Oracle Enterprise Asset Management. Finally, the Cost Manager process is executed. This process charges the resource transaction. After this process executes, you can view the actual costs for the period that you charged, within the Work Order.

The Retrieve Timecard Data from OTL to EAM process is the process that extracts timecard information, entered within OTL for specific Work Orders, from OTL to eAM.

### **Report Submission:**

1. In the Submit Requests window, select Retrieve Timecard Data from OTL to EAM from the Name list of values.

### **Report Parameters**

All report parameters are optional.

#### **Start Date**

Optionally select a beginning date, for a data range, to indicate the starting date for which the process retrieves information.

#### **End Date**

Optionally select an ending date, for a data range, to indicate the ending date for which the process retrieves information.

#### **Organization**

Optionally, select an OTL Organization to determine only one organization for which the process retrieves information.

#### **Asset Group**

Optionally select a Asset Group.

#### **Asset Number**

Optionally select a Asset Number.

#### **Project**

Optionally select a Project, if the selected organization is a Project Manufacturing organization.

#### **Task**

If you previously selected a Project, you can optionally select a Task.

#### **Resource**

Optionally select a Resource.

#### **Employee**

Optionally select an Employee.

#### **Owning Department**

Optionally select an Owning Department.

#### **Work Order**

Optionally select a Work Order.

#### **Operation**

If you previously selected a Work Order, you can optionally select a specific Operation.

#### **Change Department**

Optionally select a Change Department.

#### **Process Code**

- Optionally select a Process Code.
2. Choose OK.
  3. Choose Submit.

## Related Topics

Oracle Time and Labor Integration Setup, page 2-149

Submitting a Request, *Oracle Applications User's Guide*

## Simulate Transfer Shop Floor Invoice Variance

You can transfer variances between purchase order price and invoice price, back to a maintenance work order, from your user-defined, adjustment account. This enables you to value your maintenance costs at the actual costs.

You can generate the Simulate Transfer Shop Floor Invoice Variance report to display the details of each invoice variance and a summary total of the variance amount that may transfer. The report format is similar to the Shop Floor Invoice Variance Report. You can view this report to determine whether or not you are executing the variance transfer. You should complete this task before you run the Shop Floor Invoice Variance Report (See: Shop Floor Variance Report, page 20-13).

### Report Submission:

1. Navigate to the Shop Floor Invoice Variance window.
2. Select Simulate Transfer Shop Floor Invoice Variance from the Name list of values.

## Report Parameters

### Transfer Description

Optionally enter a description for the invoice transfer.

### Specific Work Order

You can view the variance transfer details for a specific work order by selecting a work order. Maintenance work orders with statuses of Cancelled, Closed, and Complete - No Charges are not available.

### IPV Item Type

You can transfer invoice variances for:

*Direct Shop Floor Delivery items only*

*Outside Processing and Direct Shop Floor Delivery items*

*Outside Processing items only*

### Item Range

If you chose Outside Processing items only as the value for the IPV Item Type parameter, you can specify an item range for your transfer.

### Specific Item

If you chose Outside Processing items only as the value for the IPV Item Type parameter, you can specify an item for your transfer.

### **Category Set**

If you chose Outside Processing items only as the value for the IPV Item Type parameter, you can specify a Category Set for your transfer.

### **Specific Category**

If you chose Outside Processing items only as the value for the IPV Item Type parameter and a value in the Category Set parameter, you can specify a specific category from the previously chosen category set.

### **Specific Project**

You can choose to transfer invoice variances only for items associated to a specific project.

### **Adjustment Account**

You can enter an adjustment account from which the invoice variance is transferred.

### **Invoice Cutoff Date**

Enter a date. Approved and posted invoices through this date are included in your transfer.

3. Choose OK.
4. Choose Submit.

## **Related Topics**

Transferring Invoice Variances to Maintenance Work Orders, page 6-14

Submitting a Request, *Oracle Applications User's Guide*

## **Shop Floor Invoice Variance Report**

You can transfer invoice variances from your specific adjustment account to maintenance work orders (See: Transferring Invoice Variances, page 6-15). For each invoice variance transfer processed successfully, you can use the Shop Floor Invoice Variance Report to view the invoice variance transferred into your maintenance work orders. This report displays the adjustment account and the summary total amount transferred. It also displays the detail information for each work order, item, purchase order line, and invoice included in the transfer.

### **Report Submission:**

1. Navigate to the Shop Floor Invoice Variance window.
2. Select Simulate Transfer Shop Floor Invoice Variance from the Name list of values.

## **Report Parameters**

### **Batch Date**

Enter a date to filter out batches that you do not want to select. Only batches processed on or after this date are included in the Batch Id parameter's list of values.

### **Batch Id**

Enter the identifier for the batch you would like to report on. The list of values displays the parameters entered when you run your transfer process, such as description, work order number, item number, etc.

3. Choose OK.
4. Choose Submit.

## **Related Topics**

Transferring Invoice Variances to Maintenance Work Orders, page 6-14

Submitting a Request, *Oracle Applications User's Guide*



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## Windows and Navigation Paths

This appendix covers the following topics:

- Windows and Navigation Paths
- Default Navigation Paths for Standard Application Windows

### Windows and Navigation Paths

This appendix provides the default navigator paths for the windows used in the Oracle Enterprise Asset Management. The following table provides the default navigation paths. Brackets [ ] indicate a button.

### Default Navigation Paths for Standard Application Windows

#### *eAM-Related Windows and Navigation Paths*

Window Name	Navigation Path
Activity and Asset Number/Rebuildable Association	Enterprise Asset Manager: Asset Activities > Asset Activity Association
Activity Workbench	Enterprise Asset Manager: Activities > Activity Workbench
Advanced Pricing (Price Lists)	Order Management: Pricing > Price Lists > Price List Setup
Area	Enterprise Asset Manager: Setup > Area
Asset Genealogy Import	Interfaces > Import Asset Genealogy
Asset Meter	Enterprise Asset Manager: Meters > Asset Meter Association
Asset Number Import	Interfaces > Import Asset Number
Asset Status	Enterprise Asset Manager: Assets > Asset Statuses
Bills of Material (Activity BOM)	Enterprise Asset Manager: Asset Activities > Maintenance BOM

Window Name	Navigation Path
Bills of Material (Asset BOM)	Enterprise Asset Manager: Assets > Asset BOM
Bills of Material (Rebuildable BOM)	Enterprise Asset Manager: Rebuildables > Rebuildable BOM
Categories	Enterprise Asset Manager: Setup > Category > Category Codes
Category Sets	Enterprise Asset Manager: Setup > Category > Category Sets
Close Rebuild Work Order	Enterprise Asset Manager: Work Orders > Close Rebuildable Work Orders
Close Work Order	Enterprise Asset Manager: Work Orders > Close Work Orders
Collection Elements	Quality Manager: Setup > Collection Elements
Collection Plans	Quality Manager: Setup > Collection Plans
Define Asset Number	Enterprise Asset Manager: Assets > Asset Numbers
Define Asset Route	Enterprise Asset Manager: Assets > Asset Route
Define Rebuildable Serial Number	Enterprise Asset Manager: Rebuildables > Rebuildable Serial Numbers
Departments	Enterprise Asset Manager: Setup > Routing > Departments
Department Approvers	Enterprise Asset Manager: Setup > Department Approvers
Descriptive Flexfield Segments	Enterprise Asset Manager: Setup > Flexfields > Descriptive > Segments Order Manager: Setup > Flexfields > Descriptive > Segments
EAM Asset Documents	Enterprise Asset Manager: Assets > Asset Numbers > Documents
EAM Work Order Documents	Enterprise Asset Manager: Work Orders > Documents
Enter Quality Results	Enterprise Asset Manager: Quality > Results > Entry > Enter Quality Results
Enterprise Asset Managment Parameters	Enterprise Asset Manager: Setup > Parameters
Financials Options	Purchasing Manager: Setup > Organizations > Financial Options

Window Name	Navigation Path
Find Asset Number	Enterprise Asset Manager: Assets > Asset Numbers > Asset Number field > [Find] icon
Find Category Associations	Enterprise Asset Manager: Setup > Category Associations
Find Meter Readings	Enterprise Asset Manager: Interfaces > Pending Meter Readings
Find Pending Work Orders	Enterprise Asset Manager: Interfaces > Pending Work Orders
Find Preventive Maintenance Schedules	Enterprise Asset Manager: Preventive Maintenance > Schedule Template Definition
Find Projects	Project Manufacturing Manager: Projects > Project Definition > Projects
Find Project Status	Project Manufacturing Manager: Project Status > Project Status Inquiry
Find Rebuild Work Orders	Enterprise Asset Manager: Work Orders > Rebuild Work Orders
Find Requests (PRC: Refresh Project Summary Amounts)	Project Manufacturing Manager: Other > Requests > Run OR View menu > Requests
Find Requisition Lines	Enterprise Asset Manager: Purchasing > AutoCreate
Find Resource Transactions	Enterprise Asset Manager: Work Order Transactions > View Resource Transactions
Find Work Orders	Enterprise Asset Manager: Work Orders > Work Orders Enterprise Asset Manager: Billing > Work Order Billing
Generate Preventive Maintenance Work Orders	Enterprise Asset Manager: Preventive Maintenance > Generate Work Orders
Import Items	Enterprise Asset Manager: Interfaces > Import Items
Import Jobs and Schedules	Enterprise Asset Manager: Interfaces > Import Work Orders or Import Meter Readings
Interface Managers	Enterprise Asset Manager: Inventory > Setup > Transactions > Interface Managers
Item Costs Summary	Enterprise Asset Manager: Inventory > Items > Master Items > (M) Tools, Item Costs
Launch MRP	Enterprise Asset Manager: Material Planning > MRP > Launch

Window Name	Navigation Path
Load Production Equipment Maintenance Downtime	Enterprise Asset Manager: Work Order Planning > Production Equipment Downtime
Maintenance Workbench	Enterprise Asset Manager: Work Order Planning > Maintenance WorkBench
Maintenance Work Orders	Enterprise Asset Manager: Work Orders > Work Orders
Maintenance Work Order Value Summary	Enterprise Asset Manager: Work Orders > Work Orders > [Costs] > [Value Summary]
Master Demand Schedules	Enterprise Asset Manager: Material Planning > MDS > Names
Master Item	Enterprise Asset Manager: Assets > Asset Groups or Asset Activities
Meters	Enterprise Asset Manager: Meters > Meter Definition
Meter Reading	Enterprise Asset Manager: Meters > Meter Readings
Miscellaneous Documents	Enterprise Asset Manager: Setup > Miscellaneous Documents
MRP Names	Enterprise Asset Manager: Material Planning > MRP > Names
My Work Queue	Maintenance User Workbench: sign in
Operations	Enterprise Asset Manager: Work Order Details > Operations
Organization	Enterprise Asset Manager: Inventory > Setup > Organizations > Organizations > [New]
Organization Parameters	Enterprise Asset Manager: Inventory > Setup > Organizations > Parameters
Oracle Manufacturing Lookups	Enterprise Asset Manager: Setup > Lookups
Pending Asset Number	Enterprise Asset Manager: Interfaces > Pending Asset Numbers
Pending Meter Reading	Enterprise Asset Manager: Meters > Meter Readings > Pending Meter Reading
Personal Profile Values	Enterprise Asset Manager: Setup > Profiles > Personal
Plan Options	Enterprise Asset Manager: Material Planning > MRP > Options

Window Name	Navigation Path
Purchase Orders	Purchasing Manager: Purchase Orders > Purchase Orders
Preferences	Time and Labor Administration: Preferences
Preventive Maintenance Schedules	Enterprise Asset Manager: Preventive Maintenance > Schedule Definition
Project Parameters	Project Manufacturing Manager: Projects > Project Definition > Project Parameters
Rebuild Completion	Enterprise Asset Manager: Work Order Completion > Rebuildable Work Order Completion
Requisitions	Enterprise Asset Manager: Purchasing > Requisitions > Requisitions
Resource Usage	Enterprise Asset Manager: Assets > Asset Numbers > Asset Numbers
Resource Transactions	Enterprise Asset Manager: Work Order Transactions > Resource Transactions
Routings	Enterprise Asset Manager: Asset Activities > Maintenance Routings
Run AutoInvoice	Order Manager: Receivables > Interfaces > AutoInvoice
Select Work Order	Enterprise Asset Manager: Work Order Details > Operations, Material Requirements, or Resource Requirements
Service Request	Service: Service Requests > Find Service Requests
Service Request Types	Service: Setup > Service Requests > Request Types
Scheduler Workbench	Enterprise Asset Manager: Work Order Planning > Scheduler WorkBench
Shop Floor Invoice Variance	Enterprise Asset Management Cost > Work Order Shop Floor Invoice Variance
Submit Request	Enterprise Asset Manager: Reports
Supply/Demand	Enterprise Asset Manager: Material Planning > MRP > Workbench > [Supply/Demand] > [Find]
Time	Self-Service Time and Expenses: Time Entry

Window Name	Navigation Path
Transaction Sources	Order Manager: Receivables > Setup > Transactions > Sources
Users	System Administrator: Security > User > Define
View Operations	Enterprise Asset Manager: Work Order Details > View Operations
View Material Requirements	Enterprise Asset Manager: Work Order Details > View Material Requirements
View Resource Requirements	Enterprise Asset Manager: Work Order Details > View Resource Requirements
View Resource Transactions	Enterprise Asset Manager: Work Order Transactions > View Resource Transactions > [Find]
Work In Process Parameters	WIP Manager: Setup > Parameters
Work Order Completion	Enterprise Asset Manager: Work Order Completion > Work Order Completion
Work Order	Enterprise Asset Manager: Work Orders > Work Orders
Work Orders tab	Maintenance Super User or Maintenance Workbench role: Work Orders tab

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# Glossary

**activity**

Identifies a maintenance activity for an asset. An oil change is an Activity for a car. An Activity is often pre-planned and can be used repetitively to create Work Orders that require similar maintenance on Assets.

**area code**

User-defined lookup that can be utilized to logically sort assets by where they are physically located or typically maintained.

**asset attributes**

Unique information that describes the characteristics of an asset. Each asset can have unlimited asset attributes.

**asset bills of material**

A "parts list" of items and rebuildable spares that make up a particular asset item, and can be defined for each asset group. The items defined on an asset BOM are standard inventory items (set up in the Master Item window).

**asset category**

A standard naming convention that defines assets with familiar terms and establishes how to classify assets for reporting and analysis.

**asset group**

Represent the classification of equipment. Examples include Trucks, Pumps, Towers, Buildings, Storage Tanks, and Turbines. Assets that have similar physical configurations and maintenance requirements should belong to a single Asset Group.

**asset hierarchy**

A single structure that depicts assets and their constituent elements in parent/child relationships, as maintained by the maintenance organization. It provides information that enables a user to quickly identify the relationship via an Asset Navigator that displays appropriate asset details.

**asset maintenance bill of material**

BOM used to list all items and rebuildable spares needed to perform a particular asset activity, and can be defined for each asset activity. For example, you may have an asset activity titled, Oil Change. The items necessary to perform this activity include a filter, oil, etc. As Maintenance BOMs are created, they are associated to an asset activity.

**asset number**

A unique number that represents an asset or piece of equipment on which maintenance will be performed. An example of an asset number would be a Pump-101, or Toyota Truck 01.

**asset route**

A "virtual asset" that enables multiple assets to be associated to a single work order. It eliminates the need for creating multiple work orders for the same activity.

**breach based maintenance**

Work generated by violating established tolerances, based on asset specifications. This can include changes to pressure, flow rates, or temperature. These violated tolerances can automatically generate work requests for further service.

**CMMS (computerized maintenance management system)**

A computerized system to assist with the effective and efficient management of maintenance activities through the application of computer technology. It generally includes elements, such as a computerized Work Order system, as well as facilities for scheduling Routine Maintenance Tasks, recording and storing Work Orders, Bill of Material and Application parts Lists, as well as other numerous features.

**craft**

Personnel performing maintenance tasks, such as "hands on tools". Personnel may include mechanics, electricians, instrumentation technicians, machinists, utilities and facilities workers, etc. For personnel performing both operation and maintenance functions (for example, roll grinder, boiler room, or air compressors) include in the numbers that percentage of time spent maintaining. Contract employees that are on-site, full time are included.

**crew**

A group of employees that work together, usually under one supervisor. Sometimes a crew is in charge of a specific area and may have the same craft, such as general mechanics or they may have mixed crafts, such as electricians, and instrumentation technicians.

**component (See: rebuildable spare)**

A section, piece, or part of an asset that is removable, can be rebuilt or repaired, and interchangeable with other standard components (for example, engine).

**condition based maintenance**

The result of an assets's meter readings that may reflect the current condition of an asset. The results of such readings will affect the sequence of preventive maintenance work orders. Condition of an Asset can also be tracked by tracking its Quality Results.

**dependent steps**

Operations can be dependent upon another operation; you cannot uncomplete the operation's dependency if the current operation is complete. For example, operation 20 is dependent on operation 10 completing. You cannot uncomplete operation 10 once operation 20 has been completed.



**direct items**

Represent items with infrequent use or criticality; they are not included in the internal catalog as stocked items. These items are contrived as "one off", bought directly from a vendor for a specific Work Order and Operation.

**downtime**

Specifies the time the asset was unavailable to production due to maintenance.

**duration (hours)**

Identifies the total elapsed time of the Work Order. It has a unit of measure in hours. It is manually entered, or is calculated as the difference between the Estimated Start Date and Estimated End Date.

**easy work order**

Referred to as an unplanned work order, it enables quick entry of a work order; it is automatically created at a Released status, enabling you to execute work immediately.

**equipment**

All items of a durable nature, capable of continuing or repetitive utilization by an individual or organization, defined to the level at which maintenance is to be managed.

**fixed asset**

Identifies Accounting's Asset ID for reporting.

**forecast**

Projected work that is or will be required within a user defined period of time.

**handover**

Enables a supervisor to re-assign an operation to another supervisor, for the continuation of incomplete work.

**labor**

Assignment of work to repair, inspect, or resolve a problem. It is expressed in hours, and can be divided by crafts or skills.

**maintained group**

Represents an Asset Group or Rebuildable Item.

**maintained number**

Represents an Asset Number or Serialized Rebuildable.

**maintenance schedule**

A list of planned maintenance tasks to be performed during a given period of time, together with the expected start times and duration of each of these tasks. Schedules can apply to different time periods (for example, Daily Schedule, Weekly Schedule, etc.).

**maintenance user**

An internet-based user interface for both maintenance and operations personnel. It provides an easy approach to entering and searching for information from any browser, and designated for the casual user (for example, tradespeople, such as fitters, mechanics, and electricians), in a plant or facility.

**meters**

Used to measure asset usage and periodically service the asset, based on the measurement. For example, an odometer. Another example is a pipe may start out at 12 millimeters, but when it wears to only four millimeters, it needs to be replaced.

**non-stock items**

These items are included in the internal catalog, but the decision has been made to not maintain them in an inventory balance or ordering policy, other than to purchase or make them as required.

**operation completion**

The completion of tasks/steps within a work order.

**organization**

A distinct entity in a company. It may include separate manufacturing facilities, warehouse distribution centers, and branch offices. Organizations often define boundaries within information sharing.

**owning department**

Identifies the role responsible for owning the work outlined within a Work Order.

**planned work**

Maintenance work for which a detailed work order has been written. All materials have been made available before the work order starts. The equipment to be maintained has been taken out of service, cleaned, and prepared, before the work starts, if required. Special tools, equipment, resources, and services have been scheduled for this work order. The work order must appear on a plan before the start of the period in which the work is to be carried out.

**preventive maintenance**

Maintenance carried out periodically, or by usage (throughput), that is intended to reduce the probability of failure or degradation of physical condition of an asset. This can be based on a meter or time.

**preventive maintenance (PM) work order**

A work order referencing a maintenance activity, sometimes referred to as a PM work order, and is created by the PM Scheduling process.

**RCM (reliability centered maintenance)**

The predictive approach to maintenance that trends an asset's performance and captures data. This data will help the maintenance organization to better strategize their Preventive Maintenance programs.

**rebuildable item**

Represents the classification of serialized or un-serialized rebuildables.

**routine maintenance work order**

These are the work orders that result from inspection, requests, etc. There are two types: work orders referencing a maintenance activity but created manually, and work orders created manually and not referencing a maintenance activity.

**scheduled start date**

This date is manually entered and is used to communicate to the system the scheduled date for the current Work Order.

**serialized items**

Typically tracked, and are often times rebuilt and issued properly. They are tracked with a history of failure and repair data, that is maintained for each serialized instance, regardless of their location.

**serialized or un-serialized rebuildable (See: component)**

Items that are installed, removed, and refurbished. Examples of rebuildables include, motors, control boxes, and computer boards. These items are not assets, however, they need to be associated with work orders for maintenance purposes. They are inventory items, and can be serialized. They are also referenced as portables or "components".

**shutdown type**

Indicates if a shutdown is required of the asset when performing the work order. If it is associated with an asset activity, it will inherit the value from the asset activity.

**stock items**

Items for which either the frequency of use or equipment criticality/lead time to obtain replacement parts, mandates that they be stocked in Inventory. Therefore, they utilize planning parameters to generate replenishment orders.

**tagout required**

Indicates that the asset needs to be secured before carrying out the work order, usually for safety reasons. Tags are generally printed and placed on an asset, warning workers that the asset is shutdown and should not be started. This field is intended for future use in eAM.

**work in process (WIP) accounting class**

A set of accounts that you use to charge the production of an assembly. You assign accounting classes to discrete jobs, and repetitive schedules. Each accounting class includes distribution accounts and variance accounts, and they are used in cost reporting.

**work order**

A plan that defines the resources and material equipment needed to conduct work, and then associated start and end dates.

**work order closure**

A work order that is unavailable for charges or any type of transaction. Closing a work order calculates final costs and variances, creating history for the work order.

**work order completion**

The completion of the entire work order. The operations within a work order do not need to be complete in order to complete the work order.

**work order duration**

The duration of the work order. The difference between completion date and start date.

**work order operation**

Operations (also known as tasks/steps) that prepare the instructions to perform a single activity, within the context of the work order.

**work request**

A request to have work performed on a maintainable asset.

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