

Oracle® Complex Maintenance, Repair, and Overhaul

User's Guide

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

Part No. A97640-05

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Preface

Intended Audience

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

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

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Structure

- 1 Overview of Oracle Complex Maintenance, Repair, and Overhaul
- 2 Managing Maintenance Requirements

- 3 Managing Maintenance Routes**
- 4 Managing Maintenance Documents**
- 5 Working With Master Configurations**
- 6 Working With Unit Configurations**
- 7 Managing Product Classification**
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- 9 Working with Maintenance Visits**
- 10 Managing Long Term Planning**
- 11 Administration**
- 12 Production Planning and Production**
- 13 Managing Outside Processing**
- A Windows and Navigation Paths**

Related Documents

Oracle Install Base Concepts and Procedures Guide

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

Oracle Complex Maintenance, Repair, and Overhaul Implementation Guide

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

Oracle Customer Support Implementation Guide

This guide describes how to set up the list of values that you see in Oracle Customer Support. Oracle's service solution provides everyone in the organization - with a complete, real-time customer view that allows for immediate access to information on past interactions with the customer and also provides agents with knowledge of possible solutions to speed issue resolution. Additionally, the solution empowers customers to solve their own issues via a self-service portal with access to the same knowledge base that agents utilize for quick resolution.

Oracle Demand Planning User's Guide

This guide describes how to use Oracle Demand Planning, an Internet-based solution for creating and managing forecasts.

Oracle Manufacturing Scheduling User's Guide

This guide describes how to use a the web-based scheduling product to graphically view and schedule discrete jobs and their operations based on user-defined objectives, priorities, resources, and material constraints.

Oracle Quality User's Guide

This guide describes how Oracle Quality can be used to meet your quality data collection and analysis needs. This guide also explains how Oracle Quality interfaces with other Oracle Manufacturing applications to provide a closed loop quality control system.

Oracle Service Contracts Concepts and Procedures

This manual contains the information you need to implement and use Oracle Service Contracts.

Oracle Procurement Contracts Implementation and Administration Guide

This guide contains the information you need to implement and administer Oracle Procurement Contracts.

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.

Overview of Oracle Complex Maintenance, Repair, and Overhaul

This chapter covers the following topics:

- Overview
- What is Oracle Complex Maintenance, Repair, and Overhaul?
- Key Features
- Fleet Maintenance Program
- Route Management
- Document Index
- Master Configuration
- Unit Configuration
- Product Classification
- Unit Maintenance Plan
- Visit Work Package
- Long Term Plan
- Administration
- Production Planning
- Outside Processing
- Business Processes
- Managing Maintenance Requirements
- Working with Maintenance Routes
- Managing Maintenance Documents
- Managing Master Configuration Records
- Managing Unit Configuration Records
- Working with Product Classifications
- Planning Unit Maintenance
- Managing Maintenance Visits
- Long Term Planning

- Administration
- Production Planning
- Outside Processing
- Integration and Dependencies
- Accessing Oracle Complex Maintenance, Repair, and Overhaul

Overview

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

- What is Oracle Complex Maintenance, Repair, and Overhaul, page 1-2?
- Key Features of Oracle Complex Maintenance, Repair, and Overhaul, page 1-3
- Business Processes, page 1-8
- Integration and Dependencies, page 1-13
- Accessing Oracle Complex Maintenance, Repair, and Overhaul, page 1-15

What is Oracle Complex Maintenance, Repair, and Overhaul?

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

Oracle Complex Maintenance, Repair, and Overhaul reveals maintenance practice improvement opportunities, and opportunities to improve fleet readiness. Oracle Complex Maintenance, Repair, and Overhaul provides models for electromechanical systems and defines rules for assembling units. It also records unit-specific information, allowing quick access to the maintenance history of a product component. It provides maintenance organizations a means to reduce operational costs, and thereby to yield improved profitability.

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

1. Engineering
 - Fleet Maintenance Program (maintenance requirements)
 - Route Management (work card authoring)
 - Document Index (technical document management)
2. Configuration Management
 - Master Configuration (allowable installations)
 - Unit Configuration (“as installed” maintenance tracking)
 - Product Classification (logical grouping)

3. Planning
 - Unit Maintenance Plan (active maintenance requirements)
 - Visit Work Package (work scope and resource)
 - Long Term Plan (hangar and visit plan)
4. Administration
 - Approvals
 - Workflow
 - Department Shift
 - Spaces
 - Space Unavailability
5. Execution
 - Production Planning
 - Outside Processing

Key Features

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

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

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

- Fleet Maintenance Program, page 1-4
- Route Management, page 1-4
- Document Index, page 1-4
- Master Configuration, page 1-5
- Unit Configuration, page 1-5
- Product Classification, page 1-6
- Unit Maintenance Plan, page 1-6
- Visit Work Package, page 1-6
- Long Term Plan, page 1-7
- Administration, page 1-7
- Production Planning, page 1-7
- Outside Processing, page 1-8

Fleet Maintenance Program

Key Fleet Maintenance Program features include:

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

Route Management

Key Route Management features include:

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

Document Index

Key Document Index features include:

- Receipt and registration of documents
- Upload and revision of electronic documents
- Document subscription control through supplier information recording and subscription status tracking
- Document revision control ensuring current and accurate information
- Document status look-up allowing document version verifications from multiple levels during maintenance operations

- Document Distribution Control ensuring authorization of a person (who requests a document) to receive a document

Master Configuration

Key Master Configuration features include:

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

Unit Configuration

Key Unit Configuration features include:

- Unit composition providing information on the hierarchical positions of parts within a unit
- Physical location tracking of parts
- Recording of child unit installation and removal on or from parent assemblies
- Recording of utilization or age of parts in an assembly based on different parameters related to usage of parts and events that affect the parts
- Utilization population from parent to child units enabling determination of component aging as a result of attachment to other parts, or parent units, that gain utilization
- Unit maintenance history tracking through all previously accomplished maintenance requirement records
- Applicable warranty tracking of individual units enabling easy comparison of coverage period and unit utilization period
- Equipment ownership history tracking enabling analysis of impact on business procedures due to ownership change
- Temporary part identification allowing assignment of temporary serial numbers to parts in an acquired unit

Product Classification

Key Product Classification features include:

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

Unit Maintenance Plan

Key Unit Maintenance Plan features include:

- Utilization forecast maintenance that provides the utilization forecast in terms of the applicable time based unit of measures for each unit in the fleet
- Serviceable time (UOM) of units viewing for the parent unit and all child units expressed in terms of appropriate UOM, such as hours, cycles, mileage, etc.
- Repetitive maintenance requirement modeling over a user defined period providing the UOM remaining for each occurrence of a maintenance requirement
- Due date calculation of maintenance requirements based on utilization forecasts and maintenance frequencies in the absence of a specified fixed due date
- Association of maintenance requirement groups to a visit

Visit Work Package

Key Visit Work Package features include:

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

- Visit task sequence definition permitting precise definition of the order of completion of all tasks that comprise a maintenance facility visit
- Visit work package export to Oracle Projects enabling export of the entire visit object to Oracle Projects, on completion of the visit definition, as a project record with equivalent tasks

Long Term Plan

Key Long Term Plan features include:

- Assessment of a maintenance base's work load capacity. analysis of available labor by skill, available tooling/machinery, available materials and the location's capabilities—such as the list of units and requirements the location can support—balanced against known workloads.
- Visit creation in order to group together events for long and short term capacity planning and to facilitate scheduling to a maintenance base.
- Definition of a visit's resource requirements based on the unit, man hour requirements by skill, required tooling, required materials, duration and required completion times of the visit's maintenance requirements and routes.
- Visit appointment creation based on maintenance base resource forecasting and visit requirements.
- Resource balancing capacity versus work load requirements for scheduling purposes and efficiency assurance.
- Resource leveling on different simulation plans allowing identification of the best plan with regards to resource capacity.

Administration

Key Administration features include:

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

Production Planning

Key Production Planning features include:

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

- Quality maintenance using Route Management.

Outside Processing

Key Outside Processing features include:

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

Business Processes

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

- Managing Maintenance Requirements, page 1-8
- Working with Maintenance Routes, page 1-9
- Managing Maintenance Documents, page 1-9
- Managing Master Configuration Records, page 1-9
- Managing Unit Configuration Records, page 1-10
- Working With Product Classifications, page 1-10
- Planning Unit Maintenance, page 1-11
- Managing Maintenance Visits, page 1-11
- Long Term Planning, page 1-12
- Administration, page 1-12
- Production Planning, page 1-12
- Outside Processing, page 1-13

Managing Maintenance Requirements

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

- Search the database for a specific maintenance requirement for reference, or for editing purposes.
- Create a maintenance requirement record in the database.

- Attach documents, maintenance routes, actions, effectivities, and maintenance requirement relationships to the record.
- Create revisions for maintenance requirements that are complete.
- View items that are affected by a maintenance requirement.

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

Working with Maintenance Routes

The Route Management module in Oracle Complex Maintenance, Repair, and Overhaul provides a single interface for managing all maintenance tasks. Maintenance personnel can prepare and maintain work instructions. Maintenance personnel can:

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

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

Managing Maintenance Documents

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

Maintenance personnel can:

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

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

Managing Master Configuration Records

The Master Configuration module in Oracle Complex Maintenance, Repair, and Overhaul provides models of electromechanical system assemblies. A master

configuration model will form the basis of a unit in combination with business rules that specify the systems and subsystems that may be included in the assembled unit.

Maintenance personnel can:

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

Managing Unit Configuration Records

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

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

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

Working with Product Classifications

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

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

- Check for completeness of primary product classifications.
- Launch the approval process for a draft product classification.

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

Planning Unit Maintenance

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

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

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

Managing Maintenance Visits

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

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

- Create shift schedules for department workers based on planned visits
- Search for and retrieve existing department shifts

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

Long Term Planning

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

- Assess Maintenance Workload Capacity by analysis of available labor by skill, level and certification, available tools, materials, and location capabilities balanced against known workloads.
- Create a Visit in order to group events together for long and short term capacity planning, and to facilitate scheduling to a maintenance base.
- Define a Visit's Resource Requirements to allow accurate scheduling and capacity planning.
- Analyze capacity versus work load requirements
- Run simulations in order to evaluate different scheduling scenarios before implementing actual plan changes.

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

Administration

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

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

Production Planning

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

- Search for Routine and Non-Routine Jobs using filtered search elements.

- Create Jobs from visit tasks for Scheduled, Unscheduled, and Convenience maintenance
- Create Service Requests to track reported problems when an item has a service difficulty.
- Create Operations to Non-Routine Jobs for work definition and tracking
- Maintain jobs by adjusting the schedule, the status, completing, deferring, and selecting the actual start and end for a job.
- Maintain operations by updating the operations, adding, removing, or updating the material and resource requirements.
- Maintain Quality using Route setup from Route Management for Job and Operation compliance.

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

Outside Processing

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

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

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

Integration and Dependencies

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

Oracle Counters

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

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

Oracle Install Base

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

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

Oracle Inventory

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

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

Oracle Quality

Oracle Complex Maintenance, Repair, and Overhaul uses the setup from Route Management and the system profile options in Oracle Quality, to allow maintenance organizations to capture quality elements for operations, jobs, deferrals, scrap management, and capturing counter value snapshots. This gives maintenance facility the flexible integration required to maintain reliable products. Oracle CMRO provides seeded plan templates for routes, operations, job deferrals, MRB dispositions and counter reading capturing. These templates can either be used as-is or adjusted with additional quality elements, except the counter reading template which is used by CMRO in the background and cannot be changed.

Oracle Advanced Supply Chain Planning

Oracle Complex Maintenance, Repair, and Overhaul integrates with Oracle's Advanced Planning and Scheduling (APS) applications for supply chain management. Advanced Supply Chain Planning (ASCP), is used to schedule required materials from maintenance visits. Available to Promise (ATP), is used for material availability inquiries, as well as scheduling through ASCP. Demand Planning (DP), is used for creating material demand from three sources: global demand from forecasted requirements in Unit Maintenance

Plan; scheduled demand from requirements scheduled to maintenance visits; and historical non -routine (and routine) demand from maintenance accomplished at specific faculties. Additionally, Oracle APS's Inventory Optimization (IO) application is required for complete supply chain planning.

Oracle Purchasing

Oracle Complex Maintenance, Repair, and Overhaul integrates with Oracle Purchasing to set up buyers, approvals, purchasing options, receiving options, financial options, and open accounting periods.

Oracle Warehouse Management

Oracle Warehouse Management provides maintenance organizations, the functionality to control their inventory by status/condition and associate subinventories with a department.

Oracle Order Management

Oracle Complex Maintenance, Repair, and Overhaul integrates with Oracle Order Management to set up processing constraints and create customers.

Oracle Enterprise Asset Management

Oracle Complex Maintenance, Repair, and Overhaul uses the same work order system as Oracle Enterprise Asset Management (eAM). It also uses the Oracle eAM functionality to complete operations. Oracle CMRO benefits from Oracle eAM's enhanced integration with Oracle Costing.

Oracle Customer Support

Oracle Support provides Oracle Complex Maintenance, Repair, and Overhaul with the functionality to create and update service requirements in a maintenance organization. The association of a service request to a visit task and production job allows the maintenance organization to track the service difficulty (non-routine) to the associated progress or resolution performed by the maintenance personnel.

Accessing Oracle Complex Maintenance, Repair, and Overhaul

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

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

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

1. Engineering

Engineering includes:

- Fleet Maintenance Program
- Route Management
- Document Index

2. **Configuration Management**

Configuration Management includes:

- Master Configuration
- Unit Configuration
- Product Classification

3. **Planning**

Planning includes:

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

4. **Administration**

Administration includes:

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

5. **Execution**

Execution includes:

- Production Planning
- Outside Processing

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

Managing Maintenance Requirements

This chapter covers the following topics:

- Overview
- What is Fleet Maintenance Program?
- Key Business Processes
- Creating Maintenance Requirement Records
- Retrieving Existing Maintenance Requirement Records
- Attaching Documents to a Maintenance Requirement
- Associating Routes to a Maintenance Requirement
- Setting Maintenance Route Dependencies
- Defining Maintenance Requirement Effectivity
- Defining Effectivity Details
- Defining Intervals and Thresholds
- Defining Maintenance Requirement Relationships
- Updating Maintenance Requirement Records
- Viewing Items Affected by a Maintenance Requirement
- Associating Visit Types with a Maintenance Requirement
- Creating Maintenance Requirement Revisions
- Viewing Maintenance Requirement Details
- Associating Program Sub Types to Program Types
- Service Requests
- Entering Service Requests
- Associating Maintenance Requirements
- Updating Service Requests

Overview

Ensuring the safety and readiness of machines, and the increase in component life of complex, safety sensitive, and expensive assets is crucial in today's industry. The Oracle Complex Maintenance, Repair, and Overhaul Fleet Maintenance Program module

enables organizations to manage a preventative maintenance program that accomplishes this need.

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

See:

- Creating Maintenance Requirement Records, page 2-5
- Retrieving Existing Maintenance Requirement Records, page 2-10
- Attaching Documents to a Maintenance Requirement, page 2-15
- Associating Maintenance Routes to a Maintenance Requirement, page 2-20
- Setting Maintenance Route Dependencies, page 2-25
- Defining:
 - Maintenance Requirement Effectivity, page 2-28
 - Effectivity Details, page 2-31
 - Intervals and Thresholds, page 2-34
 - Maintenance Requirement Relationships, page 2-38
- Updating Maintenance Requirement Records, page 2-43
- Viewing Items Affected by a Maintenance Requirement, page 2-45
- Associating Visit Types to a Maintenance Requirement, page 2-49
- Creating Maintenance Requirement Revisions, page 2-50
- Viewing Maintenance Requirement Details, page 2-52
- Associating Program Sub Types to Program Types, page 2-53

What is Fleet Maintenance Program?

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

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

- Origin (why a maintenance action is required)
- Effectivity (what the maintenance requirement applies to)
- Frequency (when the maintenance requirement is to be performed)

- Work Cards or Routes (how the maintenance requirement is to be performed).

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

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

Maintenance requirements

Maintenance requirements are planned/scheduled when unit maintenance is planned. Maintenance requirements are associated to visits in the Unit Maintenance Plan module.

Maintenance requirements may also arise during maintenance and crew inspections or when the visit is in production. These requirements are of the unplanned or non-routine nature. Users can choose to accomplish these requirements in the same visit by creating non-routine work orders in the Production module. Optionally, users can define these requirements in Fleet Maintenance Program and plan them from FMP by adding these unplanned requirements directly to visits in Visit Work Package. If the user chooses to defer these requirements, it will appear in Unit Maintenance Plan and can be scheduled to other visits.

Users can also log service requests to track maintenance needs discovered during inspections or production. You can view these service requests as maintenance requirements with program type of non-routine. These requirements can be associated with visits the same way as other unplanned requirements.

Key Business Processes

Fleet Maintenance Program supports the following business processes:

Maintenance Requirements Creation

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

Maintenance Routes Association

Knowledge of maintenance routes associated with a maintenance requirement greatly enhances maintenance planning, organization, and execution. The Fleet Maintenance Program module allows maintenance personnel to search the Oracle Complex Maintenance, Repair, and Overhaul Route Management module for routes applicable to a maintenance requirement, and to attach the appropriate routes to the maintenance

requirement. Routes can then be set up with technical dependencies to each other within the maintenance requirement. These dependencies are validated against the Oracle Complex Maintenance, Repair, and Overhaul Visit Work Package and Production Planning modules to assist in the scheduling order of the routes.

Documents Association

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

Effectivity Definition

Effectivity refers to the applicability of a maintenance requirement. Fleet Maintenance Program allows maintenance organizations to attach attributes to maintenance requirements, which automatically notifies personnel of the maintenance requirements applicable to certain physical units within the database. A Master Configuration node, a Master Configuration Item (alternate item), and a Product Classification node or an item from the database can be attached to a maintenance requirement. Maintenance requirements can also be associated to unit details such as Serial Number, Serial Number Range, and Manufacturer.

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

Interval and Threshold Definition

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

Maintenance Requirements and Dependent Relationships Management

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

The Letter Check relationships in aviation maintenance is an example. An A check consists of X number of children components that are all tracked on the parent

component's interval for maintenance requirement. An A Check will belong to a B Check, and the B Check will include all the A Check's children in addition to some of its own. The B Check will belong to a C Check and the C Check to a D Check. Each Check will be displayed in the Unit Maintenance Plan as a group with the same estimated due date eliminating a cluttered report. However, when a child component has a recurring maintenance requirement frequency outside of its parent (more frequent), this will be displayed separately also.

A maintenance requirement is also sometimes linked up with the completion of another requirement. This creates a dependency between the two requirements. Fleet Maintenance Program accommodates such dependency with a maintenance requirement attribute that states another maintenance requirement as its prerequisite.

Affected Items Listing

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

Create Service Requests

Log problems that occurred with the unit, whether it occurs during operation, or is the result of a maintenance inspection.

Associate Maintenance Requirements to Service Requests

Diagnose the problem and identify the Fleet Maintenance Requirement to resolve the problem. If there is no available Fleet Maintenance Requirement existing in FMP, the user has to create the required maintenance requirement in the CMRO Fleet Maintenance Program Module before it can be associated with the service request.

Creating Maintenance Requirement Records

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

To update maintenance requirement records, see *Updating Maintenance Requirement Details*, page 2-43.

To revise a maintenance requirement with the status "Complete", see *Creating Maintenance Requirement Revisions*, page 2-50.

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

Prerequisites

- ☐ You should know the Maintenance Requirement Category, Program Type, Program Sub Type, and the Service Type. These values must exist in the database. Moreover, the Program Type and Program Sub Type combination must be defined. See *Associating Program Sub Types to Program Types*, page 2-53.

To create maintenance requirement records:

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

Search Maintenance Requirements page

2. Click Create on the Search Maintenance Requirements page to launch the Create Maintenance Requirement page that allows you to perform the first of eight successive steps in the process of creating a maintenance requirement.
3. Use the information in the following table to enter values in the Search Maintenance Requirement page.

Description of fields in the Create and Update Maintenance Requirement pages

Field Name	Description
Title	The user defined maintenance requirement name. The combination of maintenance requirement Title and Version Number is unique. This can be a number, or other alpha numeric identifiers used to locate the record. For example, AD 99-01-01
Status	The seeded revision status of the maintenance requirement. This is either Draft, Complete, Approval pending, Approval Rejected, or Terminated. Statuses are not user definable or editable, and only indicate whether the maintenance requirement details and associated information are editable. Any newly created maintenance requirement is given the Draft status. The status advances to Approval Pending when the user sends the maintenance requirement for approval, becomes Complete or Approval Rejected depending on Approval Process, and becomes Terminated when terminated or replaced by newer version. Approval rules are defined when Oracle Complex Maintenance, Repair, and Overhaul is set up. Refer to Oracle Complex Maintenance, Repair, and Overhaul Implementation Guide for details

Field Name	Description
Version	The system defined version number of the maintenance requirement. This value is not user definable or editable, and indicates how many times this particular record has been changed in the system.
Revision Number	The user defined revision number of the maintenance requirement. This is an optional field used to record document revision. For example, Airworthiness Directives have FAA (Federal Aviation Authority) approved revision numbers. Such numbers may be recorded here.
Category	The user defined category of the maintenance requirement. A common method of categorization would be based on the equipment type to which the maintenance requirement applies. For example, Airframe, Powerplant, Ground Service Equipment.
Program Type	The user defined maintenance requirement program type. Program Types are used to classify or group maintenance requirements, and can be used in conjunction with Program Subtypes. For example, Letter Check, Corrosion, Modification.
Program Subtype	The user defined sub group of the Program Type, and is used in conjunction with Program Types. For example the Program Type Letter Check may have the Program Subtypes A Check, B Check, C Check, and D Check associated to it.
Service Type	The seeded service type of the maintenance requirement. The value for Service Type is either On or Off. This field value is used to determine the service type needed to fulfill the maintenance requirement. For example, On wing can be accomplished at aircraft location, whereas Off wing requires being sent to the shop.
Implement Status	The seeded implement status of the maintenance requirement. The field value is either Mandatory, Optional Implement, or Optional Do Not Implement. The user can select from these values while creating the maintenance requirement record. The field value depicts the maintenance requirement characteristic as defined by the document engineer. The Oracle Complex Maintenance, Repair, and Overhaul Unit Maintenance Plan module will pick up any Implement Status other than Optional Do Not Implement.
Repetitive	The seeded repetitive flag for the maintenance requirement. The field values can be Yes or No. The field value indicates whether the maintenance requirement is one time or repetitive. This field adds appropriate logical validations to the maintenance requirement interval thresholds.
Show (Repetitive)	The seeded flag used to show repeating maintenance requirements in the Oracle Complex Maintenance, Repair, and Overhaul Unit Maintenance Plan module. This field is only applicable to repetitive maintenance requirements. The field value can be either All or Next. This value is taken into consideration when Unit Maintenance Plan calculates the Estimated Due Dates list. Based on the Show field value, Unit Maintenance Plan will either show all repeating occurrences for the Unit Maintenance Plan rolling time window, or only the next occurrence. This is especially useful in the case of maintenance requirements that are to be carried out frequently, and would otherwise clutter up a year long report.

Field Name	Description
Whichever Comes	A seeded flag used to determine whether to choose the first or the last due date calculated based on all the interval thresholds defined for the maintenance requirement. The values you can choose from are First and Last. First would indicate an OR condition, and Last would indicate an AND condition for the interval threshold records.
Effective From	The effective start date of the maintenance requirement. Only one maintenance requirement revision can be effective at a time instance. The effective start date can be post dated to begin in the future. A revision to a maintenance requirement can be post dated to replace current version as of specified date.
Billing Item	Billing items must be setup in Oracle Inventory. Billing items are defined as non-stockable and non-transactable items. Whenever a maintenance requirement with a billing item is added to a visit, the price of the billing item is taken into account when estimating the price of the visit.
Quality Inspection Type	You can create the different Inspection Types for route and/or operation quality recording. The inspection types are maintained in a seeded collection element called Inspection Type. A Collection Element is a data structure that you use to collect quality results
Visit Category	Visit Category for an MR is used to communicate a capability need to Visit Work Package. When a visit is created in Visit Work Package, the user can take into account the capability of a facility and only select MRs that are within that capability.
Follows After Accomplishment of	The maintenance requirement after the accomplishment of which the maintenance requirement being created can be performed. This field is optional.
Description	The maintenance requirement description. The description may be anything that identifies additional information.
Comments	Text field where you can enter any user oriented comments.
Downtime	Downtime is the total amount of time needed to complete the related MR.

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

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

Create Maintenance Requirement page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Overview | Program Type Associations

Create Maintenance Requirement

* Indicates required field

Cancel Revert Apply

Maintenance Requirement Information

* Title Requirement1 Status Draft Version 1

Revision Number

* Category Ground Service Equipment

* Program Type Corrosion

Program Subtype

* Service Type On

* Implement Status Mandatory

* Repetitive Yes Show All

* Whichever Comes First

* Effective From 06-AUG-2004

Billing Item

Quality Inspection Type

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

Note: Visit Category and Down Time provide additional search criteria and enable the planner to select specific maintenance requirements to associate with a visit.
8. Click Apply to save the maintenance requirement record in the database, and proceed to the Update Maintenance Requirements page to edit the maintenance requirement details, or navigate to define the maintenance requirement attributes.

Update Maintenance Requirement page

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

Overview | Program Type Associations

Update Maintenance Requirement

Cancel Approve Revert Ap

* Indicates required field

Maintenance Requirement Information

Title	Requirement1	Status	Draft	Version	1
Revision Number					
* Category	Ground Service Equipment				
* Program Type	Corrosion				
Program Subtype					
* Service Type	On				
* Implement Status	Mandatory				
* Repetitive	Yes	Show	All		
* Whichever Comes	First				
* Effective From	06-AUG-2004				
Billing Item					
Quality Inspection Type					

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

Related Topics

- Attaching Documents to a Maintenance Requirement, page 2-15
- Associating Routes to a Maintenance Requirement, page 2-20
- Defining Maintenance Requirement Effectivity, page 2-28
- Defining Maintenance Requirement Relationships, page 2-38

Retrieving Existing Maintenance Requirement Records

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

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

The following table provides descriptions of the fields in the Search Maintenance Requirement page.

Prerequisites

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

To retrieve existing maintenance route records:

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

Enter Search Criteria - Search Maintenance Requirements page

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Document Index Route Management Fleet Maintenance Program

Overview | Program Type Associations

Search Maintenance Requirements

Title	<input type="text"/>	Revision	<input type="text"/>
Originating Document	<input type="text"/>	Status	<input type="text" value="All"/>
Program Type	<input type="text"/>	Parent Title	<input type="text"/>
Category	<input type="text" value="Airframe"/>	Description	<input type="text"/>
Associated Item	<input type="text"/>	Route Number	<input type="text"/>

Maintenance Requirements Results

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

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Use the information in the following table to enter values in the Search Maintenance Requirement page.

Description of fields in the Search Maintenance page

Field Name	Description
Title	User defined maintenance requirement name. The combination of maintenance requirement Title and Version Number is unique. This can be a number, or other alpha numeric identifiers used to locate the record. For example, AD 99-01-01.
Revision Number	User defined revision number of the maintenance requirement. This is an optional field used to record document revision. For example, Airworthiness Directives have FAA (Federal Aviation Authority) approved revision numbers. Such numbers may be recorded here.
Originating Document	The document existing in the Document Index database which serves as the source for creating a maintenance requirement record. For example, an Airworthiness Directive issued by the Federal Aviation Authority.
Status	The seeded revision status of the maintenance requirement. This is either Draft, Complete, Approval pending, Approval Rejected, or Terminated. Statuses are not user definable or editable, and only indicate whether the maintenance requirement details and associated information are editable. Any newly created maintenance requirement is given the Draft status. The status advances to Approval Pending when the user sends the maintenance requirement for approval, becomes Complete or Approval Rejected depending on Approval Process, and becomes Terminated when terminated or replaced by newer version.
Program Type	The user defined maintenance requirement program type. Program Types are used to classify or group maintenance requirements, and can be used in conjunction with Program Subtypes. For example, Letter Check, Corrosion, Modification.
Parent Title	The user defined title of the maintenance requirement that would act as parent for the maintenance requirement being retrieved.
Category	The user defined category of the maintenance requirement. A common method of categorization would be based on the equipment type to which the maintenance requirement applies. For example, Airframe, Powerplant, Ground Service Equipment.
Description	The maintenance requirement description. The description may be anything that identifies additional information.
Associated Item	The item number to which the maintenance requirement applies. You can search for maintenance requirement records based on their associated Part Numbers using this field.
Route Number	Is the user-assigned identifier for a maintenance route.

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

View Maintenance Requirement Search Results - Search Maintenance Requirements page

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Document Index Route Management Fleet Maintenance Program

Overview | Program Type Associations

Search Maintenance Requirements

Title Revision
 Originating Document Status
 Program Type Parent Title
 Category Description
 Associated Item Route Number

Maintenance Requirements Results

Select Maintenance Requirement and..

Previous 1-10 of 97 Next

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

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

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

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

Create Revision - Update Maintenance Requirements page

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Document Index Route Management Fleet Maintenance Program

Overview | Program Type Associations

Update Maintenance Requirement

Cancel Approve Revert A

* Indicates required field

Maintenance Requirement Information

Title 27-036-00 Status Draft Version

Revision Number

* Category Airframe

* Program Type Letter Check

Program Subtype C

* Service Type On

* Implement Status Mandatory

* Repetitive Yes

* Whichever Comes First

* Effective From 05-AUG-2004

Billing Item

Quality Inspection Type

Show All

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

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

Update Attached Routes page

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Document Index Route Management Fleet Maintenance Program

Overview | Program Type Associations

Update Attached Routes

Title 27-036-00 Status Draft

Revision Category AIRFRAME

Program Type Letter Check Program Subtype C

Routes List

Cancel Attach Routes Revert Apply

Previous 1-1 of 1 Next

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

Add More Rows

Previous 1-1 of 1 Next

Document Index | Route Management | **Fleet Maintenance**

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Note: You can update these attributes only for a maintenance requirement that is in the Draft or Approval Rejected state. If the

selected maintenance requirement is in the Complete, Terminated, or Approval Pending states, the application generates the details and attribute pages as view-only.

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

8. You can terminate a maintenance requirement that is in the status of 'Complete'. Select the record from the Maintenance Requirements Results table, and click Terminate. The approval workflow is initiated, and the status of the MR changes to Termination pending. On approval, the status will change to Terminated and the MR instance will be removed from the applicable Unit Maintenance plan, else the status will revert to Complete.

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

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

Attaching Documents to a Maintenance Requirement

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

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

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

Prerequisites

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

To attach documents to a maintenance requirement:

1. Retrieve the maintenance requirement records that match your needs. See Retrieving Existing Maintenance Requirement Records, page 2-10.
2. In the Search Results list, click the Title link of the pertinent record to launch the Update Maintenance Requirement page. The side navigation menu is accessible from this page.

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

Attach documents to MR - Update Attached Documents page

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Document Index Route Management Fleet Maintenance Program

Overview | Program Type Associations

Details

Documents

Routes

Effectivities

Relationships

Affected Items

Update Attached Documents

Title **Requirement1** Status **Draft**

Revision

Program Type **Corrosion** Category **GROUND SERVICE EQUIPMENT**

Program Subtype

Documents List

Cancel Associate Documents Revert Apply

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

Document Index Route Management **Fleet Maintenance**

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

Use the information in the following table to enter values in the Update Attached Documents page.

Description of fields in the Update Attached Documents page

Field Name	Description
Association Type	Indicates whether the document being attached is a source document or a reference document. The field value can be either Source or Reference. A Source association type indicates that the attached document is the originating document of the maintenance requirement, and a Reference association type indicates that the document is a supporting document.
Number	Unique identifier, generated by the organization to identify a maintenance document. If you do not know the document number, enter% in the field, and click the search icon to launch the Select Number page that displays all the document references in the database. Click the relevant record to return this value to the Number field on the Update Attached Documents page.
Title	The title of the maintenance document. This field value returns when you enter the document Number.
Type	Represents the major topic such as power plant, fleet unit, and ground support equipment that is described by the document in question. This field value is returned when you enter the document Number.
Revision	Field that holds a user-assigned document revision identifier. This field is populated when the document Number value is returned.
Chapter	The specific chapter in the document related to the maintenance requirement. This is a free text field where you can enter the chapter information.
Section	The specific section in the document chapter that relates to the maintenance requirement record. This is a free text field where you can enter the section information.
Subject	The subject within the document relating to the maintenance requirement. This is a free text field where you can enter the subject information.
Page	The page in the document that deals with the section relating to the maintenance requirement. This is a free text field. Enter the page number here.
Figure	Any figures in the document that are related to the maintenance requirement. This is a text field. Enter the figure detail here.
Note	Text field where you can enter any additional information regarding the document attached to the maintenance requirement.

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

Select Number page

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Document IndexRoute ManagementFleet Maintenance Program

Overview | Program Type Associations

Select Number

Enter Partial Value %

SearchCancel

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

First | Previous 1 - 10 of 106Next | Last

Cancel

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

Update Attached Documents page

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Document IndexRoute ManagementFleet Maintenance Program

Overview | Program Type Associations

DetailsDocumentsRoutesEffectivitiesRelationshipsAffected Items

Update Attached Documents

Title 27-036-00RevisionProgram Type Letter CheckStatus DraftCategory AIRFRAMEProgram Subtype C

Documents List

CancelAssociate DocumentsRevertApply

Previous1-1 of 1Next

Remove	Association Type	Number	Title	Type	Revision	Chapter	Section	Subject	Page	Figure	Note
<input type="checkbox"/>	Reference	MBAH019	Aircraft 1								

Add More Rows

Previous1-1 of 1Next

Document IndexRoute ManagementFleet Maintenance

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

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[Fleet Maintenance Program](#)

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

Search Document

Source

Title

Document Type

Operator

Media Type

Document Number

Status

Sub Type

Item Type

Search Results

Select	Document Num	Title	Type	Sub Type	Revision Num	Revision Type	Status
No records were found matching the given criteria..							

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- View Document Search Results - Search Document page***

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

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

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

Associating Routes to a Maintenance Requirement

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

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

Prerequisites

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

To associate maintenance routes to a maintenance requirement:

1. Retrieve the maintenance requirement records that match your needs. See Retrieving Existing Maintenance Requirement Records, page 2-10.

Maintenance Requirement Search Results

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Document Index Route Management Fleet Maintenance Program

Overview | Program Type Associations

Search Maintenance Requirements

Title
 Originating Document
 Program Type
 Category
 Associated Item

Revision
 Status
 Parent Title
 Description
 Route Number

Go Clear

Maintenance Requirements Results

Create

Select Maintenance Requirement and.. View Affected Items Create Revision Approve Delete Terminate

Previous 1-10 of 64 Next

Select	Title	Description	Program Type	Status	Effective From	Effective To	Effectivity	Relationships
<input type="radio"/>	21-040-00	Replace the electrical and electronic compartment supply fan filter.	Letter Check	Complete	2002-NOV-07	2002-NOV-13		
<input type="radio"/>	21-040-00	Replace the electrical and electronic compartment supply fan filter.	Letter Check	Complete	2002-NOV-13			
<input type="radio"/>	21-150-00	Replace cabin temperature sensor.	Letter Check	Complete	2002-NOV-07	2002-NOV-13		
<input type="radio"/>	21-150-00	Replace cabin temperature sensor.	Letter Check	Complete	2002-NOV-13			
<input type="radio"/>	24-030-01	Check generator oil level.	Letter Check	Complete	2002-NOV-07	2002-NOV-13		
<input type="radio"/>	24-030-01	Check generator oil level.	Letter Check	Complete	2002-NOV-13			
<input type="radio"/>	27-036-00	Perform detail inspection of rudder components.	Letter Check	Complete	2002-NOV-07	2002-NOV-13		

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

Maintenance Requirement Information - Update Maintenance Requirement page

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Document Index Route Management Fleet Maintenance Program

Overview | Program Type Associations

Update Maintenance Requirement

Cancel Approve Revert Apply

* Indicates required field

Maintenance Requirement Information

Title **MR 21-400** Status **Draft** Version **1**
 Revision Number
 * Category Ground Service Equipment
 * Program Type Corrosion
 Program Subtype
 * Service Type On
 * Implement Status Optional - Implement
 * Repetitive Yes
 * Whichever Comes First
 * Effective From 2005-MAR-29
 Billing Item
 Quality Inspection Type
 Visit Category
 Follows After Accomplishment of
 Description

Auto Sign Off No
Show All

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

Attach Routes to MR - Update Attached Routes page

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Document Index / Route Management / Fleet Maintenance Program

Overview | Program Type Associations

Details
Documents
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Effectivities
Relationships
Affected Items
Visit Types

Update Attached Routes

Title **MR 21-400** Status **Draft**
Revision Category **GROUND SERVICE EQUIPMENT**
Program Type **Corrosion** Program Subtype

Routes List

Previous 1-2 of 2 Next

Cancel Attach Routes Revert Apply

Remove	Route Number	Route Description	Item Type	Operator	Revision Number	Stage	Dependency
<input type="checkbox"/>	21-040-00-00	E/E cooling supply fan filter	MRO Aircraft		1	3	
<input type="checkbox"/>	32-300-00-00	Brake Accumulator Precharge Pressure	MRO Aircraft		1	1	

Add More Rows

Previous 1-2 of 2 Next

Document Index | Route Management | **Fleet Maintenance Program** | Home | CMRO Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

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

Use the information in the following table to enter values in the Update Attached Routes page.

Description of fields in the Update Attached Routes page

Field Name	Description
Route Number	User-assigned identifier for a maintenance route. You can retrieve this number from the List of Values by entering%, and clicking the search icon. This launches the Select Route Number page. Click the pertinent record to return this value to the Route Number field.
Route Description	Provides more information about the maintenance route. This field is populated when the Route Number field value is returned.
Item Type	Classification by category, of the electromechanical system to which the maintenance route applies. This field is populated when the Route Number field value is returned.
Operator	The organization operating the concerned equipment. This field is populated when the Route Number field value is returned.
Revision Number	Field that holds a system driven maintenance route revision identifier. This field is populated when the Route Number field value is returned.
Stage	User can specify a stage for the route. The maximum number of stages must have been set up during implementation. If there are two routes and one is dependent on the other, the dependent MR Route must be in a later or in the same stage as the first MR Route. Stage information is carried over when maintenance requirements are assigned to visits.

4. To associate new maintenance routes to the maintenance requirement record, click Attach Routes. This launches the Search Route page.
5. Retrieve the desired maintenance route records. For detailed instructions, see Retrieving Existing Maintenance Route Records, page 3-38.
6. From the Search Results, select the pertinent record using the Select checkbox, and click Associate to return this record to the Routes List in the Update Attached Routes page.

Associate Routes - Update Attached Routes page

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Document Index Route Management Fleet Maintenance Program

Overview | Program Type Associations

Update Attached Routes

Title **MR 21-400** Status **Draft**
Revision Category **GROUND SERVICE EQUIPMENT**
Program Type **Corrosion** Program Subtype

Routes List

Cancel Attach Routes Revert Apply

Previous 1-2 of 2 Next

Remove	Route Number	Route Description	Item Type	Operator	Revision Number	Stage	Dependency
<input type="checkbox"/>	21-040-00-00	E/E cooling supply fan filter	MRO Aircraft		1	3	
<input type="checkbox"/>	32-300-00-00	Brake Accumulator Precharge Pressure	MRO Aircraft		1	1	
<input type="checkbox"/>	24-030-01-00	Left IDG Oil Level	MRO Aircraft		1	2	
<input type="checkbox"/>							
<input type="checkbox"/>							

Add More Rows

Previous 1-2 of 2 Next

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

View Routes List - Update Attached Routes page

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Affected Items
Visit Types

Update Attached Routes

Title **MR 21-400** Status **Draft**
Revision
Program Type **Corrosion** Category **GROUND SERVICE EQUIPMENT**
Program Subtype

Routes List

Cancel Attach Routes Revert Apply

Previous 1-3 of 3 Next

Remove	Route Number	Route Description	Item Type	Operator	Revision Number	Stage	Dependency
<input type="checkbox"/>	21-040-00-00	E/E cooling supply fan filter	MRO Aircraft		1	3	
<input type="checkbox"/>	24-030-01-00	Left IDG Oil Level	MRO Aircraft		1	2	
<input type="checkbox"/>	32-300-00-00	Brake Accumulator Precharge Pressure	MRO Aircraft		1	1	

Add More Rows

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

8. To set the route dependency, click on the Dependency icon for the route. This launches the Route Dependencies page. For detailed instructions, see Setting Maintenance Route Dependencies, page 2-25.
9. To view the Route Details, click the Route Description link. The View Route page appears displaying the route details.

View Route page

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Document Index Route Management Fleet Maintenance Program

Overview | Program Type Associations

Details

View Route

Cancel Terminate Create Revision

Route Information

Route Number	21-040-00-00	Status	Complete
Revision	1	Revision Notes	
Title	E/E cooling supply fan filter	Time Span	2 Hours
Route Type	Aircraft	Process	
Item Type	MRO Aircraft	Operator	
Major Zone	Lower Fuselage	Sub Zone	Electrical & Electronics Compartment
Service Item		Quality Inspection Type	
Accounting Class		Task Template Group	
System	X		

Start Date 2002-NOV-07

Remarks Replace the E/E cooling supply fan filter.

Cancel Terminate Create Revision

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

Setting Maintenance Route Dependencies

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

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

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

Prerequisites

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

To define maintenance route dependencies:

1. Associate the appropriate maintenance routes with the maintenance requirement record. See Associating Maintenance Routes to a Maintenance Requirement, page 2-20.

2. Click the Dependency tree icon corresponding to the route that you want to set the dependency for. This launches the Route Dependencies page with the maintenance requirement and route context information.

Route Dependencies page

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Route Dependencies

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

Route Number **27-036-00-00** Revision Number **1**
Operator Item Type **MRO Aircraft**

Dependency List

Cancel Revert Apply

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

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

Use the information in the following table to enter values in the Route Dependencies page.

Description of fields in the Route Dependencies page

Field Name	Description
Dependency	Order in which maintenance routes associated to a maintenance requirement are to be carried out. The seeded field values include Execute Before and Execute After. You can choose between these values to set the order of this maintenance route accomplishment before or after another maintenance route associated to the same maintenance requirement.
Route Number	User-assigned identifier for a maintenance route. You can retrieve this number from the List of Values by entering%, and clicking the search icon. This launches the Select Route Number page. In this case, the Route Number List of Values will show only routes associated to the maintenance requirement in context. Click the pertinent record to return this value to the Route Number field.
Route Description	Information which provides more information about the maintenance route. This field is populated when the Route Number field value is returned.
Item Type	Classification, by category, of the electromechanical system to which the maintenance route applies. This field is populated when the Route Number field value is returned.
Operator	Organization operating the concerned equipment. This field is populated when the Route Number field value is returned.
Revision Number	Field that holds a system driven maintenance route revision identifier. This field is populated when the Route Number field value is returned.

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

Add Route Dependencies - Route Dependencies page

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Route Dependencies

Title **CMR003** Status **Draft**
Revision
Program Type **Special** Category **GROUND SERVICE EQUIPMENT**
Program Subtype

Route Number **111220031307** Revision Number **1**
Operator Item Type

Dependency List

Cancel Revert Apply

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

Add More Rows

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- Click Apply to save the route dependencies.

Save Route Dependencies - Route Dependencies page

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Route Dependencies

Title **CMR003** Status **Draft**
Revision
Program Type **Special** Category **GROUND SERVICE EQUIPMENT**
Program Subtype
Route Number **111220031307** Revision Number **1**
Operator Item Type

Dependency List

Cancel Revert Apply

Previous 1-1 of 1 Next

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

Add More Rows

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

Defining Maintenance Requirement Effectivity

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

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

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

Prerequisites

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

To define maintenance requirement effectivity:

- Retrieve the maintenance requirement records that match your needs. See Retrieving Existing Maintenance Requirement Records, page 2-10.

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

Update Effectivity page

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Update Effectivity

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

Effectivities List

Previous 1-1 of 1 Next Cancel Revert

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

Add More Rows

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

Use the information in the following table to enter values in the Update Effectivity page.

Description of fields in the Update Effectivity page

Field Name	Description
Effectivity	User defined name for the effectivity. The name is unique across all effectivities for a given maintenance requirement, and can relate to the actual application of the effectivity or maintenance requirement further describing its purpose. For example, Boeing 737, MD 80, Cold Weather.
Item Number	The Inventory item identification number. This refers to the Part Number that the maintenance requirement is applicable to in the context of the effectivity.
Master Configuration Position	The master configuration position to which the maintenance requirement applies to in the context of the effectivity. This indicates that the maintenance requirement would apply to a part installed in a specific position of the configuration. For detailed instructions, see Retrieving Existing Master Configuration Records.
Master Configuration Item	points to the alternate item which can be installed in the specified master configuration position. The maintenance requirement applies to the item in this position.
Product Classification Node	The Product Classification node to which the maintenance requirement applies. Product Classification refers to the logical grouping of a product family. An Item or a Master Configuration Position must be defined for the maintenance requirement effectivity in addition to the product classification node. The maintenance requirement will then be applicable to the item when it is installed in the specified product classification only.

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

Define New Effectivities - Update Effectivity page

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Update Effectivity

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Revision Category **AIRFRAME**
Program Type **Letter Check** Program Subtype **C**

Effectivities List

Previous 1-1 of 1 Next

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

Add More Rows

Previous 1-1 of 1 Next

- Click Apply on the Update Effectivity page to record the changes.

6. To remove an effectivity definition from the Effectivities List, select the Remove checkbox beside the record you want to remove, and click Apply.
7. To update the details of an effectivity definition, click the Effectivity Details icon corresponding to the record you want to update. This launches the Update Effectivity Details page. For detailed instructions, see Defining Effectivity Details, page 2-31.
8. To define intervals and thresholds for an effectivity, click the Interval Threshold icon corresponding to that record. For details, see Defining Intervals and Thresholds, page 2-34.
9. To view the items affected by a maintenance requirement effectivity, click the View Affected Items icon corresponding to that effectivity definition. For details, see Viewing Items Affected by a Maintenance Requirement, page 2-45.

Defining Effectivity Details

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

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

Prerequisites

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

To define effectivity details:

1. Define effectivities for the maintenance requirement. See Defining Maintenance Requirement Effectivity, page 2-28.
2. On the Update Effectivity page, click the Effectivity Details icon corresponding to the effectivity definition for which you want to specify details. This launches the Update Effectivity Details page with the maintenance requirement context information.

Effectivities List - Update Effectivity page

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Update Effectivity Details

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

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

Effectivity Details List

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

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

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

Use the information in the following table to enter values in the Update Effectivity Details page.

Description of fields in the Update Effectivity Details page.

Field Name	Description
Serial Number From	Allows you to enter any context item serial number to define the start of the serial number range to which the maintenance requirement applies. You can use a lookup from existing inventory serial numbers to populate this field, or enter any value here to allow accommodation of unknown new inventory, not yet owned, but would be affected by the maintenance requirement.
Serial Number To	The serial number that ends the serial number range to which the maintenance requirement applies. You can use a lookup from existing inventory serial numbers to populate this field, or enter any value here to allow accommodation of unknown new inventory that is not yet owned, but would be affected by the maintenance requirement. The Serial Number To field value can be the same as the Serial Number From value if only one item serial number is affected by the maintenance requirement.
Manufacturer	The item manufacturer identity. The current validation against this field is not in effect as manufacturer has a one to one relationship with Item Number.
Manufacture Date From	denotes the starting item manufacturing date to which the maintenance requirement applies. This field value is used to define effectivity for items with manufacturing dates within a specified range.
Manufacture Date To	represents the ending item manufacturing date to which the maintenance requirement applies. This field value is used to define effectivity for items with manufacturing dates within a specified range.
Country	represents the country of origin. The current validation against this field is not in effect as country of origin is not stored against an instance of an item. Serial number range is often used for defining this item attribute.

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

Define Effectivity Details - Update Effectivity Details

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



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[Affected Items](#)

Update Effectivity Details

Title **27-036-00** Status **Draft**
Revision
Program Type **Letter Check** Category **AIRFRAME**
Program Subtype **C**
Effectivity **C1600** Item **MRO-C1600**
Master Configuration Position
Product Classification Node
Master Configuration Item

Effectivity Details List

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

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

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

1. Click Add More Rows to open a new row.
 2. Enter the Serial Number From and Serial Number To values in this row, defining the range that you want to exclude from the effectivity.
 3. Select the Exclude checkbox beside the range that you want to exclude from the effectivity, and click Apply. The Exclude checkbox being selected serves as the flag to exclude the serial number range in that effectivity detail row from the maintenance requirement effectivity.
7. To remove an effectivity detail row from the Effectivity Details List, select the Remove checkbox beside the pertinent record, and click Apply.

Defining Intervals and Thresholds

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

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

Prerequisites

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

To define intervals and thresholds:

1. Define effectivities for the maintenance requirement. See Defining Maintenance Requirement Effectivity, page 2-28.
2. On the Update Effectivity page, click the Interval Threshold icon corresponding to the effectivity definition for which you want to define intervals and thresholds. This launches the Update Interval Threshold page with the maintenance requirement context information.

Update Interval Threshold page

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Update Interval Threshold

Title **27-036-00**

Revision

Program Type **Letter Check**

Status **Draft**

Category **AIRFRAME**

Program Subtype **C**

Effectivity **C1600**

Master Configuration Position

Product Classification Node

Item **MRO-C1600**

Master Configuration Item

Interval Threshold List

Repetitive **Yes**

Whichever Comes **FIRST**

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

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

Use the information in the following table to enter values in the Update Interval Threshold page.

Description of fields in the Update Interval Threshold page

Field Name	Description
Calendar Due	Threshold Date represents the calendar due date for the maintenance requirement effectivity. This attribute can be defined only for a one time (non-repetitive) maintenance requirement, and is used in conjunction with other one time intervals.
Counter	The associated counter identifier. The associated counter is used for all the numerical values of the row including Interval, Tolerances, Start, and Stop.
Interval	The interval value for repetitive maintenance requirements, and drop-dead counter values for one time maintenance requirements. When used with one time maintenance requirements, interval will be a count down of the associated counter. When used with repetitive maintenance requirements, interval will represent the frequency of occurrence according to the associated counter.
Start	The start counter value of the range from which the interval specified is valid. Start value is mutually exclusive with the Stop value, and begins the range for the interval in relation to the associated counter. This field does not apply for one time maintenance requirements.
Stop	The stop counter value of the range before which the interval specified is valid. This value is mutually exclusive with the Start value, and ends the range for the interval in relation to the associated counter. This field does not apply for one time maintenance requirements.
Start Date	The start date of the range before which the interval specified is valid. This field value is mutually exclusive with the Stop Date, and begins the range for the interval in relation to the associated counter. This field does not apply for one time maintenance requirements.
Stop Date	The stop date of the range before which the interval specified is valid. This date is mutually exclusive with Start Date, and ends the range for the interval in relation to the associated counter. This field is not applicable for one time maintenance requirements.
Tolerance Before	The number of counter units of measure that is acceptable for maintenance requirement accomplishment before the specified interval. This aids in planning maintenance jobs.
Tolerance After	The number of counter units of measure that is permissible for maintenance requirement accomplishment after the specified interval. This value aids in planning maintenance jobs.
UOM	The Unit of Measure as per the associated counter. This field value is returned when the counter is selected. This value is not editable.
Reset Value	The value to which the counter reading needs to be reset.

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

Define New Interval Threshold

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

















































Update Interval Threshold

Title **27-036-00** Status **Draft**
Revision
Program Type **Letter Check** Category **AIRFRAME**
Program Subtype **C**
Effectivity **C1600** Item **MRO-C1600**
Master Configuration Position
Product Classification Node Master Configuration Item

Interval Threshold List

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

[Cancel](#)

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

Note:

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

Save Interval Threshold Definition - Update interval Threshold page

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Update Interval Threshold

Title 27-036-00

Revision

Program Type Letter Check

Effectivity C1600

Master Configuration Position

Product Classification Node

Status Draft

Category AIRFRAME

Program Subtype C

Item MRO-C1600

Master Configuration Item

Interval Threshold List

Repetitive Yes

Whichever Comes FIRST

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

Add More Rows

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

Defining Maintenance Requirement Relationships

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

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

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

Prerequisites

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

To define maintenance requirement relationships:

1. Retrieve the maintenance requirement records that match your need. See Retrieving Existing Maintenance Requirement Records, page 2-10.
2. In the Search Results list, click the Title link of the pertinent record to launch the Update Maintenance Requirement page. The side navigation menu is accessible from this page.
3. On the side navigation menu, click Relationships to launch the Maintenance Requirement Relationships page.

Maintenance Requirement Relationships page

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Maintenance Requirement Relationships

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

Maintenance Requirements List

Cancel Attach Revert Apply

27-036-00

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

Add More Rows

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

Use the information in the following table to enter values in the Maintenance Requirement Relationships page.

Description of fields in the Maintenance Requirement Relationships page

Field Name	Description
Title	User defined maintenance requirement name. Enter the generic substitution metacharacter% and click the Search icon to retrieve the list of maintenance requirement records that exist in the database. Click the pertinent record in the list of values to return the value to the Title field.
Revision	The revision number of the maintenance requirement. This value if it exists, further identifies the maintenance requirement. This field is populated when the Title field value is returned.
Relationship Type	indicates whether the attached maintenance requirement relates as a parent or a child to the context maintenance requirement. The field values can be either Parent or Child. Relationship Type Parent implies that the attached maintenance requirement would include the context maintenance requirement, and Relationship Type Child implies that a context maintenance requirement would include the attached maintenance requirement.
Description	The maintenance requirement description. The description may be anything that identifies more information about the maintenance requirement. This field is populated when the Title field value is entered.
Program Type	The user defined maintenance requirement program type. Program Types are used to classify or group maintenance requirements, and can be used in conjunction with Program Subtypes. For example, Letter Check, Corrosion, Modification. This field is populated when the material requirement Title is entered.
Status	The seeded revision status of the maintenance requirement. This is either Draft, Complete, Approval Pending, Approval Rejected, or Terminated. Statuses are not user definable or editable, and only indicate whether the maintenance requirement details and associated information are editable. This field is populated when the maintenance requirement Title field value is returned.
Effective From	The effective start date of the maintenance requirement. Only one maintenance requirement revision can be effective at a time instance. This field is populated when the Title field value is entered.
Effective To	The effective maintenance requirement end date. Only one maintenance requirement revision can be effective at a time instance. This field is populated when the Title field value is entered.

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

Retrieve Maintenance Requirements - Search Maintenance Requirements page

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Overview | Program Type Associations

Search Maintenance Requirements

Title Revision
 Originating Document Status
 Program Type Parent Title
 Category Description
 Associated Item Route Number

Maintenance Requirements Results

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

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- Retrieve the maintenance requirement records that match your needs. See Retrieving Existing Maintenance Requirement Records, page 2-10.
- From the Search Results, select the record that you want to attach using the Select checkbox, and click Attach to return this record to the Maintenance Requirements List on the Maintenance Requirement Relationships page.

Attach Maintenance Requirements - Maintenance Requirement Relationships page

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Document Index Route Management Fleet Maintenance Program

Overview | Program Type Associations

Maintenance Requirement Relationships

Title **27-036-00** Status **Draft**
 Revision **1** Category **AIRFRAME**
 Program Type **Letter Check** Program Subtype **C**

Maintenance Requirements List

27-036-00

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

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

View Associated Records - Maintenance Requirement Relationships page

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Overview | Program Type Associations

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Documents
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Relationships
Affected Items

Maintenance Requirement Relationships

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

[Maintenance Requirements List](#)

Cancel Attach Revert Apply

27-036-00

Previous 1-2 of 2 Next

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

Add More Rows

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

8. To remove a related requirement from the Material Requirements List, select the Remove checkbox beside the record you want to remove, and click Apply.
9. To view the child maintenance requirements associated with any Parent Relationship Type record in the Maintenance Requirements List, click the corresponding Relationships icon. This displays the list of material requirements to which the record is related, and their relationship types.

View Maintenance Requirements Hierarchy - Maintenance Requirement Relationships page

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Details
Documents
Routes
Effectivities
Relationships
Affected Items

Maintenance Requirement Relationships

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

Maintenance Requirements List Cancel

061120031650 > **27-036-00**

Previous 1-1 of 1 Next

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

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Updating Maintenance Requirement Records

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

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

To view the details of a Complete, Approval Pending, or Terminated maintenance requirement, see Viewing Maintenance Requirement Details, page 2-52.

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

Prerequisites

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

To update maintenance requirement records:

1. Retrieve the maintenance requirements that match your need. See Retrieving Existing Maintenance Requirement Records, page 2-10.
2. In the Search Results list, click the Title Link of the record that you want to edit. This launches the Update Maintenance Requirement page if the maintenance requirement is in the Draft or Approval Rejected state.

Modify Maintenance Requirement Information - Update Maintenance Requirement page

Oracle Complex MRO

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Overview | Program Type Associations

Update Maintenance Requirement

Cancel Approve Revert Apply

* Indicates required field

Maintenance Requirement Information

Title	27-036-00	Status	Draft	Version	3
Revision Number					
* Category	Airframe				
* Program Type	Letter Check				
Program Subtype	C				
* Service Type	On				
* Implement Status	Mandatory				
* Repetitive	Yes	Show	All		
* Whichever Comes	First				
* Effective From	05-AUG-2004				
Billing Item					
Quality Inspection Type					

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

- Program Type
 - Program Sub Type
 - Service Type
 - Repetitive
 - Show Repetitive
 - Description
 - Comments
 - Revision Number
3. Make the necessary changes to the field values. For field descriptions, see Fields on the Create and Update Maintenance Requirement Pages, page 2-6.
 4. Click Apply to record the changes.
 5. To advance the maintenance requirement to Approval Pending Status, click Approve. This is possible only after maintenance routes have been associated to the requirement. The status changes are dependent on the approval rules during Oracle Complex Maintenance, Repair, and Overhaul setup.

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

View Maintenance Requirement page

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Overview | Program Type Associations

View Maintenance Requirement

Cancel

Maintenance Requirement Information

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

6. To view items to which the maintenance requirement applies, click Affected Items link on the side navigation menu. See Viewing Items Affected by a Maintenance Requirement, page 2-45.
7. To update attached documents, associated maintenance routes, attached actions, effectivities, and relationships, use the side navigation menu.

Related Topics

- Attaching Documents to a Maintenance Requirement, page 2-15
- Associating Routes to a Maintenance Requirement, page 2-20
- Defining Maintenance Requirement Effectivities, page 2-28
- Defining Maintenance Requirement Relationships, page 2-38

Viewing Items Affected by a Maintenance Requirement

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

To view items affected by a maintenance requirement:

1. You can access the View Affected Items page using any of the following methods.
From the Search Maintenance Requirement page:
 1. Retrieve the maintenance requirement record for which you want to view the affected items. See Retrieving Existing Maintenance Requirement Records, page 2-10.
 2. Select the pertinent record using the Select radio button, and click View Affected Items to launch the View Affected Items page.

View Affected Items page

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[Relationships](#)
[Affected Items](#)

View Affected Items

Title 29B9999MR

Status **Draft**

Revision

Category **AIRFRAME**

Program Type **Phase**

Program Subtype

Items List

Item

Serial Number

Location

Status

Owner

Condition

Unit

No records were found matching the given criteria.

Cancel

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Use the information in the following table to enter values in the View Affected Items page.

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Description of fields in the View Affected Items page.

Field Name	Description
Item Number	is the Inventory item identification number. This refers to the Part Number that the maintenance requirement is applicable to in the context of the effectivity.
Serial Number	The part serial number to which the maintenance requirement applies. This is derived from the serial number ranges you set for maintenance requirement effectivity on the Update Effectivity Details page.
Location	is an attribute of the item instance that is affected by the maintenance requirement, and is one of the standard item identifiers. The field value refers to the part location.
Status	is an attribute of the item instance that is affected by the maintenance requirement, and is one of the standard item identifiers.
Owner	refers to the item owner. This is an attribute of the item instance that is affected by the maintenance requirement, and is a standard item identifier. This attribute is defined when a part information is added or updated.
Condition	is an attribute of the item instance that is affected by the maintenance requirement, and is one of the standard item identifiers.
Unit	The top node of the unit configuration that this particular item instance is part of. When you click the Unit link, the unit configuration page for the item opens.

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

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

Update Effectivites page

Update Effectivity

Title **29B9999MR** Status **Draft**
 Revision Category **AIRFRAME**
 Program Type **Phase** Program Subtype

Effectivities List

Cancel Revert Apply

Previous 1-2 of 2 Next

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

Add More Rows

Previous 1-2 of 2 Next

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

View items Affected by an Effectivity Definition - View Affected Items page

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Overview | Program Type Associations

View Affected Items

Title **29B9999MR** Status **Draft**
 Revision Category **AIRFRAME**
 Program Type **Phase** Program Subtype

Effectivity **PCEffectivity1** Item **11475M95P05**
 Master Configuration Position Master Configuration Item
 Product Classification Node **Child**

Items List

Cancel

Item	Serial Number	Location	Status	Owner	Condition	Unit
No records were found matching the given criteria.						

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

Associating Visit Types with a Maintenance Requirement

You can associate specific visit types to a maintenance requirement. This is especially useful for the transit visits, as it automates the visit creation process. When a transit visit is created and a visit type selected, the applicable maintenance requirements and associated routes are automatically added to the visit being defined. For information on transit visits, see *Creating Transit Visit from Unit Schedule*, *Oracle Complex Maintenance, Repair, and Overhaul User's Guide*.

Prerequisites

- ☐ The visit types must have been defined. The maintenance requirement must be of Implement Status 'Unplanned'.

To associate a visit type with a maintenance requirement:

1. Navigate to the Update Maintenance Requirement page for the maintenance requirement with which you want to associate a visit type.

Update Visit Type Associations page

The screenshot shows the Oracle Complex MRO interface. The top navigation bar includes links like Home, CMRO Home, Engineering, Configuration, Planning, Administration, Execution, Profile, Sign Out, and Help. The side navigation menu on the left has options: Overview, Program Type Associations, Details, Documents, Routes, Effectivities, Relationships, Affected Items, and Visit Types (which is highlighted). The main content area is titled 'Update Visit Type Associations'. It shows the Title '21.040.00', Revision 'Letter Check', and Program Type 'Letter Check'. On the right, it indicates Status 'Draft', Category 'AIRFRAME', and Program Subtype 'C'. At the bottom right are buttons for 'Cancel', 'Revert', and 'Apply'. Below this information is a table with three columns: 'Remove' (with a trash icon), 'Visit Type' (with a dropdown arrow), and 'Description' (with a text input field). There are five rows in the table for adding associations.

2. Click Visit Types in the side navigation menu. The Update Visit Type Associations page appears. Click Add More Rows to associate visit type/types. Select the visit type/types to associate and click Apply. The visit type is associated with the

maintenance requirement. This maintenance requirement will be automatically associated with any visit created with the selected visit type.

Associate Visit Type to MR - Update Visit Type Associations page

The screenshot shows the 'Update Visit Type Associations' page in the Oracle Complex MRO system. The page has a sidebar on the left with links for Details, Documents, Routes, Effectivities, Relationships, Affected Items, and Visit Types. The main content area displays the title '21-040-00', revision information, and a table for associating visit types (A Check, C Check) with descriptions. Navigation buttons like Previous, Next, Cancel, Revert, and Apply are visible.

Creating Maintenance Requirement Revisions

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

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

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

Prerequisites

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

To create maintenance requirement revisions:

1. Retrieve the maintenance requirement record for which you want to create a revision. See Retrieving Existing Maintenance Requirement Records, page 2-10.
2. In the Search Results list, select the pertinent record using the Select radio button, and click Create Revision. This launches the Update Maintenance Requirement page.

Create Maintenance Requirement Revisions - Update Maintenance Requirement page

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Overview | Program Type Associations

Update Maintenance Requirement

Cancel Approve Revert

* Indicates required field

Maintenance Requirement Information

Title	00-MR-00	Status	Draft	Version	
Revision Number	<input type="text"/>				
* Category	Ground Service Equipment				
* Program Type	Letter Check				
Program Subtype	<input type="text"/>				
* Service Type	On				
* Implement Status	Mandatory				
* Repetitive	Yes	Show	All		
* Whichever Comes	First				
* Effective From	08-AUG-2004				
Billing Item	<input type="text"/>				
Quality Inspection Type	<input type="text"/>				

The fields that appear on the Update Maintenance Requirement page are the same as that on the Create Maintenance Requirement page with the exception of the Copy Last Accomplishment field, and the Version field defaulting to the next sequentially generated number. For field descriptions, see Fields on the Create and Update Maintenance Requirement , page 2-6Pages.

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

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

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

5. To update the maintenance requirement attributes, such as attached documents, associated maintenance routes, actions, effectivities, and relationships, see:
 - Attaching Documents to a Maintenance Requirement, page 2-15
 - Associating Routes to a Maintenance Requirement, page 2-20
 - Defining Maintenance Requirement Effectivities, page 2-28

- Defining Maintenance Requirement Relationships, page 2-38
6. To view items to which the maintenance requirement revision applies, click Affected Items link on the side navigation menu. See Viewing Items Affected by a Maintenance Requirement, page 2-45.

Viewing Maintenance Requirement Details

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

Prerequisites

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

To view maintenance requirement details:

1. Retrieve the maintenance requirement records that meet your needs. See Retrieving Existing Maintenance Requirement Records, page 2-10.
2. Click the pertinent Title link to launch the View Maintenance Requirement page. This page provides the maintenance requirement header details. For field descriptions, see Fields on the Create and Update Maintenance Requirement , page 2-6Pages.

View Maintenance Requirement Details - View Maintenance Requirement page

The screenshot displays the 'View Maintenance Requirement' page in the Oracle Complex MRO application. The page has a blue header with the Oracle logo and navigation links. A sidebar on the left contains a menu with links to Details, Documents, Routes, Effectivities, Relationships, and Affected Items. The main content area is titled 'View Maintenance Requirement' and contains a table of maintenance requirement information for the title 'AHLPAMR05'.

Maintenance Requirement Information		Status	Approval Pending	Version 1
Title	Revision Number	AHLPAMR05		
Category	Program Type	Ground Service Equipment		
Program Subtype	Service Type	Corrosion		
Implement Status	Repetitive	On		
Whichever Comes	Effective From	Mandatory		
		Yes	Show	All
		First		
		11-DEC-2003		
Follows After Accomplishment of	Quality Inspection Type			
Billing Item	Visit Category			
	Description			
	Comments			
Down Time				HOURS

3. To view the attributes including attached documents, associated maintenance routes, attached actions, effectivities, and relationships of a Complete, Approval Pending, or Terminated maintenance requirement, click the corresponding link on the side navigation menu.

Associating Program Sub Types to Program Types

Use the following procedure to associate Program Sub Types to Program Types.

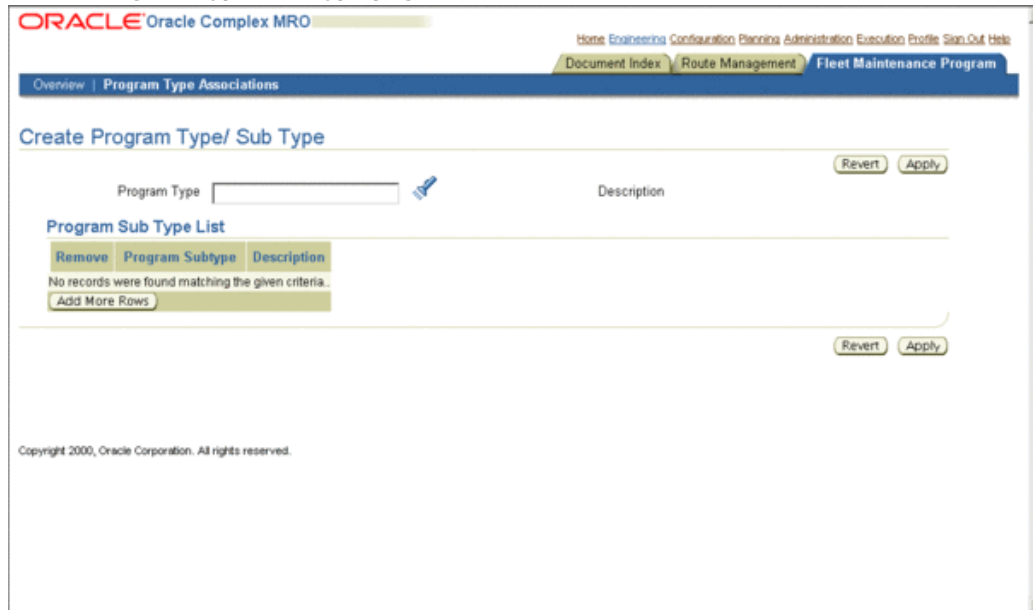
Prerequisites

- ☐ Program Type values must exist in the database.

To associate program sub types to program types:

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

Create Program Type/Sub Type page




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Overview | Program Type Associations

Create Program Type/ Sub Type

Program Type  Description Revert Apply

Program Sub Type List

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

Revert Apply

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

Select Program Type - Create Program Type/Sub Type page

Enter Partial Value

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

First | Previous 1 - 6 of 6 Next | Last

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

Define Program Sub Types - Create Program Type/Sub Type page

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Create Program Type/ Sub Type

Program Type

Description

Program Sub Type List

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

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- Enter the required values in the fields. Fields in the Program Sub Types List include:

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

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

Service Requests

Service requests (SR) can be created to track requirements that are not defined in Fleet Maintenance Program (FMP). These maintenance requirements may arise in the following conditions:

- When a non-routine job/requirement is discovered - These non-routine, or unplanned, jobs can be accomplished in the originating visit, or they can be deferred to subsequent visits. The Service Request is the instance of this requirement and is used for planning purposes to make sure that the requirement is accomplished.
- During the utilization of the applicable unit/item - An example of this in the aviation industry is the crew log. When a problem, or potential problem, is identified, the crew will enter it into the system to be followed up with in the maintenance process.
- Through administrative or executive actions - In the aviation industry, there might be a decision to change the paint scheme of a particular plane, or the seating arrangement.

An integrated service request system enables these requests to be fed directly into the planning process. You can associate predefined maintenance solutions and resource requirements with a service request. You can schedule these service requests as you schedule the requirements generated by FMP.

You can create a service requests using the service request window in Oracle Service. A corresponding Unit Effectivity is created for the service request. You can associate one or multiple maintenance requirements with the SR when a solution to the problem has been diagnosed. In these cases, a Corresponding Unit Effectivity is created for the Service Request and Child Unit Effectivities are created for the associated Maintenance Requirements. Service requests of type Complex Maintenance appear as Non-Routine maintenance requirements in FMP and UMP. Thus, you can track not only planned maintenance in unit maintenance plan, but also the unplanned maintenance originating from production inspections or through the manual creation of a service request (i.e. pilot squawk).

When a service request with maintenance requirements is planned, that is, associated with a visit, a summary task is created for the top level SR with root Unit Effectivity. For the child Unit effectivities, summary tasks and planned tasks are created similar to the process for Group MRs. All the summary tasks and planned tasks created will have Service Request ID associated.

When a service request with no child maintenance requirements is planned, a single summary and planned task is created for the SR. Both the summary task and planned task will have SR Unit Effectivity ID and Service Request ID associated.

Additionally, service requests for defects identified on the production floor can be defined in the production module when creating non-routine work orders.

Related Topics

- Entering Service Requests, page 2-56
- Associating Maintenance Requirements , page 2-57
- Viewing Service Requests, *Oracle Complex Maintenance, Repair, and Overhaul User's Guide*
- Updating Service Requests, page 2-59

Entering Service Requests

Prerequisites

- ☐ CMRO Fleet Maintenance Program and Unit Maintenance plan must have been been set up. A Service Request Type of Complex Maintenance must have been setup.

To enter service requests:

1. Change responsibility to Oracle Customer Support. From the navigator, select Service Request > Create Service Requests. The Service Request window appears.

Service Request window

2. Create a Service Request of type Complex Maintenance.

Enter information in the fields for which you know the value. The following fields are mandatory:

- Type: Complex MRO Service Request Type, the LOV returns the Complex Maintenance Requirement Service Request Type.
- Instance: Install Base Instance number
- Status: Open
- Summary: This will appear as the description of the Unit Maintenance Plan

For information on other field descriptions, refer to the *Oracle Customer Support Implementation Guide*.

3. Save your work.

View Service Request - Service Request window

Service Request (41848 - testing cmro) - AmericaLos_Angeles

Log and Notes Profile...

Contact Type: [Dropdown] Customer Type: Organization Category: [Dropdown] Number: 41848

First: [Text] Name: Business World Item: MRO-74101054 Reported: 07-JAN-2004 01:01

Last: [Text] Number: 2813 Desc: Fan, Equipmei Type: Raj_CMRO_Type

Email: [Text] Account: 1608 Revision: [Dropdown] Status: Open

Number: [Text] Email: operations@orac Instance: 70213 Severity: Low

Relationship: [Text] Phone: 650-444-4444 Serial: 5932 Group: Eastern Regi

Phone: [Text] Phone Type: Fax Tag: [Text] Owner: Daugherty, M

Subject Workbench Contacts / A... Tasks Interactions Related Obj... Service History Charges Work Order Maintenance... Custom1 Custom2

Item: MRO-74101054.2 Fan, Equipment Cooling Item Rev: [Text]

Component: [Text] Component Rev: [Text]

Subcomponent: [Text] Subcomponent Rev: [Text]

Item Instance: 70213 Type: MRO_AIRCRAFT Status: CREATED

System: [Text] Order Num: [Text] Lot Num: [Text]

Covered Site: 2391 L St; San Jose; CA; US; 95106 Refresh Site (R) Sales PO Num: [Text]

Instance Configuration (M) Instance Detail (J) Register Instance (K)

Contracts

Contract	Service	Description	Status	Coverage	Warranty	Start Date	End Date
<input checked="" type="checkbox"/> 21093	WR23763	Extended Notebook PC S	Entered	Gold Coverage	60	24-DEC-2003	23-FEB-2005
<input type="checkbox"/>							

Entitled Contracts (X) All Contracts (Y) Get Contracts (G)

Note: A maintenance requirement with program type non-routine is created.

Associating Maintenance Requirements

Prerequisites

- ☐ The Service Request, with which you want to associate the maintenance requirements, must exist in the database and be applicable to the Install Base Instance. The maintenance requirement must have been defined in Fleet Maintenance Program.

To associate maintenance requirements:

1. Retrieve the Service Request Record, with which you want to associate the maintenance requirement.
2. In the Service Request window, select the Maintenance Requirement tab. The Maintenance Requirement tab is enabled only for service requests of type Complex MRO.

Maintenance Requirements tab - Service Requests window

The screenshot displays the 'Service Request (40048 - test cmro) - America/Los_Angeles' window. The 'Maintenance Requirements' tab is selected, showing a table with columns: Program Type, Title, Description, and Status. The table is currently empty. The form fields above the table are populated with the following information:

Contact Type	Customer Type	Category	Number
Customer	Organization		40048

First	Name	Item	Reported
MS.	Business World	MRO-C1600	06-JAN-2004 05:53

Last	Number	Desc	Type
Miller	2813	Airframe, Com	J_CMRO

Email	Account	Revision	Status
jack.wong@orac	1608		Open

Number	Email	Instance	Severity
3015	operations@orac	70211	Low

Relationship	Phone	Serial	Group
Employee Of	650 444 4444	101	

Phone	Phone Type	Tag	Owner
213.861065510139	Fax		Daugherty, M

The bottom of the window shows a tabbed interface with the following tabs: Subject, Workbench, Contacts / A..., Tasks, Interactions, Related Obj..., Service History, Charges, Work Order, Maintenance..., Custom1, and Custom2. The 'Maintenance...' tab is currently active.

3. Select the Maintenance Requirement to be associated by the following search criteria:
 - Program Type: CMRO Fleet Maintenance Program MR type
 - Title: CMRO Fleet Maintenance Program MR Title

Associate Maintenance Requirements - Service Request window

Service Request (40048 - test cmro) - AmericaLos_Angeles

Log and Notes Profile...

Contact Type: **Customer** Customer Type: **Organization** Category: **MRO-C1600** Number: **40048**

First: **MS.** Last: **Amy** Name: **Business World** Item: **MRO-C1600** Reported: **06 JAN 2004 05:53**

Email: **jack.wong@orac** Number: **2813** Desc: **Airframe, Com** Type: **J CMRO**

Relationship: **Employee Of** Account: **1608** Revision: **70211** Status: **Open**

Phone: **213-861065510139** Email: **operations@orac** Instance: **101** Severity: **Low**

Phone Type: **Fax** Serial: **101** Group: **Daugherty, M**

Subject Workbench Contacts / A... Tasks Interactions Related Obj... Service History Charges Work Order Maintenance Custom1 Custom2

Program Type	Title	Description	Status
Corrosion	Raj_MR_06_Jan2	Raj_MR_06_Jan2	
Letter Check	21-150-00	Replace cabin temperature sensor.	

Note: Description is the CMRO Fleet Maintenance Program MR Description, while Status refers to the status of the associated CMRO Fleet Maintenance Program MR. You can associate a maintenance requirement with a service request when it is in Open status.

Updating Service Requests

You can close a service request using the Service request window. The maintenance requirements associated with the service request must be in Accomplished or Cancelled status. The instance created in Unit Maintenance Plan is removed when the service request is closed or cancelled.

The following conditions apply to service requests:

- You cannot associate maintenance requirements with, and/or remove maintenance requirements from the service request after it has been closed.
- You can change the SR type from CMRO to non-CMRO irrespective of the status of the service request. All associated UMP records will be deleted in this case.
- You can change the SR type from non-CMRO to CMRO only if the service request is in the Open status. A new UMP record will be created for the service request.
- If a service request has associated maintenance requirements:
 - The Instance Number on the SR cannot be modified
 - The SR type cannot be changed from CMRO to non-CMRO
 - The SR cannot be closed unless all maintenance requirements are accomplished
- If a maintenance requirement associated with a service request, is terminated or revised in Fleet Maintenance Program, then the association is also nulled.

- You cannot associate duplicate maintenance requirements with a service request.

Managing Maintenance Routes

This chapter covers the following topics:

- Overview
- What is Route Management?
- Key Business Processes
- Creating Operation Records
- Creating Maintenance Route Records
- Creating an Item Composition List
- Editing Item Compositions
- Viewing Item Compositions
- Creating Disposition Lists
- Editing Disposition Lists
- Approving Disposition Lists
- Finding Operation Records
- Finding Maintenance Route Records
- Defining Reference Documents
- Defining Reference Documents for an Operation
- Defining Reference Documents for a Maintenance Route
- Defining Resource Requirements
- Defining Resource Requirements for an Operation
- Defining Resource Requirements for a Maintenance Route
- Defining Costing Parameters
- Defining Costing Parameter for an Operation Resource Requirement
- Defining Costing Parameter for a Route Resource Requirement
- Defining Material Requirements
- Defining Material Requirements for an Operation
- Defining Material Requirements for a Maintenance Route
- Associating Operations with a Maintenance Route

- Editing Operation Records
- Editing Maintenance Route Records
- Defining Component Locations in Fleet Units
- Associating Major Zones to Product Types
- Associating Sub Zones to Product Types
- Finding Oracle Complex Maintenance, Repair, and Overhaul Resources
- Creating Oracle Complex Maintenance, Repair, and Overhaul Resources
- Editing Oracle Complex Maintenance, Repair, and Overhaul Resources
- Associating BOM Resources

Overview

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

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

See:

- Creating Operation Records, page 3-4
- Creating Maintenance Route Records, page 3-9
- Creating an Item Composition List, page 3-14
- Editing Item Compositions, page 3-19
- Viewing Item Compositions, page 3-22
- Creating Disposition Lists, page 3-23
- Editing Disposition Lists, page 3-35
- Approving Disposition Lists, page 3-36
- Finding Operation Records, page 3-36
- Finding Maintenance Route Records, page 3-38
- Defining Reference Documents, page 3-41
- Defining Resource Requirements, page 3-47

- Defining Material Requirements, page 3-56
- Associating Operations with a Maintenance Route, page 3-62
- Editing Operation Records, page 3-65
- Editing Maintenance Route Records, page 3-67
- Associating Major Zones to Product Types, page 3-68
- Associating Sub Zones to Product Types, page 3-71
- Finding Oracle Complex Maintenance, Repair, and Overhaul Resources, page 3-72
- Creating Oracle Complex Maintenance, Repair, and Overhaul Resources, page 3-74
- Editing Oracle Complex Maintenance, Repair, and Overhaul Resources, page 3-77
- Associating BOM Resources, page 3-78

What is Route Management?

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

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

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

Key Business Processes

Route Management supports the following business processes:

Work Card or Route Authoring

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

Production Planning Information

Operational data is essential to grouping work cards and planning maintenance requirements. The more the information in the work card, the easier it is for the production planner to schedule and group work cards. Oracle Complex

Maintenance, Repair, and Overhaul allows organizations to define production planning information for an operation, including work zone, work center, operation category, operation type, process, and significant tasks.

Resource Requirements Information

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

Sign-Off Requirements

A work card changes to a work order when issued to Production. In the maintenance, repair, and overhaul industry, all work orders require to be signed off when completed, and also at certain step levels. Oracle Complex Maintenance, Repair, and Overhaul allows maintenance facilities to define sign-off requirements for each work card. You can set up all sign-off requirements at the time the work card or route is created. The actual sign-off, however, occurs on the work order and not on the work card.

Resource Collection Check Points

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

Composition Lists Creation

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

Disposition List Creation

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

Creating Operation Records

The Route Management module leads you through the steps to create an operation record. The initial step creates a record of the operation in the database. Subsequent steps define operation attributes like document references, labor, machine and tooling requirements, and material requirements. The following process initiates the creation of an operation. The Create Operation page permits saving the record in the database before proceeding to define the attributes in the following pages.

Prerequisites

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

To create operation records:

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

Search Operation page

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Operations Routes Major Zones Sub Zones Resource Item Compositions

Search Operation

Operation

Operation Type

Standard

Description

Process

Status

Go Clear

Operation Results

Create

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

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

Create Operation page

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Create Operation

* Indicates required field

Cancel

Revert

Apply

Operation Information

* Operation

.....

Revision1

Please tab out of this text box

* Description

* Standard

No

StatusDraft

Operation Type

Process

* Start Date

Quality Inspection Type

Remarks

Revision Note

4. Use the information in the following table to create an operation record.

Description of fields associated with operation records

Field	Description
Operation	This field contains the operation code, which describes the order of the operation within the route. If you do not know the value for a segment in the operation, enter the generic substitution metacharacter%, and click Go to launch the Select Operation page. This returns all operation records in the segment. You can then click on the pertinent record to return the value to the corresponding field. Repeat for each segment.
Operation Type	Refers to the kind of operation being performed. It is used to help organize operations. Operation type values are set up during the installation of Oracle Complex Maintenance, Repair, and Overhaul.
Process	Refers to the kind of maintenance process, such as cleaning or inspection. If you do not know the value, enter the generic substitution metacharacter%, and click Go to launch the Select Process page. This returns all process records in the database. Click on the pertinent record to return the value to the corresponding field. Process values are set up during the installation of Oracle Complex Maintenance, Repair, and Overhaul.
Revision Status	Indicates whether the operation record is current, or in the draft stage. The status types are system defined and are approval supported.
Start Date	Refers to the date of the first day of effectivity of this operation. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.
End Date	Refers to the date before which the operation is to be completed. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.
Description	Refers to a text description of the maintenance operation.
Remarks	Is a field where you can enter any additional information that the maintenance personnel should know regarding the operation.
Revision	Is a field that holds a document revision identifier.
Revision Note	Is a description of why the revision is made.
Quality Inspection Type	Is an association to a plan in Oracle Quality with quality elements for recording the necessary accomplishments and sign-off criteria of an operation. Quality inspection types are used at the time of maintenance completion and are set up as part of Oracle Quality allowing for precise control of job completion requirements and subsequent processes. For more information, see the Oracle Quality set up procedures.
Standard	Is a user selected yes or no value to catalog an operation record as a standard or non-standard job.
Approver Note	This indicates the reason for approval rejection.

Enter Operation Information - Create Operation page

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Create Operation

* Indicates required field

Cancel Revert Apply

Operation Information

* Operation 27.10.51.12.26.16.36 Revision 1

Please tab out of this text box

* Description Test operation

* Standard No Status Draft

Operation Type Inspection Process

* Start Date 09-AUG-2004

Quality Inspection Type

Remarks

Revision Note

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

Edit Operation page

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Edit Operation

Cancel Delete Approve Revert Apply

* Indicates required field

Operation Information

Revision 1
Operation X

* Description Test operation

* Standard No Status Draft

Operation Type Inspection Process

* Start Date 09-AUG-2004 End Date

Quality Inspection Type

Remarks

Revision Note

Cancel Delete Approve Revert Apply

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

View Operation Approval Status - Edit Operation page

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Edit Operation

Cancel Create Revision Terminate Revert Apply

* Indicates required field

Operation Information

Revision 5
Operation X
Description PaPaOil level generator checking at lower levelsPaOil level generator checking at lower PaOil level generator checking at lower PaOil level generator checking at lower levelsPaOil level genePaOil level gehjklkrator checking at lower levels
Standard No Status Complete
Operation Type Process
Start Date 15-JUL-2010 End Date
Quality Inspection Type
Remarks
Revision Note

Cancel Create Revision Terminate Revert Apply

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

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

Related Topics

Defining Reference Documents for an Operation, page 3-42

Defining Resource Requirements for an Operation, page 3-47

Defining Material Requirements for an Operation, page 3-57

Creating Maintenance Route Records

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

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

Prerequisites

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

These values must exist in the database.

To create a route record:

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

Create Route page

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Create Route

* Indicates required field

Route Information

* Route Number100

Revision1

* TitleRoute100-Test

Route Type

Item Type

Major Zone

Service Item

Accounting Class

System

* Start Date09-AUG-2004

Remarks

StatusDraft

Revision Notes

* Time Span10Hours

Process

Operator

Sub Zone

Quality Inspection Type

Task Template Group

Cancel

Revert

Apply

3. Use the information in the table below to create maintenance route records.

Description of fields associated with maintenance route records

Field	Description
Route Number	Is the user-assigned identifier for a maintenance route.
Title	Refers to the text description of the maintenance route.
Operator	Refers to the organization operating the concerned fleet. If you do not know the value, enter the generic substitution metacharacter%, and click Go to launch the Select Operator page. This page displays all operator records in the database. Select the pertinent record to return the value to the field on the Create Route page.
Time Span	Defines the total duration of a route in hours. It will be used when calculating the visit structure in the Visit Work Package module.
Item Type	Refers to the classification by category, of the electromechanical system. If you do not know the value, enter the generic substitution metacharacter%, and click Go to launch the Select Item Type page. This page displays all item type records in the database. Select the pertinent record to return the value to the field.
Major Zone and Sub Zone	Refers to the user-defined zones used as a method for identifying locations in the electromechanical system being maintained. If you do not know the value, enter the generic substitution metacharacter%, and click Go to launch the Select Major Zone (or, if applicable, Sub Zone) page. This page displays all records in the database. Select the pertinent record to return the value to the field.
Route Type	Refers to the type of route, for example, whether the route applies to an entire aircraft or to a subsystem in the aircraft. The route types are defined while installing Oracle Complex Maintenance, Repair, and Overhaul.
Process	Refers to the type of the maintenance route such as cleaning or inspection.
System	Refers to the electromechanical system on which you perform the maintenance activity. This system field is a segmented flexfield. The segmentation is defined by your organization at set up time. When setting up the system field, your organization may define valid values for the segments.
Quality Inspection Type	Is an association to a plan in Oracle Quality with quality elements for recording the necessary accomplishments and sign-off criteria of an operation. Quality collection plans are used at the time of maintenance completion and are set up as part of Oracle Quality allowing for precise control of job completion requirements and subsequent processes. For more information, see the Oracle Quality set up procedures.
Service Item	Refers to the service item of this route for outside processing. This service item is used in production planning when creating the outside processing work order and the purchase order. Service Items are defined by your organization when setting up the item master in Oracle's inventory module.

Field	Description
Accounting Class	The accounting class is used when the route becomes a WIP job in Production. It supports the costing procedure in on the shop floor. Accounting Classes are defined by your organization when setting up Oracle's WIP module.
Task Template Group	Refers to a template group used by Oracle Service. Task Template Groups need only be defined when your Organization uses Oracle's Preventive Maintenance Module. Task Template Groups are defined by your organization when setting up Oracle's Service and/or Field Service module.
Start Date	Refers to the date of the first day of effectivity of this maintenance route. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.
End Date	Refers to the date that represents the last day before which the maintenance route is to be completed. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.
Revision	Is a field that holds a user-assigned document revision identifier.
Status	Indicates whether the route record is completed, or in the draft stage.
Approver Note	This indicates the reason for approval rejection.

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

Update Route page

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Details

Reference Documents

Resource Requirements

Material Requirements

Associate Operations

Disposition Associations

Update Route

* Indicates required field

Cancel Delete Approve Revert Apply

Route Information

* Route Number **100**

Revision **1**

* Title Route100-Test

Route Type

Item Type

Major Zone

Service Item

Accounting Class

System

* Please tab out of this text box

* Start Date 09-AUG-2004

Remarks

Status **Draft**

Revision Notes

* Time Span 10 Hours

Process

Operator

Sub Zone

Quality Inspection Type

Task Template Group

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

View Route Approval Status - View Route page

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Details

Reference Documents

Resource Requirements

Material Requirements

Associate Operations

Disposition Associations

View Route Cancel

Route Information

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

Cancel

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

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

6. To define the attributes of the route such as reference documents, labor requirement, resource (material, tool, machine etc.) requirement, and associated operations, see:

Related Topics

Defining Reference Documents for a Route, page 3-45

Defining Resource Requirements for a Route, page 3-51

Defining Material Requirements for a Route, page 3-60

Creating an Item Composition List

A Composition List is a flat listing of the non tracked parts, items or item groups, that are contained in, and can be used in maintaining an install base tracked item. Composition lists are revision controlled, allowing for changes to be tracked and approved through an approval workflow, automatically replacing the older revision when approved. Composition lists serve as the base definition for a component or assembly enabling creation of disposition lists. Disposition Lists provide a listing of items, item groups, and positions which may be impacted during the performance of a route. Production planners refer to the composition list during the course of maintenance as a complete listing of the items contained in an item/assembly.

To create a composition list the user must select the item or the Master Configuration for which the composition is to be created. A hierarchy is then created using either position codes or items or a combination of both. After defining the composition list, you can create the details of the Disposition List by:

- Associating the tracked item with a route
- Associating a master configuration with a route. Compositions are inherited in Master Configuration through the tracked item's association with the item groups for each position and sub-configuration position.

Composition lists reduce the amount of time required to research, create, and maintain routes. When a composition is revised the changes automatically reflect in the routes disposition, thus keeping the route up-to-date.

See also:

Editing an Item Composition, page 3-19

Viewing Composition Lists, page 3-22

Prerequisites

- ☐ Tracked items, non-tracked items and item groups must have been defined. The Approval workflow must be set up.

To create a composition list for a tracked item:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Documents page appears.
2. Click the Route Management tab. The Search Operation page appears. Click the Item Compositions sub-tab. The Search Item Composition page appears.

Search Item Composition page




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Search Item Composition

Organization 
Item 
Status
Route 

Description
Revision 

Item Composition List

Select	Organization	Item	Description	Status	Edit	Remove
No records were found matching the given criteria..						

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Note: You can create Composition Lists from the Master Configuration module also. Navigate to the Master Configuration module, and select the Composition List sub-tab. The Search Item Composition page will appear.

3. Select Create. The Create Composition List page appears.

Create Composition List



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Create Composition List

* Organization 
* Item 
Status **Draft**

Name
Description

Item List

Remove	Item Group	Item	Description	Quantity	UOM
No records were found matching the given criteria..					
<input type="button" value="Add More Rows"/>					

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4. Select an Organization from the Organization LOV. Select an Item from the Item LOV.

Enter Header Information - Create Composition List

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Create Composition List

CancelApply

OrganizationV1

Item00PKBODY

StatusDraft

NameVision Operations

DescriptionBODY FOR PKCTO CELL

Item List

RemoveItem GroupItemDescriptionQuantityUOM

No records were found matching the given criteria..

Add More Rows

CancelApply

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The following table describes fields related to item compositions.

Description of fields associated with item composition

Field	Description
Organization	Refers to the Master Organization an Item belongs to. The organization will be automatically populated when a part number is defined. When creating a material requirement for an item group the Organization remains empty, since Alternate Item Groups are not Organization related in Master Configuration. Organizations are defined by your organization when setting up the item master.
Item	Install Base Tracked item for the header item and a non-Install Base Tracked item in the details.
Status	Indicates the status of the route.
Description	Refers to the description of the item group or the part number. The description is automatically populated when selecting an item group or part number.
Revision	Is a field that holds a user-assigned document revision identifier.
Item Group	Refers to the Alternate Item Group defined in Master Configuration. If your material requirement for this task is not a specific item type but a group of alternate items, you can define the complete alternate item group as a material requirement. This allows the system to plan for all the possible alternate items to perform the task. This definition specifically applies for a replacement material requirement. You can only define an item group or a part number for one and only one material requirement. If you do not know the value, enter a partial search string using the generic substitution metacharacter%, and click on the search icon to launch the alternate Item Group list of values. The alternate item groups are defined by your organization when implementing Master Configuration.
Quantity	It describes the quantity necessary for the item or item group and is not required for the item group association.
UOM	This describes the unit of measure for the item or item group and is not required for the item group association.

5. Click Add More Rows. You can add the following to the Composition List:
 - Non-Tracked Item Groups
 - Non-Tracked Items associated with at least one Inventory organization

Add Items/Item Groups - Create Composition List

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

Create Composition List

Cancel Apply

* Organization Name **Vision Operations**

* Item Description **BODY FOR PKCTO CELL**

Status **Draft**

Item List

Remove	Item Group	Item	Description	Quantity	UOM
	KMPG002		Non Tracked		
		00PKBAT	PK CTO B4		

Add More Rows

Cancel Apply

Note: You can copy composition details from one item composition into another Composition List when you have records existing in the database. In the Update Composition List page, select Copy Compositions. In the Search Item Composition page that appears, select the item composition, that you want to copy the details from.

- Specify the quantity and unit of measure for the non-tracked items. Click Apply. The Update Composition page appears, displaying the item composition details.

Update Composition List page

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

Confirmation • Item Composition for item (00PKBODY) is created. 2 Item(s) Created.

Update Composition List

Cancel Create New Revision Copy Composition Submit for Approval Apply

Organization **V1** Name **Vision Operations**

Item **00PKBODY** Description **BODY FOR PKCTO CELL**

Status **Draft**

Item List

Previous 1-2 of 2 Next

Remove	Item Group	Item	Description	Quantity	UOM
<input type="checkbox"/>		00PKBAT	PK CTO BAT OPTION CLASS	10	Ea
<input type="checkbox"/>	KMPG002		Non Tracked Items		

Add More Rows

Previous 1-2 of 2 Next

Cancel Create New Revision Copy Composition Submit for Approval Apply

7. Select Submit for Approval, to submit the item composition for approval. An approval workflow is implemented to allow the user to obtain approval from engineering, planning, materials, or other supervisory authorities. This ensures that the materials are properly planned and approved for use.

View Composition List page

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Confirmation • Item Composition has been submitted for approval.

[View Composition List](#)

Organization **V1** Name **Vision Operations**
 Item **00PKBODY** Description **BODY FOR PKCTO CELL**
 Status **Complete**

Item List

Previous 1-2 of 2 Next

Item Group	Item	Description	Quantity	UOM
	00PKBAT PK CTO BAT OPTION CLASS 10			Ea
KMPG002		Non Tracked Items		

Previous 1-2 of 2 Next

Cancel Create New Revision

Editing Item Compositions

Prerequisites

- ☐ The Item Composition that you want to edit, must exist in the database, and must be in draft status.

To edit item compositions:

1. Navigate to the Search Item Compositions page. For information, see Creating an Item Composition List, page 3-14
2. Search for the Item Composition that you want to edit. The results appear in the Item Composition List table.

View Item Composition List - Search Item Composition page

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

Search Item Composition

Organization

Item Description

Status

Route Revision

Item Composition List

Select Item Composition and ...

1-10 of 45

Select	Organization	Item	Description	Status	Edit	Remove
<input type="radio"/>	V1	00PKBODY	BODY FOR PKCTO CELL	Complete		
<input type="radio"/>	PM	11475M95P05	HPT BLADE	Complete		
<input type="radio"/>	PM	1319M11P04	FRONT ROTATING AIR SEAL	Complete		
<input type="radio"/>	PM	1319M11P04	FRONT ROTATING AIR SEAL	Draft		
<input type="radio"/>	PM	1319M11P06	FRONT ROTATING AIR SEAL	Complete		

3. Select the Item Composition, and click the corresponding Edit icon. The Update Composition List page appears.

Edit Information - Update Composition List page

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

Update Composition List

Organization **PM** Name **Vision Project Mfg**

Item **1319M11P04** Description **FRONT ROTATING AIR SEAL**

Status **Draft**

Item List

1-1 of 1

Remove	Item Group	Item	Description	Quantity	UOM
<input type="checkbox"/>	KMPG002	<input type="text"/>	Non Tracked Items	<input type="text"/>	<input type="text"/>

1-1 of 1

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4. To remove an item and/or item group from the composition list, select the Remove check box, and click Apply.
5. To add records, click Add More Rows. Enter information in the fields provided. Click Apply to save the changes.

Add Item Group to Existing Composition - Update Composition List page

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Confirmation • 1 Item(s) Created.

Update Composition List

Cancel Create New Revision Copy Composition Submit for Approval Apply

Organization **PM** Name **Vision Project Mfg**
 Item **1319M11P04** Description **FRONT ROTATING AIR SEAL**
 Status **Draft**

Item List

Previous 1-2 of 2 Next

Remove	Item Group	Item	Description	Quantity	UOM
<input type="checkbox"/>	MBPG004		Non Tracked Part Group		
<input type="checkbox"/>	KMPG002		Non Tracked Items		

Add More Rows

Previous 1-2 of 2 Next

Cancel Create New Revision Copy Composition Submit for Approval Apply

- To copy the item composition from an existing Composition List, select Copy Compositions. The Search Item Composition page appears. Search for, and select the Item Composition that you want to copy the composition list from. The View Composition list appears, displaying the item list for the selected composition.

Copy Composition List - View Composition List page

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View Composition List

Cancel Copy Composition

Organization **V1** Name **Vision Operations**
 Item **A10** Description **A10**
 Status **Complete**

Item List

Previous 1-4 of 4 Next

Select	Item Group	Item	Description	Quantity	UOM
<input type="checkbox"/>		15000 Mile Maint	15000 Mile Truck Maintenance	1	BO
<input type="checkbox"/>		777Test Item 1	Test Item 1	1	Ea
<input type="checkbox"/>		ACT_EAV1	Activity #1	1	Ea
<input type="checkbox"/>		10-40W Oil	10-40W Car / Truck Motor Oil	1	GAL

Previous 1-4 of 4 Next

Cancel Copy Composition

- Select the items that you want to include, and click Copy Compositions. The items are added to the item list of the Composition that you were editing.

8. Select Submit for Approval to initiate the approval workflow. The item composition is submitted for approval, and the View Composition List page is displayed.
9. Select Create New Revision to make changes to the item composition that you have defined. The Update Composition List page appears. Make the necessary changes, and click Apply. A new revision, once approved, replaces the existing revision as the active revision.

Create Revision - Update Composition List page

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Confirmation • New revision of the item composition successfully created.

Update Composition List

Cancel Create New Revision Copy Composition Submit for Approval Apply

Organization **PM** Name **Vision Project Mfg**
 Item **1319M11P04** Description **FRONT ROTATING AIR SEAL**
 Status **Draft**

Item List

Previous 1-2 of 2 Next

Remove	Item Group	Item	Description	Quantity	UOM
<input type="checkbox"/>	MBPG004		Non Tracked Part Group		
<input type="checkbox"/>	KMPG002		Non Tracked Items		

Add More Rows

Previous 1-2 of 2 Next

Cancel Create New Revision Copy Composition Submit for Approval Apply

Note: You can create revisions for all Item compositions in Complete status. The Create Revision button is also available in the results table in the Search Item composition list page. Disposition Lists, which have been created utilizing the Item Compositions, automatically inherit all revisions made to the item composition they are based on.

Viewing Item Compositions

Prerequisites

- ☐ The item composition record must exist in the database.

To view item compositions:

1. Navigate to the Search Item Compositions page. For information, see Creating an Item Composition List, page 3-14.
2. Search for the Composition list that you want to view the details of. The results appear in the Item Composition List table.
3. Select an Item and click the link in the corresponding Item column. The View Composition List page appears, displaying the list of non-tracked items and item groups.

View Composition List Details - View Composition List page

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View Composition List

Cancel

Organization **PM** Name **Vision Project Mfg**
Item **11475M95P05** Description **HPT BLADE**
Status **Complete**

Item List

Previous 1-3 of 3 Next

Item Group	Item	Description	Quantity	UOM
	13445272	Pump Warman 12/10EAH 1		BO
MBPG004		Non Tracked Part Group		
KMPG002		Non Tracked Items		

Previous 1-3 of 3 Next

Cancel

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- Optionally, you can view the item composition from the Master Configuration module. Under the Master Configuration tab, click the Item Composition subtab. The Search Item Composition page appears. Enter your search criteria and click Go. The Item Composition List table populates with the desired lists. You can view the associated disposition lists, create a revision for the composition list, or submit it for approval.

Creating Disposition Lists

Disposition lists are defined as a subset of a composition list or master configuration to compliment material requirements. A Disposition List is a list of the items, item groups, and positions, that may be impacted when a route is performed. A Route can be set up to contain multiple Disposition Lists. A disposition list can also be a superset if additional materials are defined for the item or configuration.

Disposition Lists are created though the association of an item or master configuration to a route.

Route - Item association: For a route and item association, you can choose the disposition items from the composition list of the associated item. Additionally you can pick items from the item master not related to the composition list. The item must be set up as a Tracked Item. For every item defined in the disposition list, you can assign a percentage value that indicates the likelihood of a replacement or tracked percentage of rework when this maintenance route is executed. The percentage figure helps the material planner to make an accurate planning decision. You can also select non-tracked items or item groups from the composition list. The percentage of rework cannot be defined for a non-tracked item.

Route - Master Configuration association: For a route and master configuration association, you can select the positions to associate, from the configuration. This position path can be revision specific or revision independent. You can also select the alternate item and it's composition items and item groups for a position. The association

is at position level instead of the item level, indicating that every alternate item is dispositioned the same way. You can also pick items from the item master not related to the composition list. You can then assign to each position, a percentage of rework and/or replacement. The association with a Master Configuration can be revision specific or independent.

A Disposition List is approved when the Route is approved.

Materials are forecast, planned, and scheduled based on the percentile of expected replacement and/or rework from the disposition list combined with the mandatory replacement items on the material requirements list. Only the items, item groups, or positions that are set as 100% replacement are auto-planned. Disposition lists provide the ability to create material requirements that are item or master configuration specific. Disposition lists are also used by maintenance or inspection personnel to set up items/parts to be dispositioned and to create material transactions. Maintenance or inspection personnel use the listing to disposition parts for rework; scrap; use as is; identify parts not received; identify as BFS (bad from stock), not applicable, return to vendor, return to customer, hold, or not removed.

Disposition lists are created and utilized differently based on the maintenance needs. Following are some examples:

- Component overhaul - For component overhaul, the disposition list is defined based on a route-item association.
- Assembly breakdown - For assembly breakdowns, such as module disassembly in an engine shop, the items to disposition are typically the sub-assembly modules. Thus, when defining the disposition list for an assembly breakdown, the route is associated with a master configuration. The highest assembly is associated with the route, and the sub-assembly positions are selected into the disposition list.
- Assembly piece part breakdown - Disposition lists for assembly piece part breakdown are based on both the route-item as well as route-master configuration association. When a master configuration has been associated, you can also define a disposition list, which not only uses the master configuration hierarchy but also the item composition. You can select positions, and also compositions of the items assigned to the various positions. You can include the position's path if the disposition only applies to the specific position.

Prerequisites

- ☐ The following must have been defined:
 - Tracked and Non-tracked items and item groups
 - Composition lists for all tracked items
 - Master Configurations and their position associations

To create disposition lists:

1. Select the route, for which you want to create the Disposition list for. Navigate to the Update Route page for the selected route.

Route Details - Update Route page

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Details

Reference Documents

Resource Requirements

Material Requirements

Associate Operations

Disposition Associations

Update Route

* Indicates required field

Cancel Delete Approve Revert Apply

Route Information

* Route Number **24-030-01-00**

Revision 2

* Title Left IDG Oil Level

Route Type Engine

Item Type MRO Aircraft

Major Zone Engine

Service Item

Accounting Class

System

* Please tab out of this text box

* Start Date 06-JAN-2004

Remarks Check left IDG oil level and service if necessary.

Status Draft

Revision Notes

* Time Span 1 Hours

Process

Operator

Sub Zone #1 Engine

Quality Inspection Type

Task Template Group

2. Select Disposition Associations from the side navigation menu. The Define Disposition Associations page appears.

Define Disposition Associations page

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Resource Requirements

Material Requirements

Associate Operations

Disposition Associations

Define Disposition Associations

Route Number **24-030-01-00**

Revision 2

Title Left IDG Oil Level

Status Draft

Revision Notes

Cancel Apply

Remove	Master Configuration	Revision	Organization code	Item	Description	Disposition Details
No records were found matching the given criteria.						
Add More Rows						

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3. Use the information in the following table to define disposition associations.

Description of fields related to disposition association

Field	Description
Route Number	Is the user-assigned identifier for a maintenance route.
Master Configuration	Name of the master configuration that you want to associate with the route. The items can be tracked or non-tracked.
Revision	Field contains a part revision identifier.
Organization Code	Refers to the code for the inventory organization.
Item	Non-tracked item.
Position Reference	Refers to the position to be dispositioned and can be at any level within the master configuration.
%Replace	Percent of replacement.
%Rework	Percent of rework.

Enter Details - Define Disposition Associations page

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Resource Requirements
Material Requirements
Associate Operations
Disposition Associations

Define Disposition Associations

Route Number **24-030-01-00** Status **Draft**
Revision **2** Revision Notes
Title **Left IDG Oil Level**

Cancel Apply

Remove	Master Configuration	Revision	Organization code	Item	Description	Disposition Details

Add More Rows

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To create a Route - Item association:

1. Select an organization from the organization list of values, using the search icon.
2. Select an item using the Item search icon. Click Apply.

Create Route - Item Association - Define Disposition Associations page

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Resource Requirements
Material Requirements
Associate Operations
Disposition Associations

Define Disposition Associations

Route Number **24-030-01-00** Status **Draft**
Revision **2** Revision Notes
Title **Left IDG Oil Level**

Previous 1-1 of 1 Next

Cancel Apply

Remove	Master Configuration	Revision	Organization code	Item	Description	Disposition Details
<input type="checkbox"/>			V1	00PKBODY	BODY FOR PKCTO CELL	

Add More Rows

Previous 1-1 of 1 Next

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- To view the disposition details, click the Disposition details icon. The Disposition List Details page appears.

Disposition List Details page

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Disposition Associations

Disposition List Details

Route Number **24-030-01-00** Status **Draft**
Revision **2** Revision Notes
Title **Left IDG Oil Level**

Organization code **V1** Description **BODY FOR PKCTO CELL**
Item **00PKBODY**

Cancel Apply Select from Composition

Material List from Composition

Remove	Item Group	Organization code	Item	Description	Quantity	UOM	%Replace	%Rework	Exclude
No records were found matching the given criteria..									

Add More Rows

Additional Materials

Remove	Item Group	Organization code	Item	Description	Quantity	UOM	%Replace	%Rework	Exclude
No records were found matching the given criteria..									

Add More Rows

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- To add the non-tracked items and/or item groups in the item composition, click Select from Composition. The Composition Selection page appears, displaying the composition list.

Composition Selection page

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Composition Selection

Route Number **24-030-01-00** Status **Draft**
Revision 2 Revision Notes
Title **Left IDG Oil Level**
Organization code **V1** Description **BODY FOR PKCTO CELL**
Item **00PKBODY**

Item Composition List

Previous 1-2 of 2 Next

Select	Item Group	Item	Description	Quantity	UOM
<input type="checkbox"/>		00PKBAT	PK CT0 BAT OPTION CLASS 10		Ea
<input type="checkbox"/>	KMPG002		Non Tracked Items		

Previous 1-2 of 2 Next

Cancel Select

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5. Select the items to include. The items are added to the Disposition list. The disposition list definition should not include the 100% replacement parts defined in the material requirements. If such an item is included, the disposition list definition will supercede the material requirements list on the route. The disposition list will contain the same item as a material requirement if it varies by the configuration or composition.

View Items Added to Disposition List - Disposition List Details page

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Disposition List Details

Route Number **24-030-01-00** Status **Draft**
Revision 2 Revision Notes
Title **Left IDG Oil Level**
Organization code **V1** Description **BODY FOR PKCTO CELL**
Item **00PKBODY**

Cancel Apply Select from

Material List from Composition

Remove	Item Group	Organization code	Item	Description	Quantity	UOM	%Replace	%Re
	KMPG002			Non Tracked It				
		V1	00PKBAT	PK CT0 BAT O	10	Each		

Add More Rows

Additional Materials

Remove	Item Group	Organization code	Item	Description	Quantity	UOM	%Replace	%Rework	Exclude
No records were found matching the given criteria..									

Add More Rows

6. Optionally, you can add one item or item group at a time. In the Disposition List Details page, choose the item/item-group using the corresponding list of values in the Material List from Composition table.
7. To remove an item or item group from the Disposition list, select the Remove check box, and click Apply. The item is not removed from the Item composition. You can include it again, by clicking Select from Composition, and then choosing the item from the Composition list.
8. Enter a Replace and/or Rework percentage. Items with 100% Replace or Rework percentage are automatically planned by the planning engine during material demand planning and scheduling. Items with lesser percentages can be manually planned and scheduled in the Scheduled Materials page in Long Term Planning. For details, see *Material Demand Planning and Scheduling, Oracle Complex Maintenance, Repair, and Overhaul User's Guide*.

Replace/Rework Percentage - Disposition List Details page

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Disposition List Details

Route Number **24-030-01-00** Status **Draft**
Revision **2** Revision Notes
Title **Left IDG Oil Level**
Organization code **V1** Description **BODY FOR PKCTO CELL**
Item **00PKBODY**

Cancel Apply Select from

Material List from Composition

Remove	Item Group	Organization code	Item	Description	Quantity	UOM	%Replace	%Re
<input type="checkbox"/>	KMPG002			Non Tracked lte	20	Each	20	
<input type="checkbox"/>		V1	00PKBAT	PK CTO BAT O	10	Each	30	

Add More Rows

Additional Materials

Remove	Item Group	Organization code	Item	Description	Quantity	UOM	%Replace	%Rework	Exclude
No records were found matching the given criteria..									

Add More Rows

9. Select the Exclude check box if you do not want these items to appear in the Production Disposition view when selecting items to disposition. For details on item disposition, see *Item Disposition, Oracle Complex Maintenance, Repair, and Overhaul User's Guide*.
10. Optionally, you can add additional items that may be required for, and will be impacted during the route execution. Click Add More Rows in the Additional Materials table. Choose the item group and/or item that you want to add.
11. Click Apply to save the record.

Save Record - Disposition List Details page

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Disposition List Details

Route Number **24-030-01-00** Status **Draft**
Revision **2** Revision Notes
Title **Left IDG Oil Level**

Organization code **V1** Description **BODY FOR PKCTO CELL**
Item **00PKBODY**

Cancel Apply Select from Com

Material List from Composition

Previous 1-2 of 2 Next

Remove	Item Group	Organization code	Item	Description	Quantity	UOM	%Replace	%Rework
<input type="checkbox"/>		V1	00PKBAT	PK CTO BAT OPTION CLASS	10	Each	30	
<input type="checkbox"/>	KMPG002			Non Tracked Items	20	Each	20	

Add More Rows

Previous 1-2 of 2 Next

Additional Materials

Remove	Item Group	Organization code	Item	Description	Quantity	UOM	%Replace	%Rework	Exclude
--------	------------	-------------------	------	-------------	----------	-----	----------	---------	---------

To create a Route - Master configuration association:

1. In the Disposition Association page, select the master configuration that you want to associate with the route. Optionally, you can choose a specific revision of this master configuration. Click Apply.

Route - Master Configuration Association - Define Disposition Associations page

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Define Disposition Associations

Route Number **24-030-01-00** Status **Draft**
Revision **2** Revision Notes
Title **Left IDG Oil Level**

Cancel Apply

Previous 1-1 of 1 Next

Remove	Master Configuration	Revision	Organization code	Item	Description	Disposition Details
<input type="checkbox"/>	737-800				Boeing Airframe	

Add More Rows

Previous 1-1 of 1 Next

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2. To view the disposition details, click the Disposition details icon. You can now add position references to the Disposition list.

View Disposition List Details - Disposition List Details page

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Disposition List Details

Route Number **24-030-01-00** Status **Draft**
Revision 2 Revision Notes
Title **Left IDG Oil Level**
Master Configuration **737-800** Revision
Description **Boeing Airframe**

Cancel Apply Select from Composition

Material List from Composition

Remove	Position Reference	Item Group	Organization code	Item	Description	Source Composition	Quantity	UOM	% Replace	% Rework	Exclude
No records were found matching the given criteria..											
Add More Rows											

Additional Materials

Remove	Item Group	Organization code	Item	Description	Quantity	UOM	% Replace	% Rework	Exclude
No records were found matching the given criteria..									
Add More Rows									

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- Click the Position Reference search icon to select the position references defined for the master configuration, which you associated with the route. The Search Master Configuration Revision page appears displaying all versions of the master configuration record. Optionally, you can enter a version number in the Revision field to select the position from a specific version of the master configuration.
- To select a position reference, click the Tree icon corresponding to the master configuration version. The Select Position Page appears, displaying the configuration tree.

Select Position page

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Select Position

Cancel

Name	Revision	Position Key	Position Reference	Version Specific
No records were found matching the given criteria..				

Cancel

Airframe
#1 Engine
Position 1
Position 2

5. Select a position in the configuration tree. The position reference details are displayed. You can select the position reference by clicking the applicable node in the configuration tree.
6. To make the position path revision specific, select Yes from the Version Specific drop-down menu. The position reference that is taken into account is thus based on the selected master configuration version.

Select Position Reference - Select Position page

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Airframe

#1 Engine

Position 1

Position 2

Select Position

Previous 1-1 of 1 Next

Name	Revision	Position Key	Position Reference	Version Specific
737-800 1	12124	Position 1		Yes

Previous 1-1 of 1 Next

Cancel

Apply

7. Click Apply. The Position reference is added to the Disposition list.

View Material List - Disposition List Details page

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Disposition List Details

Route Number 24-030-01-00

Revision 2

Title Left IDG Oil Level

Master Configuration 737-800

Description Boeing Airframe

Status Draft

Revision Notes

Revision

Material List from Composition

Remove	Position Reference	Item Group	Organization code	Item	Description	Source Composition	Quantity	U
	Position 1							

Add More Rows

Additional Materials

8. Enter a Replace and Rework percentage. Enter the Quantity and UOM. Click Apply.

Add Position Reference - Disposition List Details page

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Disposition List Details

Route Number **24-030-01-00** Status **Draft**
Revision **2** Revision Notes
Title **Left IDG Oil Level**
Master Configuration **737-800** Revision
Description **Boeing Airframe**

Cancel Apply Select from CC

Material List from Composition

Previous 1-1 of 1 Next

Remove	Position Reference	Item Group	Organization code	Item	Description	Source Composition	Quantity	UOM	%Replace	%Rework
<input type="checkbox"/>	49-26-93 APU						5	Each	35	20

Add More Rows

Previous 1-1 of 1 Next

Additional Materials

Remove	Item Group	Organization code	Item	Description	Quantity	UOM	%Replace	%Rework	Exclude
No records were found matching the given criteria..									

Add More Rows

Disposition lists, created for part piece assembly breakdown, are based on a route - master configuration association. These lists also require non-tracked parts listing, which is derived from the composition of the item assigned to a position reference.

Note: If a composition or master configuration is revised removing positions, items, or item groups, and a disposition list has been created which utilizes them, the disposition list will automatically reflect the changes.

To create disposition lists, with both configuration and composition selection:

1. Select a route, and associate a configuration with it.
2. Select the position references to add to the disposition list.
3. To choose items from item compositions, click Select from Compositions. The Composition Selection page appears.

Select item Composition Selection page

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Composition Selection

Route Number **KM-UMP-RM001** Status **Draft**
Revision **3** Revision Notes
Title **KM-UMP-RM001**
Master Configuration **AHLUMPMC01** Revision
Description **MC for Axle**

Select Position Path and Item

* Position
* Item
Organization

Item Composition List

☐ Include Position Path in Disposition

Select	Item Group	Item	Description	Quantity	UOM
No records were found matching the given criteria..					

Document Index | Route Management | Fleet Maintenance

4. Select the Position and Item from the list of values. Click Go. The list of non-tracked items and item groups belonging to the selected item's composition are displayed.

Select Position Path and Item - Composition Selection page

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Composition Selection

Route Number **KM-UMP-RM001** Status **Draft**
Revision **3** Revision Notes
Title **KM-UMP-RM001**
Master Configuration **AHLUMPMC01** Revision
Description **MC for Axle**

Select Position Path and Item

* Position
* Item
Organization **PM**

Item Composition List

☐ Include Position Path in Disposition

Previous 1-4 of 4 Next

Select	Item Group	Item	Description	Quantity	UOM
<input type="checkbox"/>	Radhika NT Alternate Group		Radhika NT Alternate Group		
<input type="checkbox"/>	KMPG002		Non Tracked Items		

5. Select the items to include in the Disposition list.
6. Optionally, select the Include Position Path in Disposition check box to add the position, in addition to the selected composition details, to the disposition list.
7. Click Apply. The Disposition List Details page appears, displaying the item and position details.

View Disposition List - Disposition List Details page

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Disposition List Details

Route Number **KM-UMP-RM001** Status **Draft**
Revision **3** Revision Notes
Title **KM-UMP-RM001**
Master Configuration **AHLUMPMC01** Revision
Description **MC for Axle**

Material List from Composition

Remove	Position Reference	Item Group	Organization code	Item	Description	Source Composition	Quantity	UOM
	#2 Engine							
		KMPG002			Non Tracked It	#2 Engine:(AHL		
		Radhika NT Alt			Radhika NT Alt	#2 Engine:(AHL		

Add More Rows

Additional Materials

Remove	Item Group	Organization code	Item	Description	Quantity	UOM	%Replace	%Rework	Exclude
No records were found matching the given criteria.									

Add More Rows

Note: If a item or item group is removed from a composition, it will be automatically removed from the disposition list.

Disposition Planning

The disposition listing and rework and replace percentages enable the maintenance planner to schedule materials when scheduling a maintenance visit. The item's from a route's material requirements and from the disposition list, which have a 100% replacement percentage, are planned by default through Advanced Supply Chain Planning. The non-100% items from a route's disposition lists are scheduled by the planner from the Schedule Materials user interface in Long Term Planning.

If the percentile is on the position code then the planning engine considers the requirement based on the first highest priority item for the position alternates.

Related Topics

Editing Disposition Lists, page 3-35

Approving Disposition Lists, page 3-36

Editing Disposition Lists

Prerequisites

- ☐ The Disposition List record that you want to edit, must exist in the database.

To edit disposition lists:

1. Navigate to the Update Route page, for the Route whose associated Disposition list you want to edit. For information, see Editing Maintenance Route Records., page 3-67

2. Select Disposition Associations from the side navigation menu. The Define Disposition Association page appears.
3. You can add or remove items from the Disposition List. For information, see Creating Disposition Lists, page 3-23. Make the required changes and click Apply.

Approving Disposition Lists

A Disposition list is approved when the route it is associated with, is approved. For information on route approval, see Creating Maintenance Route Records, page 3-9. When the route is approved, you can view the Disposition association. From the Update Route page, select Disposition Associations. The View Disposition Associations page appears displaying the disposition list details.

Note: Disposition lists, that apply to the master configuration and item being planned, are provided to planning, when the route for a maintenance requirement is being planned. Planners use the replace and rework percentiles to determine which materials to plan. The percentile of replacement combined with the actual item instance helps in planning the expected material use. The percentile of rework combined with the items average duration is used to forecast the need for a replacement part.

Finding Operation Records

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

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

Prerequisites

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

To find an operation record:

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

Find Operation Record - Search Operation page

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Search Operation

Operation

Operation Type

Standard

Description

Go Clear

Process

Status

Operation Results

Create

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

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- Enter the information in the fields for which you know the value. For field descriptions, see Description of fields associated with operation records, page 3-7.
- Click Go. The lower half of the screen displays the Operation List of all matching records in the database.

Operation Search Results - Search Operation Page

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Search Operation

Operation

Operation Type

Standard

Description

Go Clear

Process

Status

Operation Results

Create

Select Operation and...

Previous 1-10 of 89 Next

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

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

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

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

Edit Operation Information - Edit Operation page

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Edit Operation

Cancel Delete Approve Revert Apply

* Indicates required field

Operation Information

Revision 1
Operation X

* Description Test operation

* Standard No Status Draft

Operation Type Inspection Process

* Start Date 15-AUG-2003 End Date

Quality Inspection Type

Remarks

Revision Note

Cancel Delete Approve Revert Apply

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

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

Finding Maintenance Route Records

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

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

Prerequisites

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

To find maintenance route records:

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

Find Route Results - Search Route page

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Search Route

Route Number Status

Title

Route Type

Item Type

Major Zone

Organization

Process

Operator

Sub Zone

Item

Route Results

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

3. Enter the information in the fields for which you know the value. For field descriptions, see Description of fields associated with maintenance route records, page 3-11.
4. Click Go. The lower half of the screen displays the Route List of all matching records in the database.

Route Search Results - Search Route page

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Search Route

Route Number Status

Title

Route Type Process

Item Type Operator

Major Zone Sub Zone

Organization Item

Route Results

Select Route and...

Previous 1-10 of 72 Next

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

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

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

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

Edit Route Record - Update Route page

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Update Route

* Indicates required field

Route Information

* Route Number 1

Revision 1

* Title

Route Type

Item Type

Major Zone

Service Item

Accounting Class

System
 * Please tab out of this text box

* Start Date

Remarks

Status **Draft**

Revision Notes

* Time Span **Hours**

Process

Operator

Sub Zone

Quality Inspection Type

Task Template Group

Details

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

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

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

Search Maintenance Requirements page

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Search Maintenance Requirements

Title

Originating Document

Program Type

Category

Associated Item

Revision

Status

Parent Title

Description

Route Number 00-RM-00

Maintenance Requirements Results

1-1 of 1

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

1-1 of 1

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Defining Reference Documents

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

Related Topics

Defining Reference Documents for an Operation, page 3-42

Defining Reference Documents for a Maintenance Route, page 3-45

Defining Reference Documents for an Operation

Prerequisites

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

To define reference documents for an operation:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.
2. Select the Route Management tab. The Search Operation page appears. Click the Create button to launch the Create Operation page, or search for an existing operation from the search operation page.
3. If you are creating a new operation, enter the information in the fields provided. Information in fields marked with asterisk is mandatory. (see Description of fields associated with operation records, page 3-7).
4. Click Apply, and the operation is added to the database. The Edit Operation page appears.
5. If you are associating documents to an existing operation, find that operation with the search, and click the corresponding link in the search result list to navigate to the edit operation page.

View Operation Information - Edit Operation page

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Edit Operation

Cancel Create Revision Terminate Revert Apply

* Indicates required field

Operation Information

Revision	1
Operation	X
Description	Rudder Aft Quadrant Detail Visual Inspection
Standard	Yes
Status	Complete
Operation Type	Inspection
Process	
Start Date	06-NOV-2002
End Date	
Quality Inspection Type	
Remarks	
Revision Note	

Cancel Create Revision Terminate Revert Apply

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6. Click Reference Documents on the side navigation menu to launch the Attach Reference Document page.

Attach Reference Documents page

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Attach Reference Documents

Operation **X**

Revision **1**

Title **Ada testing**

Status **Draft**
















Revision Notes

Standard **No**

Reference Documents List

Cancel

Rev

Remove	Doc Number	Type	Title	Revision	Chapter	Section	Subject	Page	Figure	Not
	MBAh1019	 Aircraft		1						
	000-BBHAT	 Locomotive	Bhat's	\$#@!						
										
										
										

Add More Rows

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Use the information in the following table to define a reference document.

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Description of fields associated with reference documents

Field	Description
Document Number	Contains a unique identifier, generated by the organization to identify a maintenance document. If you do not know the document number, enter the generic substitution metacharacter% in the field, and click Go to launch the Select Doc Number page that displays all the document references in the database.
Type	Represents the major topic such as powerplant, fleet unit, and ground support equipment that is described by the document in question. This field value is returned when you enter the Document Number.
Title	Refers to the title of the maintenance document. This field value returns when you enter the Document Number.
Revision	Is a field that holds a user-assigned document revision identifier.
Chapter	Refers to a specific chapter in the associated document. The value is defined by the user when the association is created.
Section	Refers to a specific section in the associated document. The value is defined by the user when the association is created.
Subject	Refers to a specific subject in the associated document. The value is defined by the user when the association is created.
Page	Refers to a specific page in the associated document. The value is defined by the user when the association is created.
Figure	Refers to a specific figure in the associated document. The value is defined by the user when the association is created.
Note	Refers to a specific note in the associated document. The value is defined by the user when the association is created.

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

Add Document Reference to Operation Record - Attach Reference Documents page

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Details

Reference Documents

Resource Requirements

Material Requirements

Attach Reference Documents

Operation X
Revision 1
Title Ada testing

Status Draft
Revision Notes
Standard No

Reference Documents List

Cancel Revert Apply

Previous 1-2 of 2 Next

Remove	Doc Number	Type	Title	Revision	Chapter	Section	Subject	Page	Figure	Note	Use Latest
<input type="checkbox"/>	MBAhID19	Aircraft		1							No
<input type="checkbox"/>	000-BBHAT	Locomotive Bhat's	\$#&@								No

Add More Rows

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

Defining Reference Documents for a Maintenance Route

Prerequisites

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

To define reference documents for a maintenance route:

- From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.
- Select the Route Management tab and then select the Route secondary tab. The Search Route page appears. Click the Create button to launch the Create Route page, or search for an existing route from the search route page.
- If you are creating a new route, enter the information in the fields provided. Information in fields marked with asterisk is mandatory (see Description of fields associated with maintenance route records, page 3-11).
- Click Apply, and the route is added to the database. The Update Route page appears.
- If associating documents to an existing route, search for the route, and click the Route link to navigate to the Update Route page. Click Reference Document on the side navigation menu to launch the Attach Reference Document page.

Define Reference Documents for a Route - Attach Reference Documents page

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Reference Documents

Resource Requirements

Material Requirements

Associate Operations

Disposition Associations

Attach Reference Documents

Route Number **1222222** Status **Draft**
Revision **1** Revision Notes
Title **test**

Reference Documents List

Cancel Rev

Remove	Doc Number	Type	Title	Revision	Chapter	Section	Subject	Page	Figure	No

Add More Rows

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- Enter the information in the fields provided. For field descriptions, see Description of fields associated with reference documents, page 3-44.

Enter Document References - Attach Reference Documents page

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Reference Documents

Resource Requirements

Material Requirements

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Attach Reference Documents

Route Number **1222222** Status **Draft**
Revision **1** Revision Notes
Title **test**

Reference Documents List

Cancel Rev

Remove	Doc Number	Type	Title	Revision	Chapter	Section	Subject	Page	Figure	Note
	MBAH019		Aircraft	test						
	000-BBHAT		Locomotive	Bhat's	Rev2					

Add More Rows

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

View Attached Documents - Attach Reference Documents page

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Details

Reference Documents

Resource Requirements

Material Requirements

Associate Operations

Disposition Associations

Attach Reference Documents

Route Number **122222** Status **Draft**
Revision **1** Revision Notes
Title **test**

Reference Documents List

Cancel Revert Apply

Previous 1-2 of 2 Next

Remove	Doc Number	Type	Title	Revision	Chapter	Section	Subject	Page	Figure	Note	Use Latest
<input type="checkbox"/>	MBAH019	Aircraft	test								No
<input type="checkbox"/>	000-BBHAT	Locomotive Bhat's	Rev2								No

Add More Rows

Previous 1-2 of 2 Next

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Program Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

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

Defining Resource Requirements

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

Related Topics

Defining Resource Requirements for an Operation, page 3-47

Defining Resource Requirements for a Maintenance Route, page 3-51

Defining Resource Requirements for an Operation

Prerequisites

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

To define resource requirements for an operation:

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

- 2. Select the Route Management tab to bring up the Search Operation page. Click the Create button to launch the Create Operation page, or search for an existing operation from the search operation page.
- 3. If you are creating a new operation, enter the information in the fields provided. Information in fields marked with asterisk is mandatory (see Description of fields associated with operation records, page 3-7). Click Apply to add the operation to the database. The Edit Operation page appears.
- 4. If defining resources for an existing operation, search for the operation, and click the corresponding link in the search result list to navigate to the Edit Operation page.
- 5. Click the Resource Requirements link in the side navigation menu. The Define Resource Requirements page appears. Click Add More Rows.

Define Resource Requirements page

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Define Resource Requirements

Operation 12.31.06.13.14.00

Status Draft

Revision 1

Revision Notes Prithwi Test 1.1

Title Prithwi Test 1

Standard No

Resources List

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Cancel Revert Apply

Remove	Resource Type	Resource	Description	Quantity	Duration	Total Duration	Costing Parameters	Define Alternate Resources
<input type="checkbox"/>	Machine	MROM2	Machine Resource Type 2	45	1	45		
<input type="checkbox"/>	Person	MROAV	Avionics Certified Person	3	45	135		

Add More Rows

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- 6. Use the information in the following table to enter resource requirements.

Description of fields in the Resource Requirement page

Field	Description
Resource Type	Refers to the type of resource requirement. If you do not know the value, enter a partial search string using the generic substitution metacharacter%, and click on the search icon to launch the resource type list of values. The resource types are system seeded, defined at installation of Oracle Bill of Materials.
Primary Resource	Refers to the resource required to perform the route or operation. If you do not know the value, enter a partial search string using the generic substitution metacharacter%, and click on the search icon to launch the resource list of values. The resources are set up by your organization at implementation time.
Quantity	Refers to the number of resources required to perform the route or operation.
Duration	Refers to number of hours required of each resource to perform the route or operation.
Costing Parameters	Costing parameters are used for calculating job costs during execution of the route or operation on the shop floor. The costing parameter values are defined when implementing Oracle's Work in Process (WIP) and Costing module.
Alternate Resources	Resources that the user can select as an alternative to the primary resource defined.
Total Duration	If more than one resource unit is required, the total duration represents the sum of all the required durations for each unit represented in the resource requirement's quantity field.

Enter Resource Information - Define Resource Requirements page

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Define Resource Requirements

Operation 12.31.06.13.14.00
Revision 1
Title Prithwi Test 1

Status Draft
Revision Notes Prithwi Test 1-1
Standard No

Resources List

Previous 1-2 of 2 Next

Remove	Resource Type	Resource	Description	Quantity	Duration	Total Duration	Costing Parameters	Define Alternate Resources
<input type="checkbox"/>	Machine	MROM2	Machine Resource Type 2	45	1	45		
<input type="checkbox"/>	Person	MROAV	Avionics Certified Person	3	45	135		
<input type="checkbox"/>	Person	MROSM	Sheet Metal Certified	10	30			
<input type="checkbox"/>								
<input type="checkbox"/>								

Add More Rows

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

View Resources List - Define Resource Requirements page

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Title Prithwi Test 1

Status Draft
Revision Notes Prithwi Test 1.1
Standard No

Resources List

Previous 1-3 of 3 Next

Remove	Resource Type	Resource	Description	Quantity	Duration	Total Duration	Costing Parameters	Define Alternate Resources
<input type="checkbox"/>	Machine	MROM2	Machine Resource Type 2	45	1	45		
<input type="checkbox"/>	Person	MROAV	Avionics Certified Person	3	45	135		
<input type="checkbox"/>	Person	MROSM	Sheet Metal Certified Person	10	30	300		

Add More Rows

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- Click on the Costing Parameter Icon to specify Costing Parameters for this resource requirement. The Update Costing Parameters page appears. See Defining Costing Parameters, page 3-52.

Update Costing Parameters page

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Update Costing Parameters

Operation 12.31.06.13.14.00
Revision 1
Title Prithwi Test 1

Status Draft
Revision Notes Prithwi Test 1.1
Standard No

Resource Type Person
Resource MROSM

Quantity 10
Duration 30

Costing Parameters

Cost Basis Scheduled

Autocharge Type Standard Rate

Cancel Revert Apply

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

Defining Resource Requirements for a Maintenance Route

Prerequisites

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

To define resource requirements for a maintenance route:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.
2. Select the Route Management tab then click the Route secondary tab to bring up the Search Route page. Click the Create button to launch the Create Route page, or search for an existing route from the search route page.
3. If you are creating a new route, enter the information in the fields provided. Information in fields marked with asterisk is mandatory (see Description of fields associated with maintenance route records, page 3-11). Click Apply to add the operation to the database. The Update Route page appears.
4. If you are defining resources for an existing route, search for the route, and click on the corresponding Route link in the search result list to navigate to the Update Route page.

Route Information - Update Route page

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Update Route

* Indicates required field

Cancel Delete Approve Revert Apply

Route Information

* Route Number 122222

Revision 1

* Title test

Route Type

Item Type

Major Zone

Service Item

Accounting Class

System * Communication Gyroscope GP

* Please tab out of this text box

* Start Date 30-APR-2004

Remarks

Status Draft

Revision Notes

* Time Span 20 Hours

Process

Operator

Sub Zone

Quality Inspection Type

Task Template Group

5. Click the Resource Requirements link in the side navigation menu. The Define Resource Requirement page appears.
6. Click Add More Rows to enter resource requirements. Enter the information in the fields provided. For field descriptions, see Description of fields associated with

resource requirements, page 3-49. Click Apply to add the resource requirement information to the operation record.

Define Resource Requirements for a Route - Define Resource Requirements page

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Define Resource Requirements

Route Number 1222222
Revision 1
Title test

Status Draft
Revision Notes

Resources List

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Remove

Resource Type

Resource

Description

Quantity

Duration

Costing Parameters

Define Alternate Resources

☐

Machine

MROM1

Machine Resource Type 1

5

10

Add More Rows

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- 7. Click Apply to add the resource requirement information to the operation record.
- 8. Click on the Costing Parameter Icon to specify Costing Parameters for this resource requirement. See Defining Costing Parameters, page 3-52.
- 9. To remove a labor requirement associated to the operation, click the remove icon on the pertinent record in the resource list and then click Apply.

Defining Costing Parameters

Oracle Complex Maintenance, Repair, and Overhaul allows you to define the costing parameters for resource requirements. These parameters are used for calculating job costs during execution of the route or operation on the shop floor. The costing parameter values are defined when implementing Oracle’s Work in Process (WIP) and Costing module. Definition of the costing parameters at the route or operation level is optional. Should you choose not to define any parameter values at that level when you create a job in WIP for this Route/Operation, the system selects a default from the Bill of Materials resources connected to the Oracle Complex Maintenance, Repair, and Overhaul Resource.

Related Topics

- Defining Costing Parameters for an Operation Resource Requirement, page 3-53
- Defining Costing Parameters for a Route Resource Requirement, page 3-55

Defining Costing Parameter for an Operation Resource Requirement

Prerequisites

- ☐ The operation record and the material requirements for which you want to define costing parameters must exist in the database. The costing parameters must exist in the database.

To define the costing parameters for a requirement on an operation:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.
2. Select the Route Management tab to bring up the Search Operation page. Click the Create button to launch the Create Operation page, or search for an existing operation from the search operation page.
3. If you are creating a new operation, enter the information in the fields provided. Information in fields marked with asterisk is mandatory (see Fields Associated with Operation Records, page 3-7).
4. Click Apply to add the operation to the database. The Edit Operation page appears.
5. If you are defining parameters for an existing operation, search for the operation, and click the corresponding link in the search result list to navigate to the Edit Operation page.
6. Click on Resource Requirements in the side navigation menu to navigate to the Resource Requirements page.
7. Enter the information in the fields provided. For field descriptions, see Fields on the Resource Requirement Page, page 3-49.
8. Click Apply to add the resource requirement information to the operation record.
9. Click on the Costing Parameters icon in the resource requirements list to navigate to the Update Costing Parameters page.

Define Costing Parameters - Update Costing Parameters page

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Update Costing Parameters

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

Resource Type **Machine** Quantity **10**
Resource **Drills** Duration **1**

Costing Parameters

Cost Basis Scheduled
Autocharge Type Standard Rate

Cancel Revert Apply

Cancel Revert Apply

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10. Enter the information in the fields provided. For field descriptions, see Fields on the Costing Parameter Page, page 3-56.
11. Click Apply to save your costing parameter definition.

Enter Costing Parameters - Update Costing Parameters page

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Update Costing Parameters

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

Resource Type **Machine** Quantity **10**
Resource **Drills** Duration **1**

Costing Parameters

Cost Basis Scheduled
Autocharge Type Standard Rate

Cancel Revert Apply

Cancel Revert Apply

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12. To remove Costing Parameters, select the null value from the pull down list of each field you want to remove and then click Apply.

Defining Costing Parameter for a Route Resource Requirement

Prerequisites

- ☐ The Route record and the material requirements for which you want to define costing parameters must exist in the database. The Costing Parameters must exist in the database.

To define costing parameters for a resource requirements on a route:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.
2. Select the Route Management tab then click the Route secondary tab to bring up the Search Route page. Click the Create button to launch the Create Route page, or search for an existing route from the search route page.
3. If you are creating a new route, enter the information in the fields provided. Information in fields marked with asterisk is mandatory (see Description of fields associated with maintenance route records, page 3-11). Click Apply to add the route to the database. The Update Route page appears.
4. If you are defining parameters for an existing route, search for the route, and click on the Route Number link in the search result list to navigate to the Update Route page.
5. Click on Resource Requirements in the side navigation menu to navigate to the Resource Requirements page.
6. Enter the information in the fields provided. For information, see Description of fields associated with resource requirements, page 3-49.
7. Click Apply to add the resource requirement information to the Route record
8. Click on the Costing Parameters icon in the resource requirements list to navigate to the Update Costing parameters page.

Define Costing Parameters for a Route Resource Requirement - Update Costing Parameters page

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Update Costing Parameters

Route Number **24-030-01-00** Status **Draft**
Revision **2** Revision Notes
Title **Left IDG Oil Level**

Resource Type **Machine** Quantity **1**
Resource **MROM1** Duration **1**

Costing Parameters

Cost Basis Scheduled
Autocharge Type Standard Rate

Cancel Revert Apply

Cancel Revert Apply

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- Use the information in the following table to enter costing details.

Description of fields in the Costing Parameters page

Field	Description
Cost Basis	Refers to the Cost Basis ID. The value is picked from a pull down list. The valid cost basis id's are defined upon implementation of the Bill of Materials Resources.
Scheduled	Refers to the Schedule Type ID. The value is picked from a pull down list. The valid schedule types are defined upon implementation of the Bill of Materials.
Autocharge Type	Refers to the Autocharge Type. The value is picked from a pull down list. The valid autocharge types are defined upon implementation of the Bill of Materials Resources.
Standard Rate	Refers to the application of a Standard Rate. The value is picked from a pull down list and can be either Yes or No.

- Click Apply to save your costing parameter definition.
- To remove Costing Parameters, select the null value from the pull down list of each field you want to remove and then click Apply.

Defining Material Requirements

Oracle Complex Maintenance, Repair, and Overhaul allows you to compile material requirements related to a maintenance task. This information is necessary for pre-planning activities.

Related Topics

Defining Material Requirements for an Operation, page 3-57

Defining Material Requirements for a Maintenance Route , page 3-60

Defining Material Requirements for an Operation

Prerequisites

- ❑ The operation record for which you want to define resource requirements should exist in the database. The Material required to carry out the operation must exist in the database.

To define machine requirements for an operation:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.
2. Select the Route Management tab to bring up the Search Operation page. Click the Create button to launch the Create Operation page, or search for an existing operation from the search operation page.
3. If you are creating a new operation, enter the information in the fields provided. Information in fields marked with asterisk is mandatory (see Description of fields associated with operation records, page 3-7). Click Apply to add the operation to the database. The Edit Operation page appears.
4. If defining material requirements for an existing operation, search for the operation and click on the hyper linked record in the search result list to navigate to the Edit Operation page.

View Operation Details - Edit Operation page

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Edit Operation

* Indicates required field

Operation Information

Revision 1
Operation X

* Description 30.10.52.12.26.16.RTY

* Standard No Status Draft

Operation Type System Check Process

* Start Date 04-FEB-2004 End Date

Quality Inspection Type

Remarks

Revision Note

Cancel Delete Approve Revert Apply

Cancel Delete Approve Revert Apply

5. Click the Material Requirements link in the side navigation menu. The Define Material Requirement page appears.

Define Material Requirements page

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Define Material Requirements

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

Materials List

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

Remove	Item Group	Item	Organization	Description	Quantity	UOM
No records were found matching the given criteria.						
Add More Rows						

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6. Click Add More Rows to enter material requirements. Use the information in the following table to enter material requirements.

Description of fields in the Material requirement page

Field	Description
Item Group	Refers to the Alternate Item Group defined in Master Configuration. If your material requirement for this task is not a specific item type but a group of alternate items, you can define the complete alternate item group as a material requirement. This allows the system to plan for all the possible alternate items to perform the task. This definition specifically applies for a replacement material requirement. You can only define an item group or a part number for one and only one material requirement. If you do not know the value, enter a partial search string using the generic substitution metacharacter%, and click on the search icon to launch the alternate Item Group list of values. The alternate item groups are defined by your organization when implementing Master Configuration.
Part Number	Refers to an item number that is required to perform the task. This definition supports the set up of consumable requirements to perform the task. You can only define an item group or a part number for one material requirement but not both. If you do not know the value, enter a partial search string using the generic substitution metacharacter%, and click on the search icon to launch the part number list of values. Parts are defined by your organization when setting up the item master. Only the eAM enabled inventory items are displayed in the list of values.
Description	Refers to the description of the item group or the part number. The description is automatically populated when selecting an item group or part number.
Quantity	Refers to the number of parts required to perform the task.
UOM	Refers to the Unit of Measure of the quantity required to perform the task.

Enter Material Requirements - Define Material Requirements page

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Define Material Requirements

Operation X
Revision 1
Title 30.10.52.12.26.16.RTY

Status Draft
Revision Notes
Standard No

Materials List

Cancel Revert Apply

Remove	Item Group	Item	Organization	Description	Quantity	UOM
		03 18 2004 V 11	Vision Operatio	03 18 2004 V 100	10	Dozen

Add More Rows

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- Click Apply to add the material requirement information to the operation record.

View Material List - Define Material Requirements page

- To remove a material requirement associated to the operation, click the remove icon on the pertinent record in the resource list and then click Apply.

Defining Material Requirements for a Maintenance Route

Prerequisites

- ☐ The maintenance route record for which you want to define material requirements must exist in the database. The Item Type and Part Number values should exist in the database.

To define material requirements for a maintenance route:

- From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button. The Search Maintenance Requirements page of Fleet Maintenance Program appears.
- Select the Route Management tab then click the Route secondary tab to bring up the Search Route page. Click the Create button to launch the Create Route page, or search for an existing route from the search route page.
- If you are creating a new route, enter the information in the fields provided. Information in fields marked with asterisk is mandatory (see Description of fields associated with maintenance route records, page 3-11). Click Apply to add the operation to the database. The Update Route page appears.
- If you are defining material requirements for an existing route, search for the route, and click the Route Number link in the search result list, to navigate to the Update Route page.

5. Click the Material Requirements link in the side navigation menu. The Define Material Requirement page appears. Click Add More Rows. Enter the information in the fields provided. For information, see Description of fields in the Material Requirement page, page 3-59.
6. Select the Include check box to indicate if the material requirement should be viewed in the disposition list by the Production Planner. A Disposition list is defined in Route Management as a subset of a composition list to compliment material requirements.

Items defined as material requirements are expected to be 100% replacement requirements. If you want to have the item as predominately 100% replacement but occasionally a different percentage, you must define the requirement in the disposition list and set the percentile for replacement and repair. Material requirements are superseded by the disposition requirements where applicable based on the master configuration and / or the item being planned.

Note: The item's from a route's material requirements and from the disposition list, which are set to 100% replacement, are planned by default through Advanced Supply Chain Planning.

7. Click Apply to add the material requirement information to the maintenance route record.

Add Material Requirements to a Maintenance Route - Define Material Requirements page

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Define Material Requirements

Route Number **Assembly Piece Part Breakdown** Status **Draft**
Revision **2** Revision Notes
Title **Assembly Piece Part Breakdown / Disposition**

Materials List

Previous 1-2 of 2 Next

Remove	Item Group	Item	Organization	Description	Quantity	UOM	Include
<input type="checkbox"/>	Rod, Connectin				6	Each	<input type="checkbox"/>
<input type="checkbox"/>		105457	Vision Project Mfg	Bolt 5/8x12	1	Each	<input checked="" type="checkbox"/>

Add More Rows

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Note: When material requirements change on a route that has been planned for, an approval workflow is started to notify the user to replan for the material requirements.

8. To remove a material requirement associated to the operation, click the remove icon on the pertinent record in the resource list and then click Apply.

Associating Operations with a Maintenance Route

The Associate Operation to a Route page allows you to associate operations to a selected maintenance route. The application simplifies the creation of maintenance routes by allowing you to use related operation records existing in the database. You can search for a required operation, and copy the operation record to associate it with the route.

Prerequisites

- ☐ Operation records that apply to the route must exist in the database.

To associate operations with maintenance routes:

1. Retrieve the route record for which you want to associate operations (see Finding Maintenance Route Records, page 3-38).
2. Select the pertinent route record from the Route List on the Search Route page.
3. Click Associate Operations on the side navigation menu to launch the Associate Operations page.

Associate Operations page

The screenshot displays the 'Associate Operations' page within the Oracle Complex MRO application. The top navigation bar includes links for Home, Engineering, Configuration, Planning, Administration, Execution, Profile, Sign Out, and Help. Below this, a breadcrumb trail shows Document Index > Route Management > Fleet Maintenance Program. The main header area contains tabs for Operations, Routes, Major Zones, Sub Zones, Resource, and Item Compositions. A left-hand navigation menu lists various options, with 'Associate Operations' currently selected. The main content area is titled 'Associate Operations' and shows route information: Route Number AHLRM001, Revision 6, Title AHLRM001, and Status Draft. Below this is an 'Operations List' table with columns for Remove, Step, Standard, Operation, Description, Start Date, and Check Point. The table is currently empty, with an 'Add More Rows' button at the bottom. Action buttons (Cancel, Revert, Attach, Apply) are located at the top right of the table area. The footer contains a copyright notice for Oracle Corporation, 2000.

Remove	Step	Standard	Operation	Description	Start Date	Check Point
	<input type="text"/>	No	<input type="text"/>	<input type="text"/>	<input type="text"/>	No
	<input type="text"/>	No	<input type="text"/>	<input type="text"/>	<input type="text"/>	No
	<input type="text"/>	No	<input type="text"/>	<input type="text"/>	<input type="text"/>	No
	<input type="text"/>	No	<input type="text"/>	<input type="text"/>	<input type="text"/>	No
	<input type="text"/>	No	<input type="text"/>	<input type="text"/>	<input type="text"/>	No

4. Enter the information in the fields provided.
 - Step refers to the serial order of the operation in the maintenance route. This field value is user assigned.
 - Operation field contains the pre-defined operation that you want to associate with the maintenance route.
5. Click the Operation search icon to launch the Select Operation page.

Select Operation page

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Select Operation

Enter Partial Value

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

First | Previous 0 - 0 of 0 Next | Last

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- Query for operation records. Click the link to select the operation. The fields in the Associate Operations page will get populated with these values.

View Operation List - Associate Operations page

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Associate Operations

Route Number **AHLRM001** Status **Draft**
Revision **6** Revision Notes
Title **AHLRM001**

Operations List

Remove	Step	Standard	Operation	Description	Start Date	Check Point
	<input type="text"/>	No	X	the description is a k	08-JAN-2004	No
	<input type="text"/>	No				No
	<input type="text"/>	No				No
	<input type="text"/>	No				No
	<input type="text"/>	No				No
	<input type="text"/>	No				No

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

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- Click Apply to save the records.

View Associated Operations - Associate Operations page

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Document Index Route Management Fleet Maintenance Program

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

Associate Operations

Route Number **AHLRM001** Status **Draft**
Revision **6** Revision Notes
Title **AHLRM001**

Operations List

Cancel Revert Attach Apply

Previous 1-1 of 1 Next

Remove	Step	Standard	Operation	Description	Start Date	Check Point
<input type="checkbox"/>	10	No	X	27.10.51.12.26.16.35 15-MAR-2004	No	

Add More Rows

Previous 1-1 of 1 Next

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

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- Alternatively, click Attach to search and associate multiple operations. In the Search Operation page, enter information in the fields for which you know the value, and click Go. All operations matching your search criteria are displayed in the Operations Results table.

Search Operation Record - Search Operation page

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

Search Operation

Operation

Operation Type

Standard

Description

Go Clear

Process

Status

Operation Results

Select Operation and... Associate

Previous 1-10 of 75 Next

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

- Select multiple operation records and click Associate. You will see that the values in the Operation fields are not in the same line as that of the step for which you entered the operation, but on the next empty line. Enter the values in the Step fields later, along with the rest of the fields.

10. Click Apply to associate the operations to the maintenance route record.

Editing Operation Records

Oracle Complex Maintenance, Repair, and Overhaul allows you to retrieve existing operation records and edit the information associated with the operation including sign off, material, machine, and tool requirements. You can also edit document reference and phase code definitions associated with the operation.

This first step in the process allows you to edit the basic operation record information.

Prerequisites

- ☐ The operation must exist in the database and must have a status of Draft or Approval Rejected. To edit an approved operation, you must first create a revision of that operation.

To edit operation records:

1. Retrieve the operation records that match your requirement (see Finding Operation Records, page 3-36).
2. Select an Operation record, and click the Operation link to bring it up on the Edit Operation page.

Edit Operation Information - Edit Operation page

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Operations Routes Major Zones Sub Zones Resource Item Compositions

Edit Operation

Cancel Delete Approve Revert Apply

* Indicates required field

Operation Information

Revision 1
Operation X

* Description 30.10.52.12.26.16.RTY

* Standard No Status Draft

Operation Type System Check Process

* Start Date 04-FEB-2004 End Date

Quality Inspection Type

Remarks

Revision Note

Cancel Delete Approve Revert Apply

3. Make the necessary changes to the information in the fields provided. For information, see Description of fields associated with operation records, page 3-7.

Modify Operation Information - Edit Operation page

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Document Index Route Management Fleet Maintenance Program

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

Edit Operation

Cancel Delete Approve Revert Apply

* Indicates required field

Operation Information

Revision 1
Operation X
Description 30.10.52.12.26.16.RTY
Standard No Status Draft
Operation Type Operation Check Process
Start Date 04-FEB-2004 End Date
Quality Inspection Type
Remarks
Revision Note

Cancel Delete Approve Revert Apply

- To save the edited operation, click Approve.

Approve Operation Record Changes - Edit Operation page

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

Edit Operation

Cancel Create Revision Terminate Revert Apply

* Indicates required field

Operation Information

Revision 1
Operation X
Description 30.10.52.12.26.16.RTY
Standard No Status Complete
Operation Type Operation Check Process
Start Date 15-JUL-2010 End Date
Quality Inspection Type
Remarks
Revision Note

Cancel Create Revision Terminate Revert Apply

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- To edit reference document resources, material requirements, or associated operations, click the pertinent link in the side navigation menu.

Related Topics

Defining Reference Documents for an Operation, page 3-42

Defining Resource Requirements for an Operation, page 3-47

Defining Material Requirements for an Operation, page 3-57

Editing Maintenance Route Records

Oracle Complex Maintenance, Repair, and Overhaul allows you to retrieve existing maintenance route records and edit the information associated with the route, including sign off, material, machine, and tool requirements. You can also edit document reference and phase code definitions associated with the operation.

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

Prerequisites

- ☐ The maintenance route record must exist in the database and must have a status of Draft or Approval Rejected. To edit an approved route, you must first create a revision of that route.

To edit maintenance route records:

1. Retrieve the maintenance route records that match your requirement (see Finding Maintenance Route Records, page 3-38).
2. Click the Route Number link to bring it up on the Update Route page.
3. Make the necessary changes to the information in the fields provided. For information, see Description of fields associated with maintenance route records, page 3-11.
4. To save the edited route, click Approve.
5. To edit reference document resources, material requirements, or associated operations, click the pertinent link in the side navigation menu.

Related Topics

Defining Reference Documents for a Route, page 3-45

Defining Resource Requirements for a Route, page 3-51

Defining Material Requirements for a Route, page 3-60

Associating Operations to a Maintenance Route, page 3-62

Defining Component Locations in Fleet Units

Maintenance organizations define zones to identify component locations in an electromechanical system. Oracle Complex Maintenance, Repair, and Overhaul allows you to associate major zones and sub zones in electromechanical systems to product types. Product Type refers to the classification by category of electromechanical systems such as Ground Support and Engine for aircraft. This enables you to closely monitor maintenance activities and component location on any fleet unit belonging to a product type.

Related Topics

Associating Major Zones to Product Types, page 3-68

Associating Sub Zones to Product Types , page 3-71

Associating Major Zones to Product Types

Prerequisites

- ❑ Product Type, and Major Zone values must exist in the database. You should decide on the major zone that you want to associate with the selected Product Type.

To associate major zones to a product type:

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

Associate Major Zone to Item Type page

3. Use the information in the following table to associate sub zones to item types.

Description of fields related to associating zones to item types

Field	Description
Product Type	Refers to the classification by category of the electromechanical system. Enter the value of the product type to which you want to associate zones. If you do not know the value, enter a partial search string with the generic substitution metacharacter%, and click Go. This launches the Select Product Type page with all the matching records in the database. Click the pertinent record to return this value to the field.
Major Zone	Refers to the user-defined zones used as a method for identifying locations in the electromechanical system being maintained. If you do not know the value, enter a partial search string with the generic substitution metacharacter%, and click Go. This launches the Select Major Zone page with all the matching records in the database. Click the pertinent record to return this value to the field.
Description (Major Zone)	Is the zone description automatically placed in this field when the Major Zone is selected from the database.
Sub Zone	Refers to the user-defined zones within a major zone used as a method for identifying locations in the electromechanical system being maintained. If you do not know the value, enter a partial search string with the generic substitution metacharacter%, and click Go. This launches the Select Sub Zone page with all the matching records in the database. Click the pertinent record to return this value to the field.
Description (Sub Zone)	Is the sub zone description automatically placed in this field when the Sub Zone is selected from the database.
Start Date	Refers to the date from which this definition for component location is valid. You cannot enter a date directly in this field. Click on the calendar selector icon beside the date field and select the correct date, which will be copied into the field.
End Date	Refers to the date up to which this component location definition for the product type would remain valid. Click on the calendar selector icon beside the date field and select the correct date, which will be copied into the field.

Select Major Zones - Associate Major Zone To Item Type page

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




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

Associate Major Zone To Item Type

Item TypeATO item

RevertApply

MajorZones List

Remove	Major Zone	Major Zone Description
	Engine	Engine
		
		
		
		

Add More Rows

RevertApply

4. Click Apply to record the major zones associated to the item type.

Save Association - Associate Major Zone To Item Type page

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

Associate Major Zone To Item Type

Item TypeATO item

RevertApply

MajorZones List

Previous1-1 of 1Next

Remove	Major Zone	Major Zone Description
<input type="checkbox"/>	Engine	Engine

Add More Rows

Previous1-1 of 1Next

RevertApply

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Associating Sub Zones to Product Types

Prerequisites

- ❑ Product Type, Major Zone, and Sub Zone values must exist in the database. You should decide on the major zone and sub zone that you want to associate with the selected Product Type.

To associate sub zones to product types:

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

Associate Sub Zone to Item Type page

3. Enter the information in the fields provided. For information, see Description of fields related to associating zones to item type, page 3-69.

Select SubZones - Associate Sub Zone To Item Type page

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Document Index Route Management Fleet Maintenance Program

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

Associate Sub Zone To Item Type

Item Type: ATO Option Class

Revert Apply

SubZones List

Remove	Major Zone	Major Zone Description	Sub Zone	Sub Zone Description
	Empennage	Empennage	Cockpit	Cockpit

Add More Rows

Revert Apply

- Click Apply to record the sub zones associated to the product type.

Save Sub Zone Association - Associate Sub Zone To Item Type page

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

Associate Sub Zone To Item Type

Item Type: ATO Option Class

Revert Apply

SubZones List

Previous 1-1 of 1 Next

Remove	Major Zone	Major Zone Description	Sub Zone	Sub Zone Description
<input type="checkbox"/>	Empennage	Empennage	Cockpit	Cockpit

Add More Rows

Previous 1-1 of 1 Next

Revert Apply

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Finding Oracle Complex Maintenance, Repair, and Overhaul Resources

Use this process to retrieve Oracle Complex Maintenance, Repair, and Overhaul resource records from your database.

Oracle Complex Maintenance, Repair, and Overhaul permits use of metacharacters when you type a word, or part of a word, to use as a search argument. Use % to represent any

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

Prerequisites

- ☐ The resource that you want to retrieve must exist in the database.

To find Oracle Complex Maintenance, Repair, and Overhaul resources:

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

Search Resources page

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Document Index Route Management Fleet Maintenance Program

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

Search Resources

Resource

Description

Resource Type

Go Clear

Resource List

Create

Resource	Description	Resource Type	Remove
No records were found matching the given criteria..			

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3. Enter the information in the fields for which you know the value. Click Go. The lower half of the screen displays the Oracle Complex Maintenance, Repair, and Overhaul Resources List of all matching records in the database.

Resources Search Results - Search Resources page

ORACLE Oracle Complex MRO

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

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

Search Resources









Resource

Description

Resource Type 

Resource List

1-8 of 8

Resource	Description	Resource Type	Remove
AHLPAR004	Resource in PM mode	Machine	
AHLRE02	Resource round 2	Machine	
Drills	SMA_Drills	Machine	
Jack	SMA Jack	Machine	
MROM1	Machine Resource Type 1	Machine	
MROM2	Machine Resource Type 2	Machine	
Resource1	Resource 1	Machine	
ahlipaRo01	AHL Resource	Machine	

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

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

Creating Oracle Complex Maintenance, Repair, and Overhaul Resources

The following process initiates the creation of a resource. The Create Oracle Complex Maintenance, Repair, and Overhaul Resource page lets you save the record in the database before defining the attributes.

Prerequisites

- ☐ You should know the resource type of the resource you want to create.

To create an Oracle Complex Maintenance, Repair, and Overhaul resource:

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

Create Resources page

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

Create Resources

* Indicates required field

* Name

* Description

* Resource

Cancel Revert Apply

Associated BOM Resources List

Attach

Remove	Name	Description	Organization	Disable Date	Resource Type
No records were found matching the given criteria..					
Add More Rows					

Cancel Revert Apply

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4. Enter the information in the fields provided. Information in fields marked with asterisk is mandatory.

Enter Resource Information - Create Resources page

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

Create Resources

* Indicates required field

* Name

* Description

* Resource

Cancel Revert Apply

Associated BOM Resources List

Attach

Remove	Name	Description	Organization	Disable Date	Resource Type
No records were found matching the given criteria..					
Add More Rows					

Cancel Revert Apply

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5. You must associate at least one BOM Resource with the Oracle Complex Maintenance, Repair, and Overhaul resource you are creating. Use the Associated BOM Resources List on the lower half of the page to associate BOM resources to the Oracle Complex Maintenance, Repair, and Overhaul resource. Click Add More Rows and enter the information in the fields provided.

Associate BOM Resources - Create Resources page

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Document Index Route Management Fleet Maintenance Program

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

Create Resources

* Indicates required field

* Name

* Description

* Resource

Cancel Revert Apply

Associated BOM Resources List

Attach

Remove	Name	Description	Organization	Disable Date	Resource Type
	10NWCR	10 Ton NW Crane	San Diego Manufact		Machine

Add More Rows

Cancel Revert Apply

- Alternatively, click Attach to search for, and associate a specific BOM resource.

Search BOM Resource page

ORACLE Oracle Complex MRO

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Document Index Route Management Fleet Maintenance Program

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

Search BOM Resource

Name

Description

Organization

Go Clear

BOM Resources Results

Select BOM Resource and... Associate

Previous 1-10 of 2738 Next

Select	Name	Description	Organization	Disable Date	Resource Type
<input checked="" type="checkbox"/>	Material	Material Sub-Element	Vision Healthcare Systems		
<input checked="" type="checkbox"/>	Sub1	Sub1	Vision Communications (USA)		
<input checked="" type="checkbox"/>	Material	Material	Vision Communications (USA)		
<input type="checkbox"/>	Material	Material Cost	W1 - Kansas City Distribution		
<input type="checkbox"/>	DS-Mat	Material	W1 - Kansas City Distribution		
<input type="checkbox"/>	DS-MOH2	Material Overhead for Drop Ship	W1 - Kansas City Distribution		
<input type="checkbox"/>	MOH1	MATERIAL OH 1	W1 - Kansas City Distribution		
<input type="checkbox"/>	MOH2	MATERIAL OH 2	W1 - Kansas City Distribution		
<input type="checkbox"/>	MOH3	MATERIAL OH 3	W1 - Kansas City Distribution		

- Click Apply to create the resource in the database. The Update Resources page will appear displaying the current resource in context.

Update Resources page

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Document Index Route Management Fleet Maintenance Program

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

Update Resources

* Indicates required field

* Name

* Description

Resource **Machine**

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

Associated BOM Resources List

[Attach](#)

Previous 1-1 of 1 Next

Remove	Name	Description	Organization	Disable Date	Resource Type
<input checked="" type="checkbox"/>	10NWCR	10 Ton NW Crane	San Diego Manufacturing		Machine
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Material	Material	Vision Communicat		

8. Click Cancel to stop the process and return to the previous page.
9. Click Remove next to any BOM resource you want to remove.

Editing Oracle Complex Maintenance, Repair, and Overhaul Resources

Oracle Complex Maintenance, Repair, and Overhaul allows you to retrieve existing Resources and edit the information associated with it.

Prerequisites

- ☐ The Oracle Complex Maintenance, Repair, and Overhaul Resource must exist in the database.

To edit resource records:

1. Retrieve the Oracle Complex Maintenance, Repair, and Overhaul resource records that match your requirement (see Finding Oracle Complex Maintenance, Repair, and Overhaul Resources, page 3-36).
2. Select a resource, and click the corresponding Resource link to bring it up on the Update Resources page.

Edit Resource Record - Update Resources page

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Document Index Route Management Fleet Maintenance Program

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

Update Resources

* Indicates required field

* Name 061120031300

* Description 061120031300

Resource **Person**

Cancel Revert Apply

Associated BOM Resources List

Previous 1-1 of 1 Next

Remove	Name	Description	Organization	Disable Date	Resource Type
<input type="checkbox"/>	0611031301	061120031301 Vision Project Mfg 05-NOV-2013			Person

Add More Rows

Previous 1-1 of 1 Next

Cancel Revert Apply

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3. Make the necessary changes to the information in the fields provided. For more information on attaching BOM Resources to an Oracle Complex Maintenance, Repair, and Overhaul Resource, see *Creating Oracle Complex Maintenance, Repair, and Overhaul Resources*, page 3-74.
4. Click Apply to save the changes to the database.

Associating BOM Resources

Use this process to retrieve BOM resource records from your database.

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

Prerequisites

- ☐ The resource that you want to retrieve must exist in the database.

To associate BOM resources:

1. Retrieve the Oracle Complex Maintenance, Repair, and Overhaul resource records that match your requirement (see *Finding Oracle Complex Maintenance, Repair, and Overhaul Resource*, page 3-36s).
2. Select a resource, and click the corresponding Resource link to bring it up on the Update Oracle Complex Maintenance, Repair, and Overhaul Resources page.
3. Click Attach under the Associated BOM Resources List results. The Search BOM Resource page appears.

Find BOM Resource - Search BOM Resource page

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Document Index Route Management Fleet Maintenance Program

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

Search BOM Resource

Name

Description

Organization 

BOM Resources Results

Select	Name	Description	Organization	Disable Date	Resource Type
No records were found matching the given criteria..					

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- Enter the information in the fields provided and click Go. The lower half of the page displays the BOM Resources results for that Oracle Complex Maintenance, Repair, and Overhaul resource.

BOM Resource Search Results - Search BOM Resource page

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

Search BOM Resource

Name

Description

Organization 

BOM Resources Results

Select BOM Resource and...

Previous 1-10 of 1189 Next

Select	Name	Description	Organization	Disable Date	Resource Type
<input type="checkbox"/>	RES1		MD1		Person
<input type="checkbox"/>	LBR-Assy Labour Assembly		P6-FIFO org		Person
<input type="checkbox"/>	LBR-Insp Inspection Labor		P6-FIFO org		Person
<input type="checkbox"/>	LBR-Oper Machine Operation		P6-FIFO org		Person
<input type="checkbox"/>	Test-Prs2		Project		Person
<input type="checkbox"/>	Crimper Crimper		Project		Person
<input type="checkbox"/>	NU-CP		Project		Person
<input type="checkbox"/>	NU-CPA		Project		Person
<input type="checkbox"/>	LBR-Assy Assembly Labor		Project		Person

- Click the Select button next to the pertinent resource, then click Associate. The Update Resources page displays with the revised information.

Associate BOM Resource - Update Resources page

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Document Index Route Management Fleet Maintenance Program

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

Update Resources

* Indicates required field

* Name 061120031300

* Description 061120031300

Resource **Person**

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

Associated BOM Resources List

[Attach](#)

Previous 1-1 of 1 Next

Remove	Name	Description	Organization	Disable Date	Resource Type
<input type="checkbox"/>	0611031301	061120031301	Vision Project Mfg	05-NOV-2013	Person
<input type="checkbox"/>	LBR-Assy	Labour Assembly	P6-FIFO org		Person
<input type="checkbox"/>	RES1		MD1		Person

[Add More Rows](#)

Previous 1-1 of 1 Next

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

- Click Apply to save the changes to the database.

View Associated BOM Resources - Update Resources page

ORACLE Oracle Complex MRO

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Document Index Route Management Fleet Maintenance Program

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

Update Resources

* Indicates required field

* Name 061120031300

* Description 061120031300

Resource **Person**

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

Associated BOM Resources List

[Attach](#)

Previous 1-3 of 3 Next

Remove	Name	Description	Organization	Disable Date	Resource Type
<input type="checkbox"/>	0611031301	061120031301	Vision Project Mfg	05-NOV-2013	Person
<input type="checkbox"/>	LBR-Assy	Labour Assembly	P6-FIFO org		Person
<input type="checkbox"/>	RES1		MD1		Person

[Add More Rows](#)

Previous 1-3 of 3 Next

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

- Click Revert to restore the fields to the last saved position in the database.
- Click Cancel to return to the Oracle Complex Maintenance, Repair, and Overhaul Resource page.

Managing Maintenance Documents

This chapter covers the following topics:

- Overview
- What is Document Index?
- Key Business Processes
- Creating Document References
- Associating Document Sub Types to Document Types
- Finding Document References
- Editing Document References
- Maintaining Document Subscription Information
- Maintaining Document Supplier Information
- Maintaining Document Distribution Information
- Creating Document Revision Records
- Editing Document Revision Records
- Uploading Electronic Documents

Overview

The maintenance, repair, and overhaul of high-valued electromechanical systems is supported by large volumes of documentation, supplied by original equipment manufacturers (OEMs), equipment operators, governmental agencies, and third-party maintenance specialists. These numerous documents evolve during the life of the asset, and must be monitored, often for regulatory compliance. From the perspective of the organization, the complete set of maintenance documents includes self-authored documents, as well as those produced by external organizations. Oracle Complex Maintenance, Repair, and Overhaul includes the Document Index module that permits a maintenance organization to create a repository of meta-documentation.

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

See:

- Creating Document References, page 4-3

- Associating Document Sub Types to Document Types, page 4-6
- Finding Document References, page 4-9
- Editing Document References, page 4-11
- Maintaining Document Subscription Information , page 4-12
- Maintaining Document Supplier Information, page 4-15
- Maintaining Document Distribution Information, page 4-18
- Creating Document Revision Records, page 4-20
- Editing Document Revision Records, page 4-24
- Uploading Electronic Documents, page 4-25

What is Document Index?

Document Index is a subsystem that provides an online catalog of documents used in maintenance, repair, and overhaul operations. Document Index is the Oracle Complex Maintenance, Repair, and Overhaul module that you will use to manage your maintenance, repair, and overhaul documents, regardless of their source, and regardless of their form, paper or electronic.

For each document that you would like to monitor with Document Index, you will add a reference to the document that includes the document identifier, its title, and whether or not the document can be subscribed to. Documents can be of certain types, and subtypes, and this information is also managed with Document Index. You can edit the document references that you create, as well as define and edit revisions. You cannot delete document descriptions using Document Index. When documents are no longer required, for example, after having disposed of a unit in your fleet, you can mark the document as obsolete.

Key Business Processes

The Document Index supports the following business processes:

Document Registration

Internal documents that evolve during the life of an equipment, and external documents provided by suppliers on a subscription basis, may consist of various formats that should be tracked. Oracle Complex Maintenance, Repair, and Overhaul allows you to consolidate all the document information by registering the document titles and reference information in a single area. The various business areas can refer to the documents for the latest information on a particular maintenance requirement. Maintaining accuracy in available documents begins with the process of registering the documents. Document registration defines only a document title; the document definition is created with the first revision.

Document Revision Control

Maintaining the latest documentation and related updates is a necessity for maintenance organizations. This includes tracking revisions of a document to ensure information is up to date and accurate. Inaccurate information may not be in adherence to required rules and regulations. Oracle Complex Maintenance, Repair, and Overhaul allows organizations to mark current information as reference, and obsolete information as not considered for use, while retaining the obsolete documents for document history.

Electronic Document Uploading

Any document that is available in electronic form can be uploaded to the database and associated with the relevant document revision. All file types are supported.

Document Subscription Control

Organizations maintain supplier information for documents to ensure that the right supplier provides the documentation requested or subscribed to. Oracle Complex Maintenance, Repair, and Overhaul allows organizations to maintain supplier information, and to track the status of a subscription for a document from an associated supplier.

Document Distribution

To maintain information on document distribution, it is necessary to map out who or what group is the recipient of a particular document. Missing or incorrectly identifying a recipient can cause substantial business impact. Approvals may be necessary by a specific individual before the release of a document. Oracle Complex Maintenance, Repair, and Overhaul allows organizations to maintain the distribution of documents by defining the recipient of a document. This enables organizations to map the documents and release them to the right individuals or groups.

Creating Document References

This is the primary process by which you can create references to all of the maintenance documents you would like to manage. You can record any revision information, if necessary, using this process.

Prerequisites

- ☐ To create a document reference, you should know the document type, the document source, the document number, whether the document is available through subscription, and whether the document is subscribed to by the organization. Document types should be set up by your organization while installing Oracle Complex Maintenance, Repair, and Overhaul.

To create a document reference:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button.
2. Select the Document Index tab. The Search Document page appears.

Search Document page

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

Search

Associate Type

Document Index

Route Management

Fleet Maintenance Program

Search Document

Source

Document Number

Title

Status

Document Type

Sub Type

Operator

Item Type

Media Type

Go

Clear

Search Results

Create

Select Document Num Title Type Sub Type Revision Num Revision Type Status Media Type Electronic File

No records were found matching the given criteria..

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3. Click the Create button to display the Create Document page.

Create Document page

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Search

Associate Type

Document Index

Route Management

Fleet Maintenance Program

Create Document

* Indicates required field

Cancel

Apply

Document Info

* Document Number

* Type

Sub Type

Operator

Item Type

* Source

* Name

Title

* Subscription Available

No

Cancel

Apply

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4. Use the information in the following table to enter document information.

4-4 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

Description of fields related to document records

Field	Description
Document Number	Contains a unique identifier, generated by the organization to identify a maintenance document.
Type	Refers to the maintenance document type, and typically refers to the fleet unit, or major section division of the fleet unit. The set of values of this field is created when Oracle Complex Maintenance, Repair, and Overhaul is installed, and you cannot enter a new value here. Select the correct value for the type of document that you are creating from the drop-down list.
Sub Type	Is the maintenance document category that describes the nature of the information contained in the document that you are defining in this field. Select the appropriate value from the drop-down list. Also see Associating Document Sub Types to Document Types.
Operator	Is the name of the company that owns or uses the document that you are recording. To find all operator codes, use the generic substitution meta character%, and click Go. This launches the Select Operator Page. All the records in the database appear on the page in groups of ten. Click on the operator you want, to enter this value in the Operator field in the Create Document page.
Product Type	Contains a user-defined document product identifier. To find all product types, use the generic substitution meta character%, and click Go. This launches the Select Product Type page. All the records in the database appear on the page in groups of ten. Click on the product type you want, to enter this value in the Product Type field on the Create Document page. Product Type is based on the lookup 'ITEM_TYPE'.
Source	Refers to the internal or external supplier of the maintenance document. To find all source codes, use the generic substitution meta character%, and click Go. This launches the Select Source page. All the records in the database appear on the page in groups of ten. Click on the source you want, to enter this value in the Source field on the Create Document page.
Title	Refers to the title of the maintenance document.

Field	Description
Subscription Available	Is a true or false flag that indicates whether or not this maintenance document is available by subscription. Select Yes or No from the drop-down list.
Subscribed To	Is a true or false flag that indicates whether or not your organization has subscribed to this maintenance document. The status of this field is derived from the status of the subscription available flag and whether or not a subscription is in place.
Status	Indicates whether a document is obsolete or current. Select the value from the drop-down list. The values for this field is defined when Oracle Complex Maintenance, Repair, and Overhaul is installed.

5. Click Apply.

When you click Apply, Oracle Complex Maintenance, Repair, and Overhaul checks to ensure that all required fields have been completed with valid entries. The application rejects invalid records with error messages.

Associating Document Sub Types to Document Types

Manufacturers of transportation equipment produce many different types of documents including maintenance manuals, service bulletins, parts catalogs, and others. Organizations may wish to use sub types to identify maintenance documents that are sections of others, or related otherwise. For example, a document type might be "Propellant". A powerplant will probably be supplied with an "Illustrated Tool and Equipment Manual", so you might create a document sub type called "ITEM".

Prerequisites

- ☐ You should decide how to relate maintenance document types to sub types. Your organization should have set up document types while installing Oracle Complex Maintenance, Repair, and Overhaul.

To associate document sub types to a document type:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button.
2. Select the Document Index tab. Select the Associate Type secondary tab to display the Associate Document Sub Type to Document Type page.

Associate Document Sub Type To Document Type page

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Document Index Route Management Fleet Maintenance Program

Search | Associate Type

Associate Document Sub Type To Document Type

Document Type

Remove Sub Type Name Sub Type Description

No records were found matching the given criteria..

Add More Rows

Cancel Apply

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3. Select the document type for which you wish to create a document sub type using the Document Type drop-down menu. Document Type represents the major topic such as powerplant, fleet unit, and ground support equipment that is described by the document in question. This field is populated when Oracle Complex Maintenance, Repair, and Overhaul is installed. Sub Type records existing in the database, and associated with this document type, are displayed in the lower half of the page.

Select Document Type - Associate Document Sub Type To Document Type page

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Document Index Route Management Fleet Maintenance Program

Search | Associate Type

Associate Document Sub Type To Document Type

Document Type

Previous 1-10 of 12 Next

Remove	Sub Type Name	Sub Type Description
<input type="checkbox"/>	Advisory Circular	Advisory Circular
<input type="checkbox"/>	Airworthiness Directives	Airworthiness Directives
<input type="checkbox"/>	Component Overhaul Man	Component Overhaul Manual
<input type="checkbox"/>	Engineering Order	Engineering Order
<input type="checkbox"/>	Illustrated Parts Catalog	Illustrated Parts Catalog
<input type="checkbox"/>	Illustrated Parts List	Illustrated Parts List
<input type="checkbox"/>	Maintenance Manual	Maintenance Manual
<input type="checkbox"/>	Maintenance Planning Data	Maintenance Planning Data
<input type="checkbox"/>	OEM Task Card	OEM Task Card
<input type="checkbox"/>	Service Bulletin	Service Bulletin

Add More Rows

Cancel Apply

4. Click Add More Rows to add Sub Type information.

Add Sub Types - Associate Document Sub Type To Document Type page

Associate Document Sub Type To Document Type

Document Type Aircraft

Previous 1-10 of 12 Next

Remove	Sub Type Name	Sub Type Description
<input type="checkbox"/>	Advisory Circular	Advisory Circular
<input type="checkbox"/>	Airworthiness Directives	Airworthiness Directives
<input type="checkbox"/>	Component Overhaul Man	Component Overhaul Manual
<input type="checkbox"/>	Engineering Order	Engineering Order
<input type="checkbox"/>	Illustrated Parts Catalog	Illustrated Parts Catalog
<input type="checkbox"/>	Illustrated Parts List	Illustrated Parts List
<input type="checkbox"/>	Maintenance Manual	Maintenance Manual
<input type="checkbox"/>	Maintenance Planning Dat	Maintenance Planning Data
<input type="checkbox"/>	OEM Task Card	OEM Task Card
<input type="checkbox"/>	Service Bulletin	Service Bulletin

5. Select the new document Sub Type Name from the LOV. The Sub Type Description field is automatically populated.

Sub Type Name represents the content of the document type. For example, a document type might be "Powerplant", and the document sub type might be "Illustrated Parts Catalog". Sub Type Description contains the text description of the document Sub Type Name.

6. Click Apply.

To remove a document sub type from a document type:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button.
2. Select the Document Index tab.
3. Select the Associate Type secondary tab to display the Associate Document Sub Type to Document Type page where you can define sub types.
4. Select a document type using the Document Type drop-down list. The field below shows all document sub types in the database.
5. Select the Remove check box for the sub type record that you want to delete.

Remove Sub Type - Associate Document Sub Type To Document Type page

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Document Index Route Management Fleet Maintenance Program

Search | Associate Type

Associate Document Sub Type To Document Type

Document Type: Aircraft

Previous 1-10 of 12 Next

Remove	Sub Type Name	Sub Type Description
<input checked="" type="checkbox"/>	Advisory Circular	Advisory Circular
<input type="checkbox"/>	Airworthiness Directives	Airworthiness Directives
<input type="checkbox"/>	Component Overhaul Man	Component Overhaul Manual
<input type="checkbox"/>	Engineering Order	Engineering Order
<input type="checkbox"/>	Illustrated Parts Catalog	Illustrated Parts Catalog
<input type="checkbox"/>	Illustrated Parts List	Illustrated Parts List
<input type="checkbox"/>	Maintenance Manual	Maintenance Manual
<input type="checkbox"/>	Maintenance Planning Data	Maintenance Planning Data
<input type="checkbox"/>	OEM Task Card	OEM Task Card
<input type="checkbox"/>	Service Bulletin	Service Bulletin

- Click Apply. You can remove multiple document sub types at a time.

Note: A document sub type can only be removed from its document type if the combination is not associated to an existing document.

Finding Document References

Maintenance documents undergo frequent revisions. You can retrieve document references from the Document Index database and edit these references as necessary.

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

Oracle Complex Maintenance, Repair, and Overhaul allows you to specify one or more search criteria to retrieve maintenance document references from the database. You can enter search strings in any of the fields for which you know the value. By using a combination of parameters in more than one field, you can restrict the search to retrieve only those document references that you want. After you retrieve the required document reference, click the buttons on the page to activate required functions.

Prerequisites

- ☐ The document reference must exist in the database.

To find a document reference:

- From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Engineering Global button.
- Select the Document Index tab.

3. Select Search secondary tab to display the Search Document page where you can enter the search criteria.
4. Enter the document information in the fields for which you know the value. For field descriptions, see Description of fields related to document records, page 4-5.

Find Document Record - Search Document page

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Document Index Route Management Fleet Maintenance Program

Search | Associate Type

Search Document

Source Document Number

Title Status

Document Type Sub Type

Operator Item Type

Media Type

Search Results

Select	Document Num	Title	Type	Sub Type	Revision Num	Revision Type	Status	Media Type	Electronic File
No records were found matching the given criteria..									

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5. Click Search. Search results appear in the Document List field in the lower half of the screen.

Document Search Results - Search Document Page

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Document Index Route Management Fleet Maintenance Program

Search | Associate Type

Search Document

Source Document Number

Title Status

Document Type Sub Type

Operator Item Type

Media Type

Search Results

Select object and...

Previous 1-10 of 21 Next

Select	Document Num	Title	Type	Sub Type	Revision Num	Revision Type	Status	Media Type	Electronic File
<input type="radio"/>	AHLRRD106	Test document for airplanes	Aircraft	Advisory Circular	Revision1	Temporary Revision	Obsolete	Paper	
<input type="radio"/>	AHLRRD108		Aircraft	Advisory Circular	Revision1	Temporary Revision	Obsolete		
<input type="radio"/>	AHLRRD1100	Test pseudo doc creation	Aircraft	Advisory Circular	Rev14	Temporary Revision	Obsolete	Electronic File	
<input type="radio"/>	AHLRRD1100	Test pseudo doc creation	Aircraft	Advisory Circular	Rev1	Temporary Revision	Obsolete	Electronic File	
<input type="radio"/>	AHLRRD125	Verifv editina doc	Aircraft	Advisory Circular	Revision10	Tempoorary Revision	Obsolete	Electronic File	sudha moorthw.doc

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

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

Editing Document References

After you create a document reference, you can edit it, or add more information about document subscriptions, document suppliers, and in-house document distribution.

To edit document references:

- Retrieve the document reference that you want to edit (see Finding Document References, page 4-9).
- Click the document number link from the search results to launch the Edit Document page for that document.

Edit Document Page

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Document Index Route Management Fleet Maintenance Program

Search | Associate Type

Edit Document

* Indicates required field

Document Info

* Document Number AHLRRD106

* Type Aircraft

Sub Type Advisory Circular

Operator

Item Type Capital Item

* Source 10002

* Name BNAF

Title Test document for airplanes

* Subscription Available Yes

* Subscribed To Yes

Cancel Create New Revision Apply

Document Index | Route Management | Fleet Maintenance

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

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- Make necessary changes to the document information in the fields provided. The fields in the Edit Document page are the same as in the Create Document page with the exception of the Document Number, which you cannot change. For field descriptions, see Description of fields related to document records, page 4-5 .
- Click Save to store your changes in the database.

You can edit subscription information, supplier information, and distribution information from the Edit Document page using the links on the left hand menu. You can also create new revisions for the document from the Edit Document page using the Create New Revision button.

Related Topics

Maintaining Subscription Information, page 4-12

Maintaining Supplier Information, page 4-15

Maintaining Document Distribution Information, page 4-18

Maintaining Document Subscription Information

When maintenance organizations purchase a new subscription, or want to update subscription information, tracking this information for reference is necessary. The supplier of a document may change over time, or the frequency of the subscription may change. Oracle Complex Maintenance, Repair, and Overhaul tracks such information ensuring that the document is subscribed from the right supplier, and that the information regarding the subscription is correct.

Prerequisites

- ☐ Your organization should have set up the Subscription Type and Media Type values while installing Oracle Complex Maintenance, Repair, and Overhaul.

To add subscription information:

1. Retrieve the document reference for which you want to add subscription information (see Finding Document References, page 4-9).
2. Click the document number link from the search results to launch the Edit Document page for that document.
3. Click Subscription on the left hand menu of the Edit Document page to launch the Create New Subscription page.

Edit Subscription Information page

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Document Index Route Management Fleet Maintenance Program

Search | Associate Type

Details

Subscription

Supplier

Distribution

Edit Subscription Information

Cancel Apply

Title **Leading Space**

Document Number **MBH010** Source **Fedex**

Type **Ground Support Equipment** Sub Type

Operator **5832 CWK Three** Item Type **ATO Option Class**

Subscription Available **Yes** Subscribed To **No**

Remove	Subscription Type	Frequency	Requested By	Subscribe From	From Date	To Date	Status	Quantity	Purchase Order	Media Type
No records were found matching the given criteria.										
Add More Rows										

Cancel Apply

Document Index | Route Management | Fleet Maintenance Program | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

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4. Click Add More Rows to add rows for subscription definition. Enter the subscription information in the fields provided. You must enter information into any field marked with an asterisk.
 - Subscription Type indicates whether the subscription is free, or paid for. The field contains a drop-down list box from which you can select a value. These values are set up when your configuration of Oracle Complex Maintenance, Repair, and Overhaul is installed. You cannot type a string in this field.
 - Frequency specifies the reoccurrence of the subscription; i.e., monthly, semi-annually, annually. The field contains a drop-down list box from which you can select a value. Values are set up when your configuration of Oracle Complex Maintenance, Repair, and Overhaul is installed; you cannot type a string in this field.
 - Requested By contains the name of the individual in your organization who has requested a subscription to this publication. This is a quick lookup field. You can enter a value if you know the value. Otherwise, enter a partial search string with the generic substitution meta character% (example John%), and click Go to launch the Select Requested By page. The system returns all records in the database that match the search argument. Click on a search result to return that record to the field on the Edit Subscription Information page. The requestors are internal person set up in the Oracle TCA (Trading Community Architecture) module.
 - Subscribe From is a quick lookup field that contains the name of the organization that supplies the maintenance document. Enter a partial search string with the generic substitution meta character%, click Go and the system returns all matching supplier records in the database. Click on the pertinent record to return this value to the field on the Create New Subscription page. This field is mandatory.
 - From Date contains the date on which the document subscription started. Click on the calendar selector icon beside the date field and select the correct date, which will be copied into the field.
 - To Date is date on which the subscription ends. This date must be later than the From Date. Click on the calendar selector icon beside the date field and select the correct date, which will be copied into the field.
 - Status contains a drop-down list box from which you can select a value from a set of values created when your configuration of Oracle Complex Maintenance, Repair, and Overhaul was installed. You cannot type a string in this field.
 - Quantity contains the number of subscriptions to this document that your organization will receive. The value must be at least 1.
 - Purchase Order contains a purchase order identifier supplied by your accounts payable department. If Oracle Purchasing is installed, you can select a PO Number from the list of values, using the search icon. Alternatively, if Oracle Purchasing is not installed, you can enter the PO Number in the PO Number text input. The PO Number is validated against PO Numbers in Oracle Purchasing if Oracle Purchasing is installed.
 - Media Type indicates whether the subscription is a paper or an electronic document. The field contains a drop-down list box from which you can select a value. These values are set up when your configuration of Oracle Complex

Maintenance, Repair, and Overhaul is installed. You cannot type a string in this field.

5. Click Apply to store the subscription information in the database.

Add Subscription Information - Edit Subscription Information page

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Document Index Route Management Fleet Maintenance Program

Edit Subscription Information

Title Elevator feel actuator - removal/Installation
Document Number 11N.2012.31
Type Aircraft
Operator
Subscription Available Yes

Source Angela Gentile
Sub Type Technical Order
Item Type
Subscribed To Yes

Previous 1-3 of 3 Next

Remove	Subscription Type	Frequency	Requested By	Subscribe From	From Date	To Date	Status	Quantity	Purchase Order
<input type="checkbox"/>	Paid	On request	707SECDI	Consolidat	12-NOV-2003		Active	2	17502
<input type="checkbox"/>	Paid	Quarterly	707SECM	American	12-NOV-2003		Available, but not used	7	17502
<input type="checkbox"/>	Free	On request	Perry, Rys	Consolidat	05-NOV-2002		Active	1	17502

Add More Rows

Previous 1-3 of 3 Next

Document Index | Route Management | Fleet Maintenance

To update document subscription information:

1. Retrieve the document reference for which you want to update document subscription information (see Finding Document References, page 4-9).
2. Click Subscription on the left hand menu of the Edit Document page to navigate to the Subscription Information page. The lower half of the screen displays the subscription information about the document.
3. Update the field values.
4. Click Add More Rows to add rows for recipients definitions.

Update information - Edit Subscription page

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Document Index Route Management Fleet Maintenance Program

Search | Associate Type

[Details](#)

Subscription

[Supplier](#)

[Distribution](#)

Edit Subscription Information

Title **Elevator feel actuator - removal/Installation**

Document Number **11N-2012-31**

Type **Aircraft**

Operator

Subscription Available **Yes**

Source **Angela Gentile**

Sub Type **Technical Order**

Item Type

Subscribed To **Yes**

Previous 1-3 of 3 Next

Remove	Subscription Type	Frequency	Requested By	Subscribe From	From Date	To Date	Status	
<input type="checkbox"/>	Paid	On request	707SECDI	Consolidat	12-NOV-2003		Active	2
<input type="checkbox"/>	Paid	Quarterly	707SECM	American	12-NOV-2003		Available, but not used	7
<input type="checkbox"/>	Free	On request	Perry, Rys	Consolidat	05-NOV-2002		Active	1
							Active	
							Active	
							Active	
							Active	

- Click Apply to store your changes in the database.

Maintaining Document Supplier Information

Maintaining supplier information for documents is necessary to ensure that the correct supplier provides the documentation requested or subscribed to. You may need to contact the supplier to verify information about a document, and for this reason maintenance of supplier contact information is crucial. Oracle Complex Maintenance, Repair, and Overhaul helps you record and update document supplier information.

Prerequisites

- ☐ The values for Preference Code should be set up by your organization while installing Oracle Complex Maintenance, Repair, and Overhaul.

To add supplier information:

- Retrieve the document reference for which you want to add supplier information (see Finding Document References, page 4-9).
- Click the document number link to launch the Edit Document page.
- Click Supplier on the left hand menu of the Edit Document page to launch the Supplier Information page. Click Add More Rows to add rows for Supplier definitions.

Supplier Information Page

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

Search | Associate Type

[Details](#)

[Subscription](#)






Supplier

[Distribution](#)

Supplier Information

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

Title **Leading Space**
Document Number **MBH010** Source **Fedex**
Type **Aircraft** Sub Type
Operator ***** 5832 CWk Three Item Type **ATO Option Class**
Subscription Available **Yes** Subscribed To **No**

Remove	Supplier Number	Supplier Name	Preference Code
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Add More Rows](#)

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

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

4. Enter supplier information in the fields provided. Information in fields marked with asterisk is mandatory.
 - Supplier Name refers to the name of the organization that supplies this maintenance document. This is a quick lookup field. Enter a partial search string with the generic substitution meta character%, and click Go to launch the Select Supplier page. The system returns all matching records in the supplier database. Click on the supplier name you want. This record returns to the Supplier Name field on the Supplier Information page.
 - Supplier Description value is returned along with the Supplier Name to the Supplier Information page.
 - Preference Code contains a drop-down list box from which you can select a value from a set of values created when your configuration of Oracle Complex Maintenance, Repair, and Overhaul was installed. You cannot type a string in this field.

Enter Supplier Information page

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Search | Associate Type

[Details](#)
[Subscription](#)
[Supplier](#)
[Distribution](#)

Supplier Information

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

Title **Leading Space**
Document Number **MBH010** Source **Fedex**
Type **Aircraft** Sub Type
Operator **5832 CWk Three** Item Type **ATO Option Class**
Subscription Available **Yes** Subscribed To **No**

Remove	Supplier Number	Supplier Name	Preference Code
	1000	GE Plastics	Prime
	1004	Star Gate Ltd	Secondary

[Add More Rows](#)

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

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- Click Apply to store the document supplier information in the database.

View Supplier Information - Supplier Information page

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

Search | Associate Type

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[Distribution](#)

Supplier Information

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

Title **Leading Space**
Document Number **MBH010** Source **Fedex**
Type **Aircraft** Sub Type
Operator **5832 CWk Three** Item Type **ATO Option Class**
Subscription Available **Yes** Subscribed To **No**

Previous 1-2 of 2 Next

Remove	Supplier Number	Supplier Name	Preference Code
<input type="checkbox"/>	1000	GE Plastics	Prime
<input type="checkbox"/>	1004	Star Gate Ltd	Secondary

[Add More Rows](#)

Previous 1-2 of 2 Next

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

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

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To update supplier information:

- Retrieve the document reference for which you want to update document supplier information (see Finding Document References, page 4-9).
- Click Supplier on the left hand menu of the Edit Document page to navigate to the Supplier Information page. The lower half of the screen displays the supplier information about the document.

3. Update the field values.
4. Click Add More Rows to add rows for recipients definitions.
5. Click Apply to store your changes in the database.

Maintaining Document Distribution Information

It is necessary for maintenance organizations to control the distribution of documents and software for various reasons including licensing, cost of distribution, regulatory authorities, and others. This creates the necessity to ensure that the requester has authorization to receive a document prior to distributing it. Oracle Complex Maintenance, Repair, and Overhaul allows you to manage information about recipients in the organization to whom documents will be distributed.

To record document distribution information:

1. Retrieve the document reference for which you want to record distribution information (see Finding Document References, page 4-9).
2. Click the document number link to launch the Edit Document page.
3. Click Distribution on left hand menu of the Edit Document page to launch the Distribution Information page.

Distribution Information page

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Search Associate Type

Details
Subscription
Supplier
Distribution

Distribution Information

Cancel Apply

Title	Leading Space	Source	Fedex
Document Number	MBH010	Sub Type	
Type	Aircraft	Item Type	ATO Option Class
Operator	***** 5832 CWk Three	Subscribed To	No
Subscription Available	Yes		

Remove	Recipient Name	Recipient Description
No records were found matching the given criteria..		
Add More Rows		

Cancel Apply

Document Index | Route Management | Fleet Maintenance
Program | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

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4. Click Add More Rows to add rows for recipients definitions. Enter the recipient information in the fields provided.
 - Recipient Name is the name of the individual or department that will receive a copy of the document. This is a quick lookup field. You can enter a value if you know the value, otherwise, enter a partial search string with the generic substitution meta character% (example, John%), and click Go to launch the Select Recipient page. The system returns all matching records in the database. Click

on the recipient name you want to enter. This record returns to the Recipient Name field on the Distribution Information page. Recipients are set up as Organizations in the Oracle Trading Community Architecture module.

- The system also returns the corresponding Recipient Description to the field on the Distribution Information Page.

Enter Recipient Information - Distribution Information page

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[Supplier](#)
[Distribution](#)

Distribution Information

Cancel

Apply

Title**Leading Space**

Document Number**MBH010**

Type**Aircraft**

Operator**5832 CWk Three**

Subscription Available**Yes**

Source**Fedex**

Sub Type

Item Type**ATO Option Class**

Subscribed To**No**

Remove	Recipient Name	Recipient Description
	<input type="text" value="10000"/>	<input type="text" value="Abbitual"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

Add More Rows

Cancel

Apply

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5. Click Apply to store the document recipient information in the database.

View Recipient Details - Distribution Information page

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[Details](#)
[Subscription](#)
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[Distribution](#)

Distribution Information

Cancel

Apply

Title**Leading Space**

Document Number**MBH010**

Type**Aircraft**

Operator**5832 CWk Three**

Subscription Available**Yes**

Source**Fedex**

Sub Type

Item Type**ATO Option Class**

Subscribed To**No**

Previous1-1 of 1Next

Remove	Recipient Name	Recipient Description
<input type="checkbox"/>	<input type="text" value="10000"/>	<input type="text" value="Abbitual"/>

Add More Rows

Previous1-1 of 1Next

Cancel

Apply

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To update document distribution information:

1. Retrieve the document reference for which you want to update document distribution information (see Finding Document References, page 4-9).
2. Click Distribution on the left hand menu of the Edit Document page to navigate to the Distribution Information page. The lower half of the screen displays the distribution information about the document.
3. To remove a recipient from the list, select the name that you would like to remove, and click Apply. The application saves this change automatically.
4. Click Add More Rows to add rows for recipients definitions.
5. Click Apply to store your changes in the database.

Creating Document Revision Records

Equipment manufacturers frequently revise maintenance documents. For tractability, it is necessary to record document revision information including issue dates, dates of obsolescence, dates of effectivity, and publication part number changes. Oracle Complex Maintenance, Repair, and Overhaul allows you to create new revisions once you retrieve the pertinent document reference from the database.

Prerequisites

- ☐ The document reference for which you want to create a new revision must exist in the database.

To create new revision records:

1. Retrieve the document reference for which you want to create new revisions (see Finding Document References, page 4-9).

Find Document Records - Search Document page

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Document Index Route Management Fleet Maintenance Program

Search | Associate Type

Search Document

Source Document Number

Title Status

Document Type Sub Type

Operator Item Type

Media Type

Go Clear

Search Results

Create

Select object and... Edit Revision Create New Revision Upload Delete Uploaded File

Previous 1-10 of 82 Next

Select	Document Num	Title	Type	Sub Type	Revision Num	Revision Type	Status	Media Type	Electronic File
<input type="radio"/>	MBAD010		Aircraft						
<input type="radio"/>	MBH010	Leading Space	Aircraft						
<input type="radio"/>	11N-2012-31	Elevator feel actuator - removal/Installation	Aircraft Technical Order		Rev1	Temporary Revision	Current	Electronic File	read.bt
<input type="radio"/>	11N-2012-31	Elevator feel actuator - removal/Installation	Aircraft Technical Order		1	Full Revision	Current	Electronic File	

2. In the Search Document page, select the document, and click Create New Revision. The Create New Revision page appears. The Create New Revision button is also available in the Edit Documents page.

Create New Revision page

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Document Index Route Management Fleet Maintenance Program

Search | Associate Type

Create New Revision

* Indicates required field Cancel Apply

Title		
Document Number	MBAH019	Source Imaging Innovations, Inc.
Type	Aircraft	Sub Type
Operator		Item Type
Subscription Available	No	Subscribed To No

* Revision No	<input type="text"/>	* Revision Type	Temporary Revision
Revision Date	<input type="text"/>	* Status	Current
Volume	<input type="text"/>	Issue	<input type="text"/>
Issue Number	<input type="text"/>	Issue Date	<input type="text"/>
Date Received	<input type="text"/>	Media Type	<input type="text"/>
Effective Date	<input type="text"/>	Obsolete Date	<input type="text"/>
Approved By	<input type="text"/>		
Approved Date	<input type="text"/>		

3. Enter revision information in the fields provided. Information in fields marked with asterisk is mandatory.

Enter Revision Information - Create New Revision page

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Search | Associate Type

Create New Revision

* Indicates required field Cancel Apply

Title		
Document Number	MBAH019	Source Imaging Innovations, Inc.
Type	Aircraft	Sub Type
Operator		Item Type
Subscription Available	No	Subscribed To No

* Revision No	1	* Revision Type	Temporary Revision
Revision Date	31-MAY-2004	* Status	Current
Volume	<input type="text"/>	Issue	<input type="text"/>
Issue Number	<input type="text"/>	Issue Date	<input type="text"/>
Date Received	<input type="text"/>	Media Type	<input type="text"/>
Effective Date	<input type="text"/>	Obsolete Date	<input type="text"/>
Approved By	<input type="text"/>		
Approved Date	<input type="text"/>		

Use the information in the following table to enter information related to document revisions.

Description of fields related to document revisions

Field	Description
Revision No	Is a field that holds a user-assigned document revision identifier.
Revision Date	Is usually provided by the source company of the document. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field. This date should be greater than or equal to the system date.
Volume	Contains a string that identifies the volume of this revision.
Issue Number	Contains a number that identifies the issue of this revision. You cannot enter alphabetic characters here.
Date Received	Is the date on which the document revision was received by the user organization. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field. Received date must be less than or equal to the revision date.
Effective Date	Is the date on which the document is technically effective. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field. Effective date should be greater than the revision date and the approved date.
Approved By	Contains the name of the individual who is authorized to approve this document revision. If you know the exact name, enter it. Otherwise, enter a text search argument (example, John%), and click Go to retrieve and display all records from the database that match the search argument. Click the correct value from the records displayed to have the text value returned to the field. Names of approvers are maintained as type persons in the Oracle Trading Community Architecture module.
Remarks	Refer to any notes that are pertinent to this maintenance document revision. This long text field behaves much like a simple word processor.
Revision Type	Values are defined while installing Oracle Complex Maintenance, Repair, and Overhaul. Select the correct value for this field from the drop-down list.

Field	Description
Status	Indicates whether a document revision is a draft, current, or obsolete. Select the correct value for this field from the drop-down list box.
Issue	Contains a description of the document issue.
Issue Date	Refers to the date on which the maintenance document was made available, or the date of issue of the document, coming from the supplier. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.
Media Type	Indicates whether the document is in paper or electronic format. Select the correct value for this field from the drop-down list box.
Obsolete Date	Is the date on which the document is no longer valid. If the Status of this revision is Current, this field should remain blank. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field. The Obsolete date should be greater than all other dates in this UI.
Approved Date	Is the date on which the document revision was approved by the individual named in the Approved By field. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field. The Approved date should be greater than or equal to the Revision date.

- Click Apply to add the document revision to the database.

Save Document Revision - Edit Revision page

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[Search](#) | [Associate Type](#)

Edit Revision

* Indicates required field

[Cancel](#) [Edit Document](#) [Apply](#)

Title		Revision Num	1
Document Number	MBAH019	Source	Imaging Innovations, Inc.
File		Sub Type	
Type	Aircraft	Item Type	
Operator		Subscribed To	No
Subscription Available	No		

Revision No	1	* Revision Type	Temporary Revision
Revision Date	31-MAY-2004	* Status	Current
Volume		Issue	
Issue Number		Issue Date	
Date Received		Media Type	
Effective Date		Obsolete Date	
Approved By			
Approved Date			

You can revise the maintenance document reference by clicking Edit Document, but your revision could be lost if you do not click Apply first.

Editing Document Revision Records

Documents related to an equipment often continue to evolve during the life cycle of the equipment. Maintenance organizations require to track and update such document revisions. Oracle Complex Maintenance, Repair, and Overhaul allows you to record and edit document revision information.

Prerequisites

- ☐ The document revision you want to edit must exist in the database.

To edit document revision records:

1. Retrieve the document revision record for which you want to edit information (see Finding Document References, page 4-9).
2. Select the document revision that you want to edit from the Document List at the bottom of the page.
3. Click Edit Revision to navigate to the Edit Revisions page. If you selected a document record that has no revisions defined, clicking the Edit Revision button will launch the Create New Revision page.

Edit Document Revision - Edit Revision page

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Document Index Route Management Fleet Maintenance Program

Search | Associate Type

Edit Revision

* Indicates required field

Cancel Edit Document Apply

Title	1213 Test VLe	Revision Num	1213-REV01
Document Number	12- 45 - 234	Source	Abbitual
File		Sub Type	
Type	Aircraft	Item Type	
Operator		Subscribed To	No
Subscription Available	Yes		

Revision No	1213-REV01	* Revision Type	Full Revision
Revision Date	16-JAN-2004	* Status	Current
Volume		Issue	
Issue Number		Issue Date	
Date Received		Media Type	
Effective Date		Obsolete Date	
Approved By			
Approval Date			

4. Enter the document revision information in the fields provided. The fields on the Edit Revision page are the same as on the Create New Revision page with the exception of the Revision Number field, which you cannot change. For field descriptions, see Description of fields related to document revisions, page 4-22.

If the Revision Number is incorrect, create a new revision, noting in the Remarks field, the reason for the new revision (for example, "Typo in the original revision entry."). This feature preserves the tractability of document revisions to maintenance procedures, should questions about the effectiveness of maintenance procedures be raised in the future.

5. Click Apply when you have finished entering revised document information.
You can switch to the document reference editing page by clicking the Edit Document button.

Uploading Electronic Documents

Documents available in an electronic format can be uploaded to the database and associated with relevant records in Document Index. Associated electronic documents can be accessed via links in Document Index on the search results pages and edit revision pages.

Prerequisites

- ☐ A document revision must exist with media type of 'E-File'. The user needs access to the file system where the electronic document is stored.

To upload electronic documents:

1. Retrieve the document revision record, that you want to upload electronic documents for, using the document search functionality.

Find Document Record - Search Document page

ORACLE Complex MRO Home Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Document Index Route Management Fleet Maintenance Program

Search | Associate Type

Search Document

Source Document Number

Title Status

Document Type Sub Type

Operator Item Type

Media Type

Search Results

Select object and...

Previous 1-5 of 5 Next

Select	Document Num	Title	Type	Sub Type	Revision Num	Revision Type	Status	Media Type	Electronic File
<input type="radio"/>	11N-2012-31	Elevator feel actuator - removal/Installation	Aircraft	Technical Order	1	Full Revision	Current	Electronic File	
<input type="radio"/>	2002-19-51	Flight control modules (FCM) - Boeing Model 737 Series Airplanes	Aircraft	Airworthiness Directives	R1	Full Revision	Current	Electronic File	
<input type="radio"/>	21-27-02	Equipment Cooling Fan	Aircraft	Maintenance Manual	1	Temporary Revision	Current	Electronic File	
<input type="radio"/>	21-61-06	Cabin Temperature Sensor	Aircraft	Maintenance Manual	1	Temporary Revision	Current	Electronic File	

- Click Upload to bring up the upload page. The Upload button can also be accessed from the Edit Revision page.

Electronic File Upload page

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Document Index Route Management Fleet Maintenance Program

Search | Associate Type

Electronic File Upload

Title **Elevator feel actuator - removal/Installation**

Document Number **11N-2012-31**

Revision Num **1**

File

Source **Angela Gentile**

Type **Aircraft**

Sub Type **Technical Order**

Operator

Item Type

Subscription Available **Yes**

Subscribed To **Yes**

File To Upload

File	Description
<input type="text"/>	<input type="text"/>

- Click Browse to open your file browser.
- Select your document and click on open. The file location path and the filename copy into the File field.

Note: There is a predefined folder set up in Oracle Content Manager for storing electronic documents. Refer to the Implementation Guide for more information on setting up Oracle Content Manager for Document Index.

5. Enter an optional description of the electronic document.

Upload File - Electronic File Upload page

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Document Index Route Management Fleet Maintenance Program

Search | Associate Type

Electronic File Upload

Title	Elevator feel actuator - removal/Installation		
Document Number	11N-2012-31	Revision Num	1
File		Source	Angela Gentile
Type	Aircraft	Sub Type	Technical Order
Operator		Item Type	
Subscription Available	Yes	Subscribed To	Yes

File To Upload

File	Description
heVA97640-03\images\addeff.gif Browse...	image

Cancel Upload

6. Click on Upload. The document is now accessible through the document search result page or the edit document revision page.

Note: The system verifies if the file exists or not, and a warning message will be displayed if the user enters an incorrect file name or selects an empty file to upload.

View file Upload - Search Document page

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Route Management

Fleet Maintenance Program

Search

Associate Type

Confirmation

File Upload Successful.

Search Document

Source

Title

Document Type

Operator

Media Type

Document Number

Status

Sub Type

Item Type

Go

Clear

Search Results

Create

Select object and...

Edit Revision

Create New Revision

Upload

Delete Uploaded File

Previous

1-5 of 5

Next

Select	Document Num	Title	Type	Sub Type	Revision Num	Revision Type	Status	Media Type	Electronic File
<input type="radio"/>	11N-2012-31	Elevator feel actuator - removal/Installation	Aircraft Technical Order		1	Full Revision	Current	Electronic File	adderff.gif
<input type="radio"/>	2002-19-51	Flight control modules (FCM) - Boeing Model 737 Series Airplanes	Aircraft Airworthiness Directives		R1	Full Revision	Current	Electronic File	
<input type="radio"/>	21-27-02	Equipment Cooling Fan	Aircraft Maintenance Manual		1	Temporary	Current	Electronic	

7. To delete an uploaded file, select the document revision from the Search results table, and click Delete Uploaded File.

Note: .A revision can only have one file associated with it.

Working With Master Configurations

This chapter covers the following topics:

- Overview
- What is Master Configuration?
- Key Business Processes
- Working with Master Configuration Records
- Creating Master Configuration Records
- Working with Positions
- Creating Positions in a Master Configuration
- Copying Existing Configurations to a Position
- Associating Item Groups with a Position
- Associating a Sub-Configuration/ Alternate Sub-Configuration with a Position
- Creating Rules for a Configuration or Sub-configuration
- Editing Position Ratios
- Attaching Documents to a Position
- Managing Alternate Items Information
- Adding Alternate Items Information
- Finding Alternate Items Information
- Editing Alternate Items Information
- Creating Item Group Revisions
- Editing Master Configuration Records
- Creating Master Configuration Revisions
- Approving Master Configurations
- Viewing Master Configuration Records
- Viewing Position Details
- Viewing Position Ratios Associated with a Position
- Viewing Documents Attached to a Position
- Viewing Alternate items Associated with a Position

- Viewing Positions Associated with an Alternate Item Group
- Viewing Rules
- Closing Master Configuration Records
- Reopening Closed Records

Overview

Modeling a complex assembly or system involves defining the hierarchy or structure, including the parts or sub-configurations allowed at each position or location, rules to control the configuration, documents which apply to the configuration, and ratios applicable between positions by which counter updates to will flow down, if other than one to one. The assembly configuration for an aircraft type, locomotive, ship, or any other complex system or assembly, is described by the Oracle Complex Maintenance Repair and Overhaul module called Master Configuration.

This chapter discusses the key functions supported by the Oracle Complex Maintenance Repair and Overhaul Master Configuration module. The chapter provides process oriented, task based procedures for using the application to perform essential tasks for managing configuration models.

See:

- Creating Master Configuration Records , page 5-4
- Working with Positions, page 5-9
- Creating Positions in a Master Configuration , page 5-9
- Copying Existing Configurations to a Position, page 5-12
- Associating Item Groups with a Position, page 5-15
- Associating a Sub-Configuration/Alternate Sub-Configuration with a Position, page 5-17
- Creating Rules for a Configuration or Sub-Configuration, page 5-20
- Editing Position Ratios , page 5-26
- Attaching Documents to a Position , page 5-27
- Adding Alternate Items Information , page 5-30
- Finding Alternate Items Information , page 5-34
- Editing Alternate Items Information, page 5-35
- Creating Item Group Revisions, page 5-39
- Editing Master Configuration Records, page 5-40
- Creating Master Configuration Revisions , page 5-42
- Approving Master Configurations, page 5-43
- Viewing Master Configuration Records, page 5-44
- Viewing Position Details, page 5-45
- Viewing Position Ratios Associated with a Position, page 5-46
- Viewing Documents Attached to a Position, page 5-48

- Viewing Alternate items Associated with a Position, page 5-49
- Viewing Positions Associated with an Alternate item Group, page 5-50
- Viewing Rules, page 5-51
- Closing (Removing) Master Configuration Records, page 5-52
- Reopening Closed Records, page 5-53

What is Master Configuration?

Master Configuration is the template or control structure for an assembly, system, sub-assembly, or subsystem that provides a model of the structure of an electrical, hydraulic, pneumatic, or mechanical system or assembly, with rules for component location and component selection, and applicable maintenance operations. For example, a Boeing 757-300 can be configured with either a pair of Pratt & Whitney PW2043 engines, or a pair of slightly more powerful Rolls-Royce RB211-535E4B engines. Master Configuration is used to create and maintain instances or units derived from the configuration hierarchy, parts, sub-assemblies, and rules defined. The presence of a master configuration simplifies route development (see the Route Management module for more information about maintenance routes), by serving as the basis for material requirements and their dispositioning in a disposition list. Master Configuration also simplifies maintenance requirement development (see the Fleet Maintenance Program module for more information about maintenance requirements), by serving as an association point for which maintenance requirements will apply.

Key Business Processes

The Master Configuration module supports the following business processes:

Definition of Allowable Configuration

A master configuration is a template that represents the hierarchy of component positions in an assembly. The relative component positions define the parent-child relationship among the items within a master configuration. Master Configuration identifies the tracked parts that make up a unit, and allows you to construct a logical tree structure to illustrate the component positions in an assembly. You can define multiple master configurations for a product to suit different operation modes. You can also define the allowable part alternates for each component position.

Provide Configuration Template for Unit Configuration

A fleet operator may have multiple units of the same configuration. The Master Configuration module provides a template to create a unit configuration, which reflects the current “as-installed” configuration of a product. A unit configuration replicates the position structure of a master configuration.

Attach Applicable Maintenance Requirement

When defining a unit’s applicable maintenance requirement, organizations can use several grouping mechanisms to streamline the process. Oracle Complex Maintenance, Repair, and Overhaul allows you to apply a maintenance requirement, directly to a unit configuration, to a node in a product classification that a unit configuration inherits, or to a position in a master configuration that a unit configuration inherits. If you associate a maintenance requirement to a node in a master

configuration for example, any unit configuration that you create based on the master will receive those maintenance requirements.

Provide Checklist for User

The physical breakdown of a complex assembly decides shop floor processes and information requirement. You can associate such information with a node or position in a master configuration. During the overhaul of an assembly, maintenance personnel, remove, re-install, and replace serialized parts. The service provider has to provide an on-off log for such operations. The off log indicates the item number and serial number of a item installed at a certain position before the maintenance event. The on log indicates the item number and serial number of the item installed at a certain position during maintenance. Oracle Complex Maintenance, Repair, and Overhaul allows you to provide an on-off log template indicating all the positions and item alternates for the nodes (positions) where users can install or remove items.

Working with Master Configuration Records

After you create a master configuration record using Oracle Complex Maintenance, Repair, and Overhaul, you can retrieve the record to edit the information, to create new master configurations, or to create unit configurations based on existing master configuration records.

Related Topics

Creating Master Configuration Records, page 5-4

Creating Master Configuration Records

A master configuration represents the structure of a complete electromechanical assembly, consisting of as many nodes as necessary to fully represent the assembly. There is no limit to the number of nodes that an assembly representing a fleet unit can comprise. This process allows the user to add the master configuration of a fleet unit to the database.

Prerequisites

- ☐ You must know the information required to create a master configuration record. Position references must have been set up. For information, refer to the master configuration set up in *Oracle Complex Maintenance, Repair, and Overhaul Implementation guide*.

To create a master configuration record:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click the Configuration link. The Search Master Configuration page appears.

Search Master Configuration page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Search Master Configuration

Name
Description
Position

Revision
Status
Item

Master Configuration List

Select	Name	Revision	Version	Edit	Description	Status	Close
No records were found matching the given criteria..							

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2. Select the Create button to open the Create Master Configuration page.

Create Master Configuration page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Create Master Configuration

* Name
Description
Status **Draft**

* Indicates required field
Create Position

* Position
Quantity **1**
Start Date
Item Group
Display Order **1**

Position Description
UOM **Ea**
End Date
Description
Necessity **Mandatory**

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3. Use the information in the following table to enter information related to master configuration records.

Description of fields related to master configuration records

Field	Description
Name	Refers to an appropriate name for the configuration template hierarchy.
Description	Is the field where you can enter phrases or sentences that describe this configuration hierarchy.
Status	Indicates whether a master configuration record is in Complete, Draft, Approval Pending, Approval Rejected, Closed or Expired status.
Position	Refers to the position in the assembly that acts as the topmost node of the master configuration hierarchy. Use the LOV icon to launch the Select Position page. Enter a partial search string with the generic substitution meta character% (example, Engine%), and click Search to display all matching records in the database. Click the appropriate record to return this value to the Position field in the Search Master Configuration page.
Position Description	Is the field containing phrases or sentences that describe this position in the configuration hierarchy.
Position Key	Is used to uniquely identify a position within a MC structure. The positions should be non-revision specific so that rules, FMP, and so on are not defined each time a new revision of the MC is created. The configuration position is thus created as a link list of the Master Configuration (revision-specific or non-revision specific) + positions. To achieve non-revision specificity, position keys are used. This linked list of MC/position>MC/position>MC/position.... can always uniquely identify a position within a MC structure. This position path can then be used to compare against any units.
Quantity	Refers to the number of items in the item selection option set for this position in the configuration hierarchy. Enter a number greater than zero.
UOM	This identifies the unit of measure of the items in the current hierarchy position. You cannot enter text directly in this field because the text value must exist in the database. Enter a search argument with the generic substitution meta character%, and click Go to retrieve and display all records from the database that match the search argument. Click the correct value from the records displayed on the Select UOM page, to have the text value returned to the field
Start Date	Refers to the date of the first day of effectivity of this position in the configuration hierarchy. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.
End Date	Refers to the last day on which the position in the configuration is valid. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.

Field	Description
Item Group Name	Is the name for the set of item option selections at this node. You cannot enter text directly in this field because the text value must exist in the database. Use the LOV icon to navigate to the Select Group Name page. Enter a text search argument (example, MACHINE%), and click Search to retrieve and display all records from the database that match the search argument. Click the correct value from the records displayed, to have the text value returned to the field.
Item Group Description	Refers to a description of the item options set, and is displayed automatically when you retrieve the item Group Name.
Display Order	Refers to an ordinal that determines the order in which the configuration positions are displayed.
Revision	The revision number to indicate that the master configuration is under revision control. Revision control enables multiple configuration revisions to be active at one time. This is necessary because all of the units cannot be migrated to the new master configuration at the same time. During that transition phase the user will maintain units based on two different revisions of the same master configuration. This also aids in implementing configuration modifications throughout the master configuration life cycle. The Revision will be defaulted and auto generated, if not entered by the user.
Necessity	Indicated whether the position defined is mandatory or optional.

Note: Information in fields marked with asterisk is mandatory.

4. To create the top node of the hierarchy, search for, and select a position from the position list of values.

Create Configuration Record - Create Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Create Master Configuration

Cancel Apply

* Name MC 200 Revision

Description Version 1

Status Draft

* Indicates required field

Create Position

* Position #1 Engine Position Description #1 Engine

Quantity 1 UOM Ea

Start Date 31-MAY-2004 End Date

Item Group Description

Display Order 1 Necessity Mandatory

Cancel Apply

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- Optionally, associate an item group with this node.
- Click Apply to save this master configuration record in the database. The Edit Master Configuration page appears displaying the configuration tree. The top nodes' details are displayed next to the configuration tree.

Edit Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

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Actions Add Go

Edit Master Configuration

Cancel Alternate Items GO Apply

* Name MC 200 Revision 1

Description Version 1

Status Draft

* Indicates required field

Edit Position

* Position #1 Engine Position Description #1 Engine

Position Key 12301

Quantity 1 UOM Ea

Start Date 31-MAY-2004 End Date

Item Group Description

Display Order 1 Necessity Mandatory

Cancel Alternate Items GO Apply

- From the Edit Configuration page, you can do the following:
 - Add, delete, and copy positions

- Edit Alternate items information
- Attach documents to a position
- Edit Position Ratios
- Submit the configuration for approval
- Create Rules
- Add or remove sub-configurations

Working with Positions

After you define the general master configuration attributes, you can create each position in the hierarchy. For each position in the hierarchy, you can define a set of valid items, with maintenance requirements for each item. Oracle Complex Maintenance, Repair, and Overhaul stores this information in the database. Also, you can retrieve master configuration records to add other master configurations, item locations, and valid items to a position in the selected configuration.

Related Topics

Creating Positions in a Master Configuration, page 5-9

Copying Existing Configurations to a Position, page 5-12

Associating Item Groups with a Position, page 5-15

Associating a Sub-Configuration/ Alternate Sub-Configuration with a Position , page 5-17

Creating Rules for a Configuration or Sub-configuration, page 5-20

Editing Position Ratios, page 5-26

Attaching Documents to a Position, page 5-27

Managing Alternate items/Items Information, page 5-30

Creating Positions in a Master Configuration

Use the Edit Master configuration page to create a position in your master configuration. The top node in the hierarchy is created when defining the master configuration template, in the Create Master Configuration page. All additional nodes are defined later. The position you create in the Edit Configuration page will form an additional node in the selected master configuration hierarchy.

Prerequisites

- ☐ The master configuration for which you want to define a position must exist in the database. Position references must have been set up. For information, refer to the master configuration set up in *Oracle Complex Maintenance, Repair, and Overhaul Implementation Guide*.

To create a position:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Configuration Management Global button. The Search Master Configuration page appears.

- Click the Create button to launch the Create Master Configuration page.
- Enter the master configuration information in the fields provided. For field descriptions, see Description of fields related to master configuration records, page 5-6.
- Create the top node of the configuration hierarchy.
- Click Apply to save the master configuration record in the database. The Edit Master Configuration page appears displaying the Master Configuration Tree structure in the left side of the page. The position details of the top node are also displayed.
- Select the node where you want to add a position, and then choose Add from the drop-down menu. Click Go. The Create Position section is displayed under the master configuration details.

Select Node - Edit Master Configuration page

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Actions:

☒ #1 Engine

Edit Master Configuration

Name **MC 200** Revision **1**
 Description Version **1**
 Status **Draft**

* Indicates required field

Create Position

* Position Position Description
 Position Key
 * Quantity
 Start Date
 Item Group
 * Display Order
 * UOM
 End Date
 Description
 Necessity

- Use the information in the following table to enter information in the Create Position page.

Description of fields related to creating and editing position details

Field	Description
Position	Refers to positions in the assembly that can be the parent or child node in the master configuration hierarchy. Enter a partial search string with the generic substitution meta character% (example, Engine%), and click Go to launch the Select Position page that displays all matching records in the database.
Position Description	Is the field containing phrases or sentences that describe this configuration hierarchy.

Field	Description
Quantity	Refers to the number of items in the item selection option set for this position in the configuration hierarchy. Enter a number greater than zero.
UOM	This identifies the unit of measure of the items in the current hierarchy position. You cannot enter text directly in this field because the text value must exist in the database. Enter a text search argument with the generic substitution meta character%, and click Go to retrieve and display all records from the database that match the search argument. Click the correct value from the records displayed on the Select UOM page to have the text value returned to the field.
Start Date	Refers to the date of the first day of effectivity of this position in the configuration hierarchy. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.
End Date	Refers to the date that represents the last day on which the position in the configuration is valid. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.
Item Group Name	Is the name for the set of item option selections at this node. You cannot enter text directly in this field because the text value must exist in the database. Enter a text search argument (example, MACHINE%), and click Go to retrieve and display all records from the database that match the search argument. Click the correct value from the records displayed, to have the text value returned to the field.
Item Group Description	Refers to a description of the item options set, and is displayed automatically when you retrieve the item group Name.
Display Order	Refers to an ordinal that determines the order in which the configuration positions are displayed.
Necessity	Sets a node as mandatory or optional. This field defines whether the item represented by the node is a required installation, or is only an option.

8. Click Apply to add the position to the master configuration record.

Add Position - Edit Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

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Actions Add Go

#1 Engine
72-50 TURBINE SECTION

Confirmation • Master Configuration successfully updated.

Edit Master Configuration

Cancel Alternate Items Go Apply

Name MC 200 Revision 1
Description Version 1
Status Draft

* Indicates required field

Edit Position

* Position 72-50 TURBINE SECTION Position Description TURBINE SECTION
Position Key 12302
* Quantity 1 UOM Ea
Start Date 31-MAY-2004 End Date
Item Group Description
* Display Order 1 Necessity Mandatory

This will launch the Edit Master Configuration, Edit Position page where you can edit the position details if necessary. Click Apply to save the changes. You can attach position ratios, documents, or alternate items to the node position by using the appropriate buttons on this page. For more information, refer to the appropriate sections in this chapter.

Copying Existing Configurations to a Position

The Edit Master Configuration page allows you to access the Search Master Configuration page, where you can retrieve an existing master configuration record that you want to add to a selected master configuration position. This process allows you to build configuration template hierarchies using existing master configuration records.

Prerequisites:

Master configuration records that you want to add to the position must exist in the database.

To copy configurations to a position:

1. Navigate to the node to which you want to add a configuration. See Creating Positions in a Master Configuration, page 5-9.
2. To copy an existing configuration to a node, click the check box next to the node then select Copy from the drop-down menu. Click Go. The Search Master Configuration page appears.

Search Existing Configuration - Search Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Search Master Configuration

Name Revision
Description Status
Position Item

Master Configuration List

Select Name Revision Version Description Status Tree

No records were found matching the given criteria..

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3. Search for the master configuration that you want to add. The results appear in the lower half of the page.

View Configuration List - Search Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Search Master Configuration

Name Revision
Description Status
Position Item

Master Configuration List

Previous 1-10 of 149 Next

Select	Name	Revision	Version	Description	Status	Tree
<input checked="" type="radio"/>	00-MC-00	1	1	00-MC-00	Complete	
<input type="radio"/>	00-MC-00	2	2	00-MC-00	Draft	
<input type="radio"/>	000-MC-000	1	1		Draft	
<input type="radio"/>	1.000	1	1		Draft	
<input type="radio"/>	737-800	1	1	Boeing Airframe	Complete	
<input type="radio"/>	737-800	2	2	Boeing Airframe	Complete	
<input type="radio"/>	737-800	3	3	Boeing Airframe	Complete	

4. Select the pertinent record from the Master Configuration List, generated when you execute the search.
5. This will launch the View Master Configuration page.

View Configuration Details - View Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Copyright 2000, Oracle Corporation. All rights reserved.

View Master Configuration

Cancel Alternate Items GO Copy

* Name	00-MC-00	Revision	1
Description	00-MC-00	Version	1
Status	Complete		

* Indicates required field

[View Position](#)

* Position	Airframe	Position Description	Airframe
Position Key	11740		
Quantity	1	UOM	Ea
Start Date	22-APR-2004	End Date	
Item Group	00-CMRO-00	Description	CMRO Test PG Grp
Display Order	1	Necessity	Mandatory

Cancel Alternate Items GO Copy

For more information, refer to the following sections:

- Viewing Position Details, page 5-45
 - Viewing Documents Attached to a Position, page 5-48
 - Viewing Alternate items Associated with a Position, page 5-49
 - Viewing Rules, page 5-51
 - Viewing Position Ratios Associated with a Position, page 5-46
6. To add this master configuration to the selected position, click Copy. The Edit Configuration page appears. The Master Configuration will now appear in the configuration tree.

View Configuration Tree - Edit Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Copyright 2000, Oracle Corporation. All rights reserved.

Actions: Add Go

Edit Master Configuration

Cancel Alternate Items GO Apply

* Name **MC 200** Revision 1

Description Version 1

Status **Draft**

* Indicates required field

[Edit Position](#)

* Position #1 Engine Position Description #1 Engine

Position Key **12301**

Quantity 1 UOM **Ea**

Start Date 31-MAY-2004 End Date

Item Group Description

Display Order 1 Necessity **Mandatory**

Cancel Alternate Items GO Apply

Associating Item Groups with a Position

A Tracked Item Groups comprises items that can be assigned to a particular position in a master configuration. You can associate an Item Group with a position. You can then select the item instances to be added to the position. Non-tracked item groups are created for use in item compositions. Item groups can be revised independently from the master configuration. The master configuration gets updated with the changes upon the item group approval.

See Managing Alternate Items Information, page 5-30 for information on creating Item Groups.

Prerequisites

- ☐ The item group must exist in the database. The configurations and positions must have been defined.

To associate item groups with a position:

1. Create a position and click Apply. See Working with Positions, page 5-9.
2. Search for an Item Group, using the search icon. The Select Group Name page appears. Click Go to view a list of item groups.

Select Group Name page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

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Actions Add Go

#1 Engine
72-50 TURBINE SECTION

Select Group Name

Enter Partial Value % Search Cancel

Group Name	Description	Status
00-CMRO-00	CMRO Test PG Grp	Complete
00-KM-00		Complete
00-KM-00-1		Complete
00-KM-00-2	jh%(**%	Draft
00-KM-00-3		Draft
00-KM-00-Copy	This is a copy test	Draft
00-KM-12		Approval Pending
00-PG-00-New		Draft
01-KM-00		Draft
02-KM-00		Complete

First | Previous 1 - 10 of 179 Next | Last

Cancel

3. Select the item, which you want to associate with the position. The Edit Master configuration page appears displaying the association.

View Item Association - Edit Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

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Actions Add Go

#1 Engine
72-50 TURBINE SECTION

Edit Master Configuration

Cancel Alternate Items GO Apply

* Name MC 200 Revision 1
Description Version 1
Status Draft

* Indicates required field

Edit Position

* Position #1 Engine Position Description #1 Engine
Position Key 12301
Quantity 1 UOM Ea
Start Date 31-MAY-2004 End Date
Item Group 00-CMRO-00 Description CMRO Test PG Grp
Display Order 1 Necessity Mandatory

Cancel Alternate Items GO Apply

Note: If any item in the Item Group has Quantity more than 1, it cannot be associated to a position which has child nodes.

4. Optionally, you can choose Alternate Items from the drop-down menu to add alternate item instances. See Managing Alternate Items Information., page 5-30

Associating a Sub-Configuration/ Alternate Sub-Configuration with a Position

A Master Configuration can be created as a hierarchy of positions and assembly of other master configurations. A master configuration can be defined for a sub component of a higher assembly. This sub-configuration can exist by itself, and also be added to the configuration hierarchy of another master configuration. For example, the master configuration of the engine can be included in the master configuration of the aircraft. You can add Sub-Configurations to the Master Configuration positions, thus allowing the association of configurations within a configuration.

To attach a sub-configuration to a position:

1. Create a position, and click Apply. See Creating Positions in a Master Configuration, page 5-9.
2. The Edit Position page appears. To add sub-configurations to the position that you defined, select Add More Rows in the Alternate Subconfigurations table.

Associate Sub-Configuration - Edit Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Overview | Alternate Parts | Composition List | Create

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Actions Add Go

#1 Engine

72-50 TURBINE SECTION

Airframe

Left

Edit Position

* Position Left Position Description Left

Position Key 11741

* Quantity 1

* UOM Ea

Start Date 22-APR-2004 End Date

Item Group Description

* Display Order 1 Necessity Mandatory

Alternate Subconfigurations

Select Focus	Name	Revision	Description	Status	Priority	Start Date	End Date

3. Select a sub-configuration using the Name search icon. Enter value in the Priority field.

Select Sub-Configuration - Edit Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

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Actions: Add Go

#1 Engine

72-50 TURBINE SECTION

Airframe

Left

Edit Position

* Position Left Position Description Left

Position Key 11741

* Quantity 1 * UOM Ea

Start Date 22-APR-2004 End Date

Item Group Description

* Display Order 1 Necessity Mandatory

Alternate Subconfigurations

Select	Focus	Name	Revision	Description	Status	Priority	Start Date	End Date
		737-800	5	Boeing Airframe	Complete	1		

Use the information in the following table to enter information related to sub-configuration association.

Description of fields related to sub-configuration association

Field	Description
Name	Name of the child Master Configuration or sub-configuration.
Revision	Field contains a item revision identifier. The revision number indicates that the master configuration is under revision control. Revision control enables multiple configuration revisions to be active at one time.
Focus	The user can click this icon to change the page context to the sub master configuration (sub MC).
Description	Description of the sub MC.
Status	Status of the sub MC. The sub MC should not be in Closed or Expired status.
Priority	The priority field is used to specify the highest priority assembly to be used by planning when planning for a replacement.
Start Date	Start date of the sub MC mapping.
End Date	End date of the sub MC mapping.
Remove	Is used to remove the sub MC mapping.

4. Select Apply. The sub-configuration is associated with the position.

Add Sub-Configuration - Edit Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview Alternate Parts Composition List Create

Copyright 2000, Oracle Corporation. All rights reserved.

Actions Add Go

#1 Engine
72-50 TURBINE SECTION
Airframe
Left

Edit Position

* Position Left Position Description Left
Position Key 11741
* Quantity 1 * UOM Ea
Start Date 22-APR-2004 End Date
Item Group Description
* Display Order 1 Necessity Mandatory

Alternate Subconfigurations

Previous 1-1 of 1 Next

Select	Focus	Name	Revision	Description	Status	Priority	Start Date	End Date	Remove
<input checked="" type="radio"/>	<input checked="" type="radio"/>	737-800	1	Boeing Airframe	Complete	1			

Add More Rows

Previous 1-1 of 1 Next

Cancel Alternate Items Go Apply

5. In the Alternate Subconfigurations table, select the sub-configuration and click Apply. The sub-configuration is added to the configuration tree.

View Configuration Hierarchy - Edit Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview Alternate Parts Composition List Create

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Actions Add Go

#1 Engine
72-50 TURBINE SECTION
Airframe
Left
#1 Engine
Position 1
Position 2

Edit Master Configuration

Cancel Alternate Items Go Apply

Name MC 200 Revision 1
Description Version 1
Status Draft

* Indicates required field

Edit Position

* Position Left Position Description Left
Position Key 11741
* Quantity 1 * UOM Ea
Start Date 22-APR-2004 End Date
Item Group Description
* Display Order 1 Necessity Optional

Alternate Subconfigurations

Previous 1-1 of 1 Next

Note: After adding the sub-configuration to the assembly hierarchy, the tree can be expanded and positions within the sub-configuration selected and their positions changed. The position

code for a sub-configuration position defaults to the value defined within the sub MC. You can override that by defining the position code from the context of a higher level MC. The new position will only affect the sub-configuration when the sub-assembly is installed in this higher assembly allowing for the position to be applicable based on the installation.

6. Click the sub-configuration Focus icon changes the focus of the entire configuration to the sub-configuration. You can view the master configuration header and position details of the sub - master configuration.

Change Focus to Sub-configuration - View Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview Alternate Parts Composition List Create

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View Master Configuration

Engine Assy

- 72-20-00-01 Fan Module
- CFM56 Core Assy-Turbofan CFM56
- LPT Module Assembly
- Separator-Air Oil

* Name **CFM56-7B27G14** Revision **2**

Description **ENGINE ASSY-BASIC ENG RF** Version **2**

Status **Complete**

* Indicates required field

View Position

* Position **Engine Assy** Position Description **Engine Assy, 72-00**

Position Key **12120**

Quantity **1** UOM **Ea**

Start Date **18-MAY-2004** End Date

Item Group **CFM56** Description **CFM56 Engine Assu**

Display Order **1** Necessity **Mandatory**

Note: You can associate sub master configurations with a position only when a sub-assembly has been defined under that position.

Creating Rules for a Configuration or Sub-configuration

You can setup rules for configurations, sub-configurations, positions, and items that work together, to control the allowable items to be installed into the configuration. The definition of configuration rules enables the enforcement of regulations for equipment configurations issued by OEM's and regulatory institutions such as the FAA. You can create rules for:

- Restricting items for a position
- Restricting configurations for a position
- Restricting positions based on other positions

A reference for desired fleet percentages

To create rules for a configuration:

1. Choose Rules from the drop-down menu in the Edit Configuration page. Click go. The Edit Rules page appears.

Edit Rules page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Overview | Alternate Parts | Composition List | Create | Master Configuration | Unit Configuration | Product Classification

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Actions

☐ #1 Engine
☒ 72-52-00 HPT TURBINE

Name **AHLUMPC01** Revision **3**
Description **MC for Axle** Status **Draft**

Rule List

Rule Name	Description	Rule Type	Start Date	End Date	Remove
No records were found matching the given criteria..					

2. To create rules, select Create Rule. The Create Rule page appears. Define a Rule Name. Optionally, enter a description, start date, and end date. Use the information in the following table to define rules.

Field	Description
Rule Name	User-defined Rule name.
Description	Description of the rule.
Rule Type	Can be Mandatory or Fleet. A rule type of mandatory indicates that the rule will be evaluated during installations, and a rule type of fleet indicates that the rule is created only as a reference to the fleet percentages.
Start Date/End Date	Select from calendar. The end date must be greater than the start date.
Sequence	User defined value to determine the order of the rules defined.
Left and Right Parenthesis	Used to group two rule statements.
Subject	Use the search icon to launch the 'Select Positions' page where you can select the position path for which you are defining the rule.
Operator (Predicate)	Conditions in a rule. The possible values are: is installed, is not installed, has, does not have, must have, must not have, has same sub-configuration installed, does not have same sub-configuration installed.
Object Type	You can select from the following Object types: item, configuration, configuration as position, item as position(1), or item as position.
Object	Use the search icon to select an object based on the object type chosen.
Operator	You can select from the following: And, Or, Implies, and Requires. The rule statements may be combined with these operators.

3. Choose a Rule Type.

Create Rule page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

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Actions

#1 Engine
72-52-00 HPT TURBINE

Create Rule

Rule Name Description
 Rule Type Start Date End Date

Rule Definition

Remove Sequence	(Subject	Operator	Object Type	Object
No records were found matching the given criteria.					

- Define the rule statement by entering data in the Rule Definition region.

Enter Rule Definition - Create Rule page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Copyright 2000, Oracle Corporation. All rights reserved.

Actions

#1 Engine
72-52-00 HPT TURBINE

Create Rule

Rule Name Description
 Rule Type Start Date End Date

Rule Definition

Remove Sequence	(Subject	Operator	Object Type	Object
<input type="button" value="Add More Rows"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Add More Rows"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Add More Rows"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Add More Rows"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- Click Apply. The Rule record is added to the database.
- To Edit a rule, select the link under Rule Name in the Edit Rules page. The rule details are displayed.

You can set up rule control for configurations, sub-configurations, positions, and items that work together to produce the rule or rule set to control a configuration. Each control area may be combined with one or multiple of the rule control methods to effectively control the assembly. Note the following rule controls:

Configuration Rule Control

For the configuration rule control the following apply:

Subject: Configuration

Objects: Positions and Instances

Using a configuration as the subject, the direct object pointers are one or many positions or the percent of instances to plan. The rule will include a chain or sub-construct of the other rule controls. Referencing Positions it requires, excludes, or negates though the use of Necessity - mandatory, optional, and optional with a rule (containing Empty / Is Null, Installed / Is Not Null, Same As). Referencing Instances it implies the minimum and maximum percent or quantities by state / condition per configuration.

The outcome produces the following:

- Installation Allowed
- Installation Not Allowed
- Configuration Not Valid
- Configuration Valid

Position Rule Control

For the Position Rule Control the following apply:

Subject: Position

Objects: Sub-Configurations / Alternate Sub-Configurations, and Items

Using positions as the subject it will be in a sub-construct, if configuration control, or as a stand alone which contain sub-constructs, if node specific.

Referencing Sub-Configurations / Alternate Sub-Configurations it implies allowed by the association, excludes allowed by adding a rule, and requires by the use of mandatory or a rule.

Referencing Items though the item group association it implies allowed and excludes or requires through a rule.

The outcome produces the following:

- Installation Allowed
- Installation Not Allowed
- Configuration Not Valid
- Configuration Valid

Sub-Configuration / Alternate Sub-Configuration Rule Control

For the Sub-Configuration / Alternate Sub-Configuration Control the following apply:

Subject: Sub-Configuration / Alternate Sub-Configuration

Object: Position and Instances

Referencing Positions it requires, excludes, or negates though the use of Necessity - mandatory, optional, and optional with a rule (containing Empty / Is Null or Installed / Is Not Null)

Referencing Instances it implies the minimum and maximum percent or quantities by state / condition per configuration.

The outcome produces the following:

- Installation Allowed
- Installation Not Allowed
- Configuration Not Valid
- Configuration Valid

Item Rule Control

For the Item Control the following apply:

Subject: Item or Item #

Object: Item #, Is Installed, Previously Installed, Interchangeability Type, Interchangeability Code, and Instances

Referencing the item number it excludes, requires, or negates based on the hierarchy for which the rule is contained.

Referencing Item # and Is Installed or Previously Installed requires, excludes, or negates based on the current or historical reference.

Referencing Interchangeability Type and Interchangeability Code with the item # requires, excludes, negates, or implies based the type, code, or combination.

Referencing the priority with the item # provides defaults.

Referencing Instances it implies the minimum and maximum percent or quantities by state / condition per configuration. This rule is not evaluated.

The outcome produces the following:

- Installation Allowed
- Installation Not Allowed
- Configuration Not Valid
- Configuration Valid

Instance Rule Control

For the Instance Control the following apply:

Subject: Instance (Implied)

Object: Minimum, Maximum, Percent, Quantity, State / Condition

Referencing the object combination implies the instance quantity allowed per condition. This rule is not evaluated

The following table includes examples of some legal rule statements:

Subject	Predicate	Object	Outcome
Position	is installed / is not installed		T/F
Position	has / does not have	item	T/F/U if uninstalled
Position	has / does not have	sub-master configuration (rev specific)	T/F/U if uninstalled
Position	must have / must not have	item	T/F

The outcome of each rule evaluation is as follows:

- Success (T)
- Unable to determine true or false (U)
- Rule failed in evaluation (F)

When a rule is applied, the units affected by the configuration are validated. Once a list of applicable rules are defined for each position, then each rule is evaluated individually. The statements will require mapping position path to UC item instance and comparing instance properties against the rule requirements. The result of validation is either status “S” for success or a table of rule violations. If the validation fails the status of the configuration changes to incomplete. When you add a rule to a configuration or update a rule for a sub-configuration, the configuration and position path information are populated into the rule when the selection is made. When updating a rule for a sub-configuration from a higher assembly the modified rule will only apply to the higher assembly. You cannot alter the base rule.

Editing Position Ratios

The Edit Position Ratio page allows you to add information about service timer ratios in cases where the value derived from a service timer should be a multiple of the timer reading. For example, a powerplant operated in a high-temperature, high-altitude environment might run at much higher RPM to produce the same torque as compared to a less severe environment.

Prerequisites

- ☐ The master configuration record with the position that you want to define the position ratio for, must exist in the database. The values for the fields UOM and Rule Code should be set up by your organization.

To edit position ratios:

1. Retrieve the master configuration records that match your requirement.
2. Select the pertinent record from the Master Configuration List on the Search Master Configuration page.
3. The Edit Master Configuration page appears. Use the tree to find the position that needs to be changed. Click Position Ratio.

4. The Add Position Ratio page appears on the right.
5. Enter the information in the fields provided. If no position ratios are defined, the page will be empty. To define a position ratio, click Add More Rows. This will add three rows to the table. Enter information in the provided fields.
 - UOM indicates the unit of measurement that the operational service timer for this position represents. In most cases, this unit will be hours of time. You cannot enter text directly in this field because the text value must exist in the database. Enter a text search argument (e.g., MACHINE%), and click Go to retrieve and display all records from the database that match the search argument. Click the correct value from the records displayed on the Select UOM page to have the text value returned to the field.
 - Description refers to a text description of the unit of measure, and is automatically placed in this field when the UOM is selected from the database.
 - Ratio is a multiplying factor to be applied to an operational service timer to yield the service life value of the component. Typically, this ratio will be a number greater than or equal to 1.
 - Rule Code is a field containing a drop-down list box from which you can select a value. The set of values in this list is created when your configuration of Oracle Complex Maintenance, Repair, and Overhaul is installed.
6. Click Apply to retain the Position Ratio information in the database.
7. To remove a position ratio from the configuration hierarchy, select the record from the Position Ratio List, check the remove check box then click Apply.

Attaching Documents to a Position

The Edit Master Configuration page allows you to access the Attach Documents page, where you can search for, and enter documents that you want to attach as references for a component position in the hierarchy. This allows maintenance personnel to refer to the right documents while carrying out maintenance activities at a specific location in a system assembly. For more information on Document References, see the Document Index module.

Prerequisites

- ☐ The master configuration with the position to which you want to attach the documents must exist in the database.

To attach documents to a position:

1. Retrieve the master configuration records that match your requirement.
2. Select the pertinent record from the Master Configuration List on the Search Master Configuration page.
3. Click the Edit icon next to the record you want to edit. The Edit Master Configuration page appears.
4. Select a position. Choose Documents from the drop-down menu. Click Go. The Edit Document Associations page appears on the right.

Edit Document Associations page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

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Actions:

☐ Airframe
☒ Access Unit, Loading

Master Configuration Details

Name	000-MC-000	Revision	1
Description		Version	1
Status	Draft		

Position Details

Position	Airframe	Position Description	Airframe
Necessity	MANDATORY	Description	Mandatory

Document List

Remove	Document	Title	Revision	Type	Chapter	Section	Subject	Page	Figure	Note	Use Latest
No records were found matching the given criteria..											

- To attach documents to the position, click Add More Rows. Enter the following information:
 - Document refers to the name of a maintenance document previously recorded using the Document Index module. You cannot enter text directly in this field. Enter a search string with the generic substitution meta character%, and click Go to launch the Select Document Number page. The lower half of the Select Document Number page displays the list of documents in the database. Click the pertinent document record to return this value to the Document List fields in the Attach Documents page.
 - Title is the document title that is automatically placed in this field when the Document Name is selected from the database.
 - Chapter refers to the chapter number where the required reference is available. If the component at this level in the hierarchy is described by a single chapter or less in the maintenance document, enter the chapter number here in this field.
 - Section refers to the section identifier of the maintenance document that describes maintenance procedures for the component described by the current configuration position.
 - Page, Figure, and Note fields allow you to provide more specific information about the maintenance documentation for the items in the current configuration hierarchy position.
 - Use Latest field contains a drop-down list box from which you can select a value from a set of values set up when your Oracle Complex Maintenance, Repair, and Overhaul configuration was installed.

If you have attached a document reference to the selected position, the page will display the attached document in the Document List field.

Attach Documents to Positions - Edit Document Associations page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

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Actions: Add Go

Cancel Apply

☐ Airframe
☒ Access Unit, Loading

Edit Document Associations

Master Configuration Details

Name	000-MC-000	Revision	1
Description		Version	1
Status	Draft		

Position Details

Position	Airframe	Position Description	Ai
Necessity	MANDATORY	Description	Me

Document List

Remove	Document	Title	Revision	Type	Chapter	Section	Subject
	000-BBHAT-0	Bhat's	#%@^	LOCOMOTI			

- Click Apply to store your maintenance document definition for the selected configuration position in the database.

Save Document Association - Edit Document Associations page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Copyright 2000, Oracle Corporation. All rights reserved.

Actions: Add Go

☐ Airframe
☒ Access Unit, Loading

Edit Document Associations

Confirmation • 1 Document(s) Attached

Cancel Apply

Master Configuration Details

Name	000-MC-000	Revision	1
Description		Version	1
Status	Draft		

Position Details

Position	Airframe	Position Description	Airframe
Necessity	MANDATORY	Description	Mandatory

Document List

Previous 1-1 of 1 Next

Remove	Document	Title	Revision	Type	Chapter	Section	Subject	Page
<input type="checkbox"/>	000-BBHAT-0	Bhat's	#%@^	LOCOMOTIVE				

- To remove a document reference attachment, select the Remove check box, and click Apply.

Managing Alternate Items Information

Fleet vehicles with long service lives are designed and constructed with similar items from different suppliers. For example, aircraft can often be ordered from manufacturers with powerplant choice. A master configuration template definition that serves as a general model for a unit configuration definition, provides the fleet operator an opportunity to define an optional item group for any part position in the configuration.

The alternate items listed in the master configuration template allows you to derive a unit configuration that represents the “as-operated” configuration of a fleet unit. You can create Tracked item groups for association with master configurations, and Non-tracked item groups for use in item compositions. After creating the item group, you may submit it for approval. Once approved the new revision will replace the current revision. This allows the item group to be revised independently from the Master Configuration eliminating the need to revise the Master Configuration for each item group change. The new changes will be inherited into the Master Configuration upon the item group approval.

Related Topics

Adding Alternate Items Information, page 5-30

Finding Alternate Items Information, page 5-34

Editing Alternate Items Information, page 5-35

Adding Alternate Items Information

The Alternate Parts secondary tab allows you to access the Add Alternates page where you can add items, identified by item numbers existing in the database, to a particular group name. The group name specifies the set of item option selections at a node. You can also record any revision made to alternate item information in a group. You can create either a tracked item group or a non-tracked item group.

Prerequisites

- ☐ Values for Group Name, Item Number, Revision, Type, Interchangeability, and Reason fields should exist in the database.

To add alternate items:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Configuration Management Global button. The Master Configuration page appears.
2. Click on the Alternate Parts secondary tab to launch the Search Alternate Items page.

Search Alternate Items page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Overview | **Alternate Parts** | Composition List | Create

Master Configuration Unit Configuration Product Classification

Search Alternate Items

Group Name Description
Organization Item
Type Status All

Item Group List

Select	Group Name	Description	Status	Type	Edit	Remove
No records were found matching the given criteria..						

- Click Create to launch the Add Alternates page.

Add Alternates page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Overview | **Alternate Parts** | Composition List | Create

Master Configuration Unit Configuration Product Classification

Add Alternates

Group Name Description
Type Tracked Status **Draft**

Item List

Remove	Item	Organization	Description	Revision	UOM	Quantity	Priority	Interchangeability	Type	Reason
No records were found matching the given criteria..										
<input type="button" value="Add More Rows"/>										

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- Use the information in the following table to add alternate items details.

Description of fields related to alternate items

Field	Description
Group Name	Is the name for the set of item option selections at this node. You cannot enter text directly in this field because the text value must exist in the database. Enter a text search argument (example, MACHINE%), and click Go to retrieve and display all records from the database that match the search argument. Click the correct value from the records displayed on the Select Group page, to have the text value returned to the field.
Description	Refers to the description of the item options set, and is displayed automatically when you retrieve the Group Name.
Type	Refers to the Tracked and Non-Tracked Item groups. Tracked Item Group is a group of install base tracked items, which can be associated with positions in a master configuration. Non-Tracked Item Groups is a group of non tracked items, that are contained in a tracked item and may be required for use in a route to maintain a component.
Item	This field contains the identifier of the item that you want to add to the group of items that can be installed in this position. You cannot enter text directly in this field because the text value must exist in the database. Use the LOV icon to launch the Select Item List page. Enter a text search argument (example, MACHINE%), and click Search to retrieve and display all records from the database that match the search argument. Click the correct value from the records displayed to have the text value returned to the field.
Status	Status of the item group. The options are: Complete, Draft, Approval Pending, Removed, and Approval Rejected.
Description (item)	Is the item description automatically placed in this field when the Item Number is selected from the database. You cannot enter a value in this field.
Organization Code	Refers to the code for the inventory organization assigned to the alternate item when the item information is created in inventory. This information exists in the database.

Field	Description
Revision	This field contains a item revision identifier. You cannot enter text directly in this field because the revision must exist in the inventory database. Enter a text search argument (example, MACHINE%), and click Go to retrieve and display all records from the database that match the search argument. Click the correct value from the records displayed to have the text value returned to the field.
UOM	This field contains a unit of measure in which the item is usually supplied. You cannot enter text directly in this field because the text value must exist in the database. However, you can enter a text search argument (example, MACHINE%), and click Go to retrieve and display all records from the database that match the search argument. Click the correct value from the records displayed on the Select UOM page to have the text value returned to the field.
Quantity	Specifies the number of optional items in this group that is to be installed.
Priority	Specifies the preferred selection order of items in the group. The most preferred item should be assigned a value of 1.
Interchangeability Type	Refers to the selection of a item for a configuration. One-way interchangeability means that the item can only be used for a single configuration. Two-way interchangeability means that the item can be used in multiple configurations. Other values are Deleted, Obsoleted, Reference, and Superseded. You can choose one of the following from the drop-down menu.
Reason	Refers to the technical justification for one-way interchangeability. You can enter text directly in this field.
Composition	This will launch the Item Composition List Page for the selected item.

Add Items to Alternate Group - Add Alternates page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Add Alternates

Group Name: Description:

Type: Status: **Draft**

Item List

Remove	Item	Organization	Description	Revision	UOM	Quantity	Priority	Interchangeability Type	Reason	Composition
	00PKBODY	V1	BODY FOR PKCTO		Ea	3	1	Reference		
	00PKCTO	V1	00 PK CTO CELLPH		Ea	2	2	Reference		

[Add More Rows](#)

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

- Click Apply to add the alternate items information to the database.

Edit Alternates page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Confirmation • Item Group (Alt Group 1) is created. 2 Item(s) Added to Item Group

Edit Alternates

Group Name: **Alt Group 1** Description:

Type: **Tracked** Status: **Draft**

Item List

Previous 1-2 of 2 Next

Remove	Item	Organization	Description	Revision	UOM	Quantity	Priority	Interchangeability Type	Reason	Composition
<input type="checkbox"/>	00PKBODY	V1	BODY FOR PKCTO CELL		Ea	3	1	Reference		
<input type="checkbox"/>	00PKCTOCELL	V1	00 PK CTO CELLPHONE1		Ea	2	2	Reference		

[Add More Rows](#)

Previous 1-2 of 2 Next

[Cancel](#) [Copy](#) [Submit for Approval](#) [Apply](#)

Finding Alternate Items Information

Use the Search Alternate Items page to retrieve alternate item information that you want to edit. You can search for alternate items based on Group Name, Description, Item, Type, Status, and the Organization Code for the item.

Prerequisites

- ☐ The alternate item groups must be created.

To find alternate items:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Configuration Management Global button. The Master Configuration page appears.
2. Select Alternate Parts secondary tab to launch the Search Alternate Items page.
3. Enter the alternate item information in the fields provided. For field descriptions, see Description of fields related to alternate items, page 5-32.
4. Click Search to generate all alternate item groups that match the search criteria.

Find Alternate Items - Search Alternate Items page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | **Alternate Parts** | Composition List | Create

Search Alternate Items

Group Name: Description:

Organization: Item:

Type: Status:

Item Group List

Select Item Group and ...

Previous 1-1 of 1 Next

Select	Group Name	Description	Status	Type	Edit	Remove
<input type="checkbox"/>	Alt Group 1		Draft	Tracked	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>

Previous 1-1 of 1 Next

Select Item Group and ...

Editing Alternate Items Information

The Search Alternate Items page allows you to access the Edit Alternates page, where you can make necessary changes to alternate item information.

Prerequisites

- ☐ Values for Item Number/Item, Revision, Type, Interchangeability, and Reason fields should exist in the database.

To edit alternate item information:

1. Retrieve the pertinent alternate item group record from the database (see Finding Alternate Items Information, page 5-34).
2. To delete an alternate item group, click the remove icon in the search results list. Only Alternate Item Groups with no association to a master configuration position can be deleted.

- To view the configurations with which an alternate item group is associated, select the group from the Item Group List on the Search Alternate Items page, and choose View Positions from the drop-down menu. This will launch the Edit Associated Positions page. See Viewing Alternate Item Associations, page 5-50.

Edit Associated Positions

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Overview | Alternate Parts | Composition List | Create

Master Configuration Unit Configuration Product Classification

Edit Associated Positions Cancel

Group Name **00-CMRO-00** Description **CMRO Test PG Grp**
 Type **Tracked** Status **Complete**

Configuration Positions List

Previous 1-4 of 4 Next

Configuration Name	Configuration Description	Revision	Status	Position	Position Description	Necessity	Edit
00-MC-00	00-MC-00	1	Complete	Airframe	Airframe	Mandatory	
00-MC-00	00-MC-00	1	Complete	Left	Left	Mandatory	
00-MC-00	00-MC-00	2	Draft	Airframe	Airframe	Mandatory	
00-MC-00	00-MC-00	2	Draft	Left	Left	Mandatory	

Previous 1-4 of 4 Next

Cancel

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- To submit an Alternate Item Group for approval, select the Item Group, and choose Submit for Approval from the drop-down menu. You can submit an Item Group for approval from the Edit Alternates page also. To initiate the approval workflow, at least one item should have the interchangeability 1-Way or 2-Way and the quantity should not exceed 1 if any position it is associated with has child position associations.

Submit Item Group for Approval - Search Alternate Items page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Confirmation • Item Group was submitted for approval successfully.

Search Alternate Items

Group Name Description

Organization Item

Type Status

Item Group List

Select Item Group and ...

Previous 1-10 of 105 Next

Select	Group Name	Description	Status	Type	Edit	Remove
<input type="radio"/>	00-CMRO-00	CMRO Test PG Grp	Draft	Tracked	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
<input type="radio"/>	00-KM-00		Draft	Tracked	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
<input type="radio"/>	00-KM-00-2	jh%(**%	Draft	Tracked	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
<input type="radio"/>	00-KM-00-3		Draft	Tracked	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>
<input type="radio"/>	00-KM-00-Copy	This is a copy test	Draft	Tracked	<input type="button" value="Edit"/>	<input type="button" value="Remove"/>

Note: The status of the item group changes from Draft to Approval Pending and finally to Complete on approval. An item group created for the first time and in Draft status can be associated with master configurations. When its status changes to Complete on approval, the information is recorded in history tables.

- To copy an Item Group, select the record from the Item Group List, and choose Copy from the drop-down menu. The Add Alternates page appears where you can add, delete, and/or modify items in the group. The Copy button is also available in the Edit Alternates page.
- To edit alternate item details, select the required alternate item group name from the Item Group List on the Search Alternate Items page, and click the Edit icon. This launches the Edit Alternates page showing the alternate items contained in the selected item Group.

View Alternate Item List - Edit Alternates page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Edit Alternates

Group Name: 00-CMRO-00 Description: CMRO Test PG Grp
Type: Tracked Status: Draft

Cancel Copy Submit for Approval Select Applicable Positions Apply

Item List

Previous 1-3 of 3 Next

Remove	Item	Organization	Description	Revision	UOM	Quantity	Priority	Interchangeability Type	Reason	Composition
<input type="checkbox"/>	CMRO unit item 1 PM		CMRO unit item 1		Ea	1	1	1-Way Interchangeable	This is a te	
<input type="checkbox"/>	CMRO unit item 2 PM		CMRO unit item 2		Ea	1	2	1-Way Interchangeable	This is a te	
<input type="checkbox"/>	CMRO unit item 3 PM		CMRO unit item 3		Ea	1	3	1-Way Interchangeable	This is a te	

Add More Rows

Previous 1-3 of 3 Next

Cancel Copy Submit for Approval Select Applicable Positions Apply

Note: A temporary copy of the group is created to allow for editing a completed item group, while the completed group is in use. You can also access this page from the Edit Master Configuration page using the Alternates button (Search > Search Master Configuration page > Edit > Edit Master Configuration page > Edit Master Configuration tree page > Alternate Items).

- Select the item record that you want to modify, and make the necessary changes in the fields provided. For field descriptions, see Description of fields related to alternate items, page 5-32.
- You can also add alternate item records to the group, using the fields provided in the Items List section on the Edit Alternates page (see Adding Alternate Items Information, page 5-30).
- To remove an alternate item from the item group, select the Remove check box for that item, and click Apply. If the alternate item group you edited is not attached to additional master configurations and positions, the changes are saved. If the alternate item group you selected is attached to a master configuration or position other than the one currently being edited, and you click Remove or Apply, the application will prompt you, "This item group is associated with more than one position. Do you want to force the changes to all positions?"
 - To apply the changes to all the configuration positions to which the item group is attached, click OK.
 - To cancel the changes and return to the Edit Alternates page, click Cancel.
 - To view the Composition List for an item in the Item List, click the corresponding icon under the Composition column. For information on Composition Lists, see Creating an Item Composition., page 3-14

12. To edit position associations, click Select Applicable Positions in the Edit Alternates page. The Edit Associated Positions page appears.

Modify Position Associations - Edit Associated Positions page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Overview | **Alternate Parts** | Composition List | Create

Edit Associated Positions

Cancel Apply

Group Name **00-CMRO-00** Description **CMRO Test PG Grp**
 Type **Tracked** Status **Draft**

Configuration Positions List

Previous 1-4 of 4 Next

Associate	Configuration Name	Configuration Description	Revision	Status	Position	Position Description	Necessity
<input checked="" type="checkbox"/>	00-MC-00	00-MC-00	1	Complete	Airframe	Airframe	Mandatory
<input checked="" type="checkbox"/>	00-MC-00	00-MC-00	1	Complete	Left	Left	Mandatory
<input checked="" type="checkbox"/>	00-MC-00	00-MC-00	2	Draft	Airframe	Airframe	Mandatory
<input checked="" type="checkbox"/>	00-MC-00	00-MC-00	2	Draft	Left	Left	Mandatory

Previous 1-4 of 4 Next

Cancel Apply

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13. To remove a position association for that item group, uncheck the Associate check box. Click Apply. This launches the Associate Item Group to Positions Page, where you can associate the item group to the position once again.

Any modifications to an item group and/or items in the group, impacts the Unit Configuration it is associated with, in the following ways:

- If an item that has its item instance associated with a node in unit configuration, is removed or if the Interchangeability Type is modified to 'Reference' or 'Deleted', the relationship between the Item Instance and the node is deleted. If the Status of the unit configuration is Complete, it changes to 'Incomplete'. For any other status, it remains the same.
- If the Interchangeability is modified to 'Obsolete' or 'Supersede', there is no impact on the existing unit configuration associations, but these items are no longer allowed for the position.

Creating Item Group Revisions

You can create multiple versions of an item group. If an item group in Draft status having an existing version in the status of Complete, is submitted for approval, it overwrites the existing item group, and the change is recorded in the history tables.

Prerequisites

- ☐ The item group that you want to revise must exist in the database.

To create item group revisions:

1. Navigate to the Search Alternates Items page. See Finding Alternate Items Information, page 5-34.
2. To create an item group revision, select the item group, and choose Create Revision from the drop-down menu. Revisions can only be created for Alternate Item Groups in Complete status. A draft version of the Item Group is created.

Create Revision - Edit Alternates page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Confirmation • Item Group new revision was created successfully.

Edit Alternates

Group Name: 16T_Vert_Stab Description: Vertical Stabilizer1
Type: Tracked Status: Draft

Item List

Previous 1-2 of 2 Next

Remove	Item	Organization	Description	Revision	UOM	Quantity	Priority	Interchangeability Type	Reason	Composition
<input type="checkbox"/>	MRO-16T9001-831	PM	Vertical Stabilizer Assy		Ea	1	1	2-Way Interchangeable		
<input type="checkbox"/>	MRO-16T9001-832	PM	Vertical Stabilizer Assy		Ea	1	2	2-Way Interchangeable		

Add More Rows

Previous 1-2 of 2 Next

Cancel Copy Submit for Approval Select Applicable Positions Apply

Editing Master Configuration Records

After you create a master configuration template, you can edit the record to add additional attributes. Because the configuration template must consist of all item locations, item installation options, and pertinent maintenance documents, the configuration hierarchy is completed by retrieving a previously created Master Configuration record from the database, and extending it, using the Edit Master Configuration page. Remember that the hierarchy must include a topmost position (the fleet unit itself).

After you view the topmost position in the configuration template, you can drill down into the hierarchy by clicking on the Position link. You have reached the bottom of the configuration tree when Master Configuration finds no more records.

Prerequisites

- ☐ The master configuration record that you want to edit must exist in the database.

To edit master configuration records:

1. Search for the master configuration records that match your requirement.
2. Select the Master Configuration record from the search results, and click the corresponding Edit icon to launch the Edit Master Configuration page. You can edit

the Master Configuration header information like the Revision and Description fields as well as the top node information.

Modify Master Configuration Record - Edit Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview Alternate Parts Composition List Create

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Actions Add Go

☐ Airframe
☒ Left

Edit Master Configuration

* Name **00-MC-00** Revision **2**
 Description **00-MC-00** Version **2**
 Status **Draft**

* Indicates required field

Edit Position

* Position **Airframe** Position Description **Airframe**
 Position Key **11740**
 Quantity **1** UOM **Ea**
 Start Date **22-APR-2004** End Date
 Item Group **00-CMRO-00** Description **CMRO Test PG Grp**
 Display Order **1** Necessity **Mandatory**

- To change the description or revision of the master configuration record, enter the relevant values in the Description and Status fields then click Apply.
- Navigate through the tree to go to the position that needs to be edited. To edit information, click the position name link in the tree. The right hand part of the page displays the position information.

Edit Position Details - Edit Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview Alternate Parts Composition List Create

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Actions Add Go

☐ Airframe
☒ Left
☒ #1 Engine

Edit Master Configuration

Name **00-MC-00** Revision **2**
 Description **00-MC-00** Version **2**
 Status **Draft**

* Indicates required field

Edit Position

* Position **#1 Engine** Position Description **#1 Engine**
 Position Key **11961**
 * Quantity **1** * UOM **Ea**
 Start Date **28-APR-2004** End Date
 Item Group **KM-Track** Description **To track uc issues**
 * Display Order **1** Necessity **Mandatory**

Alternate Subconfigurations

5. Make necessary changes in the fields provided. For field descriptions, see Fields Associated with Master Configuration Records, page 5-6.
6. Click Apply to store the changes in the database.
7. You can change the item groups associated with a position using the Item Groups LOV icon.
8. You can alter the sub configurations associated to a position in a master configuration by adding or deleting version specific child master configurations.
9. You can choose the following options from the actions drop- down menu:
 - Choose Alternate Items to view the alternate items associated with the master configuration and/or with a specific position.
 - Choose Documents to view and edit the document references attached to the master configuration.
 - Choose Submit for Approval to submit the entire MC for approval. This option is only available for a Master Configuration in the status of 'Draft' or 'Approval Rejected' .
 - Select a position in the Master Configuration tree, and choose Position ratio to view the position ratio for that node.
 - Choose Rules to view the list of rules which pertains to this position.
10. You can also add, delete, and copy positions using the options in the Actions drop-down menu.

Related Topics

Editing Position Ratios, page 5-26

Attaching Documents to a Position, page 5-27

Editing Alternate items Information, page 5-35

Creating Positions in a Master Configuration, page 5-9

Copying Existing Configurations to a Position, page 5-12

Associating Item Groups with a Position, page 5-15

Associating a Sub-Configuration/Alternate Sub-Configuration with a Position, page 5-17

Creating Rules for a Configuration or Sub-Configuration, page 5-20

Creating Master Configuration Revisions

Prerequisites

- ☐ The master configuration record must be the latest version of that record, and should be in the status of 'Complete'.

To create a master configuration revision:

1. Retrieve the master configuration records that match your requirement.
2. Select the record from the Master Configuration List on the Search Master Configuration page, and choose Create Revision from the drop-down

menu. Click Go. If the validations pass, then the master configuration header details, relationships, counter rules, document associations, rules, and rule statements will be copied to a new version. A confirmation message will be displayed and the new revision will appear in the Master configuration List in Draft status. You can edit the new MC version while it is in the Draft status.

View New Master Configuration Revision - Search Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Overview | Alternate Parts | Composition List | Create

Master Configuration | Unit Configuration | Product Classification

Confirmation • A new revision of the Master Configuration "737-800" is created.

Search Master Configuration

Name: Revision:
 Description: Status:
 Position: Item:
 Go Clear

Master Configuration List

Create

Select Master Configuration and ... Re-Open Go

Previous 1-10 of 155 Next

Select	Name	Revision	Version	Edit	Description	Status	Close
<input type="radio"/>	00-MC-00	1	1		00-MC-00	Complete	
<input type="radio"/>	00-MC-00	2	2		00-MC-00	Draft	
<input type="radio"/>	000-MC-000	1	1			Draft	
<input type="radio"/>	1000	1	1			Draft	

Approving Master Configurations

You can set up an approval hierarchy to review and approve master configurations. Master configurations can be submitted for approval at the time of creation and/or modification. Changes made to the master configurations affect unit configurations and maintenance plans for all the units based off the updated master configuration. The Approval Workflow tracks and controls these changes. When a configuration is submitted for approval, a validation is performed to ensure that the configuration is complete, and that complete item groups and/or complete sub-configurations have been associated to each position. Errors are returned if the configuration is incomplete.

Prerequisites

- ☐ The Master configuration record, which you want to submit for approval, must exist in the database. All positions must have been set up. The item groups and/or sub-configurations associated with these positions must be in Complete status.

To approve master configurations:

1. Retrieve the master configuration records that match your requirement.
2. Select the pertinent master configuration from the Master Configuration List on the Search Master Configuration page, and choose Submit for Approval from the drop-down menu.

Submit Master Configuration for Approval - Search Master Configuration page

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Master Configuration

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Overview

Alternate Parts

Composition List

Create

Search Master Configuration

Name

Description

Position

Go

Clear

Revision

Status

Draft

Item

Master Configuration List

Create

Select Master Configuration and ...

Submit For Approval

Go

Previous

1-10 of 63

Next

Select	Name	Revision	Version	Edit	Description	Status	Close
<input checked="" type="radio"/>	00-MC-00	2	2		00-MC-00	Draft	
<input type="radio"/>	000-MC-000	1	1			Draft	
<input type="radio"/>	1000	1	1			Draft	
<input type="radio"/>	AHL-MC271103-1	2	2		Master Configuration -- New Part grp	Draft	
<input type="radio"/>	AHLUMPMC01	3	3		MC for Axle	Draft	
<input type="radio"/>	ALEX	1	1			Draft	

Completeness Check - A concurrent program checks for the completeness of the unit to determine if the unit is Complete or Incomplete. Each mandatory position must be mapped to an instance. If any Optional positions are mapped to item instances, then its child Mandatory positions must be mapped to instances as well. Any sub-units mapped within the main unit must be complete. If all sub-units are 'Complete' and all Mandatory positions (except those with "Optional" parent positions and no corresponding parent item instance) are mapped, the completeness check is successful, the configuration is approved, and the status changes from Approval Pending to Complete.

If rejected the configuration status changes to Approval Rejected and a list of position paths that are missing mandatory item instances, as well as extras and rule violations are displayed. The configuration is treated like a draft configuration, which the user can modify.

Viewing Master Configuration Records

View master configuration details using the following procedure.

Prerequisites

- ☐ The master configuration record must exist in the database.

To view master configuration details:

- Retrieve the master configuration records that match your requirement.
- Click the Master Configuration Name link. The View Master Configuration page appears showing the Name, Description, and Status of the configuration. The topmost node in the configuration is shown in the Position List.

View Configuration Details - View Master Configuration

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

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Airframe
Left

View Master Configuration

Cancel Alternate Items GO

* Name **00-MC-00** Revision **1**
Description **00-MC-00** Version **1**
Status **Complete**

* Indicates required field
[View Position](#)

* Position **Airframe** Position Description **Airframe**
Position Key **11740**
Quantity **1** UOM **Ea**
Start Date **22-APR-2004** End Date
Item Group **00-CMRO-00** Description **CMRO Test PG Grp**
Display Order **1** Necessity **Mandatory**

Cancel Alternate Items GO

You can view the Position Ratio, Documents, and Alternate Items, and Rules associated with a node in the configuration, by choosing the corresponding option from the drop-down menu.

Related Topics

Viewing Position Details, page 5-45

Viewing Position Ratio, page 5-46

Viewing Documents Associated with a Position, page 5-48

Viewing Alternate items associated with a Position, page 5-49

Viewing Rules, page 5-51

Viewing Position Details

You can view the position details of master configuration nodes using the following procedure.

Prerequisites

- ☐ The master configuration record must exist in the database.

To view position details:

1. Retrieve the master configuration records that match your requirement.
2. Check the select radio button next to the pertinent master configuration from the Master Configuration List on the Search Master Configuration page. Click the Master Configuration Name link. The View Master Configuration page appears showing the Name, Description, and Status of the configuration. The topmost node in the configuration is shown in the Position List.

- View Configuration Positions - View Master Configuration page***

Viewing Position Ratios Associated with a Position

Prerequisites

- To view position ratios associated with a position:**

- 5-46 Oracle Complex Maintenance, Repair, and Overhaul User's Guide

View Position List - View Master Configuration page

ORACLEComplex MRO

HomeHome EngineeringConfigurationPlanning AdministrationExecution ProfileSign Out Help

Master ConfigurationUnit ConfigurationProduct Classification

OverviewAlternate PartsComposition ListCreate

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Airframe

Indicator, Rate of Climb

Fan, Equipment Cooling

Relief Valve, Positive Pressure

Antenna, VHF

Main Battery

Bus Power Control Unit

Hydraulic System Shutoff Valve

Digital Flight Data Recorder

Transfer Unit, Ammo

Radome

#1 Engine

#2 Engine

Shock Strut MLG LH

Shock Strut MLG RH

View Master Configuration

CancelPosition RatioGO

* NameC-1600 AircraftRevision1

DescriptionC-1600 AircraftVersion1

StatusDraft

* Indicates required field

View Position

* PositionAirframePosition DescriptionAirframe

Position Key10000

Quantity1

Start Date06-NOV-2002

Item GroupC-1600

Display Order1

UOMEa

End Date

DescriptionC-1600 Airframe

NecessityMandatory

CancelPosition RatioGO

- Navigate to the node that you want to view position ratios for, using the tree structure; click on the plus icon next to a node listing to display subordinate nodes. Click on a node to select it. The position details corresponding to the node appear.

View position details of selected node - View Master Configuration page

ORACLEComplex MRO

HomeHome EngineeringConfigurationPlanning AdministrationExecution ProfileSign Out Help

Master ConfigurationUnit ConfigurationProduct Classification

OverviewAlternate PartsComposition ListCreate

Copyright 2000, Oracle Corporation. All rights reserved.

Airframe

Indicator, Rate of Climb

Fan, Equipment Cooling

Relief Valve, Positive Pressure

Antenna, VHF

Main Battery

Bus Power Control Unit

Hydraulic System Shutoff Valve

Digital Flight Data Recorder

Transfer Unit, Ammo

Radome

#1 Engine

#2 Engine

Shock Strut MLG LH

Shock Strut MLG RH

View Master Configuration

CancelPosition RatioGo

NameC-1600 AircraftRevision1

DescriptionC-1600 AircraftVersion1

StatusDraft

* Indicates required field

View Position

* Position#2 EnginePosition Description#2 Engine

Position Key10012

* Quantity1

Start Date06-NOV-2002

Item GroupGF_180-00

* Display Order12

UOMEa

End Date

DescriptionEngine Assembly

NecessityMandatory

CancelPosition RatioGo

- Choose Position Ratio from the drop down menu. The View Position Ratio page appears.

View Position Ratio page

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Home Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview Alternate Parts Composition List Create

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View Position Ratio Cancel

Master Configuration Details

Name	C-1600 Aircraft	Revision	1
Description	C-1600 Aircraft	Version	1
Status	Draft		

Position Details

Position	#2 Engine	Position Description	#2 Engine
Necessity	MANDATORY	Description	Mandatory

Position Ratio List

UOM	Description	Ratio	Rule
No records were found matching the given criteria..			

Cancel

Viewing Documents Attached to a Position

Use the following procedure to view documents attached to a master configuration node.

Prerequisites

- ☐ Documents relating to the master configuration node must be defined. See Attaching Documents to a Position, page 5-27.

To view the documents attached to a position:

1. Retrieve the master configuration records that match your requirement.
2. Check the select radio button next to the pertinent master configuration from the Master Configuration List on the Search Master Configuration page. Click the Master Configuration Name link. The View Master Configuration page appears showing the Name, Description, and Status of the configuration. The topmost node in the configuration is shown in the Position List.
3. The node hierarchy is represented by the tree structure on the left. Navigate to the node for which you want to view the documents association for, using the tree structure; click on the plus icon next to a node listing to display subordinate nodes. Click on a node to select it. The position details corresponding to the node appear.
4. Choose Documents from the drop-down menu. The Documents List appears, displaying all documents associated with the selected position.

View Document List - Edit Document Associations page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

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#1 Engine
Airframe

Edit Document Associations

Cancel Apply

Master Configuration Details

Name	AHL-KM271103	Revision	1
Description	This is a MC to test the approval validation and rules	Version	1
Status	Complete		

Position Details

Position	#1 Engine	Position Description	#1 Engine
Necessity	MANDATORY	Description	Mandatory

Document List

Previous 1-1 of 1 Next

Document	Title	Revision	Type	Chapter	Section	Subject	Page	Figure	Note	Use Latest
MBAHL020	MBAHL020Rev1	SERVICE BULLETIN								N

Previous 1-1 of 1 Next

Viewing Alternate items Associated with a Position

Use the following procedure to view alternate items associated with different nodes in a master configuration.

Prerequisites

- ☐ Alternate items must be defined for the position prior to viewing the items associated with a position in a master configuration. See Adding Alternate items Information, page 5-30.

To view alternate items associated with a position:

1. Retrieve the master configuration records that match your requirement.
2. Check the select radio button next to the pertinent master configuration from the Master Configuration List on the Search Master Configuration page. Click the Master Configuration Name link. The View Master Configuration page appears showing the Name, Description, and Status of the configuration. The topmost node in the configuration is shown in the Position List.
3. Navigate to the node you want to view documents for using the tree structure; click on the plus icon next to a node listing to display subordinate nodes. Click on a node to select it. The position details corresponding to the node appear.
4. Choose Alternate Items from the drop-down menu. The Item Group details are displayed.

View Associated Alternate items/Items - Master Configuration Details page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

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Engine Airframe

Cancel Create Revision

Master Configuration Details

Name	AHL-KM271103	Revision	1
Description	This is a MC to test the approval validation and rules	Version	1
Status	Complete		

Item Group Details

Group Name	AHL-KM27112003	Description	AHL Part group -- Tracked Items
Type	Tracked	Status	Complete

Item List

Previous 1-1 of 1 Next

Item	Organization	Description	Revision	UOM	Quantity	Priority	Interchangeability Type	Reason
AHLITEM001	PM	This is a item for AHL in PM		Ea	1	1	2-WAY INTERCHANGEABLE	Test

Previous 1-1 of 1 Next

Viewing Positions Associated with an Alternate Item Group

Use the following procedure to view the configuration positions with which an alternate item group is associated.

Prerequisites

- ☐ The alternate item group must be created.

To view positions associated with an alternate item group:

1. Retrieve the pertinent alternate item group record from the database (see Finding Alternate items Information, page 5-34).
2. To view the configurations with which an alternate item group is associated, select the pertinent group from the items Group List on the Search Alternate items page, and click View Positions.

This will launch the Edit Associated Positions page. The Configuration Positions List displays all the configurations and positions where the item group is attached.

Edit Associated Positions page

ORACLEComplex MRO

Home Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master ConfigurationUnit ConfigurationProduct Classification

OverviewAlternate PartsComposition ListCreate

Edit Associated Positions

Cancel

Group Name16T_Vert_StabDescriptionVertical Stabilizer
TypeTrackedStatusDraft

Configuration Positions List

Previous1-1 of 1Next

Configuration Name	Configuration Description	Revision	Status	Position	Position Description	Necessity	Edit
M-1900 Aircraft	M-1900 Aircraft	1	Draft	Vertical Stabilizer Assy	Vertical Stabilizer Assy, 11J00	Mandatory	

Previous1-1 of 1Next

Cancel

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Viewing Rules

Use the following procedure to view the rules defined for configurations, sub-configurations, positions, and items.

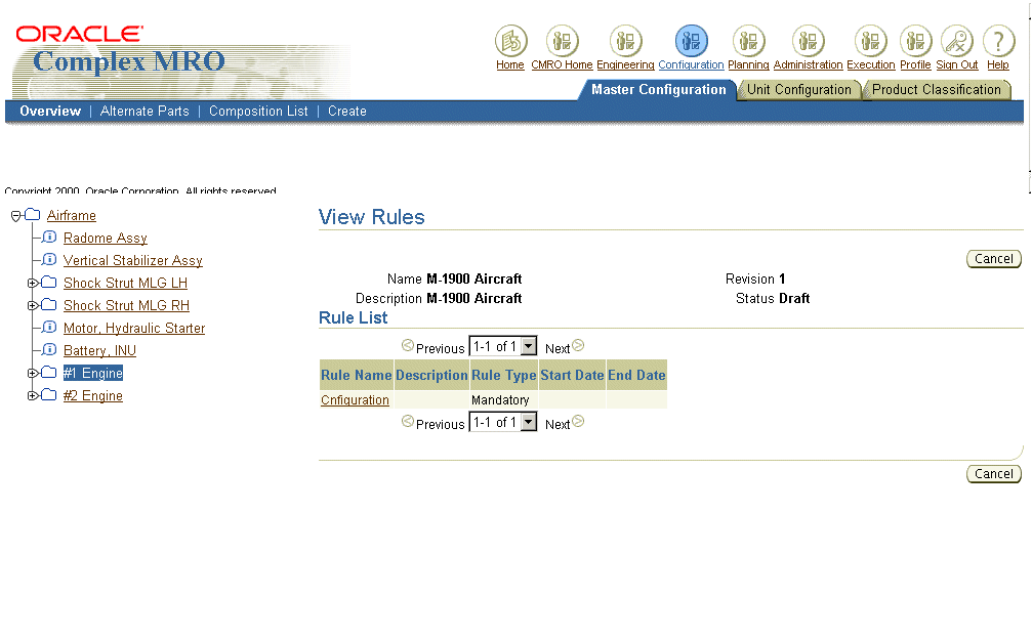
Prerequisites

- ☐ The rule that you want to view must exist in the database.

To view rules:

1. Navigate to the View Master Configuration page. See Viewing Master Configuration Records, page 5-44.
2. Choose Rules from the drop-down menu. The View Rules page appears, displaying the rules defined for the selected master configuration.

View Rules page



Closing Master Configuration Records

Prerequisites

- ☐ The master configuration record that you want to close must exist in the database. The master configuration must be in 'Complete' status and must not have any unit configurations associated with it.

To close master configuration records:

1. Retrieve the master configuration records that match your requirement.
2. Select a record, and click the corresponding Trash icon under the Close column. A message is displayed asking you to confirm whether you want to close the record.

Closing Master Configuration - Search Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview | Alternate Parts | Composition List | Create

Search Master Configuration

Name Revision
 Description Status
 Position

Go Clear

Master Configuration List

Create

Select Master Configuration and ... Re-Open Go

Previous 71-80 of 155 Next

Select	Name	Revision	Version	Edit	Description	Status	Close
<input type="radio"/>	LPT	1	1		Low Pressure Turbine	Draft	
<input type="radio"/>	M-1900 Aircraft	1	1		M-1900 Aircraft	Draft	
<input type="radio"/>	M-1900 Aircraft -- COPY Rev 1	1	1		M-1900 Aircraft -- COPY	Draft	
<input type="radio"/>	MC 200	1	1			Draft	
<input type="radio"/>	MC Test 004	1	1			Draft	
<input checked="" type="radio"/>	MC-22032004	1	1		This is to test the IB issue	Complete	

- Click Ok. A confirmation message is displayed, and the search results list is refreshed with the status of the selected master configuration record changed to Closed.

View Closed Record - Search Master Configuration page

Confirmation • Master Configuration successfully closed.

Search Master Configuration

Name Revision
 Description Status
 Position Item

Go Clear

Master Configuration List

Create

Select Master Configuration and ... Re-Open Go

Previous 71-80 of 155 Next

Select	Name	Revision	Version	Edit	Description	Status	Close
<input type="radio"/>	LPT	1	1		Low Pressure Turbine	Draft	
<input type="radio"/>	M-1900 Aircraft	1	1		M-1900 Aircraft	Draft	
<input type="radio"/>	M-1900 Aircraft -- COPY Rev 1	1	1		M-1900 Aircraft -- COPY	Draft	
<input type="radio"/>	MC 200	1	1			Draft	
<input type="radio"/>	MC Test 004	1	1			Draft	
<input checked="" type="radio"/>	MC-22032004	1	1		This is to test the IB issue	Closed	
<input type="radio"/>	MC-KM004	1	1		This is a sample MC. Do not use this for association	Expired	
<input type="radio"/>	MC001	1	1		This is a test MC.	Expired	

Reopening Closed Records

You can reopen a master configuration record that was previously deleted.

Prerequisites

- ☐ The master configuration record must have been previously defined, and then removed.

Note: You can only reopen master configuration records with status Closed or Expired.

To reopen closed master configuration records:

1. Retrieve the master configuration records that match your requirement.
2. Select the pertinent record from the Master Configuration List on the Search Master Configuration page.

Reopen Master Configuration Record - Search Master Configuration page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Overview | Alternate Parts | Composition List | Create

Master Configuration | Unit Configuration | Product Classification

Search Master Configuration

Name

Description

Position

Revision

Status

Item

Master Configuration List

Select Master Configuration and ...

Previous 1-1 of 1 Next

Select	Name	Revision	Version Edit	Description	Status	Close
<input type="checkbox"/>	Verify bug #3565859	1	<input type="text"/>	This is a MC to test approvals and associations	Closed	<input type="button" value="Close"/>

Previous 1-1 of 1 Next

Select Master Configuration and ...

3. Choose Reopen from the drop-down menu. The status reverts to complete or draft depending on the status from which it is closed.

Working With Unit Configurations

This chapter covers the following topics:

- Overview
- What is Unit Configuration?
- Key Business Processes
- Creating Unit Configuration Records
- Finding Master Configuration Records
- Creating Unit Configuration
- Assigning Items to Unit Configuration Positions
- Finding Unit Configuration Records
- Validating Unit Configuration Records
- Migrating Unit Configurations
- Editing Unit Configuration Records
- Approving Unit Configurations
- Viewing Alternate Items Utilization
- Assigning Alternate Items to Unit Configuration Positions
- Creating and Updating Item Information

Overview

In the maintenance, repair, and overhaul industry, the “as-constructed” configuration of an assembly determines the specific maintenance program required to ensure the operational readiness of that asset. Even if two units have the same part number, or belong to the same product family, the as-constructed configurations may be different due to optional subsystems selected by fleet operators, and due to the asset’s operational and service history. Ultimately, maintenance organizations must manage maintenance activities for each unit in the fleet. For maintenance purposes, an aircraft, for example, might consist of a thousand items that you must monitor. As you remove, overhaul, or replace items, you must associate the monitored items that have unique model and serial numbers with a fleet unit, and retain the maintenance history of those items. Many systems, such as aircraft flight management computers, contain software that is revised during their service lives. The Oracle Complex Maintenance, Repair, and Overhaul Unit Configuration module describes

the configuration for each unit, and enables maintenance organizations to define and monitor items in a fleet unit.

This chapter discusses the key functions supported by the Oracle Complex Maintenance, Repair, and Overhaul Unit Configuration module. The chapter provides process-oriented, task based procedures for using the application to perform essential tasks for managing maintenance activities of fleet units.

See:

- Creating Unit Configuration Records, page 6-3
- Finding Master Configuration Records, page 6-4
- Creating Unit Configuration, page 6-6
- Assigning Items to Unit Configuration Positions, page 6-9
- Finding Unit Configuration Records, page 6-13
- Validating Unit Configuration Records, page 6-15
- Migrating Unit Configurations, page 6-16
- Editing Unit Configuration Records, page 6-19
- Approving Unit Configurations, page 6-21
- Viewing Alternate Items Utilization, page 6-22
- Assigning Alternate Items to Unit Configuration Positions, page 6-23
- Creating and Updating Item Information (Create Product and Search Product), page 6-24

What is Unit Configuration?

Unit Configuration is a subsystem that describes the structure of an assembled electromechanical system. Unit Configuration is also concerned with monitored components modeling to support the management of a single part of interest, or a complex assembly that consists of a hierarchy of monitored items.

Unit Configuration manages information about the service readiness of any component, and implements Closed Loop Asset Tracking techniques, the result of which is instantaneous online intelligence about the location and state of components. Another important feature of Unit Configuration is the ability to precisely record the utilization of as many items or subassemblies in a fleet unit as required. Oracle Complex Maintenance, Repair, and Overhaul allows you to represent the part lifetime using industry-standard units of measure, such as operating hours, flight cycles, elapsed time, and calendar time. Unit Configuration also allows you to define and maintain the maintenance requirements for a subassembly or subsystem. Maintenance requirements for each fleet unit support detailed maintenance planning for the fleet as a whole.

Key Business Processes

The Unit Configuration module of Oracle Complex Maintenance, Repair, and Overhaul supports the following business processes:

Managing Equipment As-Installed Configurations

When a product is in service, some components may need replacement for maintenance and modification, or upgrade purposes. Knowing the current or “as-installed” configuration is critical to plan the required maintenance actions. The Oracle Complex Maintenance, Repair, and Overhaul Unit Configuration module allows you to track the as-installed configuration of a complex assembly, component installation and removal history, and the software installed in a unit.

Managing Configuration Changes

When a current equipment configuration does not meet the future needs, operators modify the existing equipment, instead of replacing it. Organizations also maintain multi-purpose equipment that require a configuration change between different modes of operation. Oracle Complex Maintenance, Repair, and Overhaul allows you to compare the unit (current) configuration with its master configuration to derive the effort required for the modification. Unit Configuration also allows you to validate allowable installation, and whether a configuration is complete.

Tracking Utilization of a Unit

Utilization is a major factor determining the maintenance required to preserve an equipment's operational utility. When an assembly is made up of different components that may require different parameters to measure utilization and aging, the resulting maintenance forecast process can be complicated. Unit Configuration will precisely track the utilization of each individual component within an assembly by tracking current utilization of units, such as age, odometer reading, and flight hours since overhaul. Unit Configuration applies the appropriate unit of measure to suit different types of utilization or aging.

Tracking Maintenance Requirements of a Unit

The key functions of maintenance planning include identifying the maintenance requirements of a unit, and calculating the service life before the next maintenance event. Fleet Maintenance Program provides this functionality. Unit Configuration enables you to model the maintenance requirement applicable to individual units, by providing a tracking mechanism for maintenance requirements.

Closed Loop Asset Management

Maintenance organizations track information about a unit using multiple systems throughout the service life of the unit. To build a continuous “cradle-to-grave” event history of a unit, may require great efforts. The Unit Configuration module provides an anchor to tie all the transactions required to build the full history of a unit. It tracks all transactions associated to unit location and status changes.

Tracking Unit Specific Business Information

Some critical business information resides at the individual unit level, and will require special attention and tracking. Unit Configuration provides a platform to track unit-specific information such as ownership.

Creating Unit Configuration Records

Master configuration provides a template for the structure of an electromechanical system with rules for component location and component selection, and applicable maintenance operations. An instance of a master configuration models the general characteristics of a fleet unit. You can derive a unit configuration modeling the structure of an “as-operated” electromechanical system from a master configuration.

Creating a unit configuration from an existing master configuration record involves three stages:

1. Finding the master configuration record, page 6-4 (that serves as the unit configuration template)
2. Creating Unit Configuration, page 6-6
3. Assigning items to unit configuration positions, page 6-9

Finding Master Configuration Records

When searching for a master configuration record that will serve as the unit configuration template, you can search using the master configuration template name, or the hierarchical position reference where a master configuration is connected. You can also retrieve all records by providing no search criteria, and clicking Search. For more information about master configurations, see the Master Configuration module.

Prerequisites

- ☐ Master configuration records from which you want to derive unit configurations must exist in the database.

To find a master configuration record:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Configuration Management link. The Search Master Configuration page appears.
2. Click the Unit Configuration tab. The Search Unit Configuration page appears.

Search Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

Search Unit Configuration

Unit Config Name	<input type="text"/>	Unit Config Status	All
Item	<input type="text"/>	Master Config Name	<input type="text"/>
Instance Number	<input type="text"/>	Master Config Revision	<input type="text"/>
Serial Number	<input type="text"/>	Master Config Status	All
Lot Number	<input type="text"/>	Search For	All

Go Clear

Unit Configuration List

Create

Select	Unit Configuration	Edit	Instance Number	Item	Serial Number	Lot Number	Status	Installed	Master Configuration	Revision
--------	--------------------	------	-----------------	------	---------------	------------	--------	-----------	----------------------	----------

No records were found matching the given criteria.

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3. Click Create. The Search Master Configuration page appears. Alternatively, you can navigate to this page by selecting the Create From Master secondary tab.

Search Master Configuration page


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[Master Configuration](#) [Unit Configuration](#) [Product Classification](#)

[Search Unit](#) | [Create From Master](#) | [Search Product](#) | [Create Product](#)

Search Master Configuration

Name Revision
Description Position 

Master Configuration List

Select	Name	Revision	Description	Position
No records were found matching the given criteria..				

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4. To retrieve master configuration templates by name, enter part of the master configuration name followed by the generic substitution metacharacter% (example, Air%) in the Name field, and click Go.
5. To retrieve master configuration records by position in the hierarchy, enter part of the position name followed by the generic substitution metacharacter% in the Position field, and click Go. Alternatively, use the search icon.
6. To search for a particular revision of a master configuration, enter the revision number.
7. If you do not know the name or position of the master configuration, use the Description field to enter your search string, and click Go. The Description field contains a text description of the master configuration that will serve as the basis for the new unit configuration.
8. The lower half of the page displays all matching master configuration records.

Master Configuration Search Results - Search Master Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

Search Master Configuration

Name Revision
Description Position

Master Configuration List

Select Master Configuration and ...

Previous 1-10 of 89 Next

Select	Name	Revision	Description	Position
<input type="radio"/>	00-MC-00	2	00-MC-00	Airframe
<input type="radio"/>	00-MC-00	1	00-MC-00	Airframe
<input type="radio"/>	737-800	1	Boeing Airframe	Airframe
<input type="radio"/>	737-800	4	Boeing Airframe	Airframe
<input type="radio"/>	737-800	3	Boeing Airframe	Airframe
<input type="radio"/>	737-800	5	Boeing Airframe	Airframe
<input type="radio"/>	737-800	2	Boeing Airframe	Airframe
<input type="radio"/>	AHL-KM271103 1		This is a MC to test the approval validation and rules #1 Engine	
<input type="radio"/>	AHL-KM271103 5		This is a MC to test the approval validation and rules #1 Engine	
<input type="radio"/>	AHL-KM271103 2		This is a MC to test the approval validation and rules #1 Engine	

The application will display all master configuration records matching the search criteria you provided, as long as the Status of the master configuration record is “Complete”. The system will not permit you to create unit configuration records from master configuration templates of any other Status value. Additionally, a unit configuration cannot be created from a template that is future dated.

Creating Unit Configuration

After retrieving a master configuration template from the database, you can create a unit configuration that represents an individual fleet unit, and shares attributes in common with other fleet units derived from the same master configuration template. To create a unit configuration, provide a name for the unit configuration, and select the item instance for the top position.

Prerequisites

- ☐ The master configuration record that serves as template for the unit configuration must exist in the database. The instances that can be associated with the top node need to be defined at the Installed Base level. The user would decide the top node instance from the available instances.

To create unit configuration:

1. Retrieve the master configuration record that serves as the template for creating the new unit configuration (see Finding Master Configuration Records, page 6-4).
2. Select the pertinent master configuration record, and click Create Unit Configuration to launch the Create Unit Configuration page.

Create Unit Configuration page

3. Enter the information in the fields provided. Information in fields marked with asterisk is mandatory.
 - Unit Config Name represents a descriptive name for this unit configuration record. Your organization must have established a naming convention for you to follow. You can update the name after it is automatically generated. The Unit Config text field will become read only when the record gets approved or is in Complete or Incomplete status.
 - Instance Number is the Install Base Instance Number of the tracked item.
4. Alternatively, you can search for an item instance using the Search icon. Enter information in the fields for which you know the value, and click Go. All instances existing for the item are displayed in the Alternate item instance list. Choose an Item Instance and click Select. This will return the Create Unit configuration page.

The application populates the Party Type, Description, Serial Number, Owner, Owner Name, Location, and Location Address fields in the Create Unit Configuration page when you select an instance number. These field values represent the description, and the attributes of the fleet unit, such as serial number, owner, and current location. The attributes are defined when a part information is added or updated. You cannot update the values in these fields, you can only view them.

View Unit Configuration Details - Create Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

Create Unit Configuration

Unit Config Name Unit Config Status **Draft**
Master Config Name **MC0206** Master Config Revision **1.0**
Master Config Description **New MC** Position **Barrel Set**

Select Item Instance For Top Position

* Instance Number Item **VG0205**
Serial Number **SN0244** Lot Number
Owner **1005** Owner Name **AT&T Universal Card**
Location **1331** Location Address **115 INDUSTRIAL BLVD.;AVENUE CHARLES DE GAULE;SAN MATEO;94401;CAUS**
Description **New Item** Party Type **Party**

* Indicates required field

Cancel Apply

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- Click Apply to add the unit configuration record to the database. The Edit Configuration page appears, displaying the position details and the item association for the top node of the Unit configuration tree.

Edit Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

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Barrel Set

Edit Unit Configuration

Unit Configuration Unit Config Status **Draft**
Master Configuration **MC0206** Master Config Revision **1.0**
Description **New MC**

Position Details

Position **Barrel Set** Necessity **Mandatory**
Item **VG0205** Description **New Item**
Serial Number From Inventory
Lot Number Mfg Date
Revision Instance Number **92551**
Quantity **1** UOM **Ea**
Owner **1005** Owner Name **AT&T Universal Card**
Install Date **11-FEB-2004** Location **115 INDUSTRIAL BLVD.;AVENUE CHARLES DE GAULE;SAN MATEO;94401;CAUS**
Status **Out of the Enterprise** Condition

Cancel Apply

- You can assign item instances to position references in this page. To assign items to the unit configuration, See Assigning Items to Unit Configuration Positions, page 6-9.

Related Topics

Validating Unit Configuration Records, page 6-15

Migrating Unit Configuration Records, page 6-16

Editing Unit Configuration Records, page 6-19

Approving Unit Configurations, page 6-21

Assigning Items to Unit Configuration Positions

Creating a unit configuration logical record from a master configuration results in the connection of a unit configuration record with at least one item in the inventory catalog, and with an actual part or assembly in the inventory database. A unit configuration cannot exist without an item definition and a position definition. After you create a unit configuration header in the database, you can add item instances to all the positions that were defined in the template master configuration. All the item instances that you assign must exist in a group created using the Master Configuration module.

Prerequisites

- ☐ The unit configuration record, with which you want to associate item instances, must exist in the database, and the Status must be flagged as Draft.

To assign items to a unit configuration position:

1. In the Edit Configuration page, click the position reference that you want to associate the item instance/part with. Under the Configuration details, the following two regions are displayed:
 - Create and Assign New Item Instance - You can create an item instance, and then associate it with the position reference.
 - Assign Item - You can assign applicable existing item instances as well as item instances removed from extra nodes to the position references. If items have been assigned to the position at the master configuration level, they will be displayed in the Assign Item table. You can select an existing item instance and assign it to the position. You can also view the part utilization for that item.

Assign Item Instance - Edit Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

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Airframe
#1 Engine
Barrel Set

Create and Assign New Item Instance

* Item Revision

Lot Number Mfg Date

Serial Number From Inventory

* Indicates required field

Assign Item

Select Item Instance and ... View Utilization Assign

Previous 1-1 of 1 Next

Select	Item	Instance Number	Serial Number	Lot Number	Owner	Location	Mfg Date	Instance Status
<input type="radio"/>	KM-MC001	106006	KM600		A. C. Networks	Rue Pont Neuf,Nanterre Ville,NANTERRE,92000FR		Out of the Enterprise

Previous 1-1 of 1 Next

Select Item Instance and ... View Utilization Assign

- To create a new item instance, select the Item using the search icon.

Create New item Instance - Edit Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

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Airframe
#1 Engine
Barrel Set

Edit Unit Configuration

Unit Configuration: **Unit Aircraft 2** Unit Config Status: **Draft**

Master Configuration: **MC Aircraft** Master Config Revision: **2**

Description: **#1 Engine** Necessity: **Mandatory**

Create and Assign New Item Instance

* Item Revision

Lot Number Mfg Date

Serial Number Temporary

* Indicates required field

Assign Item

Select Item Instance and ... View Utilization Assign

- Optionally, you can enter the following additional information for the item instance:
 - Lot No - is an identification number representing the part's manufacturing lot. Search for a lot number using the search icon. If lot control is defined for the part/item instance, the page lists all the lot number records for this part. If no lot control is defined when the part information is created in the database, you

cannot enter a value in this field. The application will return error messages if you enter a value in this field for a part with no lot control defined.

- Mfg. Date represents the date of manufacture of the part. You can enter a value in this field only if manufacturing date control is defined for the part when this part record is created in the database. To enter a value in this field, click the calendar icon beside the field. Click the correct date to copy this value into the field.
 - Revision represents the part revisions introduced by manufacturers. Part revisions are made to accommodate changes that may somehow improve the efficiency of the part. You can enter a value in this field only if revision control definitions exist for this part record in the database. The application returns errors when you enter revision values for items that do not have revision control defined. To enter a value in this field, follow the same procedure as you did for the Lot No.
 - Serial number indicates that the item is under serial control. You can assign a temporary serial number, which can be updated in the production stage. Optionally, you can enter a serial number existing in inventory but not in use.
4. A master configuration, on which the unit configuration is based on, may have sub-configurations assigned to its position reference. In the Unit configuration, you need to assign sub-units based on that sub-configuration, to the position reference. If sub-units based on the master configuration exist in the database, they will be available for selection in the Assign Items table. The status of available sub-units must be consistent with the status of the parent unit into which it will be installed (i.e. 'Complete/Incomplete' sub units can only be installed into 'Complete/Incomplete' units and 'Draft' sub units can only be installed into 'Draft' units). Select the sub-assembly, and click Assign.

Assign Sub-configurations - Edit Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

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Edit Unit Configuration Cancel

Unit Configuration **Unit Aircraft 2** Unit Config Status **Draft**
Master Configuration **MC Aircraft** Master Config Revision **2**
Description

Position Details Unassociate Position Remove Apply

Position	Barrel Set	Necessity	Mandatory
Sub Master Config	737-800	Sub Config Rev	1
Sub Unit Config	sub unit2	Description	737-800
Item	737-800		
Serial Number	<input type="text" value="02"/> From Inventory	Mfg Date	<input type="text" value="119085"/>
Lot Number	<input type="text"/>	Instance Number	119085
Revision	<input type="text"/>	UOM	Ea
Quantity	1	Owner Name	A. C. Networks
Owner	1143	Location	Rue Pont Neuf;Nanterre
Install Date		City	Ville;NANTERRE;92000FR
Status	In Relationship	Condition	

5. Alternatively, you may have to create sub-units for the master configuration. To create sub-units, select the Create from Master sub-tab. See Creating Unit Configuration, page 6-6.

Note: The sub-units must be in draft status to be assigned to the unit configuration.

6. After creating the sub-unit, search for the unit by Sub Master Config name. The Sub Unit Config field will be automatically populated with the unit name.
7. Click Apply to add the part to the unit configuration structure.

When you click Apply, the application checks to ensure that all required fields have been completed with valid entries. The application rejects invalid records with error messages.

8. To associate an existing item instance, select the item from the Assign Item table, and click Assign.

Assign Existing Item Instance - Edit Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit Create From Master Search Product Create Product

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Airframe

#1 Engine

Barrel Set

#1 Engine

Position 1

Position 2

28B545-7-300

Create and Assign New Item Instance

Apply

* Item

Lot Number

Serial Number

From Inventory

Revision

Mfg Date

* Indicates required field

Assign Item

Select Item Instance and ...

View Utilization

Assign

Previous

1-1 of 1

Next

Select	Item	Instance Number	Serial Number	Lot Number	Owner	Location	Mfg Date	Instance Status
<input checked="" type="radio"/>	28B545-7	109308	400		AT&T Universal Card	5645 Main Street,Jacksonville,32209,FLUS		Out of the Enterprise

Previous

1-1 of 1

Next

Select Item Instance and ...

View Utilization

Assign

9. To view utilization for an item instance, select the item and click View Utilization.

View Item Instance Utilization page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

View Item Instance Utilization

Unit Configuration: **Unit Aircraft 2** Draft: **2**

Master Config Name: **MC Aircraft** Position: **Position 2**

Description

Alternate Item Instance

Item	28B545-7	Serial Number	400
Quantity	1	Status	Out of the Enterprise
Install Date	18-MAY-2004	Mfg Date	
Owner	AT&T Universal Card	Condition	
Location	5645 Main Street;Jacksonville;32209;FLUS		

Item Instance Utilization

Counter Name	Description	UOM	Reading
No records were found matching the given criteria...			

Note: Unit Configuration records the utilization of each component within an assembled hierarchy by monitoring current utilization of units and component hierarchies. Unit Configuration uses appropriate units of measurement including Time Since New, Time Since Overhaul, Time Since Repair, utilization cycles, Hobbs meter time, and many others. Unit Configuration also records utilization history of a revenue fleet unit, serialized part, or component hierarchy.

Note: You can assign alternate items to unit configuration positions after viewing the utilization gained by each allowable part listed for a position.

10. You can remove an item instance from an extra node or other nodes. When you remove an item instance from an extra node, the node itself is removed from the tree structure. When you remove an item instance from a non-extra node, only the item instance is removed from the node. The position is now empty, and the Create Item Instance UI is displayed where the user can assign an item instance to the empty position.
11. If the instance from an extra node can be installed into a missing node, then this instance will be displayed in the item instance table list together with other applicable instances. You can then select and assign it to a missing node.

Finding Unit Configuration Records

Oracle Complex Maintenance, Repair, and Overhaul helps you to retrieve any unit configuration record that exists in the database, by name, serial number, instance number, lot number and other additional search criteria. You can also retrieve all records in the database by providing no search criteria, and clicking Go.

Prerequisites

- ☐ The unit configuration record you want to retrieve must exist in the database.

To find unit configuration records:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Configuration Management link. The Search Master Configuration page appears.
2. Click on the Unit Configuration tab to launch the Search Unit Configuration page. This is also the default Unit Configuration page.

Find Unit Configuration Records - Search Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

Search Unit Configuration

Unit Config Name

Item

Instance Number

Serial Number

Lot Number

Unit Config Status

Master Config Name

Master Config Revision

Master Config Status

Search For

Go Clear

Unit Configuration List

Create

Select	Unit Configuration	Edit	Instance Number	Item	Serial Number	Lot Number	Status	Installed	Master Configuration	Revision
No records were found matching the given criteria.										

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3. To retrieve unit configuration records by name, enter part of the unit configuration name followed by the generic substitution metacharacter% (example, Air%) in the Name field, and click Go.
4. To retrieve unit configuration records by serial number, enter the value in the Serial Number field, and click Go. Serial Number represents a unique identifier for the fleet unit, provided by the original equipment manufacturer, or the re builder.
5. To retrieve unit configuration records by instance number, enter the value in the Instance Number field and click Go. Alternatively, you can search for an instance number using the Search icon.
6. To retrieve unit configuration records by lot number, enter the value in the Lot Number field and click Go.
7. To retrieve Unit Configuration records by the Master Configuration template it is based on, enter the name in the Master Config Name field. If the unit configuration is based on a particular version of the master configuration, enter the revision number in the Master Config Revision field. Click Go.
8. The lower half of the screen displays the Unit Configuration List of all matching records in the database.

View Unit Configuration List - Search Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

Search Unit Configuration

Unit Config Name Unit Config Status

Item Master Config Name

Instance Number Master Config Revision

Serial Number Master Config Status

Lot Number Search For

Unit Configuration List

Select Unit Configuration and ...

Previous 1-10 of 25 Next

Select Unit Configuration	Edit	Instance Number	Item	Serial Number	Lot Number	Status	Installed	Master Configuration	Revision
Bug #3584044		106249	KM-MC002	KM1003		Draft		KM-MC-TestUC1	1
Config100		107812	CMRO unit item 1	KM001		Draft		APS MC 001	1
config200		107814	CMRO unit item 1	KM002		Draft		00-MC-00	1
KMUC-Test		106247	KM-MC002	KM1001		Draft		KM-MC-TestUC1	1

Validating Unit Configuration Records

You can validate a unit against the master configuration structure, allowed items and sub-configurations, and the rule applicable to a configuration. You can independently validate the completeness of a unit. You can also validate a unit after migrating it to a new master configuration, or to a revision of an existing master configuration.

Prerequisites

- ☐ The unit configuration record you want to validate must exist in the database.

To validate a unit:

1. Retrieve the unit configuration record that you want to validate (see Finding Unit Configuration Records, page 6-13). The search results appear in the lower half of the page.
2. Select the unit configuration record, and click Validate. The Unit Configuration Validation Results page appears displaying the errors for structure and rule violations, if any.

Prerequisites

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

Unit Configuration Validation Results

Unit Configuration: **Config100** Unit Config Status: **Draft**

Master Config Name: **APS MC 001** Master Config Revision: **1**

Description: **APS MC 001**

Validation Results

Number	Message
1	The node with Item CMRO unit item 2 and Serial number SR002 is an extra node in the Unit Configuration with name "Config100".
2	Item has not been assigned to mandatory position(#1 Engine).
3	Item has not been assigned to mandatory position(HP Turbine).
4	Item has not been assigned to mandatory position(#1 Engine).
5	Item has not been assigned to mandatory position(HP Turbine).

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Migrating Unit Configurations

Master configurations may be revised over a period of time. Often these changes can be implemented immediately across the fleet. However at times, it is necessary to transition the units throughout a given period or to a completely different master configuration. In Unit Configuration, the modification process is broken into steps allowing the user to choose when to migrate and what configuration to migrate to, allowing a staged lifecycle change. A Unit Configuration can migrate to a new master configuration or to another revision of the existing master configuration when desired throughout the unit's lifecycle.

When a master configuration is revised, certain part positions may be added or removed from the existing configuration. When a part or sub-assembly exists that is not defined in the master configuration, it will show up as an extra part in the unit configuration tree. You can unassociate these position references. Master configuration positions that do not have item association, are identified by the missing items icon in the configuration tree.

The alternate items/sub-assemblies appear in the Assign Items Table for sibling positions which are empty. You can assign these items to the empty position. You can then validate the completeness as needed. Optionally, you can create new Item Instances, and sub-units to assign to these position references.

Prerequisites

- ☐ The Unit configuration that you want to migrate must exist in the database. The new or revised Master configuration must also exist in the database.

To migrate a unit configuration:

1. Retrieve the unit configuration record that you want to validate (see Finding Unit Configuration Records, page 6-13). The search results appear in the lower half of the page.

2. Select the Unit configuration that you want to migrate, and click Migrate. The Migrate Unit Configuration page appears.

Migrate Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master ConfigurationUnit ConfigurationProduct Classification

Search Unit | Create From Master | Search Product | Create Product

Migrate Unit Configuration

Search and select a Master Configuration to which the Unit is to be migrated. Cancel

Unit Configuration
Master Config Name

Config100
APS MC 001

Unit Config Status
Master Config Revision

Draft
1

Search Master Configuration

Name

Revision

Description

Position

Go Clear

Master Configuration List

Select

Name

Revision

Description

Position

No records were found matching the given criteria..

Cancel

3. Search for the new or revised Master Configuration that you want the unit configuration to migrate to. You can query for a specific version of a master configuration by entering a version number in the Revision field. The records matching your search criteria are displayed in the Master Configuration list.

Select Master Configuration - Migrate Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master ConfigurationUnit ConfigurationProduct Classification

Search Unit | Create From Master | Search Product | Create Product

Migrate Unit Configuration

Search and select a Master Configuration to which the Unit is to be migrated. Cancel

Unit Configuration
Master Config Name

Config100
APS MC 001

Unit Config Status
Master Config Revision

Draft
1

Search Master Configuration

Name

Revision

Description

Position

Go Clear

Master Configuration List

Select Master Configuration and ...

Migrate

Previous 1-10 of 80 Next

Select	Name	Revision	Description	Position
<input type="radio"/>	00-MC-00	1	00-MC-00	Airframe
<input type="radio"/>	737-800	1	Boeing Airframe	Airframe
<input type="radio"/>	737-800	3	Boeing Airframe	Airframe

4. Select the relevant master configuration, and click Migrate. The Edit Unit Configuration page appears, displaying the unit hierarchy and the position details for the top node.

View Configuration Tree - Edit Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

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Edit Unit Configuration

Unit Configuration: Config100 Unit Config Status: Draft
Master Configuration: CMRO mc 1 Master Config Revision: 1
Description: CMRO mc 1

Position Details

Position Item	Airframe	Necessity	Mandatory
Serial Number	CMRO unit item 1	Description	CMRO unit item 1
Lot Number	KM001 From Inventory	Mfg Date	
Revision		Instance Number	107812
Quantity	1	UOM	Ea
Owner	1143	Owner Name	A. C. Networks
Install Date	04-MAY-2004	Location	Site Alcatel;Place Trocadero;75016 Paris;ParisFR
Status	Out of the Enterprise	Condition	

The following mapping is done when you migrate an unit configuration:

- If the node in unit configuration (UC) is a sub-unit and it matches one of the sub-configuration defined in that node of the new master configuration (MC), no further mapping is required.
- If the node in UC is a sub-unit but it doesn't match any sub-configurations defined in that node of the new MC, the sub-unit is treated as an extra node and its tree structure is retained.
- If the node in UC is not a sub-unit and it matches one of the nodes in the same level of the new MC, further mapping is required.
- If the node in UC is not a sub-unit and it doesn't match any node in the same level of the new MC, then the node and all its decedents in the UC are treated as extra nodes.

Note: Migration is not possible if the top nodes of the templates do not match.

5. To remove the extra nodes, select the node and click Remove.
6. To assign item instances to the position references missing items, select the item instance from the Assign item table, and click assign. Optionally, you can assign a new item instance.
7. The extra items will be displayed in the unit hierarchy corresponding to the empty sibling position. To associate this item, you can select it from the Assign Item table and click Assign.

Assign Extra Item - Edit Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

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Airframe
#1 Engine
HP Turbine
CMRO unit item 2-SR002

* Item
Lot Number
Serial Number From Inventory

Revision
Mfg Date

* Indicates required field

Assign Item

Select Item Instance and ... View Utilization Assign

Previous 1-1 of 1 Next

Select	Item	Instance Number	Serial Number	Lot Number	Owner	Location	Mfg Date	Instance Status
<input type="radio"/>	CMRO unit item 2	106164	SR002		AT&T Universal Card	Site Alcatel,Place Trocadero,75016 Paris,ParisFR		In Relationship

Previous 1-1 of 1 Next

Select Item Instance and ... View Utilization Assign

Cancel

- Optionally, you can remove or unassociate the position references that are not mandatory. See Editing Unit Configuration Records, page 6-19.

Editing Unit Configuration Records

Maintenance organizations alter fleet unit configurations to suit different modes of operation, or to comply with changes in business rules. These alterations may also result from component replacements with allowable items at certain hierarchical positions. Oracle Complex Maintenance, Repair, and Overhaul allows you to retrieve and update unit configuration records to reflect these changes.

To edit unit configuration records:

- Retrieve the unit configuration record that you want to edit (see Finding Unit Configuration Records, page 6-13C). The search results appear in the lower half of the page.
- To remove a unit configuration record, select the pertinent record from the Unit Configuration List, and click Remove. You can only delete unit configurations that are in 'Draft' or 'Approval Rejected' status. You can reuse the item represented by the unit configuration that you remove.
- To edit a unit configuration record, click the Edit icon for the pertinent record in the Unit Configuration List. This launches the Edit Unit Configuration page.

Edit Details - Edit Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

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Airframe
Left

Edit Unit Configuration

Unit Configuration: config200 Unit Config Status: Draft
Master Configuration: 00-MC-00 Master Config Revision: 1
Description: 00-MC-00

Cancel Apply

Position Details

Position	Airframe	Necessity	Mandatory
Item	CMRO unit item 1	Description	CMRO unit item 1
Serial Number	KM002 From Inventory	Mfg Date	
Lot Number		Instance Number	107814
Revision		UOM	Ea
Quantity	1	Owner Name	A. C. Networks
Owner	1143	Location	Site Alcatel;Place Trocadero;75016 Paris;ParisFR
Install Date	04-MAY-2004	Condition	
Status	Out of the Enterprise		

Cancel Apply

Note: You cannot add or update position references in the unit configuration after changing the Status to Complete. Make sure that you assign items to all the positions in the unit configuration hierarchy before changing the Status to Complete.

- To edit a position in the unit configuration hierarchy, use the tree structure on the left. The position references beneath the selected node in the unit configuration appear with corresponding part information. You can view the position details by clicking a position reference.

View Position Details - Edit Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

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Airframe
Left

Edit Unit Configuration

Unit Configuration: config200 Unit Config Status: Draft
Master Configuration: 00-MC-00 Master Config Revision: 1
Description: 00-MC-00

Cancel

Position Details

Position	Left	Unassociate Position	Remove	Apply
Item	CMRO unit item 1	Necessity	Mandatory	
Serial Number	KM006 From Inventory	Description	CMRO unit item 1	
Lot Number		Mfg Date		
Revision		Instance Number	107819	
Quantity	1	UOM	Ea	
Owner	1143	Owner Name	A. C. Networks	
Install Date	04-MAY-2004	Location	Site Alcatel;Place Trocadero;75016 Paris;ParisFR	
Status	In Relationship	Condition		

- To remove a position reference from the unit configuration record, click on the the position reference. Select Remove in the Position details region. You can reuse the item represented by the position reference that you remove from the unit configuration.

Note: You cannot remove a position reference that is defined as Mandatory in the master configuration. The Edit Unit Configuration page presents this information in the Necessity field under Unit Configuration Structure.

- To unassociate an items position, without removing the nodes from the Unit configuration tree, select the position reference and click Unassociate. This allows you to map the positions manually, when the correct installation cannot be automatically determined.

Unassociate Position - Edit Unit Configuration page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

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Edit Unit Configuration

Unit Configuration: config200 Unit Config Status: Draft
Master Configuration: 00-MC-00 Master Config Revision: 1
Description: 00-MC-00

Position Details

Position	Airframe	Necessity	Mandatory
Item	CMRO unit item 1	Description	CMRO unit item 1
Serial Number	KM002 From Inventory	Mfg Date	
Lot Number		Instance Number	107814
Revision		UOM	Ea
Quantity	1	Owner Name	A. C. Networks
Owner	1143	Location	Site Alcatel;Place Trocadero;75016 Paris;ParisFR
Install Date	04.MAY.2004	Condition	
Status	Out of the Enterprise		

- To assign a part to a position in the unit configuration, select the pertinent position reference. If item instances for that position exist in the database, they will appear in the Assign Item table. Optionally, you can create and assign a new item instance. See Assigning Items to Unit Configuration Positions, page 6-9.

Approving Unit Configurations

Creating or updating unit configurations is supported with an approval workflow.

You can setup an approval hierarchy to review and approve the unit creation. You can also submit a unit configuration for approval when you make a manual change to a complete unit configuration. Manual changes are necessary to record a discrepancy; all the other unit configuration changes should be performed through the proper production flow with work order sign off etc. Both the creation and the manual update of a unit configuration are critical tasks and need to be controlled.

After the Unit configurations have been created and/or edited, the unit is submitted for approval. When approved, if the unit is not complete it will be given the status of “Incomplete Approved” and if complete it will be assigned the “Complete Approved” status.

Prerequisites

- ☐ The Unit Configuration records that you want to submit for approval must exist in the database.

To approve unit configurations:

1. Retrieve the unit configuration record that you want to submit for approval (see Finding Unit Configuration Records, page 6-13). The search results appear in the lower half of the page.
2. To approve a unit configuration record, select the pertinent record from the Unit Configuration List, and click Submit for Approval. When a unit in draft is submitted for approval, the status changes to Approval Pending. If the changes are approved, the status changes to Complete else it changes to Approval Rejected.

Submit Unit Configuration for Approval - Search Unit Configuration page

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Master Configuration Unit Configuration Product Classification

Search Unit | Create From Master | Search Product | Create Product

Confirmation • The request for approval has been successfully submitted.

Search Unit Configuration

Unit Config Name Unit Config Status

Item Master Config Name

Instance Number Master Config Revision

Serial Number Master Config Status

Lot Number Search For

Unit Configuration List

Select Unit Configuration and ...

Previous 1-10 of 24 Next

Select	Unit Configuration	Edit	Instance Number	Item	Serial Number	Lot Number	Status	Installed	Master Configuration	Revision
<input type="radio"/>	Bug #3584044		106249	KM-MC002	KM1003		Draft		KM-MC-TestUC1	1
<input type="radio"/>	confia200		107814	CMRO unit item 1	KM002		Draft		00-MC-00	1

Viewing Alternate Items Utilization

Unit Configuration records the utilization of each component within an assembled hierarchy by monitoring current utilization of units and component hierarchies. Unit Configuration uses appropriate units of measurement including Time Since New, Time Since Overhaul, Time Since Repair, utilization cycles, Hobbs meter time, and many others. Unit Configuration also records utilization history of a revenue fleet unit, serialized part, or component hierarchy.

You can assign alternate items to unit configuration positions after viewing the utilization gained by each allowable item listed for a position.

Prerequisites

- ☐ An assigned item must exist for the pertinent position in the unit configuration, and the Unit Configuration record must be in the Draft status..

To view alternate item utilization:

1. Retrieve the unit configuration record that you want to edit (see Finding Unit Configuration Records, page 6-13). Search results appear in the lower half of the page.
2. To view the use of alternate items, select the pertinent record from the Unit Configuration List, and click the Edit icon corresponding to it. The Edit Unit Configuration page appears. Using the tree structure on the left, navigate to the node you want to edit.
3. Select the position to which you want to assign alternate items. The alternate items will be displayed in the Assign Item table. To view item utilization, select the item and click View Utilization.

Assigning Alternate Items to Unit Configuration Positions

When a fleet unit is in operation providing a transport service, eventually some components will require replacement to preserve the operational readiness of that unit. A unit configuration inherits the alternate items list for each component position in the hierarchy, from its master configuration template. Use this procedure to assign alternate items to a component position in an assembly. This will enable you to manage the “as-installed” configuration details of any fleet unit.

Prerequisites

- ☐ An assigned item must exist for the pertinent position in the unit configuration, and the Unit Configuration record Status must be flagged Complete.

To assign an alternate item to a unit configuration position:

1. Retrieve the unit configuration record that you want to edit (see Finding Unit Configuration Records, page 6-13). Search results appear in the lower half of the page.
2. To remove a unit configuration record, select the pertinent record from the Unit Configuration List, and click Remove.
3. To assign alternate items to a unit configuration position, select the pertinent record from the Unit Configuration List, and click Edit. This launches the Edit Unit Configuration (Unit Configuration Structure) page.
4. Click the topmost node in the unit configuration that appears in the Position field under Unit Configuration Structure. The position references beneath the selected node appear with corresponding part information.
5. Select the position to which you want to assign alternate items.
6. Click Alternates to launch the Alternate Items List page. This is the allowable items list defined for the selected position.
7. Select the alternate item that you want to assign to the position.

8. Click Assign. This assigns the selected alternate item to the position, and the item previously assigned to the selected position is marked Out-of-Service and returned to the Alternate Items List.

Creating and Updating Item Information

Oracle Complex Maintenance, Repair, and Overhaul uses Oracle Install Base, part of the Oracle e-Business Suite, to create and update item information.

- Click the Create Product secondary tab in the Unit Configuration module to launch the Create Product page.
- Click the Search Product secondary tab in the Unit Configuration module to launch the Search My Products page.

For instructions on using these pages to create, find, and update part information, refer to *Oracle Install Base Concepts and Procedures*. The chapter, “Using the Product Tabbed Page” in this guide provides all the information you need to use the Create Product and Search My Product pages.

Managing Product Classification

This chapter covers the following topics:

- Overview
- What is Product Classification?
- Key Business Processes
- Finding Product Classifications
- Working With Product Classifications
- Creating a Product Classification
- Copying a Product Classification
- Editing a Product Classification
- Working With Nodes
- Adding a Node
- Editing a Node
- Removing a Node
- Viewing Nodes
- Associating Documents to a Node
- Attaching Units/Items in Product Classification
- Viewing Utilization Forecasts
- Viewing Associated Maintenance Requirements
- Checking Completeness
- Launching the Approval Process

Overview

In the transportation business, the term fleet commonly describes a group of related vehicles. A fleet may be divided into smaller groups, or subfleets, each consisting of products that are similar with regard to manufacturer, operating region, or other pertinent attribute. Because maintenance requirements are often based on such attributes, product classification is needed to provide a hierarchy within which the products can be grouped.

Throughout the MRO industry, businesses need to define how MRO maintenance and supporting documents apply to physical units. These MRO documents typically represent other parts or technical information, and their purpose is to express what requirements apply to what units.

A product classification will group products logically across multiple levels. Examples are the family-model-version classification for engines and the fleet-series-model classification for aircraft. A product classification can be represented by a tree structure in which individual units can be attached to the nodes of the tree, with the implication that maintenance requirements and maintenance documents applicable to such a node “flow down” to the attached units or parts.

This chapter presents the key functions supported by the Oracle Complex Maintenance, Repair, and Overhaul Product Classification module. The chapter provides process-oriented, task base procedures for using Oracle Complex Maintenance, Repair, and Overhaul to perform essential product classification tasks.

See:

- Finding Product Classifications, page 7-4
- Working with Product Classifications:, page 7-7
 - Creating a Product Classification, page 7-8
 - Copying a Product Classification, page 7-10
 - Editing a Product Classification, page 7-11
- Working with Nodes:, page 7-13
 - Adding a Node, page 7-13
 - Editing a Node, page 7-15
 - Removing a Node, page 7-16
- Viewing Nodes, page 7-17
- Associating Documents to a Node, page 7-18
- Attaching Units in Product Classification, page 7-20
- Viewing Utilization Forecasts, page 7-22
- Viewing associated Maintenance Requirements, page 7-23
- Checking Completeness, page 7-24
- Launching the Approval Process, page 7-25

What is Product Classification?

A product classification is a logical categorization of units or parts pertaining to maintenance, with a unit being the physical instance of an item and a part being the general item definition from which a unit is instantiated. Product Classification allows an organization to group its units or parts together from multiple viewpoints. Examples are the general product family classification, a classification per geographical location or a classification based on the type of usage of a unit or part. The affiliation of a unit or part to certain classifications is used to define the applicability of maintenance requirements and maintenance documents. In case of changing a product classification by adding, deleting or moving a unit or a part, the unit maintenance plan of the affected

unit(s) is changed automatically to represent the maintenance requirements based on the edited product classification. This gives an organization a powerful set up of maintenance applicability with a minimum of maintenance of the engineering set up when implementing maintenance plan changes.

Key Business Processes

Product Classification supports the following business processes:

Product Classification

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

Maintenance Personnel can:

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

Parts and Unit Classification

Oracle Complex Maintenance, Repair, and Overhaul allows organizations to group parts or units in multiple product classifications. A product classification is represented in a tree model hierarchy. This supports organizations to group parts or units together from different viewpoints and enables them to define maintenance requirements and maintenance documents based on the parts or units product classification(s) association.

Primary and Supplementary Classification

Oracle Complex Maintenance, Repair, and Overhaul supports primary and supplementary classifications. For a primary classification all parts or units of that classifications' product type need to be associated to this primary classification. An organization can have one primary classification per product type. This gives the organization a view of all the parts or units for a specific product type. An example of that would be the complete fleet of an airline. A supplementary classification can represent a subset of the parts and units for a particular product type. An organization can have multiple supplementary classifications for a particular product type. This allows an organization to group the parts and units together from different viewpoints. An example of that would be a categorization by geographical location of the parts and units.

Association of Maintenance Documents

Oracle Complex Maintenance, Repair, and Overhaul allows you to associate maintenance documents to any node within the product classification hierarchy.

View Maintenance Requirement Association

Oracle Complex Maintenance, Repair, and Overhaul displays the maintenance requirements associated to a node in a product classification. The association itself happens in Fleet Maintenance Program.

Unit Maintenance Plan Update

When a part or unit changes its product classification or is newly added or deleted from a product classification. The system automatically runs the re-calculation of the affected units' maintenance plan.

Finding Product Classifications

Maintenance organizations refer to existing product classification records while defining solutions for similar maintenance requirements. Oracle Complex Maintenance, Repair, and Overhaul permits use of meta characters when you type a word, or part of a word, to use as a search argument. Use % to represent any string of zero or more characters. Use _ to represent any single character. For example, if the database contains a record with the value "ENGINE" in a field, typing "E%" will return all records where the field value begins with "E".

Prerequisites

- ☐ The product classification record you want to retrieve must exist in the database.

To find a product classification record:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Configuration Management link. The Search Master Configuration page of Master Configuration appears.
2. Select the Product Classification tab. The Search Product Classification page appears in Product Classification.

Search Product Classification page

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Oracle Complex MRO

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Master ConfigurationUnit ConfigurationProduct Classification

Overview

Search Product Classification

Name

Description

Item Type

Status

Primary Classification

Association Type

Document

Maintenance Requirements

Revision

Item

Unit

Go

Clear

Product Classification Results

Create

Select	Name	Description	Item Type	Status	Primary Classification	Association Type	Tree	Remove
No records were found matching the given criteria..								

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3. Enter the information in the fields for which you know the value. The following table describes the fields in the Search Product Classification page.

Description of fields in the Search Product Classification page

Field Name	Description
Name	Refers to the name of the product classification.
Product Type	Refers to the kind of product, such as airplane, train, car, and so on. This is a seeded field. All classifications have a product type defined to control the association of a unit or a part. This is to ensure that different types of products do not get mixed up in the same classification (i.e. Airplanes and Engines). When defining the Product Classification's Product Type, the value chosen by the user must match the master item's User Item Type as defined in Oracle Inventory.
Status	Refers to the state of the classification which is one of the following: Draft, Approval Pending, Approval reject, or Complete. When creating a product classification the default is Draft. This is a seeded field.
Primary Classification	One of two types of product classifications, primary or supplementary. A primary classification is used to give an overview of all existing units that make up a complete list of components. For an operator in the transportation industry, this consist of all airplanes, trains, buses, ships, cars, and so forth. Multiple primary classifications can be defined but must associate an item type to a primary classification for validation purposes. For example, you can define multiple primary classifications for the complete fleet of Airplanes and the complete list of Engines. Only parts of product type 'Airplane' can be associated to the primary classification for the fleet of Airplanes and only parts of product type 'engine' could be associated to the Engine classification. Since one part can only have one product type, there is no duplication when associating parts or units to a primary classification. Every unit defined as part of the fleet has to be part of the primary product classification. Supplemental classifications are applied to group certain units for specific classification needs based on geography, types not covered through the primary classification or any other attribution. A supplementary classification does not necessarily resemble the complete fleet it therefore does not have to have every unit assigned to a leaf node.
Association Type	Refers to the kind of association; either unit or part.
Document	Refers to the document number set from document index
Revision	Refers to the revision number of the associated document.
Maintenance Requirements	Refers to the maintenance requirements determined in Fleet Maintenance Program.
Unit	Refers to the name of the unit.
Part	Refers to the part number.

4. Click Go. The lower half of the screen displays the Product Classification results for all matching records in the database.

Product Classification Search results - Search Product Classification page

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[Master Configuration](#) [Unit Configuration](#) [Product Classification](#)

Overview

Search Product Classification

Name	<input type="text"/>	Description	<input type="text"/>
Item Type	<input type="text"/>	Status	<input type="text"/>
Primary Classification	<input type="text"/>	Association Type	<input type="text"/>
Document	<input type="text"/>	Maintenance Requirements	<input type="text"/>
Revision	<input type="text"/>	Item	<input type="text"/>
Unit	<input type="text"/>		
<input type="button" value="Go"/> <input type="button" value="Clear"/>			

Product Classification Results

Select classification and ...

1-10 of 101

Select	Name	Description	Item Type	Status	Primary Classification	Association Type	Tree	Remove
<input type="radio"/>	AHLPC001	This is a PC to certify bug	IT21042004	Complete	Yes	Unit		
<input type="radio"/>	AHLPC001	This is a PC to certify bug	IT21042004	Draft	Yes	Unit		
<input type="radio"/>	AHLPC001 test	This is a PC to certify bug	IT21042004	Draft	No	Unit		

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

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

Related Topics

Working With Product Classifications, page 7-7

Working With Product Classifications

Product Classification provides a multilevel hierarchy that permits the logical grouping of products. Product classifications are used mainly to define maintenance requirements and documents applicability. There are two types of classification - Primary and Secondary. There can be only one Primary classification for one product type. Oracle Complex Maintenance, Repair, and Overhaul allows you to copy, edit, and create product classifications.

Related Topics

Creating Product Classifications, page 7-8

Copying Product Classifications, page 7-10

Editing Product Classifications, page 7-11

Creating a Product Classification

Prerequisites

- ☐ You should know the name, product type, classification status, and association type of the product classification you want to create.

To create a product classification:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Configuration Management link. The Search Master Configuration page of Master Configuration appears.
2. Select the Product Classification tab. The Search Product Classification page appears in Product Classification.
3. Click the Create button in the Product Classification Results in the lower half of the page. The Create Product Classification page appears.

Create Product Classification page

The screenshot shows the 'Create Product Classification' page in the Oracle Complex MRO system. The page has a navigation bar at the top with links for Home, Engineering, Configuration, Planning, Administration, Execution, Profile, Sign Out, and Help. Below the navigation bar, there are tabs for Master Configuration, Unit Configuration, and Product Classification. The Product Classification tab is selected. The main content area is titled 'Create Product Classification' and includes a 'Cancel' and 'Apply' button. Below this, there is a section for 'Product Classification Details' with the following fields:

- * Name: A text input field.
- Status: A dropdown menu showing 'Draft'.
- * Item Type: A dropdown menu with a search icon.
- * Primary Classification: A radio button selected for 'True' and an unselected option for 'False'.
- * Association Type: A radio button selected for 'Unit' and an unselected option for 'Item'.
- Description: A text area with a scroll bar.

At the bottom right of the form, there are 'Cancel' and 'Apply' buttons.

4. Enter the information in the fields for which you know the value. Fields marked with asterisks require an entry.

Enter Product Classification Details - Create Product Classification page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview

Create Product Classification

* Indicates required field

Cancel Apply

Product Classification Details

* Name PClassType

Status Draft

* Item Type ATO item

* Primary Classification ☐ True ☒ False

* Association Type ☒ Unit ☐ Item

Description

Cancel Apply

- Click Apply to save the changes to the database. You should see a message: Confirmation—Product Classification successfully created. The Edit Product Classification page appears, displaying the new Product Classification.

Edit Product Classification page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview

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Action Delete Node Go

Confirmation • Product Classification successfully created.

Edit Product Classification

* Indicates required field

Cancel Submit Apply

Product Classification Details

Name PClassType

Status Draft

* Item Type ATO item

* Primary Classification ☐ True ☒ False

* Association Type ☒ Unit ☐ Item

Description

- Click Cancel to return to the previous page.

Related Topics

Copying Product Classifications, page 7-10

Copying a Product Classification

Prerequisites

- ☐ A draft status product classification must exist in the database.

To copy a product classification:

1. Retrieve the product classification you want to copy. See Finding Product Classifications, page 7-4.
2. Select the product classification you want to copy from the Product Classification Results on the lower half of the page, then click Copy.
3. The Copy Product Classification page appears. Give the copy a new name—each product classification must have a unique name.

Copy Product Classification page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview

Copy Product Classification

* Indicates required field

Product Classification Details

Name AHLPC001

* New Name AHLPC150

Status Draft

* Item Type IT21042004

* Primary Classification ☒ True ☐ False

* Association Type ☒ Unit ☐ Item

Description This is a PC to certify bug

Other Components

Component
<input type="checkbox"/>

4. Change any other information about the copy in the fields provided.

Note: Only one primary product classification is permitted for any product type. If you also want to copy other components, such as any associated Unit/Parts or Documents, click the check boxes next to the relevant component.

5. Click Apply to save the changes to the database. You should see a message: Confirmation—Product Classification successfully copied. The Edit Product Classification page appears, displaying the copied Product Classification.

View Confirmation - Edit Product Classification page

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Master Configuration Unit Configuration Product Classification

Overview

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Action:

☐ Root Node
☐ Child Node

Confirmation • Product Classification successfully copied.

Edit Product Classification

* Indicates required field

Product Classification Details

Name: **AHLPC150**

Status: **Draft**

* Item Type:

* Primary Classification: ☐ True
☒ False

* Association Type: ☒ Unit
☐ Item

Description:

6. Click Cancel to return to the previous page.

Related Topics

Creating Product Classifications, page 7-8

Editing Product Classifications, page 7-11

Editing a Product Classification

Oracle Complex Maintenance, Repair, and Overhaul Product Classifications can be edited only if the status of the Product Classification is in “draft” status. If the status is “complete” changes are not allowed, including any changes in associations of maintenance requirements and documents.

Prerequisites

- ☐ A draft status product classification must exist in the database.

To edit product classification:

1. Retrieve the product classification you want to edit. See Finding Product Classifications, page 7-4.
2. Select the product classification that you want to edit, and click the corresponding tree icon. The Edit Product Classification page appears.

Update Product Classification - Edit Product Classification page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview

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Action:

☐ Root Node
☐ Child Node

Edit Product Classification

* Indicates required field

Product Classification Details

Name: **AHLPC001**
Status: **Draft**
* Item Type:

* Primary Classification: ☒ True
☐ False

* Association Type: ☒ Unit
☐ Item

Description:

3. Make the necessary changes in the fields provided. Note that only one primary product classification is permitted for any product type.
4. Click Apply to save the changes to the database. The page refreshes and displays 'Product Classification successfully updated'.

Update Product Classification page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview

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Action:

☐ Root Node
☒ Child Node 10

• Product Classification Node successfully updated.

Update Product Classification

Product Classification Name: **AHLPC001**
Description: **This is a PC to certify bug**
Status: **Draft**
Item Type: **IT21042004**
Primary Classification: **Yes**
Association Type: **Unit**

* Indicates required field

Node Details

* Name:

Description:

Related Topics

Creating Product Classifications, page 7-8

Copying Product Classifications, page 7-10

Working with Nodes, page 7-13

Working With Nodes

Assigning a part, instead of the unit to a node is an easier way to classify the products if a differentiation is not needed on the instance level. Oracle Complex Maintenance, Repair, and Overhaul uses a hierarchy tree to graphically display the structure of product classifications and the elements related to them. In Product Classification, you can add, edit, and remove nodes in addition to attaching documents, associate units/parts, and view the maintenance requirements for any selected product classification.

Related Topics

Adding a Node, page 7-13

Editing a Node, page 7-15

Removing a Node, page 7-16

Adding a Node

Prerequisites

- ☐ A draft status product classification must exist in the database.

To add a node:

1. Find the product classification to which you want to add a node. See Finding Product Classifications, page 7-4.
2. Click the corresponding tree icon. The Edit Product Classification page appears. The node tree appears on the left hand side of the page, displaying the nodes defined.

View Node Tree - Edit Product Classification page

Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview

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Action: **Delete Node** **Go**

Root Node
Child Node 10

Edit Product Classification

* Indicates required field

Product Classification Details

Name: **AHLP001**

Status: **Draft**

* Item Type: **IT21042004**

* Primary Classification: ☒ True
☐ False

* Association Type: ☒ Unit
☐ Item

Description: **This is a PC to certify bug**

Cancel Submit Apply

3. Select a Node, and choose Add Node from the Action pull down menu. Click Go.
4. Node Details appears on the lower right hand of the page. Enter the information in the fields for which you know the value.

Enter Node Details - Update Product Classification page

Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview

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Action: **Add Node** **Go**

Root Node
Child Node 10

Update Product Classification

Product Classification Name: **AHLP001**

Description: **This is a PC to certify bug**

Status: **Draft**

Item Type: **IT21042004**

Primary Classification: **Yes**

Association Type: **Unit**

* Indicates required field

Node Details

* Name: **Child Node 20**

Description:

Cancel Apply

5. Click Apply to save the changes to the database.
6. The page refreshes and displays "Confirmation: Product Classification Node successfully created" and the tree displays the new node.

View New Node - Update Product Classification page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration **Product Classification**

Overview

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Action:

☐ Root Node
☒ Child Node 10
☐ Child Node 20

Confirmation • Product Classification Node successfully created.

Update Product Classification

Product Classification Name	AHLPC001
Description	This is a PC to certify bug
Status	Draft
Item Type	IT21042004
Primary Classification	Yes
Association Type	Unit

* Indicates required field

Node Details

* Name	Child Node 20
Description	

Related Topics

Editing a Node, page 7-15

Removing a Node, page 7-16

Editing a Node

Prerequisites

- ☐ A draft status product classification and an editable node must exist in the database.

To edit a node:

1. Retrieve the product classification records. See Finding Product Classifications., page 7-4
2. Select the product classification that you want to make changes to, and click the corresponding tree icon. The Edit Product Classification page appears. The node tree appears on the left hand side of the page, displaying the nodes defined.
3. Use the tree to find the node you want to edit, and select the node. The details for that node appear.

Edit Node - Update Product Classification page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview

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Action:

☐ Root Node

☒ Child Node 10

☐ Child Node 20

Update Product Classification

Product Classification Name: **AHLP0001**

Description: **This is a PC to certify bug**

Status: **Draft**

Item Type: **IT21042004**

Primary Classification: **Yes**

Association Type: **Unit**

* Indicates required field

Node Details

* Name:

Description:

4. Make the necessary changes in the fields provided. Click the More details button if you want to associate documents or attach parts.
5. Click Apply to save the changes to the database. The page refreshes and displays "Product Classification Node successfully updated."
6. Click Cancel to return to the previous page.

Related Topics

- Adding a Node, page 7-13
- Removing a Node, page 7-16
- Associating Documents to a Node, page 7-18
- Attaching Units in Product Classification, page 7-20

Removing a Node

Prerequisites

- ☐ The node you want to remove must exist in the database.

To remove a node:

1. Find the product classification that has the node that you want to remove. See Finding Product Classifications., page 7-4
2. Select the product classification record, and click the corresponding tree icon. The Edit Product Classification page appears. The node tree appears on the left hand side of the page, displaying the nodes defined.

3. Use the tree to find the node that you want to remove. Select Delete Node from the Action pull down menu and click Go.
4. The page refreshes and displays “Confirmation: Product Classification Node(s) successfully deleted.” The node, all its associations, and sub nodes are deleted. If the top node of the product classification is deleted, the entire tree is lost.

Delete Node - Edit Product Classification page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview

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Action:

☐ Root Node

Confirmation • 1 Product Classification Node(s) successfully deleted.

Edit Product Classification

* Indicates required field

Product Classification Details

Name: AHLPC001

Status: Draft

* Item Type:

* Primary Classification: ☒ True ☐ False

* Association Type: ☒ Unit ☐ Item

Description:

5. Click Apply to save the changes to the database.
6. Click Cancel to return to the previous page.

Related Topics

- Adding a Node, page 7-13
- Editing a Node, page 7-15

Viewing Nodes

Oracle Complex Maintenance, Repair, and Overhaul uses a hierarchy tree to graphically display the structure of product classifications and the elements related to them. You can use Product Classification to view any nodes associated to a product classification.

Prerequisites

- ☐ A product classification with associated nodes must exist in the database.

To view a node:

1. Find the product classification that has the node that you want to view. See Finding Product Classifications., page 7-4

2. Select the product classification record, and click the corresponding tree icon. The Edit Product Classification page appears. The node tree appears on the left hand side of the page, displaying the nodes defined.
3. Navigate through the tree by clicking on the plus/minus icons next to the node names.

View Nodes - Update Product Classification page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration **Product Classification**

Overview

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Action:

Product Classification Name: **AHLPC150**

Description: **This is a PC to certify bug**

Status: **Draft**

Item Type: **IT21042004**

Primary Classification: **No**

Association Type: **Unit**

* Indicates required field

Node Details

* Name:

Description:

Associating Documents to a Node

Product Classification uses a tree structure to graphically display the structure of product classifications and the elements related to them. Documents can be associated with product classifications by attaching them to the appropriate node of this tree structure. You can search for relevant documents from document index then use Product Classification to attach documents to a node.

Prerequisites

- ☐ A draft status product classification must exist in the database.

To associate a document to a node:

1. Find the product classification that has the node that you want to associate with a document. See Finding Product Classifications., page 7-4
2. Select the product classification record, and click the corresponding tree icon. The Edit Product Classification page appears. The node tree appears on the left hand side of the page, displaying the nodes defined.
3. Use the tree to find the node to which you want to associate a document.
4. Select the node. The Edit Product Classification page refreshes with information on that node. Click More Details.

5. The Update Attached Documents page should appear. If it does not, click Documents on the left hand side menu to bring up the page.

Update Attached Documents page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview

Documents

Units/Items

Maintenance Requirements

Update Attached Documents

Cancel Apply

Product Classification Name: **AHLPC150**

Description: **This is a PC to certify bug**

Status: **Draft**

Item Type: **IT21042004**

Primary Classification: **No**

Association Type: **Unit**

Node Details

Name: **Child Node**

Description: **This is child**

Document List

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

Cancel Apply

Master Configuration | Unit Configuration | **Product Classification** | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign

6. The Update Attached Documents page displays currently attached documents. To add a document, click Add More Rows. For information on fields related to document records, see Description of fields related to Document records in the Document Index chapter.

Attach Documents to Product Classification - Update Attached Documents page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview

Documents

Units/Items

Maintenance Requirements

Update Attached Documents

Product Classification Name: **AHLPC150**

Description: **This is a PC to certify bug**

Status: **Draft**

Item Type: **IT21042004**

Primary Classification: **No**

Association Type: **Unit**

Node Details

Name: **Child Node**

Description: **This is child**

Document List

Remove	Number	Title	Type	Revision	Chapter	Section	Subject

7. Select a document from the document number list of values. Click Apply to save the changes to the database.

View Attached Document - Update Attached Documents page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration **Product Classification**

Overview

Documents

Units/Items

Maintenance Requirements

Confirmation • 1 Document(s) successfully associated with the Product Classification Node.

Update Attached Documents

Cancel Apply

Product Classification Name: **AHLPC150**
 Description: **This is a PC to certify bug**
 Status: **Draft**
 Item Type: **IT21042004**
 Primary Classification: **No**
 Association Type: **Unit**

Node Details

Name: **Child Node**
 Description: **This is child**

Document List

Previous 1-1 of 1 Next

Remove	Number	Title	Type	Revision	Chapter	Section	Subject	Page	Figure	Note
<input type="checkbox"/>	000-BBHAT-000	Bhat's Locomotive #%%@^								

Add More Rows

8. Click Cancel to return to the previous page.

Attaching Units/Items in Product Classification

Product Classification uses a tree structure to graphically display the structure of product classifications and the elements related to them. Units/Items can be associated with product classifications by attaching them to the appropriate node of this tree structure.

Prerequisites

- ☐ A draft status product classification must exist in the database.

To attach a part or unit:

1. Find the product classification that has the node that you want to associate with a unit/item. See Finding Product Classifications., page 7-4
2. Select the product classification record, and click the corresponding tree icon. The Edit Product Classification page appears. The node tree appears on the left hand side of the page, displaying the nodes defined.
3. Use the tree to find the node to which you want to attach a part or unit.
4. Click the node link. The Edit Product Classification page refreshes with information on that node. Click More Details.
5. The Update Attached Documents page appears. Click Units/Items from the left hand navigation menu. The Update Attached Units page appears, displaying any currently attached units.

Update Attached Units page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration **Product Classification**

Overview

Documents

Units/Items

Maintenance Requirements

Update Attached Units

Cancel Apply

Product Classification Name **AHLPC150**

Description **This is a PC to certify bug**

Status **Draft**

Item Type **IT21042004**

Primary Classification **No**

Association Type **Unit**

Node Details

Name **Child Node**

Description **This is child**

Attached Units

Remove Name Item Serial Number

No records were found matching the given criteria.

Add More Rows

Cancel Apply

Master Configuration | Unit Configuration | **Product Classification** | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

- To add a unit/item, click Add More Rows. Select an unit/item from the Name list of values.

Add Unit to Product Classification - Update Attached Units page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration **Product Classification**

Overview

Documents

Units/Items

Maintenance Requirements

Update Attached Units

Cancel Apply

Product Classification Name **AHLPC150**

Description **This is a PC to certify bug**

Status **Draft**

Item Type **IT21042004**

Primary Classification **No**











Association Type **Unit**

Node Details

Name **Child Node**

Description **This is child**

Attached Units

Remove	Name	Item	Serial Number
	AHLUC001	 AHLITEM007	SR001
			
			
			
			

- Click Apply to save the changes to the database.

View Attached Units - Update Attached Units page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview

Documents

Units/Items

Maintenance Requirements

Confirmation • 1 Unit(s) successfully attached to the Product Classification Node.

Update Attached Units

Cancel Apply

Product Classification Name AHLPC150

Description This is a PC to certify bug

Status Draft

Item Type IT21042004

Primary Classification No

Association Type Unit

Node Details

Name Child Node

Description This is child

Attached Units

Previous 1-1 of 1 Next

Remove	Name	Item	Serial Number
<input type="checkbox"/>	AHLUC001	AHLITEM007	SR001

Add More Rows

Previous 1-1 of 1 Next

8. Click Cancel to return to the previous page.

Viewing Utilization Forecasts

The Oracle Complex Maintenance, Repair, and Overhaul Product Classification module allows you to view any utilization forecasts related to a particular product classification.

To view utilization forecasts:

1. Retrieve the relevant product classification records. See Finding Product Classifications, page 7-4.
2. Select the product classification record from the results table, and click the corresponding tree icon. Only a primary and complete product classification can have a utilization forecast associated to it. The Edit Product Classification page appears. The node tree appears on the left hand side of the page, displaying the currently defined nodes.
3. Select the node, whose related utilization forecast you want to view. The Edit Product Classification page refreshes with information on that node. Click More Details.

Note: Utilization forecasts cannot be associated to the top node in the tree.

4. The Update Attached Documents page appears. Click Utilization Forecast from the left hand navigation menu. The View Utilization Forecast page appears, displaying any related utilization forecasts.
5. Click Cancel to return to the previous page.

Viewing Associated Maintenance Requirements

The Oracle Complex Maintenance, Repair, and Overhaul Product Classification module allows you to view any maintenance requirements related to a particular product classification.

Prerequisites

- ☐ A primary product classification with associated maintenance requirements must exist in the database. Maintenance requirements can be associated with only product classifications in the complete status.

To view an associated maintenance requirement:

1. Find the product classification that has the node with the associated maintenance requirements you want to view. See Finding Product Classifications, page 7-4.
2. Select the record, and click the corresponding tree icon. The Edit Product Classification page appears. The node tree appears on the left hand side of the page, displaying the currently defined nodes.
3. Use the tree to find the node with the maintenance requirement you want to view.
4. Select the node. The Edit Product Classification page refreshes with information on that node. Click More Details.
5. The Update Attached Documents page appears. Click Maintenance Requirements from the left hand navigation menu. The View Maintenance Requirement page appears, displaying any currently relevant maintenance requirements.

View Maintenance Requirement page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview

Documents

Units/Items

Maintenance Requirements

View Maintenance Requirement

Cancel

Product Classification Name: AHLPC150

Description: This is a PC to certify bug

Status: Draft

Item Type: IT21042004

Primary Classification: No

Association Type: Unit

Name: Child Node

Description: This is child

Maintenance Requirement List

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

Cancel

Master Configuration | Unit Configuration | Product Classification | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

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6. Click Cancel to return to the previous page.

Checking Completeness

The Oracle Complex Maintenance, Repair, and Overhaul Product Classification module allows you to check a draft product classification for completeness before launching an approval process.

Prerequisites

- ☐ A primary product classification must exist in the database.

To check the completeness of a product classification:

1. Retrieve the product classification you want to check. See Finding Product Classifications, page 7-4.

Find Product Classification Record - Search Product Classification page

ORACLE Oracle Complex MRO

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

[Master Configuration](#) [Unit Configuration](#) [Product Classification](#)

Overview

Search Product Classification

Name

Item Type

Primary Classification

Document

Revision

Unit

Go

Clear

Description

Status

Association Type

Maintenance Requirements

Item

Product Classification Results

Create

Select classification and ...

Check Complete

Copy

Previous

1-10 of 103

Next

Select	Name	Description	Item Type	Status	Primary Classification	Association Type	Tree	Remove
<input type="radio"/>	AHLPC001	This is a PC to certify bug	IT21042004	Complete	Yes	Unit		
<input type="radio"/>	AHLPC001	This is a PC to certify bug	IT21042004	Draft	Yes	Unit		
<input type="radio"/>	AHLPC001 test	This is a PC to certify bug	IT21042004	Draft	No	Unit		

2. Select the product classification you want to check completeness for from the Product Classification Results on the lower half of the page, then click Check Complete. Note that you cannot initiate the check complete process on a non-primary Product Classification.
3. Oracle Complex Maintenance, Repair, and Overhaul performs the check, then displays a confirmation message. Completeness errors, if any, are also displayed.

View Completeness Error - Unapplied Units page


ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview

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 [Root Node](#)

Unapplied Units

Please select a leaf node to attach unit(s) to. Cancel

Product Classification Name

AHLPC001

Description

This is a PC to certify bug

Status

Draft

Item Type

IT21042004

Primary Classification

Yes

Association Type

Unit

Previous

1-1 of 1

Next

Name	Item	Serial Number
AHLUC001	AHLITEM007	SR001

Previous

1-1 of 1

Next

Cancel

Launching the Approval Process

The Oracle Complex Maintenance, Repair, and Overhaul Product Classification module allows you to start the approval process for a draft product classification.

Prerequisites

- ☐ There must be a draft status process classification in the database.

To launch the approval process:

1. Find the product classification for which you want to launch an approval process. See Finding Product Classifications., page 7-4
2. Select the record, and click the corresponding tree icon. The Edit Product Classification page appears, displaying the currently selected product classification.

Submit Product Classification for Approval - Edit Product Classification page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview

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Action: Delete Node Go

Node 1
Node 2
Node 3

Edit Product Classification

* Indicates required field

Product Classification Details

Name **KM24122003**

Status **Draft**

* Item Type Asset Activity

* Primary Classification ☒ True
☐ False

* Association Type ☒ Unit
☐ Item

Description this is a test pc

Cancel Submit Apply

- Click Submit. The Product Classification status changes from Draft to Approval Pending.

View Approval Status - Edit Product Classification page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Master Configuration Unit Configuration Product Classification

Overview

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Node 1
Node 2
Node 3

Confirmation • Product Classification successfully updated.

Edit Product Classification

Cancel

Product Classification Details

Name **KM24122003**

Status **Approval Pending**

Item Type **Asset Activity**

Primary Classification **Yes**

Association Type **Unit**

Description **this is a test pc**

Cancel

Working With Unit Maintenance Plans

This chapter covers the following topics:

- Overview
- What is Unit Maintenance Plan?
- Key Business Processes
- Finding Unit Maintenance Plan Records
- Associating a Maintenance Requirement to a Visit
- Calculating Maintenance Requirement Due Dates
- Viewing Unit Maintenance Requirement Detail and History
- Viewing Group Maintenance Requirements
- Initializing Maintenance Requirements
- Viewing Unit Maintenance Requirement Details
- Viewing Maintenance Requirement Thresholds
- Finding Item Utilization Forecasts
- Updating Item Utilization Forecasts
- Finding and Updating a Product Classification Utilization Forecast
- Finding and Updating a Unit Configuration Utilization Forecast
- Transit/Line Maintenance and Scheduling
- Viewing Unit Schedule
- Creating Transit Visit from Unit Schedule
- Viewing Unit Schedule Details
- Maintaining Flight Schedule
- Updating Transit Visit Schedule

Overview

In a Maintenance, Repair, and Overhaul (MRO) environment, it is necessary to plan work on complex equipment and simple components. This work is typically specified by a set of maintenance requirements that have been defined by the engineering organization to ensure proper operation of the equipment or component. Unit Maintenance Plan

is used to ensure that all maintenance requirements are accomplished on or prior to their due date, and provides the “demand” over a planning time window by forecasting the due date of maintenance requirements associated to a unit. It searches and displays maintenance requirements that are due for an equipment unit and provides maintenance personnel instant access to maintenance requirements, due date estimation, accomplishment history, and planning information for a unit configuration.

This chapter discusses the key functions supported by the Oracle Complex Maintenance, Repair, and Overhaul Unit Maintenance Plan module. The chapter provides process-oriented, task based procedures for using the application to perform essential tasks for managing maintenance planning activities.

See:

- Finding Unit Maintenance Plan Records, page 8-3
- Associating a Maintenance Requirement to a Visit, page 8-6
- Calculating Maintenance Requirement Due Dates, page 8-9
- Viewing Unit Maintenance Requirement Detail and History, page 8-9
- Viewing Group Maintenance Requirements, page 8-11
- Initializing a Maintenance Requirement, page 8-12
- Viewing Unit Maintenance Requirement Details, page 8-13
- Viewing Maintenance Requirement Thresholds, page 8-14
- Finding Item Utilization Forecasts, page 8-17
- Updating Item Utilization Forecasts, page 8-18
- Finding and Updating a Product Classification Utilization Forecast, page 8-21
- Finding and Updating an Unit Configuration Utilization Forecast, page 8-22
- Entering Service Requests, page 2-55
- Transit/Line Maintenance and Scheduling, page 8-23
 - Viewing Unit Schedule, page 8-24
 - Creating Transit Visit from Unit Schedule, page 8-26
 - Viewing Unit Schedule Details, page 8-28
 - Maintaining Flight Schedule, page 8-32
 - Updating Transit Visit Schedule, page 8-34

What is Unit Maintenance Plan?

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

Unit Maintenance Plan manages information about the service readiness of any component or subassembly, and offers instantaneous online intelligence about the maintenance requirement due date, the planning status and the history of all the maintenance works performed on the unit. Another important feature of Unit Maintenance Plan is the ability to precisely forecast the maintenance due dates.

Key Business Processes

Unit Maintenance Plan supports the following business processes:

Maintain utilization forecast

Unit Maintenance Plan allows maintenance personnel to forecast utilization for each unit in a fleet using appropriate units of measure such as operation hours, cycles, or mileage, for a period of time specified by the personnel.

View remaining serviceable time (UOM) of units

Determining the remaining service time of units, expressed in relevant units of measure (UOM), such as hours, cycles, or mileage is critical for maintenance planning. Unit Maintenance Plan has a full featured search for viewing and determining the remaining service time of units.

Model repetitive maintenance requirement over a time period

Replicate the maintenance requirement for any repetitive requirements over a user defined period, and provide the relevant unit of measure remaining for each occurrence of a maintenance requirement.

Calculate due dates of maintenance requirement

Calculate due dates based on utilization forecast and maintenance frequency if a fixed due date is not specified.

Associate a Maintenance Requirement to a Visit

Unit maintenance plan uses Oracle Complex Maintenance, Repair, and Overhaul Visit Work Package to associate a maintenance requirement to a visit. Unit Maintenance Plan allows you to schedule by associating a maintenance requirement group to visit appointments. View Service Requests

View Service Requests

Track unplanned maintenance by viewing service requests created to meet maintenance requirements originating from inspections, or other administrative and executive actions.

Finding Unit Maintenance Plan Records

The Unit Maintenance Plan module allows you to search for records using any or nearly any combination of the following criteria: unit name, part number, serial number, MR Title, MR status, program type, or due date ranges. Maintenance requirements can come from a defined maintenance plan in Fleet Maintenance Program, or created as service requests.

Prerequisites

- ☐ The Unit configuration records from which you want to derive a unit maintenance plan for must exist in the database. It will help to know at least part of the unit name, part or serial number, or the MR Title of the sought after unit(s) in order to conduct a search.

To find Unit Maintenance Plan records:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page appears. This page is for searching and displaying any maintenance requirements that are due on a unit.

Search Unit Maintenance Plan page

ORACLE

Complex MRO

HomeCMRO HomeEngineeringConfigurationPlanningAdministrationExecutionProfileSign OutHelp

Unit Maintenance PlanVisit Work PackageLong Term Planning

OverviewUtilization ForecastUnit ScheduleFlight Schedule

Search Unit Maintenance Plan

Unit Name

Item

Sort byDue Date

Title

Due from

☐ Show Dependent Components

☐ Show Replicate

GoClear

Serial Number

StatusOpen

Program TypeLetter Check

Due to

☐ Include Tolerance Dates

Search ForAll

☐ Show Child Maintenance Requirements

Results: Unit Maintenance Requirements

Select	Program Type	Title	Item	Serial Num	UOM Remain	Cnt Name	Earlier Due	Due Date	Latest Due	Tolerance	Status	Sched. Date	Visit	Originator Title	Dependent Title	Deferred From	Deferred To	Manually Planned
No records were found matching the given criteria..																		

2. Use the information in the following table to enter details in the Search Unit Maintenance Plan page.

Description of fields in the Search Unit Maintenance Plan page

Field	Description
Unit Name	User-defined name for a serialized part or assembly stored in the Oracle Complex Maintenance, Repair, and Overhaul database as a unit configuration. At this screen, the user provides all or part of name of an equipment record to be used to search Installed Base. For aviation users, this field might contain the FAA registration ID (called tail number) of the aircraft.
Part Number	Inventory identifying number. Note that the Oracle Inventory does not store what is actually in stock, only what is available to stock, so in that way it is more like a catalog. Actual warehouse contents are stored in Oracle Installed Base. This field might contain an aircraft type, like "B777-200".
Sort By	This field is not part of the database, but is used by the program to order the query results. The values displayed in the "pick-one" list are the names of other fields on this page. They are stored as seeded data and created by default. You can sort by due date, MR program, MR category, and implement status.

Field	Description
MR Title	Search argument field that contains a user-defined title of the maintenance requirement for which the user is searching. The maintenance requirement itself is created using Fleet Maintenance Program when the maintenance plans are loaded into the database.
Due From	Starting date range argument for imminent maintenance requirements.
Serial Number	User-defined ID that uniquely identifies a part for which the user wants to view maintenance requirements.
MR Status	Maintenance requirements can be in different states. These states are provided by default in Oracle Complex Maintenance, Repair, and Overhaul, but can be expanded by the user as needed. This search argument field permits specifying a status in the retrieval query.
Program Type	The user may specify the name of a maintenance program that will be used as a search argument in retrieving imminent maintenance requirements. A maintenance program type might be "Corrosion Prevention." A maintenance requirement may be one of many that belong to the same program. Non routine requirements are discovered during maintenance or crew inspections.
Due To	Ending date range argument for imminent maintenance requirements.
Search For	Search criteria can be defined to select either manually planned, forecasted, or all types of requirements.

3. Click Go. The lower half of the screen displays all matching records in the database.

View Search Results - Search Unit Maintenance Plan page

ORACLE
Complex MRO

Home CMRO Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast | Unit Schedule | Flight Schedule

Search Unit Maintenance Plan

Unit Name

Item

Sort by

Title

Due from

☐ Show Dependent Components

☐ Show Replicate

Serial Number

Status

Program Type

Due to

☐ Include Tolerance Dates

Search For

☐ Show Child Maintenance Requirements

Results: Unit Maintenance Requirements

Select Unit Maintenance Plan and ... Associate to Visit

Previous 1-25 of 129 Next

Select	Program Type	Title	Item	Serial Num	UOM	Remain	Cnt	Earlier Due	Due Date	Latest Due	Tolerance	Status	Sched. Date	Visit	Originator Title	Dependent Title	Deferred From	Deferred To	Manually Planned
<input type="radio"/>	Letter Check	A-Check	MRO-C1600	105	-13627	TSN			2002-NOV-13					25					
<input type="radio"/>	Letter Check	A-Check	MRO-C1600	102	-13108	TSN			2002-NOV-13				2005-FEB-22	80					

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

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

Use the Due From and Due To fields to narrow your search to units due for maintenance between specified dates, or any units due before or after a specified date. If you are not sure of the dates you are looking for, pull up a calendar by clicking on the calendar icon next to the relevant field. 'Due to' represents the end of a period of time during which the Maintenance Requirement due date is valid within the Due From date.

Note: Select the 'Show Dependent Components' check box to return any maintenance requirements for any other components of the assembly or sub assembly to which the unit belongs. Select 'Show Replicate' to return the repeating maintenance requirements of the unit based on interval frequency and a rolling time window.

Associating a Maintenance Requirement to a Visit

You can associate maintenance requirements to visits defined in Visit Work Package.

Prerequisites

- ☐ Any relevant maintenance requirements must already be set up in Fleet Maintenance. Additionally, requirements may also arise from service requests. The Unit configuration records from which you want to derive unit maintenance plan must exist in the database. It will help to know at least part of the unit name, part or serial number, or MR Title of the sought after unit(s) in order to conduct a search.

To associate a maintenance requirement to a visit:

1. From the search results page in Unit Maintenance Plan, retrieve the unit maintenance plan record that you want to associate with a visit (see Finding Unit Maintenance Plan Records, page 8-3).
2. Select the record, and choose Associate to Visit from the pull-down menu in the results header.

Select Associate to Visit Option - Search Unit Maintenance Plan page

ORACLE
Complex MRO

Home CMRO Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast | Unit Schedule | Flight Schedule

Search Unit Maintenance Plan

Unit Name

Item

Sort by

Title

Due from

☐ Show Dependent Components

☐ Show Replicate

Serial Number

Status

Program Type

Due to

☐ Include Tolerance Dates

Search For

☐ Show Child Maintenance Requirements

Results: Unit Maintenance Requirements

Select Unit Maintenance Plan and ... Associate to Visit

Previous 1-10 of 15 Next

Select	Program Type	Title	Item	Serial Num	UOM	Remain	Cnt	Earlier Due	Due Date	Latest Due	Tolerance	Status	Sched. Date	Visit	Originator Title	Dependent Title	Deferred From	Deferred To	Manually Planned	
<input type="radio"/>	Corrosion	MR0113 VG0113 SN0113A											2005-JAN-13	83						
<input type="radio"/>	Corrosion	MR0113 VG0113 SN0113A											2005-APR-05	170						✓
<input type="radio"/>	Corrosion	MR0113 VG0113 SN0113											2005-JAN-13	86						✓

3. Click Go. The Search Visit page appears. For information, see Description of fields in the Search Visit page.

Search Visit page

ORACLE
Complex MRO

Home CMRO Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast | Unit Schedule | Flight Schedule

Search Visit

Item	VG0113	Unit	UC0113A
Serial Number	SN0113A	Service Request	
Organization		Department	
Visit Number		Visit Name	
Start From Date		Start To Date	
Visit Status		Visit Type	
Service Category		Priority	

Go Clear

Search Results

Select a Visit and .. Associate to Visit Associate to Visit(Default Department)

Previous 1-1 of 1 Next

Select	Visit Number	Visit Name	Item	Unit	Serial Number	Visit Type	Priority	Organization	Department	Start Date	Visit Status
<input type="radio"/>	73	Visit0113A	VG0113	UC0113A	SN0113A	B Check		San Diego Manufacturing	Outside Processing	2005-JAN-12	Planning

Previous 1-1 of 1 Next

Select a Visit and .. Associate to Visit Associate to Visit(Default Department)

4. Search for a visit, and associate it with the unit maintenance plan. The Create Planned Task page appears, displaying the association. You can click Apply to navigate to the Search Visit Tasks page, and define tasks for the visit.

Create Planned Task Page

ORACLE
Complex MRO

Home CMRO Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast | Unit Schedule | Flight Schedule

Create Planned Task

Visit Number 73	Visit Type B Check	Item VG0113
Unit UC0113A	Start Date 2005-JAN-12	Organization San Diego Manufacturing
Serial Number SN0113A	End Date 2005-JAN-13	Department Outside Processing

Cancel Revert Apply

Unit Maintenance Plan Requirements

Select	Maintenance Requirement/Service Request	Due By Date	Item	Serial Number	Service Request Number	Department
<input type="checkbox"/>	MR0113		VG0113	SN0113A		

Cancel Revert Apply

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Note: Deferred non-routine requirements that were discovered but not accomplished when the visit was in production can also be scheduled for other visits.

Calculating Maintenance Requirement Due Dates

You can use Unit Maintenance Plan to estimate due dates and any repetitive maintenance requirement for the selected unit.

Prerequisites

- ☐ Maintenance requirement records must exist in the database. The relevant maintenance requirements must be initialized, and the information for Last Accomplishment must be set up. A product classification forecast and/or an unit utilization forecast must be defined to calculate due dates.

To calculate maintenance requirement due dates:

1. Retrieve the unit maintenance plan record for which you want to view maintenance requirement details (see Finding Unit Maintenance Plan Records, page 8-3).
2. Select the record, and choose Calculate Due Dates from the drop-down menu in the results header. Click the Go button.
3. Unit Maintenance Plan will calculate the due dates for the selected record, then confirm that it has done so.

Calculate Due Dates - Search Unit Maintenance Plan page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast

Confirmation • Due Date has been calculated Successfully.

Search Unit Maintenance Plan

Unit Name

Item

Serial Number

Sort by Due Date

Status Open

Title

Program Type

Due from

Due to

☐ Include Tolerance Dates

☐ Show Dependent Components

☐ Show Child Maintenance Requirements

☐ Show Replicate

Go Clear

Results: Unit Maintenance Requirements

Select Unit Maintenance Plan and ... Calculate Due Date

Previous 1-10 of 2906 Next

Select	Program Title	Title	Item	Serial Num	UOM	Cnt	Earlier Due	Latest Due	Tolerance	Status	Sched. Date	Visit	Originator Title	Dependent Title	Deferred From
--------	---------------	-------	------	------------	-----	-----	-------------	------------	-----------	--------	-------------	-------	------------------	-----------------	---------------

Viewing Unit Maintenance Requirement Detail and History

The Unit Maintenance Plan module allows you to view maintenance requirement details.

Prerequisites

- ☐ Maintenance requirement records must exist in the database. The Unit configuration records from which you want to derive unit maintenance plan must exist in the database. It will help to know at least part of the unit name, part or serial number, or MR Title of the sought after unit(s) in order to conduct a search.

To view Unit Maintenance requirement history:

1. Retrieve the unit maintenance plan record for which you want to view details (see Finding Unit Maintenance Plan Records, page 8-3).
2. Select the record, and choose View Details & History from the drop-down menu. Click Go.
3. The View MR Detail and History page appears displaying the history and details relevant for the selected record.

View Maintenance Requirement Detail & History page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast

View Maintenance Requirement Detail & History

Unit Name: RADITEM1-APS-Trackable
Status: Corrosion
Tolerance Flag: Mandatory
Date Run: 17-JUN-2004
Due Date: 19-NOV-2003
Remarks: APS5
Counter Name: R.FMP100
Visit End Date: to test bug
Visit Status: Ground Service Equipment

Results: Maintenance Requirement History

Due Date	Set Due Date	Accomplished Date	Remarks	Status
No records were found matching the given criteria..				

The following table provides information about the fields in the View Maintenance Requirement Detail and History page.

Description of fields in the View Maintenance Requirement Detail and History page

Field	Description
Due Date	Is the date on which an imminent task is due to be completed. Click the calendar icon to display a calendar from which you can select a due date.
Set Due Date	Determines the calendar due date for the maintenance requirement.
Accomplished Date	Indicates the date on which the maintenance was performed.
Status	Maintenance requirements can be in different statuses. These are provided by default in Oracle Complex Maintenance, Repair, and Overhaul, but can be expanded by the user as needed. This search argument field permits specifying a status in the retrieval query

4. Select 'Cancel' to return to previous page.

Viewing Group Maintenance Requirements

Unit Maintenance Plan allows you to view group Maintenance requirements.

Prerequisites

- ☐ Maintenance requirement records must exist in the database.

To group Maintenance requirements:

1. Retrieve the unit maintenance plan record for which you want to view group maintenance requirement details (see Finding Unit Maintenance Plan Records, page 8-3).
2. Select the record, and choose View Group MR from the drop-down menu. Click Go.
3. The Unit Maintenance Plan - Group MR page appears displaying the group maintenance requirements relevant for the selected record.

Group Maintenance Requirement page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast

Group Maintenance Requirement

Cancel

Title **R-FMP100**

Item **RADITEM1-APS-Trackable** Serial Number **123-trackable**

Due Date **19-NOV-2003**

Visit Number **15**

Visit End Date **19-NOV-2003**

Results: Maintenance Requirements

R-FMP100

Select Focus	Title	Description	Item	Serial Number	Status
No records were found matching the given criteria.					

Cancel

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The following table provides information about fields in the Group Maintenance Requirement page.

Description of fields in the Group Maintenance Requirement page

Field	Description
MR Status	Maintenance requirements can be in different states. These states are provided by default in Oracle Complex Maintenance, Repair, and Overhaul, but can be expanded by the user as needed. This search argument field permits specifying a status in the retrieval query.
Visit Number	Refers to the Visit Number attribute of the visit template record retrieved.
Visit Date	Refers to the date on which the relevant maintenance visit is scheduled.

4. Select 'Cancel' to return to previous page.

Initializing Maintenance Requirements

Unit Maintenance Plan module allows you to initialize maintenance requirements.

Prerequisites

- ☐ Any relevant maintenance requirements must already be set up in Fleet Maintenance.

To initialize a maintenance requirement:

1. Retrieve the unit maintenance plan record you want to initialize (see Finding Unit Maintenance Plan Records, page 8-3).
2. Select the record, and choose Initialize MR from the drop-down menu. Click Go. The Initialize Maintenance Requirement page appears.

Initialize Maintenance Requirement page

3. Select Initializing action, First Due, or Initial Accomplishment from the Init. Action pull-down menu.
4. Select a date you want to set the initialization on, in the Set Date field.
5. To define first due or last accomplished counter values for the requirement, click Add More Rows. Enter information in the provided fields.
6. Click the Apply button.
7. A header on the page should display the following message:
“Confirmation—Maintenance Requirement Initialized”

View Confirmation - Initialize Maintenance Requirement page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Overview | Utilization Forecast

Unit Maintenance Plan | Visit Work Package | Long Term Planning

Confirmation • Maintenance Requirement Initialized

Initialize Maintenance Requirement

Item: R-ITEM1-Trackable Serial Number: ctr-sno-1

Program: Corrosion Title: FMP-Dec1

Init. Action: First Due Set Date: 17-JUN-2004

Remove Counter Name Counter Value UOM

No records were found matching the given criteria..

Add More Rows

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8. Prerequisites

Viewing Unit Maintenance Requirement Details

The Unit Maintenance Plan module can display all maintenance requirements applicable to a selected unit. You can sort the results by due date, category, program type, implement status, or group type. Maintenance Requirements with unspecified due dates appear at the top of the list by default. You can calculate the remaining time of a maintenance requirement based on many factors, including the usage counter, the UOM time remaining, and utilization forecast and maintenance requirement thresholds.

The system will allow the user to filter by maintenance requirement type or by status: Accomplish, Terminate, Initialized or Open.

Prerequisites

- ☐ The maintenance requirement records must exist in the database.

To view maintenance requirement details:

1. Retrieve the unit maintenance plan record for which you want to view maintenance requirement details (see Finding Unit Maintenance Plan Records, page 8-3).
2. Select the record, and choose View MR Details from the drop-down menu. Click Go.
3. The View Maintenance Requirement page appears displaying the information for that record.

View Maintenance Requirement page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast

View Maintenance Requirement

[Cancel](#)

Maintenance Requirement Information

Title	FMP-Dec4	Status	Complete	Version 1
Revision Number				
Category	Ground Service Equipment			
Program Type	Corrosion			
Program Subtype				
Service Type	On			
Implement Status	Mandatory			
Repetitive	No	Show	Next	
Whichever Comes	First			
Effective From	04-DEC-2003			
Follows After Accomplishment of				
Billing Item				
Quality Inspection Type				
Visit Category				
Description				
Comments				
Down Time				HOURS

4. From the View Maintenance Requirement page, you can use the side navigation menu to navigate to the following pages:
 - Documents
 - Routes
 - Action
 - Effectivities
 - Relationships
 - Effected Items
5. Select 'Cancel' to return to the previous page.

Viewing Maintenance Requirement Thresholds

The Unit Maintenance Plan module allows you to view maintenance requirement thresholds.

Prerequisites

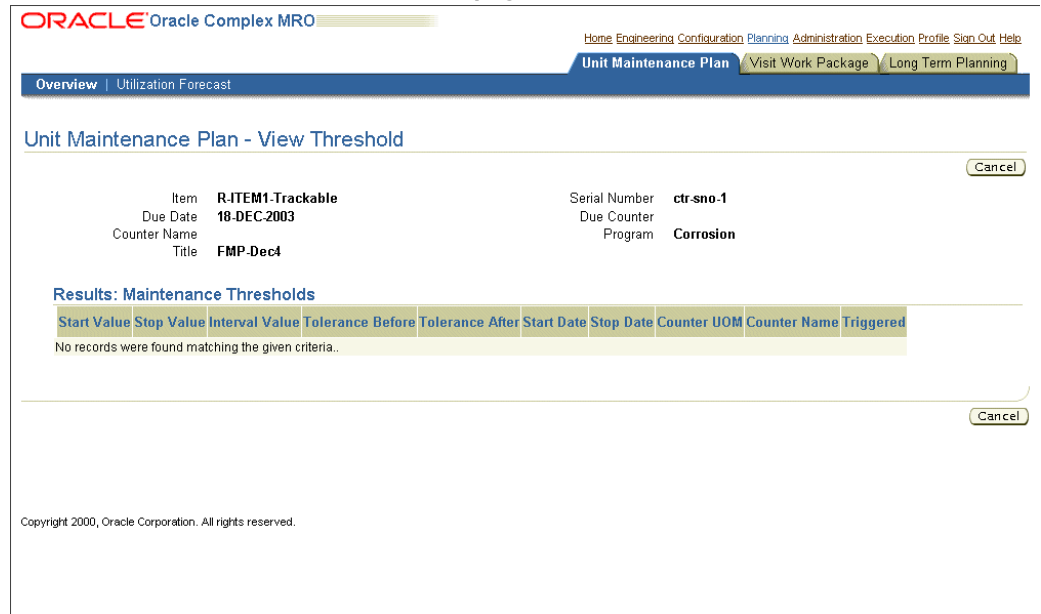
- ☐ Any relevant maintenance requirements must already be set up in Fleet Maintenance. The Unit configuration records from which you want to derive unit

maintenance plan must exist in the database. It will help to know at least part of the unit name, part or serial number, or MR Title of the sought after unit(s) in order to conduct a search.

To view maintenance requirement thresholds:

1. Retrieve the unit maintenance plan record for which you want to view maintenance requirement thresholds (see Finding Unit Maintenance Plan Records, page 8-3).
2. Select the record, and choose View Threshold from the drop-down menu. Click Go.
3. The Unit Maintenance Plan - View Threshold page appears, displaying the thresholds relevant for the selected record.

Unit Maintenance Plan - View Threshold page



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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast

Unit Maintenance Plan - View Threshold

Cancel

Item	R-ITEM1-Trackable	Serial Number	ctr-sno-1
Due Date	18-DEC-2003	Due Counter	Corrosion
Counter Name	FMP-Dec4	Program	Corrosion
Title	FMP-Dec4		

Results: Maintenance Thresholds

Start Value	Stop Value	Interval Value	Tolerance Before	Tolerance After	Start Date	Stop Date	Counter UOM	Counter Name	Triggered
No records were found matching the given criteria..									

Cancel

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The following table describes the fields in the View Threshold page.

Field	Description
Start Value	The start counter value of the range from which the interval specified is valid. Start value is mutually exclusive with the Stop value, and begins the range for the interval in relation to the associated counter. This field does not apply for one time maintenance requirements.
Stop Value	The stop counter value of the range before which the interval specified is valid. This value is mutually exclusive with the Start value, and ends the range for the interval in relation to the associated counter. This field does not apply for one time maintenance requirements.
Interval Value	The interval value for repetitive maintenance requirements, and drop-dead counter values for one time maintenance requirements. When used with one time maintenance requirements, interval will be a count down of the associated counter. When used with repetitive maintenance requirements, interval will represent the frequency of occurrence according to the associated counter.
Tolerance Before	The number of counter units of measure that is acceptable for maintenance requirement accomplishment before the specified interval. This aids in planning maintenance jobs.
Tolerance After	The number of counter units of measure that is permissible for maintenance requirement accomplishment after the specified interval. This value aids in planning maintenance jobs.
Start Date	The start date of the range before which the interval specified is valid. This field value is mutually exclusive with the Stop Date, and begins the range for the interval in relation to the associated counter. This field does not apply for one time maintenance requirements.
Stop Date	The stop date of the range before which the interval specified is valid. This date is mutually exclusive with Start Date, and ends the range for the interval in relation to the associated counter. This field is not applicable for one time maintenance requirements.
Counter UOM	The Unit of Measure as per the associated counter. This field value is returned when the counter is selected. This value is not editable.

4. Select 'Cancel' to return to previous page.

Finding Item Utilization Forecasts

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

Prerequisites

- ❑ Any relevant maintenance requirements must already be set up in Fleet Maintenance. The Unit configuration records from which you want to derive unit maintenance plan must exist in the database. It will help to know at least part of the unit name, part or serial number, or MR Title of the sought after unit(s) in order to conduct a search.

To find an item utilization forecast:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of Unit Maintenance Plan appears.
2. Select the Utilization Forecast secondary tab. The Search Item page appears.

Search Item page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast

Search Item

Search Product Classification

Search Unit

Search Item

Item

Description

Search With

Go Clear

Search Results

Select	Item	Description	Forecast Available	Product Classification	Item Type
No records were found matching the given criteria..					

Unit Maintenance Plan | Visit Work Package | Long Term Planning

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

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The following table provides information about the fields in the Search Item page.

Description of fields in the Search Item page

Field	Description
Item	Inventory identifying number. Note that Oracle Inventory does not store what is actually in stock, only what is available to stock, so in that way it is more like a catalog. Actual warehouse contents are stored in Oracle Installed Base. This field might contain an aircraft type, like "B777-200".
Search With	A pull-down menu that allows you to specify items with an associated forecast, or with no forecast, or with both.
Forecast Available	Indicates if a forecast is available for this item.
Product Classification	Displays the product classification number for the item.
Item Type	Refers to the group the product belongs to according to its use or category.

- Click Go. The lower half of the screen displays all matching records in the database.

View Item Search Results - Search Item page

The screenshot shows the Oracle Complex MRO interface. At the top, there's a navigation bar with links: Home, Engineering, Configuration, Planning, Administration, Execution Profile, Sign Out, Help. Below this is a sub-navigation bar with: Overview | Utilization Forecast. The main content area is titled 'Search Item'. It contains a search form with fields for 'Item' and 'Description', a 'Search With' dropdown menu set to 'All', and 'Go' and 'Clear' buttons. Below the search form, the 'Search Results' section displays a table of results. The table has columns: Select, Item, Description, Forecast Available, Product Classification, and Item. There are four rows of results, each with a radio button in the 'Select' column. The first row is 'Capital Item KM001' with description 'This is a test item for item type Capital Item for AHL No'. The second row is 'Radhika Item1 aps take2' with description 'Radhika Item1 aps take2'. The third row is 'Radhika Item2 aps p' with description 'Radhika Item2 aps p'. The fourth row is 'VG0205' with description 'New Item'. Below the table, there are pagination controls: 'Previous', '1-4 of 4', and 'Next'. At the bottom, there's a 'Select Item and ..' button and a 'Utilization Forecast' button.

Select	Item	Description	Forecast Available	Product Classification	Item
<input type="radio"/>	Capital Item KM001	This is a test item for item type Capital Item for AHL No	No	KM-PC31122003	Capital Item
<input type="radio"/>	Radhika Item1 aps take2	Radhika Item1 aps take2	Yes	apspc	APSTYPE
<input type="radio"/>	Radhika Item2 aps p	Radhika Item2 aps p	Yes	apspc	APSTYPE
<input type="radio"/>	VG0205	New Item	Yes	PC0304	PTO Optic

Updating Item Utilization Forecasts

The Unit Maintenance Plan module allows you to create and update item configuration utilization forecasts.

Prerequisites

- Any relevant maintenance requirements must already be set up in Fleet Maintenance. The Unit configuration records from which you want to derive unit maintenance plan must exist in the database. It will help to know at least part of the unit name, part or serial number, or MR Title of the sought after unit(s) in order to conduct a search.

To update an item utilization forecast:

- Retrieve the part record with the forecast you want to update (see Finding Item Utilization Forecasts, page 8-17).
- Select the record, and click Utilization Forecast. The Update Item Utilization Forecast page appears.

Update Item Utilization Forecast page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast

Confirmation • 1 records updated

Update Item Utilization Forecast

Product Classification KM-OC31122003-1 Item Type Capital Item

Item Capital Item KM001 Description This is a test item for item type Capital Item for AHL

Utilization Forecast

Previous 1-1 of 1 Next

Remove	Start Date	End Date	Usage Per Day	UOM
<input type="checkbox"/>	17-JUN-2004	24-JUN-2004	20	10P

Add More Rows

Previous 1-1 of 1 Next

Cancel Copy Apply View

Use the information in the following table to enter item utilization forecast details.

Description of fields in the Update Item Utilization Forecast page

Field	Description
Start Date	Marks the start of a utilization forecast period.
End Date	End of utilization forecast period. If left empty, Unit Maintenance assumes there is no end date and the forecast is unlimited.
Usage Per Day	Estimates usage per day (as 100 miles per day).

- Enter the information in the fields provided. If no utilization forecast is defined, the page will be empty. To define a forecast, click Add More Rows. Enter information in the fields provided.

Enter Forecast Information - Update item Utilization Forecast page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast

Update Item Utilization Forecast

Product Classification **KM-OC31122003-1** Item Type **Capital Item**
Item **Capital Item KM001** Description **This is a test item for item type Capital Item for AHL**

Utilization Forecast

Remove	Start Date	End Date	Usage Per Day	UOM
	17-JUN-2004	24-JUN-2004	10	10P

Add More Rows

Cancel Copy Apply View

- Click Apply to retain the utilization forecast information in the database.

Save Forecast Record - Update Item Utilization Forecast page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast

Confirmation • 1 records created

Update Item Utilization Forecast

Product Classification **KM-OC31122003-1** Item Type **Capital Item**
Item **Capital Item KM001** Description **This is a test item for item type Capital Item for AHL**

Utilization Forecast

Previous 1-1 of 1 Next

Remove	Start Date	End Date	Usage Per Day	UOM
<input type="checkbox"/>	17-JUN-2004	24-JUN-2004	10	10P

Add More Rows

Previous 1-1 of 1 Next

Cancel Copy Apply View

- To remove a forecast from the list, select the Remove check box next to the forecast then click Apply.

6. Select 'Cancel' to return to the previous page.

Finding and Updating a Product Classification Utilization Forecast

In order to estimate due dates for the Maintenance Requirement applied to the Unit Maintenance Plan, you need to be able to convert the remaining time of a maintenance requirement UOM that is in a form other than a calendar date into a calendar date. The Utilization Forecast page helps to facilitate this calculation. For example, an estimate of driving 50 miles a day will translate the requirement of changing engine oil every 3000 miles to 60 days.

Prerequisites

- ☐ The Unit configuration records on which you want to base an utilization forecast and the Primary Product Classification must exist in the database.

To update a product classification utilization forecast:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of Unit Maintenance Plan appears.
2. Select the Utilization Forecast secondary tab. The Search Part page appears.
3. Enter the information in the fields for which you know the value. Click Go. The lower half of the screen displays all matching records in the database.
4. Select the part that you want to create or update the product classification for, and click Utilization Forecast.
5. The Update Item Utilization Forecast page appears. Make any necessary changes. Click Add More Rows to enter new forecast data.
6. Click Apply to add the changes to the database.

Edit Records - Update Item Utilization Forecast page

Note: All Product Classification records are read-only.

To reset the form and start a new search, click on the Clear button.

Finding and Updating a Unit Configuration Utilization Forecast

The Unit Maintenance Plan module allows you to create and update unit configuration utilization forecasts.

Prerequisites

- ☐ Any relevant maintenance requirements must already be set up in Fleet Maintenance.

To create an Unit Configuration Utilization Forecast:

- Using the Result Product Classification Tree Structure located on the left hand side of the page, double click on the Product Classification or Unit for which the utilization forecast is to be added or updated.
- The Update Product Classification Utilization Forecast section appears directly to the right of the Product Classification Tree.
- Click on the Add More Rows Icon to add a new utilization forecast.

Create Utilization Forecast - Update item Utilization Forecast page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast

Update Item Utilization Forecast

Product Classification KM-OC31122003-1

Item Capital Item KM001

Item Type Capital Item

Description This is a test item for item type Capital Item for AHL

Utilization Forecast

Previous 1-1 of 1 Next

Remove	Start Date	End Date	Usage Per Day	UOM
<input type="checkbox"/>	17-JUN-2004	24-JUN-2004	20	10P

Add More Rows

Previous 1-1 of 1 Next

- Enter a start date in the Start Date field or click on the calendar selector icon next to the date field to bring up a calendar from which you can select the desired date.
- Enter the end date in the Start Date field or click on the calendar selector icon next to the date field to bring up a calendar from which you can select the desired date. Note that the end date must be later or on the same date as the start date.
- Enter the usage per day in the Usage Per Day field.

7. Enter the UOM directly to the UOM field or partial of UOM followed by the generic substitution meta character% in UOM field, and click the search icon. Select the UOM from the search result.
8. Click 'Apply' to Save the record. Before saving the record, the system will check for duplicate records and for any overlap of the utilization forecast.

View New Forecast Record - Update Item Utilization Forecast page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview Utilization Forecast

Confirmation • 1 records created

Update Item Utilization Forecast

Product Classification **KM-OC31122003.1** Item Type **Capital Item**

Item **Capital Item KM001** Description **This is a test item for item type Capital Item for AHL**

Utilization Forecast

Previous 1-2 of 2 Next

Remove	Start Date	End Date	Usage Per Day	UOM
<input type="checkbox"/>	17-JUN-2004	24-JUN-2004	20	10P
<input type="checkbox"/>	25-JUN-2004	30-JUN-2004	10	10P

Add More Rows

Previous 1-2 of 2 Next

Cancel Copy Apply View

Transit/Line Maintenance and Scheduling

Transit maintenance and scheduling functionality allows users to import, view, update, edit or create a unit's utilization schedule, and then schedule maintenance at the defined opportunities. In addition to the normal transit visit inspections and requirements, various nonroutine requirements may arise due to defects discovered on the production floor or during operation of the unit. These may delay the next scheduled utilization. Flight schedule is imported into the application through integration with a flight operation system. Optionally, users may manually define a flight schedule using the Create Flight Schedule UI. The Unit Schedules UI displays the flight schedule for a particular unit over the time period specified by the planner. This page provides complete visibility over the unit's schedule and allows transit visit planners to plan visits for the various maintenance opportunities, and deal with potential conflicts.

Related Topics

- Viewing Unit Schedule, page 8-24
- Creating Transit Visit from Unit Schedule, page 8-26
- Viewing Unit Schedule Details, page 8-28
- Maintaining Flight Schedule, page 8-32
- Updating Transit Visit Schedule, page 8-34

Viewing Unit Schedule

The unit schedule is a graphical workbench that shows the different flight segments for a tail number and the scheduled visits or maintenance opportunities between flights. Flight schedules are imported into the application through integration to a flight operation system. Public APIs support the integration of the flight operation system into CMRO. Users may also create a flight schedule manually using the Create Flight Schedule page. Transit visit planners can view flight details and identify where visits can be created. The unit schedules are displayed in context of a unit in increments of minutes, hours or days. Planners may drill into the applicable unit/period intersection to create a visit for a maintenance opportunity, view an existing flight or visit, view potential conflicts or view a combination of these.

To view unit schedules:

1. Click the Unit Schedule secondary tab to navigate to the Unit Schedules UI. Query for a unit schedule by unit name, item number, or serial number. Specify the start date and time. Enter a Display Increment and select a UOM to define the time period. Schedules are divided in specified time increments, for example, 2 hours or 2 days.

Unit Schedules page

ORACLE Complex MRO

Home Home Engineering Configuration Planning Administration Execution Profile Sign Out

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast | Unit Schedule | Flight Schedule

Unit Schedules

TIP Please enter search criteria and click "Go" to perform a search on Unit Schedules.

Unit Name	M-1900, Tail # 301	* Start Date and Time	09-Jun-2005 14:56:12
Item Number	MRO-M1900	Serial Number	301
* Display Increment	3	* UOM	Hours

Go Clear

Unit Maintenance Plan | Visit Work Package | Long Term Planning

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

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2. Click Go. The unit schedule appears in a table in the lower half of the page. The flight information spreads across the time frame defined by the display increment and corresponding unit of measure.

View Schedule - Unit Schedules page

ORACLE Complex MRO [Home](#) [Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#)

Unit Maintenance Plan | [Visit Work Package](#) | [Long Term Planning](#)

[Overview](#) | [Utilization Forecast](#) | **[Unit Schedule](#)** | [Flight Schedule](#)

Unit Schedules

Unit Name: M-1900, Tail # 301 Start Date and Time: 09-Jun-2005 14:56:12
(example: 21-Jun-2005 19:45:00)

Item Number: MRO-M1900 Serial Number: 301

* Display Increment: 3 * UOM: Hours

Conflict Maintenance Opportunity Multiple Events Multiple Events with Maintenance Opportunity Visit Scheduled Flight Scheduled

Unit	14:56:12	17:56:12	20:56:12	23:56:12	02:56:12	05:56:12	08:56:12	11:56:12	14:56:12	17:56:12	20:56:12	23:56:12
M-1900, Tail # 301												

Conflict Maintenance Opportunity Multiple Events Multiple Events with Maintenance Opportunity Visit Scheduled Flight Scheduled

[Unit Maintenance Plan](#) | [Visit Work Package](#) | [Long Term Planning](#) | [Home](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#)

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The icons represent a conflict, maintenance opportunity, visit scheduled, flight scheduled, multiple events, or multiple events with maintenance opportunity. The following table defines each of the above mentioned entity.

Maintenance Opportunity	A Maintenance Opportunity is defined as any time period when a unit is available for maintenance.
Conflict	A Conflict is shown any time there is an overlap of successive events (visit or flights) or when the arriving/departing/visit organizations do not match.
Flight Scheduled	The Flight Scheduled icon indicates that a flight is scheduled during the corresponding time slot.
Visit Scheduled	The Visit Scheduled icon indicates that a visit has been scheduled in the corresponding time slot.
Multiple Events	The Multiple Events icon indicates that too many events to display are found for a time period. This may happen if the user has selected a big display increment.
Multiple Events with Maintenance Opportunity	This icon represents the following two conditions: Multiple Events and Maintenance Opportunity. The user can differentiate between a multiple events condition with or without an embedded maintenance opportunity.

You can do the following:

- Create a Transit visit. See [Creating Transit Visit from Unit Schedule](#), page 8-26
- View conflict details. See [Viewing Unit Schedule Details](#), page 8-28
- View the flight information for a time slot as well as view the preceding and the following event. See [Viewing Unit Schedule Details](#), page 8-28
- View visit details like visit number, department, organization, start and end times, status, and so on. See [Viewing Unit Schedule Details](#), page 8-28

- View multiple events found within a specified time period. See Viewing Unit Schedule Details, page 8-28
- Create visits if opportunities exist between multiple events. See Viewing Unit Schedule Details, page 8-28

Creating Transit Visit from Unit Schedule

Transit visit is a visit created from the Unit Schedule page in the context of a maintenance opportunity. The visit is created to fill the ground time slot for a unit. Maintenance Planners can create visits in 'Planning' status or along with the workorders in 'released' or 'unreleased' status.

Prerequisites

- ❑ A maintenance opportunity must exist for a unit. The unit configuration must exist in complete status. Default MR must be created with association to a visit type. MR must be of 'Unplanned' implementation type. Flight schedule must be created for the Unit, with behavior of following transit visit selected from one of the three attributes (Always Reschedule, Delete Visit, Never Reschedule). For flight schedule details, see Maintaining Flight Schedule, page 8-32.

To create a transit visit :

1. Click the Maintenance Opportunity icon corresponding to the time period during which you want to schedule the visit. The Create Transit Visit page appears. The values for the Unit Name, Organization and Department fields default based on the unit flight schedule information. The Item and Instance are derived based on the Unit Name. The Preceding and Succeeding Event information is displayed in the lower half of the page. You must take this into account to fill the visit duration information (Start and End time).

Create Transit Visit page

Create Transit Visit

* Indicates required field

Visit Header Info

* Visit Name	0610	Create Visit in	Create Visit in Planning
Visit Type		Unit	M-1900, Tail # 301
Item	MRO-M1900	Serial Number	301
Organization	JFK Maintenance Center	Department	Line Maintenance
Service Request		Service Category	
Start Date	10-Jun-2005 Hour 19 Minutes 21	End Date	10-Jun-2005 Hour 23 Minutes 40
Project Template		Priority	
Description			
Flight Number	0610		

Preceding Event Information	Succeeding Event Information
Visit Number 160	Visit Number 161
Visit Organisation JFK Maintenance Center	Visit Organisation JFK Maintenance Center
Visit Department Line Maintenance	Visit Department Line Maintenance
Start Date 10-JUN-2005 18:01:00	Start Date 10-JUN-2005 23:40:00
End Date 10-JUN-2005 19:20:00	End Date 10-JUN-2005 23:58:00

Note: Preceding event can be an arrival flight or a visit. Succeeding event can be either a visit or a flight.

2. Select a visit type. The maintenance requirements (MR) with Implement Status of Unplanned and associated by default with the selected visit type (MRs associated when defining the visit type at the MR effectivity level), are automatically associated with the transit visit being defined. For more information, see *Associating Visit Types with a Maintenance Requirement*, *Oracle Complex Maintenance, Repair, and Overhaul User's Guide*

Enter Visit Details - Create Transit Visit page

Create Transit Visit

Cancel Revert Apply

* Indicates required field

Visit Header Info

* Visit Name	0610	Create Visit in	Create Visit in Planning
Visit Type	Transit Check	Unit	M-1900, Tail # 301
Item	MRO-M1900	Serial Number	301
Organization	JFK Maintenance Center	Department	Line Maintenance
Service Request		Service Category	
Start Date	10-Jun-2005 Hour 19 Minutes 21	End Date	10-Jun-2005 Hour 21 Minutes 40
Project Template		Priority	
Description			
Flight Number	0610		

Preceding Event Information	Succeeding Event Information		
Visit Number	160	Visit Number	161
Visit Organisation	JFK Maintenance Center	Visit Organisation	JFK Maintenance Center
Visit Department	Line Maintenance	Visit Department	Line Maintenance
Start Date	10-JUN-2005 18:01:00	Start Date	10-JUN-2005 23:40:00
End Date	10-JUN-2005 19:20:00	End Date	10-JUN-2005 23:58:00

Enter other visit details. For information on visit definition, see *Creating Maintenance Visit Records*, *Oracle Complex Maintenance, Repair, and Overhaul User's Guide*.

3. Select the status in which to create the visit. You can create a visit either in status planning (no work orders are created yet), status production for scheduling (work order created in status unreleased for shop floor scheduling) or status production released (work order created in status released for immediate start of execution). The project parameters and project information are automatically created prior to pushing the visit to production in Released or Unreleased status.
4. Click Apply to save the record. The Update Visit page appears.

Update Visit page

Update Visit

Cancel Revert Validate Go Apply

* Indicates required field

Visit Header Info

Visit Number **162** Visit Name **0610**

Visit Type **Transit Check** Item **MRO-M1900**

Unit **M-1900, Tail # 301** Serial Number **301**

Organization **JFK Maintenance Center** Department **Line Maintenance**

Priority **Planning**

Service Request **Service Category**

Project Template **C3** Simulation Plan **Primary Plan**

Start Date **10-JUN-2005** Hour **19** Minutes **21**

Planned End Date **10-JUN-2005** Hour **21** Minutes **40**

End Date **Due By Date**

Description

Preceding Event Information **Succeeding Event Information**

Visit Number **160** Visit Number **161**

Visit Organisation **JFK Maintenance Center** Visit Organisation **JFK Maintenance Center**

Visit Department **Line Maintenance** Visit Department **Line Maintenance**

If MRs are associated and the visit is created in Planning status, tasks corresponding to the MR are automatically created for the visit. Alternatively, if MRs are associated and the visit is created in Push to Production status, workorders corresponding to the MR are automatically created for the visit. A visit will not be created for a period that will not accommodate the total default MRs for the visit type. You can add Planned Tasks or Unplanned tasks to the visit in addition to the default tasks created if any. For information, see *Associating Tasks with Maintenance Visits*, *Oracle Complex Maintenance, Repair, and Overhaul User's Guide*.

Note: A warning is displayed if the visit duration is not sufficient to complete the associated tasks to the visit as well as a 'Calculated End Date' being displayed.

The system will automatically adjust the visit schedule should flight information data change between visit creation and visit execution.

Viewing Unit Schedule Details

The Unit Schedule page identifies where flights and maintenance visits have been created, as well as where visits can be created or 'maintenance opportunities' exist. The unit schedules are displayed in context of a unit in increments of minutes, hours or days. Maintenance opportunities are identified whenever there are available times between flights or flights and other scheduled visits. You can also view schedule conflicts. Conflicts occur whenever two flights or a flight and a maintenance visit overlap either in the scheduled arrivals and departures (start and end dates for visits) or in the defined organizations. Maintenance Planners can quickly identify where visits might need to be canceled or rescheduled, drill into the applicable unit/period intersection to create a visit for a maintenance opportunity, view an existing flight or visit, view potential conflicts or view a combination of these.

To view unit schedule details:

1. Navigate to the Unit Schedules page and query for a unit record. The schedule, based on the time increment specified in the search criteria, is displayed in the lower half of the page.
2. Click the Visit Scheduled icon to navigate to the Update Visit page and view the visit details. You can update the information of the visit. If the visit is in planning status, you can push the visit to production in either released or unreleased status.

Modify Visit Details - Update Visit page

3. Click the Flight Scheduled icon to navigate to the View Unit Schedule page. The Unit flight schedule is displayed with information on the unit, flight number, segment, departure and arrival organization and departments, departure and arrival estimated and actual times, and so on. You can also view the Preceding and Succeeding events, which can be either visits or flights.

A link to view the preceding and succeeding flight or visit is displayed. If multiple visits start at the same time (for a preceding or following event) a warning display message is shown at top of screen and either the preceding or following event information is blank.

View Unit Schedule page

ORACLE Complex MRO [Home](#) [Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#)

Unit Maintenance Plan [Visit Work Package](#) [Long Term Planning](#)

[Overview](#) | [Utilization Forecast](#) | **[Unit Schedule](#)** | [Flight Schedule](#)

View Unit Schedule

Unit **M-1900, Tail # 301** Item **MRO-M1900** Serial Number **301** [Cancel](#)

Flight Number **0610** Segment **MRO-EM3**

Departure Organization **JFK** Arrival Organization **EM3**
 Departure Department **Base Maint** Arrival Department **W-Maint**
 Estimated Departure Date/Time **10-Jun-2005 05:47:14** Estimated Arrival Date/Time **10-Jun-2005 09:47:34**
 Actual Departure Date/Time **Preceding Event Information** Actual Arrival Date/Time **Succeeding Event Information**

Flight Number **0610**
 Departure Organization **MRO**
 Departure Department **MRO Dept 1**
 Estimated Departure Time **10-Jun-2005 09:25:16**
 Actual Departure Time

[Cancel](#)

[Unit Maintenance Plan](#) | [Visit Work Package](#) | [Long Term Planning](#) | [Home](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#)

- Click the Conflicts icon to view the conflict in unit flight schedules and previously created visits for the same unit. A conflict can exist when ever the ending date and time, or arrival times for flights, overlaps with the subsequent events date and time, or departure times for flights. A conflict is also displayed when the preceding and subsequent locations differ. These locations can be based on organization or organization and department, depending on the defined profile value.

The Multiple Events Found with Conflicts page includes the list of visits and flights that are in conflict with the preceding or the following event or with one another. The list of visits shows the visit number, visit name, department, organization, start and end date and time, visit status. The list of flights shows the flight number, segment, department, organization, and estimated and actual times.

View Conflicts - Multiple Events Found with Conflicts page

ORACLE Complex MRO [Home](#) [Home](#) [Engineering](#) [Configuration](#) [Planning](#) [Administration](#) [Execution](#) [Profile](#) [Sign Out](#)

Unit Maintenance Plan [Visit Work Package](#) [Long Term Planning](#)

[Overview](#) | [Utilization Forecast](#) | **[Unit Schedule](#)** | [Flight Schedule](#)

Multiple Events Found with Conflicts

Unit **M-1900, Tail # 301** Start Date and Time **10-Jun-2005 08:56:12** [Cancel](#)
 Item **MRO-M1900** End Date and Time **10-Jun-2005 11:56:12**
 Serial Number **301**

[Show Conflict Messages](#)

List of Flights

Event No.	Conflict Number	Flight Number	Segment	Departure Organization	Departure Department	Arrival Organization	Arrival Department	Departure Time	Arrival Time
1		0610	MRO-EM3	JFK	Base Maint	EM3	W-Maint	10-Jun-2005 05:47:14	10-Jun-2005 09:47:34
2	A	0610	8	MRO	MRO Dept 1	JFK	Line Maint	10-Jun-2005 09:25:16	10-Jun-2005 11:25:16

List of Visits

Event No.	Conflict Number	Visit Number	Visit Type	Visit Name	Status	Organization	Department	Start Time	End Time	Cancel
3		155	Transit Check	0610	Planning	JFK	Line Maint	10-Jun-2005 11:26:00	10-Jun-2005 11:56:00	Cancel

[A](#) Conflict

[Cancel](#)

- You can modify the planned start and end times for a visit. Optionally, click the Visit Number link to navigate to the Visit Details page and modify the details of the visit.

- Click the Multiple Events icon to navigate to the Multiple Events Found page. This UI is similar to the Unit Schedule Conflict Details UI and displays all the events found within the specified time period. You can also drill into a particular event to view the event's details.

Multiple Events Found page

ORACLE Complex MRO Home Home Engineering Configuration Planning Administration Execution Profile Sign Out

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast | **Unit Schedule** | Flight Schedule

Multiple Events Found

Cancel

Unit M-1900 Tail # 301 Start Date and Time **10-Jun-2005 11:56:12**
 Item **MRO-M1900** End Date and Time **10-Jun-2005 14:56:12**
 Serial Number **301**

List of Flights

Event No.	Flight Number	Segment	Departure Organization	Departure Department	Arrival Organization	Arrival Department	Departure Time	Arrival Time
No data exists.								

List of Visits

Event No.	Visit Number	Visit Type	Visit Name	Status	Organization	Department	Start Time	End Time	Cancel
1	156	A Check	0610	Planning	JFK	Line Maint	10-Jun-2005 11:57:00	10-Jun-2005 12:27:00	
2	157	Transit Check	0610	Planning	JFK	Line Maint	10-Jun-2005 12:28:00	10-Jun-2005 12:58:00	
3	158	Overnight Check	0610	Planning	JFK	Line Maint	10-Jun-2005 12:59:00	10-Jun-2005 14:56:00	

Cancel

Unit Maintenance Plan | Visit Work Package | Long Term Planning | Home | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out

- Click the Multiple Events with Maintenance Opportunity icon to navigate to the Multiple Events Found with Maintenance Opportunities page.

Multiple Events Found with Maintenance Opportunities page

ORACLE Complex MRO Home Home Engineering Configuration Planning Administration Execution Profile Sign Out

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast | **Unit Schedule** | Flight Schedule

Multiple Events Found with Maintenance Opportunities

Cancel

Unit M-1900 Tail # 301 Start Date and Time **10-Jun-2005 17:56:12**
 Item **MRO-M1900** End Date and Time **10-Jun-2005 20:56:12**
 Serial Number **301**

[Show Maintenance Opportunity Details](#)

List of Flights

Event No.	Maintenance Opportunity	Flight Number	Segment	Departure Organization	Departure Department	Arrival Organization	Arrival Department	Departure Time	Arrival Time
No data exists.									

List of Visits

Event No.	Maintenance Opportunity	Visit Number	Visit Type	Visit Name	Status	Organization	Department	Start Time	End Time	Cancel
1		159	A Check	0610	Planning	JFK	Line Maint	10-Jun-2005 14:57:00	10-Jun-2005 18:00:00	
2		160	Transit Check	0610	Planning	JFK	Line Maint	10-Jun-2005 18:01:00	10-Jun-2005 19:20:00	
3										

Maintenance Opportunity

Cancel

An icon representing a maintenance opportunity enables you to differentiate between a Multiple Events condition with or without an embedded maintenance opportunity. Click this icon to navigate to a UI displaying all events found within

the specified time period, and also providing a link to the Create Transit Visit UI. You can create a maintenance visit during the unit's down time, and based on the facility's capabilities and the applicable unit's defined maintenance plan.

Maintaining Flight Schedule

Flight schedules are imported into the application through integration with a Flight Operation System. Users may define schedules manually through the Flight Schedule UIs. Users can search for, view, edit, create or remove the applicable flights.

To create a flight schedule:

1. Click the Flight Schedule secondary tab. The Search Flight Schedules page appears. Enter your search criteria to view the list of flights scheduled and the flight details.

Search Flight Schedules page

ORACLE Complex MRO

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

Unit Maintenance Plan

Visit Work Package

Long Term Planning

Overview

Utilization Forecast


Unit Schedule

Flight Schedule

Search Flight Schedules


Unit

M-1900, Tail # 301




Item Number

MRO-M1900



Departure Organization




Start Date

(example: 21-Jun-2005 19:45:00)

Go


Clear

Flight Number




Serial Number

301



Arrival Organization



End Date

(example: 21-Jun-2005 19:45:00)

Go

Clear

Create

View/Edit	Flight		Departure	Arrival	Estimated	Estimated	Actual	Actual	
	Unit Number	Segment	Organization	Organization	Departure	Arrival Time	Departure	Arrival	Remove
No search conducted.									

Unit Maintenance Plan

Visit Work Package

Long Term

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

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2. The page refreshes with details about the Unit, Flight Number, Segment, Departure Organization, Arrival Organization, Estimated Departure and Arrival Time, Actual Departure and Arrival Time. Click the View/Edit icon to navigate to the Update Flight Schedule page, and view or edit the flight details.

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View Flights Scheduled - Search Flight Schedules page

ORACLE Complex MRO

Home Home Engineering Configuration Planning Administration Execution Profile Sign Out

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview Utilization Forecast Unit Schedule Flight Schedule

Search Flight Schedules

Unit: M-1900, Tail # 301
 Item Number: MRO-M1900
 Departure Organization:
 Start Date: (example: 21-Jun-2005 19:45:00)
 Flight Number:
 Serial Number: 301
 Arrival Organization:
 End Date: (example: 21-Jun-2005 19:45:00)
 Go Clear

Create

View/Edit	Unit	Flight Number	Segment	Departure Organization	Arrival Organization	Estimated Departure Time	Estimated Arrival Time	Actual Departure Time	Actual Arrival Time	Remove
	M-1900, Tail # 301	0610	MRO-EM3	JFK	EM3	10-Jun-2005 05:47:14	10-Jun-2005 09:47:34			
	M-1900, Tail # 301	0610	8	MRO	JFK	10-Jun-2005 09:25:16	10-Jun-2005 11:25:16			

Unit Maintenance Plan Visit Work Package Long Term Planning | Home | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out

- To create a new flight schedule, click Create on the Search Flight Schedules page. The Create Flight Schedule page appears. Define a flight for a unit with the relevant arrival and departure information. Select a Synchronization Rule for the visit that will be created for the maintenance opportunity after this flight.

The synchronization rule determines if the system will automatically reschedule a subsequent visit (Always Reschedule), delete it (Delete) or allow the planner to manually make the required changes (Never Reschedule). This behavior is always in relation to a Transit Visit (created for a maintenance opportunity) that follows the flight in context.

Create Flight Schedule page

ORACLE Complex MRO

Home Home Engineering Configuration Planning Administration Execution Profile Sign Out

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview Utilization Forecast Unit Schedule Flight Schedule

Create Flight Schedule

* Indicates required field

* Unit: M-1900, Tail # 301
 * Flight Number: 3420
 * Departure Organization: JFK
 * Departure Department: Base Maint
 * Estimated Departure Time: 14-Jun-2005 15:33:22
 Actual Departure Time: (example: 21-Jun-2005 19:45:00)
 * Segment: MRO-EM3
 * Arrival Organization: EM3
 * Arrival Department: W-Maint
 * Estimated Arrival Time: 15-Jun-2005 17:33:27
 Actual Arrival Time: (example: 21-Jun-2005 19:45:00)
 * Synchronization Rule for following Visit
☒ Always Reschedule
☐ Delete
☐ Never Reschedule

Cancel Apply

Unit Maintenance Plan Visit Work Package Long Term Planning | Home | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out

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- Click Apply to save the record.

Update Flight Schedule page

ORACLE Complex MRO Home Home Engineering Configuration Planning Administration Execution Profile Sign Out

Unit Maintenance Plan Visit Work Package Long Term Planning

Overview | Utilization Forecast | Unit Schedule | **Flight Schedule**

Update Flight Schedule

* Indicates required field

<p>Unit M-1900, Tail # 301</p> <p>* Flight Number <input type="text" value="3420"/></p> <p>* Departure Organization <input type="text" value="JFK"/></p> <p>* Departure Department <input type="text" value="Base Maint"/></p> <p>* Estimated Departure Time <input type="text" value="14-Jun-2005 15:33:22"/> (example: 21-Jun-2005 19:45:00)</p> <p>Actual Departure Time <input type="text"/> (example: 21-Jun-2005 19:45:00)</p>	<p>* Segment <input type="text" value="MRO-EM3"/></p> <p>* Arrival Organization <input type="text" value="EM3"/></p> <p>* Arrival Department <input type="text" value="W-Maint"/></p> <p>* Estimated Arrival Time <input type="text" value="15-Jun-2005 17:33:27"/> (example: 21-Jun-2005 19:45:00)</p> <p>Actual Arrival Time <input type="text"/> (example: 21-Jun-2005 19:45:00)</p>
---	---

* Synchronization Rule for following Visit

☒ Always Reschedule
☐ Delete
☐ Never Reschedule

Cancel Apply

Note the following:

- The Actual date and time for a flight arrival/departure can be recorded only if the prior event's actual date and time have been recorded.
- You cannot update the department, organization or estimated date and time if the actual date and time has been entered for the following event of the same unit. Only a Super User can update all the fields if the actual date and time information have been entered.
- You can delete a flight schedule for a unit if the actual date and/or time for this event has not been recorded. The Super User can delete any flight segment.

Updating Transit Visit Schedule

Maintenance planners can modify a visit as requirements arise or when the visit is out of sync with the utilization of the applicable unit. The important attributes to keep in synchronization are the preceding utilization's end date, time, organization, department and space (optional) and the subsequent utilization's start date. A conflict is created when visits are out of sync, that is, overlap with each other or with scheduled flights.

To update a transit visit:

1. Navigate to the Update Visit page by clicking the Visit Scheduled icon or through the Unit Schedule Conflict Details page. You can modify the Organization and Department (until the visit has been released), Planned End Time, Visit Name, and Start Time. For associated tasks, you can update the Department (until the visit has been released), Service Request, Cost, Start from Hours, and Task Name.

Note: If the visit has been pushed to production, the organization cannot be updated hence the visit must be cancelled and re-created.

2. You can delete a visit from the Unit Schedule Conflict Details page as well as from the Multiple Events pages. When a unit schedule is deleted, the transit visit created for the unit schedule and the workorders in production are deleted. If the visit is in planning status, all the visit tasks are deleted and the associated workorders (if created in draft status for costing purpose) and scheduled materials are cancelled. If

the visit is in released status, all the visit tasks, associated workorders, and scheduled materials are cancelled.

Working with Maintenance Visits

This chapter covers the following topics:

- Overview
- What is Visit Work Package?
- Key Business Processes
- Creating Maintenance Visit Records
- Defining Stages for a Visit
- Preparing the Maintenance Visit for Production Planning
- Push to Production
- Retrieving Existing Maintenance Visit Records
- Associating Tasks with Maintenance Visits
- Associating Maintenance Requirements to a Visit
- Retrieving Existing Visit Task Records
- Updating Visit Records
- Associating Item Serial Numbers with Tasks
- Creating Visit Tasks Unassociated with Routes
- Setting up Stages for Tasks
- Updating Visit Task Headers
- Defining Visit Task Hierarchy
- Viewing Maintenance Requirements for a Visit
- Defining Visit Cost Structure
- Visit Costing and Pricing
- Visit Costing
- Visit Pricing

Overview

Transportation services, including aviation, railway and marine require complex and high-valued unit maintenance. Maintenance of such systems is complex and

expensive, and organizations seek to minimize operational costs while maximizing operational revenues.

In addition to the conflicting requirements of service availability versus service reliability, a maintenance planner seeks to optimize a maintenance plan, taking into consideration the following:

- Service efficiency: Do not replace a unit component or the unit itself any sooner than economically necessary.
- Constrain off-line maintenance duration: Organizations earn revenue when their units are in operation, not when under maintenance.
- Constrain maintenance cost: Provide an infrastructure that permits maximum skilled worker productivity. Sequence maintenance tasks based on efficiency dependencies, and historical service records that help predict maintenance requirements.
- Meet safety and regulatory mandates.

The Oracle Complex Maintenance, Repair, and Overhaul Visit Work Package module permits a maintenance planner to organize a maintenance visit for an equipment unit, whether the unit be at a maintenance base, or in the field.

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

See:

- Creating Maintenance Visit Records, page 9-4
- Retrieving Existing Maintenance Visit Records, page 9-16
- Associating Tasks with Maintenance Visits, page 9-20
- Retrieving Existing Visit Task Records, page 9-29
- Updating Visit Records, page 9-32
- Associating Item Serial Numbers and Service Requests to Tasks, page 9-33
- Creating Visit Tasks Unassociated with Routes, page 9-36
- Updating Visit Task Headers, page 9-41
- Defining Visit Task Hierarchy, page 9-43
- Viewing Maintenance Requirements for a Visit, page 9-44
- Defining Visit Cost Structure, page 9-46
- Visit Costing and Pricing, page 9-48

What is Visit Work Package?

Visit Work Package is an Oracle Complex Maintenance, Repair, and Overhaul subsystem that provides planning capabilities to an organization responsible for complex and high valued unit maintenance. Visit Work Package permits a maintenance planner, skilled in the maintenance of the firm's units, and aware of cost and complexity, to organize maintenance tasks for a unit based on unit availability and forecasted maintenance requirement due dates.

Oracle Complex Maintenance, Repair, and Overhaul treats a unit as a hierarchy of other units and/or positions. The advantage of supporting such a unit structure is the capability to associate maintenance requirements with increasing component granularity. Maintenance requirements can be tracked at the unit level or at any of the unit's subcomponents. This allows forecasted requirements to move with subcomponent from one unit to another. This is especially important in an industry like aviation.

Visit Work Package allows the planner to group maintenance requirements applicable to a unit and its subcomponents into a single maintenance event. In defining the maintenance visit, the planner can add planned and unplanned maintenance requirements and individual maintenance tasks. The individual tasks within a visit can be structured to optimize work performed on the production floor. Planners can also manage maintenance visits to the individual task level, based on the estimate costs at the task, route, task group, task package, and visit levels.

Key Business Processes

Visit Work Package supports the following business processes:

Equipment-Based Maintenance Visit Definition

Visit Work Package provides a maintenance planner with the ability to create and manage a maintenance visit. A visit definition connects a unit with a block of tasks, a location where the maintenance work takes place, and a period of time in which the work is accomplished.

Adding Forecasted Maintenance Requirements to Visits

When creating tasks for a maintenance visit, the planner will usually select forecasted requirements from Unit Maintenance Plan. By adding these requirements, the associated routes, and all the routes for any child maintenance requirements are added to the visit as tasks. Through the associated routes, the material and resource requirements are planned for at the task level. Additionally, any technical dependencies between associated routes, defining the sequence in which the work must be accomplished, are automatically created between the visit's tasks.

Adding Unplanned Maintenance Requirements to Visits

In an industry like aviation, unplanned or non-routine requirements make up the majority of the work performed during production. These requirements are added to a visit based on discoveries made during the inspection process. These requirements may be added to a visit any time during the planning and production phases of a visit. When adding them during the production phase, the Push to Production function must be manually initiated from Visit work Package in order to create work orders for the new visit tasks.

In addition to non-routine maintenance added to a visit, unplanned requirements may be used for maintenance performed on third-party units. In this case, the forecasted maintenance is being tracked by outside parties and contracted to the CMRO user. After adding these requirements to a visit, maintenance will be tracked through the production process in the same way, regardless of whether the requirement is planned or unplanned.

Adding Unassociated Repair Tasks to Visits

If a job needs to be done on an equipment unit, for a requirement not tracked by Unit Maintenance Plan or defined in Fleet Maintenance Program, the planner will create an unassociated repair task. These tasks are not associated with a route, but the scope of the

work to be accomplished is manually described at the task header. Unassociated tasks are intended to address minor, non-routine repairs.

Resource Schedule Definition

Efficient maintenance planning seeks to smooth the workload curve. Before a shop visit duration can be accurately determined, an organization's skilled workers' schedules and availability must be considered. Using Long Term Planning's Resource Leveling, the planner can view the resource capacities for visit requirements defined in Visit Work Package.

Visit Task Cost Structure Definition

To calculate the costs incurred during a maintenance visit, a cost structure must be defined, so that labor, parts, and materials cost transactions associated with tasks can be configured, recorded, and accumulated using other Oracle eBusiness Suite modules, and used to account for overall visit costs. The cost structure is implied by the parent-child relationship between tasks. After costs have been defined by item and unit of measure, summary tasks, representing the maintenance requirements, can be defined as control breaks for subtotal cost calculations at any point in the visit hierarchy.

Visit Task Hierarchy Definition

Visit Work Package permits the maintenance planner to precisely define the order of completion of all tasks that comprise a maintenance facility visit. The precedence order is established by parent-child relationships such that a child task has as many parents as it is technically dependent on. This feature ensures that complex routes are correctly planned and accomplished. Technical dependencies defined between routes for a maintenance requirement in Fleet Maintenance Program are automatically used to create a hierarchical relationship between a visit's tasks. This sequence of tasks within a visit is used to calculate the derived completion date of a visit, allowing the planner to make sure that it does not exceed the visit's defined end date.

Visit Costing and Pricing

Costing and estimating the price for a service is very important for any service organization. Visit Work Package enables the maintenance planner to estimate the cost of an in-house maintenance visit, and calculate the visit price as a third-party service provider. The visit cost and price estimation enables the maintenance organization to calculate the profit, on providing such a service, before sending the quotation to the customer. By comparing the historical data including estimated costs and actual costs for visits, maintenance requirements, and tasks, the maintenance planner can plan the cost of future visits effectively.

Creating a Project for a Maintenance Visit

Oracle Complex uses Projects as part of its maintenance planning and production flows. A project is created for each visit work package and project tasks assigned to it. A visit's corresponding project is used in the maintenance execution flow to collect costs associated with resource and material transactions performed in CMRO's Production module. Project Manufacturing's standard billing functionality can be used to generate the required reports for the corresponding visit work packages.

Creating Maintenance Visit Records

A maintenance visit represents the intersection of several entities:

- Equipment to be maintained

- Location where the maintenance jobs will take place
- Period of time, called a visit slot, during which the maintenance will be accomplished
- Maintenance requirements to be completed during the visit

The number of tasks that can be in a visit and the duration a visit have no limits.

Visit Work Package continues the workflow begun in the Oracle Complex Maintenance, Repair, and Overhaul Unit Maintenance Plan module, where the maintenance requirements for tracked units are forecasted. The goal of the maintenance planner is to schedule requirements within the forecasted due by dates at capable facilities, while minimizing a unit's down time. The first process in creating a visit is to define the visit header. Its attributes include a name, number, organization, description, department, visit type, inventory item, serial number, etc. After the header has been created, maintenance requirements are added to the visit, which create tasks to complete the visit definition. Tasks can be attached to the visit from the maintenance plan associated through Unit Maintenance Plan, or through unplanned requirements from Fleet Maintenance Program, or as ad hoc tasks.

The following procedure initiates a visit work package creation by allowing you to create a visit header record in the database.

Prerequisites

- ☐ The item and serial number to which the maintenance visit applies must exist in the database. The organization and the department in which the visit is to be carried out must exist in the repository.

To create a maintenance visit record:

1. On the Oracle Complex Maintenance, Repair, and Overhaul Home page, click the Planning link at the top right corner to access the Visit Work Package tab.
2. Click the Visit Work Package tab. This launches the Search Visit page under the Visit subtab.

Search Visit page

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

[Unit Maintenance Plan](#) [Visit Work Package](#) [Long Term Planning](#)

Visit

Search Visit

Item Unit
 Serial Number Service Request
 Organization Department
 Visit Number Visit Name
 Start From Date Start To Date
 Visit Status Visit Type
 Service Category Priority

Search Results

Select	Visit Number	Visit Name	Item	Unit	Serial Number	Visit Type	Priority	Organization	Department	Start Date	Visit Status	Cost Structure	Remove
No records were found matching the given criteria..													

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- On the Search Maintenance Visit page, click Create to launch the Create Visit page.

Create Visit page

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[Unit Maintenance Plan](#) [Visit Work Package](#) [Long Term Planning](#)

Visit

Create Visit

* Indicates required field

Visit Header Info

* Visit Name
 Visit Type Unit
 Item Serial Number
 Organization Department
 Service Request Service Category
 Start Date Hour Minutes
 Project Template Priority
 Description

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- Use the information in the following table to create a visit record.

Description of fields in the Create and Edit Maintenance Visit pages

Field Name	Description
Visit Name	Is an alphanumeric description that uniquely identifies the visit you want to create.
Visit Type	Is a work package category that your organization has created for different types of shop, or field maintenance and service visits.
Item	Is the equipment type for which the visit is to be created. This equipment type description comes from the inventory catalog that your organization has created.
Unit	Is the name of the unit configuration. For example, it is the name of the configuration of the assembly, subassembly, plant, or vehicle, for which you would like to retrieve visit definitions. Enter the full name of an asset configuration, or use the field list of values pages by clicking the flashlight icon. If you link to the LOV page to select a unit configuration by part of its name, only Unit Configuration objects that are complete display because maintenance visits can only be defined for complete unit configurations.
Service Request	Is the identifier of a request a type of unit service for which a visit definition has been created.
Category	Is a drop-down list field where you can choose the general class of visit for which to search.
Serial Number	Is the user or manufacturer-supplied part identifier to which the maintenance visit applies. The serialized part information is stored in the unit configuration repository.
Organization	Is the identifier of the business entity or division where the maintenance work is managed. In order to activate additional unit management features that are integrated with Oracle Complex Maintenance, Repair, and Overhaul, and are provided by Oracle Enterprise Asset Management, the organization that you choose for the visit header record must be eAM-enabled. Wherever a list of Organization values page is displayed, only those organizations that are eAM-enabled will be displayed. Additional unit management features include Activity Type Activity Cause, and Shutdown Type. See the Oracle Inventory User's Guide for more information about organization-level item definition.
Department	Is the organization subdivision where the maintenance work is accomplished, and to which skilled workers, and other resources are assigned.
Start Date	Is the date on which the maintenance visit is expected to begin. The hour of the day at which work will start is also selected here.
Description	Contains any comments that you want to record for this visit.
Visit Number	Is a view-only field displayed only on the Update Visit page. This is a system-generated value.

Field Name	Description
Priority	A value that defines the priority assigned to a visit. For example, High, Medium, and Low, or 1,2, and 3, respectively. Visit priority values should be the same as currently used by WIP and defined by the lookup WIP_EAM_ACTIVITY_PRIORITY. Priority can be entered and modified until the visit is pushed to production. The planning engine also plans material requirements for visits based on priorities.
Project Template	LOV contains all the project templates defined for an operating unit. The project template defined in the system profile defaults at the visit header level. User can select alternative templates until the visit is pushed to production.

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

Enter Visit Header Details - Create Visit page

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Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Create Visit

* Indicates required field

Visit Header Info

* Visit Name Engine Check

Visit Type A Check

Item MRO-M1900

Organization Vision Project Mfg

Service Request

Start Date 2005-MAR-16 Hour 07 Minutes 00

Project Template

Unit M-1900, Tail # 304

Serial Number 304

Department

Service Category

Priority

Description

Cancel Revert Apply

- To create a single visit record for multiple units and/or tracked items, leave the Unit field blank. When a unit is selected, the visit record is created only for that unit. When no unit or item instance is specified at the visit header level, a master work order is created without any item or serial number definition.
- Click Apply to save the visit record in the database, and proceed to the Update Visit (Visit Header Info) page to update the visit header information, or to navigate to the

Visit Tasks page to associate tasks with the visit record. See *Associating Tasks with Maintenance Visits*, page 9-20.

Update Visit page

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Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Details

Visit Tasks

Maintenance Requirements

Cost Details

Visit Stages

Update Visit

Cancel Revert Validate Go Apply

* Indicates required field

Visit Header Info

Visit Number	123	* Visit Name	Engine Check
Visit Type	A Check	Item	MRO-M1900
Unit	M-1900, Tail # 304	Serial Number	304
Organization	Vision Project Mfg	Department	
Priority		Visit Status	Planning
Service Request		Service Category	
Project Template	CMRO Project Template	Simulation Plan	Primary Plan
Start Date	2005-MAR-16 Hour 07 Minutes 00		
Planned End Date	Hour 00 Minutes 00		
End Date		Due By Date	
Description			

Defining Stages for a Visit

Users can define the stages that a visit can have. Stages can also be specified when associating a route to a maintenance requirement (MR). When this maintenance requirement is assigned to a visit, the visit tasks automatically inherit the stages specified during the MR-Route association. The stage numbers are predefined for all visits.

Prerequisites

- ☐ The maximum number of stages for a visit should have been set up.

To set up stages for a visit:

1. Navigate to the Visit Details UI.

Visit Details page

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

Visit

Details

[Visit Tasks](#)
[Maintenance Requirements](#)
[Cost Details](#)
[Visit Stages](#)

Update Visit

Indicates required field

Visit Header Info

Visit Number **140**

Visit Type **A Check**

Unit **M-1900, Tail # 301**

Organization **San Diego Manufacturing**

Priority

Service Request

Project Template **CMRO Project Template**

Start Date **2005-MAR-29** Hour **08** Minutes **00**

Planned End Date **2005-MAR-31** Hour **17** Minutes **00**

End Date

Description

Visit Name **KLM201 Check**

Item **MRO-M1900**

Serial Number **301**

Department **Assembly Department**

Visit Status **Planning**

Service Category

Simulation Plan **Primary Plan**

Cancel Revert Validate Go Apply

Unit Maintenance Plan **Visit Work Package** Long Term Planning Home CMRO Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

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- Click Stages in the side navigation menu. The Visit Stages page appears. Alternatively, you can access this page by selecting the visit from the search results table in the Search Visit page, and then choosing Stages from the drop-down menu.
- In the Stage List table, enter a name and duration for the stage. The Stage Start/End Time is derived from based on the Visit Start Time, Visit Department, Department Shift, and Stage Duration. The Duration must be an integer greater than or equal to 0 and the stage name must be unique within one visit.

Note: If you do not want all of the stages defined in setup for a particular visit, you can leave the name blank and the duration left at "0".

Visit Stages page

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Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Details
Visit Tasks
Maintenance Requirements
Cost Details
Visit Stages

Visit Stages

Visit Number **140** Visit Type **A Check** Item **MRO-M1900**
Unit **M-1900, Tail # 301** Start Date **2005-MAR-29** Organization **San Diego Manufacturing**
Serial Number **301** End Date Department **Assembly Department**

Stage List

Previous 1-10 of 10 Next

Stage Number	Name	Duration	Planned Start Date	Planned End Date	Actual Date
1	Clean	3	2005-03-29 15:00:00.0	2005-03-29 15:00:00.0	
2	Oil Check	2	2005-03-29 15:00:00.0	2005-03-29 15:00:00.0	
3	Servicing	5	2005-03-29 15:00:00.0	2005-03-29 15:00:00.0	
4	Install Parts	2	2005-03-29 15:00:00.0	2005-03-29 15:00:00.0	
5	5	0	2005-03-29 15:00:00.0	2005-03-29 15:00:00.0	
6	6	0	2005-03-29 15:00:00.0	2005-03-29 15:00:00.0	
7	7	0	2005-03-29 15:00:00.0	2005-03-29 15:00:00.0	
8	8	0	2005-03-29 15:00:00.0	2005-03-29 15:00:00.0	
9	9	0	2005-03-29 15:00:00.0	2005-03-29 15:00:00.0	
10	10	0	2005-03-29 15:00:00.0	2005-03-29 15:00:00.0	

Previous 1-10 of 10 Next

Cancel Revert Apply

Note: The stage duration and name can be updated until the visit is closed, and if no job in all the subsequent stages has been firming or released.

- Click Apply to save. The Planned Start and End time changes based on the duration specified.

View Stages defined for a visit - Visit Stages page

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Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Details
Visit Tasks
Maintenance Requirements
Cost Details
Visit Stages

Visit Stages

Visit Number **140** Visit Type **A Check** Item **MRO-M1900**
Unit **M-1900, Tail # 301** Start Date **2005-MAR-29** Organization **San Diego Manufacturing**
Serial Number **301** End Date Department **Assembly Department**

Stage List

Previous 1-10 of 10 Next

Stage Number	Name	Duration	Planned Start Date	Planned End Date	Actual Date
1	Clean	3	2005-03-29 15:00:00.0	2005-03-29 18:00:00.0	
2	Oil Check	2	2005-03-29 18:00:00.0	2005-03-29 20:00:00.0	
3	Servicing	5	2005-03-29 20:00:00.0	2005-03-30 17:00:00.0	
4	Install Parts	2	2005-03-30 17:00:00.0	2005-03-30 19:00:00.0	
5	5	0	2005-03-30 19:00:00.0	2005-03-30 19:00:00.0	
6	6	0	2005-03-30 19:00:00.0	2005-03-30 19:00:00.0	
7	7	0	2005-03-30 19:00:00.0	2005-03-30 19:00:00.0	
8	8	0	2005-03-30 19:00:00.0	2005-03-30 19:00:00.0	
9	9	0	2005-03-30 19:00:00.0	2005-03-30 19:00:00.0	
10	10	0	2005-03-30 19:00:00.0	2005-03-30 19:00:00.0	

Previous 1-10 of 10 Next

Cancel Revert Apply

Preparing the Maintenance Visit for Production Planning

Once you have finished developing and refining the structure of a maintenance visit, you can transfer the visit, including the visit header and all of the associated tasks to Oracle Complex Maintenance, Repair, and Overhaul Production Planning for final adjustments before the maintenance project is started.

You can validate a visit and/or push it to production.

Validating Visits

This process checks that the visit structure meets all business logic requirements.

Prerequisites

- ☐ The visit record you want to validate must exist in the database.

To validate a visit:

1. On the Oracle Complex Maintenance, Repair, and Overhaul Home page, click the Planning link at the top right corner to access the Visit Work Package tab.
2. Select the Visit Work Package tab. This launches the Search Visit page under the Visit subtab.
3. Find the visit that you want to validate by entering the relevant search criteria. Use the information in the following table to query for records.

Description of fields in the Search Visit page

Field Name	Description
Item	Is the equipment type for which a maintenance visit was defined. This equipment type description comes from the inventory catalog that your organization has created.
Serial Number	Is the user-supplied part identifier to which the maintenance visit applies. The serialized part information is stored in the unit configuration repository.
Organization	Is the identifier of the business entity or division where the maintenance work is managed. Information about your organizations is managed with Oracle Human Resources.
Unit	Is the name of the unit configuration. For example, it is the name of the configuration of the assembly, subassembly, plant, or vehicle, for which you would like to retrieve visit definitions. Enter the full name of a unit configuration, or use the field list of values pages by clicking the flashlight icon. If you link to the LOV page to select a unit configuration by part of its name, only Unit Configuration objects that are complete display because maintenance visits can only be defined for complete unit configurations.
Service Request	Is the identifier of a request a type of unit service for which a visit definition has been created.
Category	Is a drop-down list field where you can choose the general class of visit for which to search.
Department	Is the organization subdivision where the maintenance work is accomplished, and to which skilled workers and other resources are assigned. Information about your departments is managed with Oracle Bills of Material. If you provide a valid organization in the previous field, the set of department values available for your selection consists of departments that belong to the organization.
Visit Number	Is an alphanumeric value that uniquely identifies the visit definition that you wish to retrieve.
Visit Name	Is an alphanumeric description of the visit.
Start From Date	Is the earlier visit starting date search argument. Use the calendar icon to display a calendar to make the date value selection. Visit header records with a starting date on or later than your search date will be displayed.
Start To Date	Is the later visit starting date search argument. Use the calendar icon to select the date value. Visit header records with a starting date on or earlier than your search date will be displayed.
Visit Status	Provides a drop-down list from which to select a visit status. Only one status value can be active for the query.
Visit Type	Is a category of work package that your organization has created for different types of shop or field maintenance and service visits.

4. Select the visit from the results table, and choose **Validate** from the drop-down menu. Validation errors, if any, will be displayed.

Visit Errors page

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[Unit Maintenance Plan](#) [Visit Work Package](#) [Long Term Planning](#)

Visit

Visit Errors

Visit Number **2** Visit Type **A Check** Item **MRO-C1600**
Unit **C:1600, Tail #** Start Date Organization
101
Serial Number **101** End Date Department

[Back](#)

Error List

Number	Description
1	ERROR: Visit Number 2 : Start Date Time Missing
2	ERROR: Visit Number 2 : Organization Missing
3	ERROR: Visit Number 2 : Department Missing
4	ERROR: Visit Number 2 : Planned end date missing
5	ERROR: Visit Number 2 : No Project is associated to this Visit
6	ERROR: Visit Number 2 : Department has no department shift
7	ERROR: Visit Number 2 : MR Routes associated to some tasks not exists

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Push to Production

If the visit structure is logically correct, push the visit to production on the Visit Overview page. Optionally, this function is also available in the Visit Details UI. The visit structure logic is checked, and the process creates an associated project and task. A master workorder is created for the visit and the visit's MRs as well as associated workorders are created for the visit's tasks. Visit tasks are exported to Oracle Projects as a complete set.

Prerequisites

- ☐ The visit record that you want to push to production must exist in the database.

To push a job to production:

1. On the Oracle Complex Maintenance, Repair, and Overhaul Home page, click the Planning link at the top right corner to access the Visit Work Package tab.
2. Select the Visit Work Package tab. This launches the Search Visit page under the Visit subtab.
3. Enter your search criteria. For field descriptions, see Description of fields in the Search Visit page, page 9-13.
4. Select the visit from the results table and choose either **Push to Production (Jobs Released)** or **Push to Production (Jobs Unreleased)** from the drop-down menu. Both of them create work orders for the visit and tasks, but you can choose the status of the work orders, either released or unreleased. If you choose to push the visit to production with jobs in unreleased status, all the date validations, accounting period validations and scheduling hierarchy is skipped.

Push a Visit to Production - Search Visit page

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Complex MRO

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Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Search Visit

Item Unit

Serial Number Service Request

Organization Department

Visit Number Visit Name

Start From Date Start To Date

Visit Status Visit Type

Service Category Priority

Search Results

Create

Select a Visit and ..

Previous 1-10 of 113 Next

Select	Visit Number	Visit Name	Item	Unit	Serial Number	Visit Type	Priority	Organization	Department	Remove
<input type="radio"/>	2	A-Check for N101	MRO-C1600	C-1600, Tail # 101	101	A Check		San Francisco Aviation Maintenance Center	MRO Satellite Department	<input type="button" value="Push to Production (Jobs Unreleased)"/>
<input type="radio"/>	8	C-Check for N101	MRO-C1600	C-1600, Tail # 101	101	C Check		San Francisco Aviation Maintenance Center	MRO Headquarters	<input type="button" value="Cost and Price Information"/>
<input type="radio"/>	10	test	MRO-C1600	C-1600, Tail # 104	104	A Check		San Francisco Aviation Maintenance Center	MRO Headquarters	<input type="button" value="Stages"/>

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Note: Only complete sets of tasks are transferred to Projects and to the Oracle Complex Maintenance, Repair, and Overhaul production modules. If an error occurs during the export of tasks to production jobs, the Projects object is not rolled back. Instead, the relationships between visit tasks and tasks in Projects are maintained, and another attempt is made to export production jobs when pushing the visit structure to production.

The following visit attributes are checked when a visit and its tasks are exported to maintenance production:

- The visit is associated with a valid department, and a valid organization.
- The visit has a starting date and time. The visit end date and time is automatically calculated.
- The visit is associated with a valid Item, and a correct Unit from Install Base.
- The visit is in the Planning stage.
- A correct visit type is selected for the visit.
- The visit definition is a member of a primary simulation plan. See the Long Term Planning module for more details.
- All visit tasks not based on a repair or service route defined by Fleet Maintenance Program as pertinent to the equipment being serviced may not have a duration of zero.
- Visit tasks based on an expired maintenance requirement or route cannot be scheduled for maintenance production.
- Only tasks associated with parent maintenance requirements by Fleet Maintenance Program that apply to the type of equipment being maintained

may be included in a visit. This check prevents the inclusion of erroneously selected tasks in a visit.

- The inventory part template and serial number associated with a task must exist in the Unit Configuration structure for the asset for which the visit definition was created.
- For tasks added to a visit because of a corresponding maintenance requirement in the plan for the asset, derived as imminent by Unit Maintenance Plan, the effectivity must be for the same maintenance requirement and task.
- Each department in which a maintenance task is planned must belong to the related organization.

After successfully checking all of these conditions, Visit Work Package will return a message indicating that the visit was correctly defined. The status of a visit after it has been "pushed to production" changes from 'released' to 'implemented'. If the user adds a new requirement or task to the visit after it has been pushed to production, the status changes to 'partially implemented'. Users must then run the process again to create workorders for the new tasks.

Retrieving Existing Maintenance Visit Records

Maintenance planners need to retrieve existing maintenance visit records for reference or new visits based on an existing visit. Oracle Complex Maintenance, Repair, and Overhaul permits efficient retrieval of visit records saved in the database. The Search Visit page provides the ability to search and display all maintenance visits regardless of their status.

Prerequisites

- ☐ The visit record you want to retrieve must exist in the database.

To retrieve existing maintenance visit records:

1. On the Oracle Complex Maintenance, Repair, and Overhaul Home page, click the Planning link at the top right corner to access the Visit Work Package tab.
2. Select the Visit Work Package tab. This launches the Search Visit page under the Visit subtab.
3. Enter your search criteria. For field descriptions, see Description of fields in the Search Visit page, page 9-13.

Note: You can also execute a search without specifying any search criteria. In this case, the system returns all the records existing in the database that have the selected Status (Released, Planning, or Closed).

4. Click Go. The lower half of the screen displays the Search Results.

View Search Results - Search Visit page

Search Visit

Item

Unit

Serial Number

Service Request

Organization

Department

Visit Number

Visit Name

Start From Date

Start To Date

Visit Status

Visit Type

Category

Go Clear

Search Results

Create

Select a Visit and .. Push To Production Go

Previous 1-10 of 439 Next

Select	Visit Number	Visit Name	Item	Unit	Serial Number	Visit Type	Organization	Department	Start Date	Visit Status	Cost Structure	Remove
	2	A-Check for N101	MRO-C1600	C-1600, Tail #101	101	A Check				Planning		
	8	C-Check for N101	MRO-C1600	C-1600, Tail #101	101	C Check			07-MAY-2004	Planning		
	10	test	CMROITEM1		1	A Check	San Diego Manufacturing	Outside Processing	24-JUN-2003	Released		
	11	COPY FROM PLAN	MRO-16T9001-831		4456555	A Check	San Diego Manufacturing	Outside Processing	02-DEC-2003	Planning		
							San Diego	Outside	13-NOV-			

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

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

- To validate a visit before releasing to production, select the pertinent record, and choose Validate from the drop-down menu.

Note: You can only validate visits that are in the Planning Status.

- To remove a visit record from the database, click the Remove icon corresponding to that record.
- To view the cost and/or price information for the visit, select the visit, and choose Cost and Price information from the drop-down menu. Click Go. The Visit Cost and Price page appears. Optionally, you can access the visit cost page from the Search Visit UI and the Visit Details UI.

Visit Cost and Price page

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Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Details
Visit Tasks
Maintenance Requirements
Cost Details

Visit Cost and Price

Cancel

Visit Number **457** Visit Type **A Check** Item **VG0205**
 Unit **Ud0206** Start Date **26-MAY-2004** Organization **San Diego Manufacturing**
 Serial Number **SN0206** End Date **26-MAY-2004** Department **Outside Processing**

Cost/Price Details

Estimate Price Price Snapshot Cost Snapshot Items Without Price Apply Revert

☒ Visit for Outside Party

Price List Price List 0204 Currency **ANY**
 Estimated Cost **171.9** Actual Cost **28.65**
 Estimated Price **299.46** Actual Price **49.91**
 Estimated Profit **127.56** Actual Profit **21.26**

Estimate Price Price Snapshot Cost Snapshot Items Without Price Apply Revert

Unit Maintenance Plan | **Visit Work Package** | Long Term Planning | Planning | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

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- To view the Maintenance Requirements for the visit, choose Maintenance Requirements from the drop-down menu and click Go. The Search Maintenance Requirement page appears.

Search Maintenance Requirements page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Details
Visit Tasks
Maintenance Requirements
Cost Details





Search Maintenance Requirements

Cancel

Visit Number **457** Visit Type **A Check** Item **VG0205**
 Unit **Ud0206** Start Date **26-MAY-2004** Organization **San Diego Manufacturing**
 Serial Number **SN0206** End Date **26-MAY-2004** Department **Outside Processing**

Maintenance Requirement Description
 Go Clear

Previous 1-1 of 1 Next

Title	Description	Type	Item	Serial Number	Tasks	Cost/Price
MR0421			VG0205	SN0206	  	

Previous 1-1 of 1 Next

Unit Maintenance Plan | **Visit Work Package** | Long Term Planning | Planning | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

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- To search tasks associated with the visit, select Search Tasks from the drop-down menu. The Search Visit Task page appears.

Search Visit Task page

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Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Details

Visit Tasks

Maintenance Requirements

Cost Details

Visit Stages

Search Visit Task

Cancel

Visit Number **8** Visit Type **C Check** Item **MRO-C1600**

Unit **C-1600, Tail #** Start Date **2003-APR-07** Organization **San Francisco Aviation Maintenance Center**

Serial Number **101** End Date Department **MRO Headquarters**

Task Number Maintenance Requirement Task Name Route Tasks Due By Workorder Status Department Serial Number Stage Status

Go Clear

Search Results

Push to Production (Jobs Released) Go

Previous 1-10 of 17 Next

Task Number	Task Name	Item	Serial Number	Maintenance Requirement	Department	Stage	Task Type	Status	Hierarchy	Cost/Price	Remove
1	27-036-00	MRO-C1600	101				Planned				
2	27-036-00-00	MRO-C1600	101	27-036-00			Planned				

- To view the task cost structure for a visit, click the Cost Structure icon corresponding to that record.

Cost Structure page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Cost Structure

Visit Number **457** Visit Type **A Check** Item **VG0205**

Unit **Ud0206** Start Date **26-MAY-2004** Organization **San Diego Manufacturing**

Serial Number **SN0206** End Date **26-MAY-2004** Department **Outside Processing**

Visit0526A

MRO421

Visit Cost Information

Estimated Cost **171.9** Actual Cost **28.65**

Cancel

- To edit visit header details, and associated tasks, click the pertinent Visit Number link.

Note: You can update the header information and associated tasks only for a visit that is in the Planning state. If the selected visit is in

the Released or Closed states, the application generates the details and associated tasks page in view-only mode. You can also view the cost details and the maintenance requirements, associated with a visit, by clicking the corresponding link in the left-hand navigation panel.

13. To cancel a visit, select the record from the visit search results table, and choose Cancel Visit from the drop-down menu. When a visit is canceled the associated jobs get canceled and the project is closed. Unit maintenance plans if any, associated with the canceled visit are withdrawn.

Note: A visit can be cancelled only when it has been pushed to production and all the jobs are in unreleased status.

A visit in production cannot be deleted, only canceled. To reschedule a visit after it has been released, you must cancel the visit and recreate it in the new organization.

Associating Tasks with Maintenance Visits

After a maintenance planner has completed the visit header creation, the planner can add new tasks to the visit structure. A maintenance plan can consist of three task types:

1. Tasks based on routes that comprise a maintenance requirement, and can have required completion dates based on the forecast in Unit Maintenance Plan. For more information, refer to Associating Unplanned and Planned Maintenance Requirements to a Visit, page 9-23.
2. Tasks based on routes from unplanned requirements that is not forecasted in Unit Maintenance Plan, but might apply, in the judgment of the planner, to the equipment being maintained. These tasks are created from routes associated with maintenance requirements that pertain to the equipment type.
3. Tasks can be added on an ad hoc basis, even if no corresponding route exists. The description of the work to be accomplished is stored as a task remark. For more information, refer to Creating Visit Tasks Unassociated With Routes, page 9-36.

The following sections detail procedures for associating tasks with maintenance visits:

Prerequisites

- ☐ The visit record to which you want to attach tasks must exist in the database.

To associate tasks with maintenance visits:

1. Retrieve the visit records that match your need. See Retrieving Existing Maintenance Visit Records, page 9-16.
2. In the Search Results list, click the Visit Number link of the record you want to edit. This launches the Update Visit page if the visit record is in the Planning state. If the visit record is in the Released or Closed status, the application generates the View Visit Details page.

View Visit Details - Update Visit page

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

Visit

Update Visit

* Indicates required field

Visit Header Info

Visit Number **8** Visit Name **C-Check for N101**

Visit Type **C Check** Item **MRO-C1600**

Unit **C-1600, Tail # 101** Serial Number **101**

Organization **San Francisco Aviation M...** Department **MRO Headquarters**

Priority Visit Status **Planning**

Service Request Service Category

Project Template Simulation Plan **Primary Plan**

Start Date **2003-APR-07** Hour **00** Minutes **00**

Planned End Date Hour **00** Minutes **00**

End Date Due By Date

Description

Cancel Revert Validate Go Apply

Unit Maintenance Plan | **Visit Work Package** | Long Term Planning | Home | CMRO Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

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- On the side navigation menu, click Visit Tasks. This launches the Search Visit Task page with the visit context information, and the list of tasks, if any, already associated with the visit.

Find a Visit Task - Search Visit Task page

ORACLE® Complex MRO

Home CMRO Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

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

Visit

Search Visit Task

Cancel

Visit Number **8** Visit Type **C Check** Item **MRO-C1600**

Unit **C-1600, Tail # 101** Start Date **2003-APR-07** Organization **San Francisco Aviation Maintenance Center**

Serial Number **101** End Date Department **MRO Headquarters**

Task Number Task Name

Maintenance Requirement Route

Task Type Tasks Due By

Workorder Workorder Status

Service Request Department

Item Serial Number

Route Type Stage

Status

Go Clear

Search Results

Push to Production (Jobs Released) Go

Previous 1-10 of 17 Next

Task Number	Task Name	Item	Serial Number	Maintenance Requirement	Department	Stage	Task Type	Status	Hierarchy	Cost Price	Remove
1	27-036-00	MRO-C1600	101				Planned				
2	27-036-00-00	MRO-C1600	101	27-036-00			Planned				

Note: You can also navigate to this page from the Search Visit UI. For details, see Retrieving Existing Maintenance Visit Records, page 9-16.

4. To update a task associated with the visit, click the Name link corresponding to the pertinent task. This launches the Update Visit Task page. For details, see Updating Visit Task Headers, page 9-41.
5. To create a summary task, select Create Summary Task from the drop-down menu and click Go. The Create Summary Task page appears.

Create Summary Task page

ORACLE[®] Complex MRO

Home CMRO Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Create Summary Task

Visit Number 2 Visit Type A Check Item MRO-C1600

Unit C-1600, Tail # 101 Start Date 2002-JUN-04 Organization San Francisco Aviation Maintenance Center

Serial Number 101 End Date 2002-JUN-12 Department MRO Satellite Department

* Indicates required field

Task Header Information

* Task Name

Department

Originating Task

Cost Parent Task

Task Description

6. Enter task details and click Apply. Summary tasks are created automatically for each maintenance requirement in the process of creating Planned and Unplanned tasks. User should be able You can create summary tasks until the visit is closed. If new summary tasks are created in a released visit, then the status of the visit will not become 'Partially Released'.
7. To create a new task, unassociated to any maintenance route, click Create Unassociated Task. This launches the Create Unassociated Task page. For details, refer to Creating Visit Tasks Unassociated with Routes, page 9-36.

Create Unassociated Task page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Create Unassociated Task

Visit Number 456 Visit Type A Check Item AHLITEM002

Unit UC0426 Start Date 26-MAY-2004

Serial Number SN0426 End Date

Organization Department

Cancel Revert Apply

* Indicates required field

Task Header Information

* Task Name

Department

* Item

Service Request

Cost Parent Task

Task Description

* Duration /Hour

* Serial Number

Start From Hours

Originating Task

Cancel Revert Apply

8. To remove a task associated to the visit, click the corresponding Remove icon.

When you remove a task associated to a maintenance visit, note the following:

- If all tasks associated to a maintenance requirement summary task are deleted, the summary task is deleted as well.
- You can delete a task that is the originating task for another only if the association is first removed.
- You must first remove the association to delete a task with associated child tasks.
- You cannot delete a task that has other tasks dependent on it.

Note: You can add tasks (Planned, Unplanned, Unassociated and Summary) to a visit after the visit is exported to production and until the visit is closed. The tasks are automatically added to the cost structure. You can adjust the cost structure for the newly added tasks. You can also create technical dependency for the newly added tasks provided any of the subsequent jobs for the task for which technical dependency is created is not released.

You can push one or multiple unreleased tasks to production. The jobs are created in 'Unreleased' status. After tasks are added to a visit that is in released status, the visit status changes to 'Partially Released' until all the remaining tasks are released to production.

Associating Maintenance Requirements to a Visit

Planned maintenance requirements come from Unit Maintenance Plan. When a planned MR from Unit Maintenance Plan (UMP) is associated to a visit, all the routes associated with the MR are assigned to the visit automatically. If a group MR is associated to a visit, the routes of group MR and the routes of all the MRs in the group MR are assigned to the visit. You can also associate a service request that is planned through UMP to a

visit. The routes of all the MRs associated with the service request are assigned to the visit automatically.

Unplanned or non-routine maintenance requirements are those requirements that are not factored into the planning process in Unit Maintenance Plan and may occur due to adhoc service needs or during work on third party units, aircrafts or engines. Adding unplanned requirements to visits that are in production is especially useful for third party customers whose aircraft and engines are not tracked in Unit Maintenance Plan. When an unplanned maintenance requirement (MR) from Fleet maintenance program is added to a visit, all the routes associated with the MR are assigned to the visit. When a group MR is assigned, the routes of the group MR and the routes of all the MRs in the group MR are associated with the visit. Service requests logged by users also appear as non-routine requirements in Fleet Maintenance Program.

Note: If these unplanned requirements cannot be accomplished during the visit, it will show in Unit Maintenance Plan as Non-Routine requirements. These deferred maintenance requirements can then be scheduled to other visits in Unit Maintenance Plan.

Users can also create a non-routine work order in Production to meet these adhoc or unplanned service needs. See the Production module for more details.

To associate planned maintenance requirements to a visit:

1. Select the visit to which you want to add planned maintenance requirements. Navigate to the Update Visit page for this visit.

Note: Planners may also add maintenance requirements to a visit directly, without first navigating to the visit, using the Associate to Visit function in the Unit Maintenance Plan module.

Update Visit page

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Home CMRO Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

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

Visit

Update Visit

* Indicates required field

Visit Header Info

Visit Number 2

Visit Type A Check

Unit C-1600, Tail # 101

Organization San Francisco Aviation M...

Priority

Service Request

Project Template

Start Date 2002-JUN-04 Hour 00 Minutes 00

Planned End Date Hour 00 Minutes 00

End Date 2002-JUN-12 8:00 Due By Date

Description not yet associated to requirement dates in Unit Maintenance Plan

* Visit Name A-Check for N101

Item MRO-C1600

Serial Number 101

Department MRO Satellite Department

Visit Status Planning

Service Category

Simulation Plan Primary Plan

Cancel Revert Validate Go Apply

Unit Maintenance Plan | **Visit Work Package** | Long Term Planning | Home | CMRO Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

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- Click Maintenance Requirements in the side navigation menu. In the Search Maintenance Requirements page, select Add Planned Requirements from the drop-down menu.

Select Maintenance Requirement - Search maintenance Requirements page

ORACLE Complex MRO

Home CMRO Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Details Visit Tasks Maintenance Requirements Cost Details Visit Stages

Search Maintenance Requirements

Visit Number 2 Unit C-1600, Tail # 101 Serial Number 101 Visit Type A Check Start Date 2002-JUN-04 End Date 2002-JUN-12 Item MRO-C1600 Organization San Francisco Aviation Maintenance Center Department MRO Satellite Department

Maintenance Requirement Description

Go Clear

Search Results

Add Unplanned Requirement Go

Previous 1-2 of 2 Next

Title	Description	Service Request	Service Request Summary	Item	Serial Number	Tasks	Cost/Price	Remove
24-030-01	Check generator oil level.			MRO-C1600	101			
32-300-00	Check brake accumulator precharge pressure, service as required.			MRO-C1600	101			

Previous 1-2 of 2 Next

Cancel

Unit Maintenance Plan Visit Work Package Long Term Planning Home CMRO Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

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- The Search Unit Maintenance plan page appears. Query for the unit maintenance requirements. The results appear in the Unit Maintenance Requirements table.

Search Unit Maintenance Plan page

ORACLE Complex MRO

Home CMRO Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Search Unit Maintenance Plan

Unit Name C-1600, Tail # 101 Item MRO-C1600 Serial Number 101 Status Unscheduled

Sort by Due Date Title Due from

☒ Show Dependent Components ☐ Show Replicate

Go Clear

Program Type Due to ☐ Include Tolerance Dates Search For All

Results: Unit Maintenance Requirements

Select Unit Maintenance Plan and ... Associate to Visit Associate to Visit(Default Department)

Previous 1-10 of 61 Next

Select	Program Type	Title	Item	Serial Num	UOM	Remain	Cnt	Name	Earlier Due	Due Date	Latest Due	Tolerance	Status	Sched. Date	Visit	Originator Title	Dependent Title	Deferred From	Deferred To	Manually Planned
<input type="checkbox"/>	Letter Check	B-Check	MRO-C1600	101	-11374	TSN			2002-NOV-13											
<input type="checkbox"/>	Letter Check	test mr 1	MRO-C1600	101	10	TSI			2005-APR-06	2005-APR-11	2005-APR-16									
<input type="checkbox"/>	Corrosion	TestResc	MRO-C1600	101	178	CSI			2005-JUN-29											

4. Select one or more maintenance requirements and click Associate to Visit. The Create Planned Task page appears. Click Apply to add the task to the visit. A summary task is automatically created for each maintenance requirement and service request (SR) in the process of creating Planned tasks. Summary tasks will be used as the originating task and cost parent of planned tasks. If you select Associate to Visit (Default Department), the task is automatically added to the visit without requiring association through the Create Planned Task page.

Create Planned Task page

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Complex MRO

Home CMRO Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

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

Visit

Create Planned Task

Visit Number 2 Visit Type **A Check** Item **MRO-C1600**

Unit **C-1600, Tail # 101** Start Date **2002-JUN-04** Organization **San Francisco Aviation Maintenance Center**

Serial Number **101** End Date **2002-JUN-12** Department **MRO Satellite Department**

Unit Maintenance Plan Requirements

Select	Maintenance Requirement/Service Request	Due By Date	Item	Serial Number	Service Request Number	Department
	B-Check	2002-NOV-13	MRO-C1600	101		

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Note: If a Unit is specified in visit header, then tasks can only be created for units on the configuration tree of the visit header unit. One MR or SR must be planned entirely in only one visit instead of across visits. You cannot associate individual routes to visits. The same MR Route and Serial Number combination can be planned in a visit only once. Route Dependency defined in Fleet Maintenance program is imported as task hierarchy for the newly created planned tasks. An Unit Maintenance Plan requirement can be associated to only one primary visit. You can associate a department to the tasks. Alternatively, the department associated to the visit header is associated to all the tasks created.

To associate unplanned maintenance requirements to a visit:

1. Select the visit to which you want to add unplanned maintenance requirements to. Navigate to the Update Visit page for this visit. Click Maintenance Requirements in the side navigation menu. Maintenance requirements associated with the visit in Unit Maintenance Plan will appear be displayed in the search results.

Search Maintenance Requirements page

ORACLE Complex MRO

Home CMRO Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Details
Visit Tasks
Maintenance Requirements
Cost Details
Visit Stages

Search Maintenance Requirements

Cancel

Visit Number 8 Visit Type C Check Item MRO-C1600
Unit C-1600, Tail # 101 Start Date 2003-APR-07 Organization San Francisco Aviation Maintenance Center
Serial Number 101 End Date Department MRO Headquarters

Maintenance Requirement Description

Go Clear

Search Results

Add Unplanned Requirement Go

Title	Description	Service Request	Service Request Summary	Item	Serial Number	Tasks	Cost Price	Remove
No records were found matching the given criteria..								

Cancel

Unit Maintenance Plan Visit Work Package Long Term Planning Home CMRO Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

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2. Select Add Unplanned Maintenance requirement from the drop-down menu and click Go. The Search Maintenance Requirements page appears. Query for the maintenance requirements and click Go.

View Maintenance Requirement Search Results

ORACLE Complex MRO

Home CMRO Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Search Maintenance Requirements

Title
Originating Document
Program Type
Category
Associated Item MRO-C1600
Serial Number 101
Revision
Status Complete
Parent Title
Description
Route Number

Go Clear

Maintenance Requirements Results

Associate To Visit Associate To Visit(Default Department) Cancel

Previous 1-10 of 64 Next

Select	Title	Revision	Description	Program Type	Status	Effective From	Effective To	Associated Item	Serial Number
<input type="checkbox"/>	21-040-00		Replace the electrical and electronic compartment supply fan filter.	Letter Check	Complete	2002-NOV-13		MRO-C1600	101
<input type="checkbox"/>	21-150-00		Replace cabin temperature sensor.	Letter Check	Complete	2002-NOV-13		MRO-C1600	101
<input type="checkbox"/>	24-030-01		Check generator oil level.	Letter Check	Complete	2002-NOV-13		MRO-C1600	101
<input type="checkbox"/>	27-036-00		Perform detail inspection of rudder components.	Letter Check	Complete	2002-NOV-13		MRO-C1600	101
<input type="checkbox"/>	27-073-00		Perform a general visual inspection of the elevator mechanical control path.	Letter Check	Complete	2005-MAR-17		MRO-C1600	101
<input type="checkbox"/>	28-020-01		Operationally check left surge tank relief valves.	Letter Check	Complete	2002-NOV-13		MRO-C1600	101
<input type="checkbox"/>	29-030-02		Replace hydraulic pump filter.	Letter Check	Complete	2002-NOV-13		MRO-C1600	101
<input type="checkbox"/>	32-300-00		Check brake accumulator precharge pressure, service as required.	Letter Check	Complete	2002-NOV-13		MRO-C1600	101

3. From the search results, select one or more maintenance requirements and click Associate to Visit or Associate to Visit (default dept). The Create Unplanned Visit Task page appears. Click Apply to add the task to the visit.

Create Unplanned Visit Task page

ORACLE
Complex MRO

Home CMRO Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

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

Visit

Create Unplanned Visit Task

Visit Number **8** Visit Type **C Check** Item **MRO-C1600**

Unit **C-1600, Tail # 101** Start Date **2003-APR-07** Organization **San Francisco Aviation Maintenance Center** Cancel Revert Apply

Serial Number **101** End Date Department **MRO Headquarters**

Task Header Information

Select Maintenance Requirement	Item	Serial Number	Department
Test MR Alt 001	MRO-C1600	101	

Cancel Revert Apply

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Note: Select Associate to Visit (Default Department) to add the task automatically to the visit without going through the Create Unplanned Task page.

- The maintenance requirement is added to the visit record. The tasks inherits the same stage as the corresponding MR route. A summary task is created automatically for each MR in the process of creating unplanned tasks. Summary tasks are used as originating task and cost parent of unplanned tasks.

View Requirement Association

ORACLE
Complex MRO

Home CMRO Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

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

Visit

Search Maintenance Requirements Cancel

Visit Number **8** Visit Type **C Check** Item **MRO-C1600**

Unit **C-1600, Tail # 101** Start Date **2003-APR-07** Organization **San Francisco Aviation Maintenance Center**

Serial Number **101** End Date **2003-APR-08** Department **MRO Headquarters**

Maintenance Requirement Description Go Clear

Search Results Add Unplanned Requirement Go

Title	Description	Service Request	Service Request Summary	Item	Serial Number	Tasks	Cost Price	Remove
Test MR Alt 001				MRO-C1600	101			

Cancel

Unit Maintenance Plan **Visit Work Package** Long Term Planning Home CMRO Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

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Note: The same MR Route and Serial Number combination can be planned in a visit only once. You can associate a department to the tasks. Alternatively, the department associated to the visit header

is associated to all the tasks created. You can create unplanned tasks until the visit is closed. If new unplanned tasks are created in a released visit, then the status of the visit becomes 'Partially Released'. You can delete a maintenance requirement from the visit when the visit is in planning stage. When a task is deleted all the tasks of that MR get deleted.

Retrieving Existing Visit Task Records

After a maintenance planner creates a visit structure, the Search Visit Tasks page permits the planner to retrieve tasks associated with a particular visit, or to add new tasks to the visit structure.

After retrieving visit tasks based on desired search criteria, the planner can select a task for subsequent editing. The Search Visit Tasks page also allows maintenance personnel to link to pages that permit creation of tasks associated with serialized inventory items, for both imminent and undated maintenance requirements, and tasks associated only with non-serialized assemblies.

Prerequisites

- ☐ The visit record for which you want to retrieve associated tasks must exist in the database, and must have tasks assigned to it.

To retrieve existing visit tasks:

1. Click the Planning link at the top right corner of the Oracle Complex Maintenance, Repair, and Overhaul Home page to access the Visit Work Package tab.
2. Click Visit Work Package. The Search Visit page appears.
3. Find the visit associated with the task you want to retrieve. Use the information in the following table to query for records.

Description of fields in the Search Visit Task page

Field Name	Description
Task Number	Is an alphanumeric value that uniquely identifies the task you retrieve.
Task Name	Is the name of the task that you want to retrieve.
Maintenance Requirement	Contains the ID of the maintenance requirement corresponding to the task that you want to retrieve.
Route	Is the identifier of the maintenance route to which the tasks you want to work with is connected. Use a value in this field to limit the tasks that are retrieved from the database.
Display Only	Is a drop-down list field that provides a task type to select when retrieving the visit's tasks.
Department	Is the name of the department that is responsible for completion of the maintenance task. Click the LOV icon to select from a list of departments for which visit tasks have been created.
Task Type	Is the task category that classifies the task as planned (imminent tasks), unplanned (required tasks, but not dated), or unassociated (ad hoc tasks).
Tasks Due By	Is the date on which an imminent task is due to be completed. Click the calendar icon to display a calendar from which you can select a due date.
Service Request	Is the service request identifier that corresponds to the task you want to retrieve.
Priority	A value that defines the priority assigned to a visit. For example, High, Medium, and Low, or 1,2, and 3, respectively. Visit priority values should be the same as currently used by WIP and defined by the lookup WIP_EAM_ACTIVITY_PRIORITY. Priority can be entered and modified until the visit is pushed to production. The planning engine also plans material requirements for visits based on priorities.

4. The lower half of the screen displays the Search Results. Select the visit, and choose Search Tasks from the drop-down menu. The Search visit task page appears, displaying the details of the tasks associated with the visit.

View Task Search results - Search Visit Tasks page

ORACLE Complex MRO

Home CMRO Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Search Visit Task Cancel

Visit Number 2 Unit **C-1600, Tail # 101** Visit Type **A Check** Start Date **2002-JUN-04** Item **MRO-C1600** Organization **San Francisco Aviation Maintenance Center**

Serial Number **101** End Date **2002-JUN-12** Department **MRO Satellite Department**

Task Number Task Name

Maintenance Requirement Route

Task Type Tasks Due By

Workorder Workorder Status

Service Request Department

Item Serial Number

Route Type Stage

Status

Search Results

1-10 of 12

Task Number	Task Name	Item	Serial Number	Maintenance Requirement	Department	Stage	Task Type	Status	Hierarchy	Cost/Price	Remove
1	24-030-01	MRO-C1600	101				Unplanned				
2	A-Check	MRO-C1600	101				Unplanned				

5. Enter information in any of the search fields to query for tasks related specifically to your search criteria.
6. To update visit task details, click the Task Number link.

UpdateTask Header page

ORACLE Complex MRO

Home CMRO Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Update Task Header

Visit Number 2 Unit **C-1600, Tail # 101** Visit Type **A Check** Start Date **2002-JUN-04** Item **MRO-C1600** Organization **San Francisco Aviation Maintenance Center** Cancel Revert Apply

Serial Number **101** End Date **2002-JUN-12** Department **MRO Satellite Department**

* Indicates required field

Task Header Information

Task Number **1** Task Name **24-030-01**

Department Task Type **Unplanned**

Task Status

Item **MRO-C1600** Serial Number **101**

Maintenance Requirement Route

Zone Sub Zone

Route Type Service Request

Cost Parent Task **2** Originating Task

Start From Hours Duration /Hour

Start Time **2002-JUN-04 4:00** End Time **2002-JUN-04 4:00**

Stage Workorder Status

Workorder Number

Project Task Number

Task Description

Cancel Revert Apply

Unit Maintenance Plan **Visit Work Package** Long Term Planning Home CMRO Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Note: You can update the visit task details and associated information only if the visit record is in the Planning state. If the visit record is in the Released or Closed status, the system generates the visit task details page in view-only mode.

7. To remove a task associated to the visit, click the Remove icon corresponding to the task record.

Note: You can only remove a task that is in the Planning state. To delete a task from a Primary visit, any task associated to it in a simulation visit must have the association removed. If you delete all tasks associated to a maintenance requirement summary task, the summary task is deleted as well. To remove a task that is the originating task for another task, the associations must be first removed. To remove a task with associated children tasks, the association must first be removed. Also, a task with other technically dependent tasks cannot be removed. Any material requests defined in Long Term Planning for a task must be cancelled before it can be deleted.

Updating Visit Records

Oracle Complex Maintenance, Repair, and Overhaul allows you to retrieve existing maintenance visit records and edit the header and associated tasks information.

The following explains how you can update existing visit records:

Note: You can update these attributes only for a visit record that is in the Planning state. If the selected visit is in the Released or Closed states, the application generates the details and visit tasks pages in view-only mode.

Prerequisites

- ☐ The visit record you want to edit must exist in the database. The record must be in the Planning state.

To update visit details:

1. Retrieve the visit records that match your need. See Retrieving Existing Maintenance Visit Records, page 9-16.
2. In the Search Results list, click the Visit Number link of the record that you want to edit. This launches the Update Visit page if the visit record is in the Planning state.

Update Visit Details - Update Visit page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Details

Visit Tasks

Maintenance Requirements

Cost Details

Update Visit

Cancel Revert Apply

* Indicates required field

Visit Header Info

Visit Number	456	Visit Name	Visit0526
* Visit Type	A Check	Item	AHLITEM002
Unit	UC0426	Serial Number	SN0426
Organization		Department	
Service Request		Category	Category 5
		Simulation Plan	Primary Plan
Start Date	26-MAY-2004	Hour	05 00
Planned End Date	31-MAY-2004	Hour	08 00
End Date		Due By Date	
Visit Status	Planning		
Description	New Visit		

Cancel Revert Apply

3. Make the necessary changes to the field values. For field descriptions, see Description of fields in the Create and Edit Maintenance Visit pages, page 9-7.
4. Click Apply to record the changes.

If the visit record you selected has the status Released, or Closed, the application launches the View Visit page. If necessary, a Super-User can change the details of a visit. This is possible if such a user responsibility has been created while setting up Oracle Complex Maintenance, Repair, and Overhaul.

5. To update tasks associated with the visit, use the side navigation menu. See Associating Tasks with Maintenance Visits, page 9-20.

Associating Item Serial Numbers with Tasks

A repair job required to fix a defect reported by built-in test equipment, monitoring and control systems, operating personnel, or maintenance personnel during inspections, might not have a corresponding route in the unit maintenance plan. In such cases, it may be necessary to select a maintenance requirement and routes to add to a visit for the equipment type.

After a technician has inspected a part, the equipment type task must be associated with an actual part in the unit configuration. If the part to be serviced or repaired is not serialized, or not of sufficient importance to describe in the Unit Configuration, the task can be associated with the visit header's equipment type and serial number.

Prerequisites

- ❑ The equipment specific task must exist in the database. The service request to be connected to the ad hoc task must exist in the database. The serial number of the part to be serviced must exist as part of the unit configuration.

To associate serial numbers and service requests with a task:

1. Navigate to the Create Unplanned Visit Task page. The page displays the Visit Number, Visit Type, Item, Unit, Start Date and End Date as context information. The Item subcomponent in the visit package to which the service request or serial number is to be associated is also displayed as view-only.

View Task Header Information - Create Unplanned Visit Task page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Create Unplanned Visit Task

Visit Number 2 Visit Type A Check Item MRO-C1600

Unit C-1600, Tail # 101 Start Date Organization Cancel Revert Apply

Serial Number 101 End Date Department

Fleet Maintenance Plan Requirements

Maintenance Requirement 21-040-00

* Indicates required field

Task Header Information

* Item [] * Serial Number []

Department [] Service Request []

Cancel Revert Apply

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2. Select an Item using the Item LOV. Enter a Serial Number. Use the Search icon to retrieve and display all matching records in the database. Click the pertinent search result to return the value to the corresponding field. Only a serial number that corresponds to the item for which the task was created can be used.

Associate Item and Serial Number to Tasks - Create Unplanned Visit Task page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Create Unplanned Visit Task

Visit Number 2	Visit Type A Check	Item MRO-C1600
Unit C-1600, Tail # 101	Start Date	Organization
Serial Number 101	End Date	Department

[Fleet Maintenance Plan Requirements](#)

Maintenance Requirement **21-040-00**

* Indicates required field

Task Header Information

* Item	MRO-C1600	* Serial Number	101
Department		Service Request	

Cancel Revert Apply

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The table below provides describes fields in the Associate Serial Number to Task page. The following fields update the association between a task, a service request, and a serialized component of the equipment unit:

Description of fields in the Associate Serial Number/Service Request to Task page

Field Name	Description
(Associated to) Serial Number	Is the user-supplied part identifier to which the maintenance requirement applies.
Unit	Is the name of the unit configuration. For example, it is the name of the configuration of the assembly, subassembly, plant, or vehicle, for which you would like to retrieve visit definitions. Enter the full name of a unit configuration, or use the field list of values pages by clicking the flashlight icon. If you link to the LOV page to select a unit configuration by part of its name, only Unit Configuration objects that are complete display because maintenance visits can only be defined for complete unit configurations.

The following view-only context fields appear on the Associate Serial Number to Task page:

- Visit Number
- Serial Number
- Visit Type
- Start Date
- Item
- End Date

- Click Apply to associate the Item Serial Number to the selected task.

Note: The unit configuration name is displayed as part of the visit context information, and is a display-only field on this page.

Creating Visit Tasks Unassociated with Routes

The following provides detailed procedures for creating tasks that are unassociated with any maintenance route for attachment to visits. This process supports the creation of an ad hoc task, usually to repair or replace a component, to be included in a shop or field maintenance visit. Tasks can be added to a visit on an ad hoc basis, even if no corresponding route exists. The description of the work to be accomplished, and the required tools and materials is stored as a task remark.

The Create Unassociated Task page is used to create a task that is not associated with any maintenance route.

Prerequisites

- The visit record for which an ad hoc task is to be created must exist in the database. The part type to which the task pertains must exist in the unit configuration hierarchy of the equipment to which the visit applies.

To create visit tasks unassociated with routes:

- On the Search Visit Task page (see Retrieving Existing Visit Task Records , page 9-29for navigation), use the Visit Number field to select the visit record to which you want to associate tasks that are unassociated with routes.
- Click Create Unassociated Tasks. This launches the Create Unassociated Task page with the visit context information.

Define New Unassociated Task - Create Unassociated Task page

ORACLE[®] Complex MRO

Home CMRO Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

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

Visit

Create Unassociated Task

Visit Number **140** Visit Type **A Check** Item **MRO-M1900**

Unit **M-1900, Tail # 301** Start Date **2005-MAR-29** Organization **San Diego Manufacturing** Cancel Revert Apply

Serial Number **301** End Date **2005-MAR-29** Department **Assembly Department**

* Indicates required field

Task Header Information

* Task Name

Department

* Item

Start From Hours

Cost Parent Task

Stage

* Serial Number

* Duration /Hour

Originating Task

Task Description

Cancel Revert Apply

Note: You can also access the Create Unassociated Task page from the Visit Tasks page by clicking the Create Unassociated Tasks button. See Associating Tasks with Maintenance Visits, page 9-20.

3. Use the information in the following table to create unassociated tasks. The following fields comprise a task record for the visit, where the task does not have an associated service requirement in the equipment maintenance plan.

Description of fields in the Create Unassociated Task page

Field Name	Description
Task Name	Contains any name for the task that you consider meaningful. The task name can contain any letters or numbers.
Item	Is the master configuration object with which this task is associated.
Service Request	Is the identifier of the technical defect that is repaired by the accomplishment of the associated task.
Cost Parent Task	Is the identifier of the summary task in the task hierarchy at which a subtotal of cost transactions, including the costs attached to the task being created, will be calculated. A top task must be a summary task.
Description	Contains a description of the work that this task consists of. This task does not have a corresponding route. You should therefore, provide a complete description including the resources required to finish the job, in this field.
Duration/Hour	Contains the duration in hours of this task.
Serial Number	Is the user-supplied part identifier to which this new task applies.
Start From Hours	Is the time offset in decimal hours, of this task, from the beginning of the visit being planned. Use this field to specify precisely when this task should start relative to the beginning of the visit.
Originating Task	Is the identifier of another task that requires the inclusion of the current task in the visit task package. A task may not originate itself. The originating task usually is part of a scheduled maintenance requirement.
Stage	Is to specify which stage of the visit the task will be associated with.

The Visit Number, Unit, Visit Type, Start Date, Item, and End Date fields are view-only and appear as part of the context information on the Create Unassociated Task Page. Use the Remarks field to describe the work to be completed, the level of skill required to accomplish the task, the part kits required, and any tools and materials required.

Enter Task Header Information - Create Unassociated Task page

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Complex MRO

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Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Create Unassociated Task

Visit Number 140	Visit Type A Check	Item MRO-M1900
Unit M-1900, Tail # 301	Start Date 2005-MAR-29	Organization San Diego Manufacturing
Serial Number 301	End Date 2005-MAR-29	Department Assembly Department

Cancel Revert Apply

* Indicates required field

Task Header Information

* Task Name	Parts servicing	Stage	5
Department		* Serial Number	364324
* Item	MRO-3786671	* Duration /Hour	2
Start From Hours		Originating Task	
Cost Parent Task			
Task Description			

Cancel Revert Apply

Note: If unit is specified in the visit header, you can create unassociated tasks only for one of the components of the unit.

- Click Apply to save the unassociated task, and proceed to update the visit task. For more information, see Updating Visit Task Headers, page 9-41.

Update Task Header page

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Complex MRO

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Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Details
Hierarchy
Cost Details

Update Task Header

Visit Number 140	Visit Type A Check	Item MRO-M1900
Unit M-1900, Tail # 301	Start Date 2005-MAR-29	Organization San Diego Manufacturing
Serial Number 301	End Date 2005-MAR-30	Department Assembly Department

Cancel Revert Apply

* Indicates required field

Task Header Information

Task Number 3	* Task Name	Parts servicing	
Department	Task Type	Unassociated	
Task Status	In Planning		
Item	* Serial Number	364324	
Stage	5		
Cost Parent Task	Originating Task		
Start From Hours	* Duration /Hour	2	
Start Time	2005-MAR-30 19:00	End Time	2005-MAR-30 21:00
Task Description			

Cancel Revert Apply

Unit Maintenance Plan | Visit Work Package | Long Term Planning | Home | CMRO Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

Note: You can create unassociated tasks until the visit is closed. If new unassociated tasks are created in a released visit, the status of the visit changes to 'Partially Released'.

Setting up Stages for Tasks

Users can associate tasks with the stages defined for a visit. Stages can be determined when associating routes to a maintenance requirement (MR). When this MR is assigned to a visit, the task automatically inherits the stage definition specified during MR-Route association. Stages cannot be assigned to Summary tasks.

To associate stages with tasks:

1. Navigate to the Create Unassociated Task page to define a task.

Define a Task - Create Unassociated Task page

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Complex MRO

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

Visit

Create Unassociated Task

Visit Number 140	Visit Type A Check	Item MRO-M1900	
Unit M-1900, Tail # 301	Start Date 2005-MAR-29	Organization San Diego Manufacturing	<input type="button" value="Cancel"/> <input type="button" value="Revert"/> <input type="button" value="Apply"/>
Serial Number 301	End Date 2005-MAR-29	Department Assembly Department	

* Indicates required field

Task Header Information

* Task Name <input type="text"/>	Stage <input type="text"/>
Department <input type="text"/>	
* Item <input type="text"/>	* Serial Number <input type="text"/>
Start From Hours <input type="text"/>	* Duration /Hour <input type="text"/>
Cost Parent Task <input type="text"/>	Originating Task <input type="text"/>
Task Description <input type="text"/>	

2. Enter task details. To associate stages, click the LOV icon for the Stage field. The Select Stage page appears. Query for the stages defined.

Select Stage page

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Complex MRO

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Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Select Stage

Enter Partial Value % Search Cancel

Stage	Stage Number	Duration
Clean	1	3
Oil Check	2	2
Servicing	3	5
Install Parts	4	2
5	5	0
6	6	0
7	7	0
8	8	0
9	9	0
10	10	0

First | Previous 1 - 10 of 10 Next | Last

Cancel

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3. Select the stage that you want to associate the task with. The Task header information gets updated to reflect the stage associated.

View Stage Associated with Task - Create Unassociated Task page

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Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Create Unassociated Task

Visit Number 140 Visit Type A Check Item MRO-M1900

Unit M-1900, Tail # 301 Start Date 2005-MAR-29 Organization San Diego Manufacturing

Serial Number 301 End Date 2005-MAR-29 Department Assembly Department

Cancel Revert Apply

* Indicates required field

Task Header Information

* Task Name Oiling

Department

* Item MRO-GF-180

Start From Hours

Cost Parent Task

Task Description

Stage Oil Check

* Serial Number 6235

* Duration /Hour 2

Originating Task

Cancel Revert Apply

Note: Users can add and modify stage information until the task is pushed to production. A task with no stage defined for it is planned at the end of the visit and is not considered for long term planning. A stage with no duration and tasks in a visit implies that the stage is not applicable for that visit.

Task hierarchy honors stage sequence. If there are two tasks and one is dependent on the other, the second task will be in the later stage or in the same stage as the first task.

Updating Visit Task Headers

Oracle Complex Maintenance, Repair, and Overhaul allows you to retrieve existing maintenance visit task records, and edit the header and task hierarchy information. For updating task hierarchy, see Defining Visit Task Hierarchy, page 9-43.

The following explains how you can update existing visit headers. After a maintenance planner associates maintenance requirements with a visit by retrieving the routes defined for the imminent maintenance work, the resulting set of tasks can be edited.

The planner can modify the task attributes that are unique to the current visit association. Attributes inherited from the route definition cannot be updated.

Use the Update Task Header page to update visit task header details, and to navigate to pages that allow you to update task dependency and task hierarchy.

You can access the Update Task Header page using any of the following methods.

From the Search Task page:

1. Retrieve desired visit task records from the database. See Retrieving Existing Visit Task Records, page 9-29.
2. On the Search Results list, click the Task Number link of the task record that you want to update. This launches the Update Task Header page.

Modify Information - Update Task Header page

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Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Update Task Header

Visit Number 72 Visit Type A Check Item VG0113
Unit UC0113 Start Date 2005-JAN-13 Organization San Diego Manufacturing
Serial Number SN0113 End Date 2005-JAN-13 Department Outside Processing

Cancel Revert Apply

* Indicates required field

Task Header Information

Task Number 2 Task Name Route0113
Department Department Task Type Unplanned
Task Status In Planning Serial Number SN0113
Item VG0113 Route Route0113
Maintenance Requirement MR0113 Sub Zone
Zone Route Type Service Request
Cost Parent Task 1 Originating Task 1
Start From Hours Duration /Hour 5
Start Time 2005-JAN-13 7:00 End Time 2005-JAN-13 12:00
Stage
Task Description

Cancel Revert Apply

3. Use the information in the following table to enter or update values in the Update Task Header page.

Note: You cannot update a task if a maintenance requirement or maintenance requirement route is associated with the task.

Description of fields in the Update Task Header page

Field Name	Description
Task Number	Is an alphanumeric value that uniquely identifies the task you update.
Task Name	Contains any name for the task that you consider meaningful. The task name can contain any letters or numbers.
Maintenance Requirement	Indicates the imminent maintenance requirement to which this task applies. Updating this field might require that the route association must also be updated.
Service Request	Is the identifier of the technical defect that is repaired by the accomplishment of the associated task.
Cost Parent Task	Is the identifier of the summary task in the task hierarchy at which a subtotal of cost transactions, including the costs attached to the task being updated, will be calculated. A top task must be a summary task.
Description	Contains a description of the work that this task consists of. If the task does not have a corresponding route, you should provide a complete description, including the resources required to finish the job, in this field.
Duration/Hour	Contains the duration in hours of this task.
Serial Number	Is the user-supplied part identifier to which this task applies.
Route	Is the maintenance route associated with the previously selected maintenance requirement.
Start From Hours	Is the time offset in decimal hours, of this task, from the beginning of the visit being planned. Use this field to specify precisely when this task should start relative to the beginning of the visit.
Originating Task	Is the identifier of another task that requires the inclusion of the current task in the visit task package. A task may not originate itself. The originating task usually is part of a scheduled maintenance requirement.
Stage	Is defined when creating visits. A Visit can have multiple stages defined for it.

Visit Number, Serial Number, Visit Type, Start Date, Item, and End Date are view-only context fields.

4. Click Apply to save the changes.
5. To proceed to defining or updating task dependencies and hierarchy, use the side navigation menu.

From the Create Unplanned Visit Task page:

1. Associate Item Serial Numbers to visit tasks. See *Associating Item Serial Numbers to Tasks*, page 9-33. Clicking Apply to save the association will launch the Update Task Header page.
2. Enter or update the field values as required.
3. Click Apply to save the changes.

From the Create Unassociated Task page:

1. Create an unassociated task for a visit. For details, refer to *Creating Visit Tasks Unassociated with Routes*, page 9-36. Click Apply to save the unassociated task will launch the Update Task Header page.
2. Enter the field values as required.
3. Click Apply to save the changes.
4. To proceed to defining or updating task dependencies and hierarchy, use the side navigation menu.

Defining Visit Task Hierarchy

The following details procedures for defining and editing visit task hierarchy. After visit tasks are attached to the visit header, further refinement of the visit structure involves three processes: removing redundant tasks, defining the task hierarchy for costing purposes, and arranging the tasks sequence. It may be possible to remove redundant tasks if more than one job will be done in the same area of the equipment. To support cost transaction summarization during and after production, a task hierarchy specifies the summary tasks for subtotal calculations using the Oracle Projects features. The tasks sequence specifies the temporal order of tasks to be carried out during the visit, respecting the technical considerations of task dependencies.

After defining task dependencies, the planner can create a final task structure by deriving the task network connecting tasks to each other in a parent-child relationship. The task network complies with the technical dependencies between tasks while becoming the optimal structure for more efficient maintenance resources utilization.

The Visit Work Package module allows maintenance planners to retrieve visit tasks, select a task record, and define the parent-child relationship between the selected task and other tasks in the visit structure using the Task Hierarchy page.

Prerequisites

- ☐ The visit and the associated maintenance task for which you want to define the hierarchy must exist in the database. The visit record must be in the Planning state.

To define visit task hierarchy:

1. Retrieve desired visit task records from the database. See *Retrieving Existing Visit Task Records*, page 9-29.
2. On the Search Results list, click the Task Name link of the task record that you want to update. This launches the Update Task Header page.
3. Click Hierarchy on the side navigation menu to launch the Task Hierarchy page. The task header context information is displayed on the page. Optionally, you can use

the Hierarchy icon in the Search Visit Task page, to navigate to the Task Hierarchy page for a particular task.

Task Hierarchy page

- To edit the workflow hierarchy information of an associated task, select the task using the radio button, and click Edit Hierarchy. This launches the Update Visit Task Hierarchy page. The following table describes the fields in the Update Visit Task Hierarchy page.

Field Name	Description
Task Name	identifies the task that you want to associate in a parent or child relationship with the task in context. A task can have one or more parent or child task relationships.
Relationship	Is a seeded value. Select Parent or Child.

Task Name, Service Request, Maintenance Requirement, Route Zone, and Sub Zone are view-only task context fields.

- To remove a task from the hierarchy, click the corresponding Remove icon on the Task Hierarchy page.
- Click Apply to save the changes, and refresh the Hierarchy list with new rows.

Viewing Maintenance Requirements for a Visit

The Search Maintenance Requirements page provides an overview of maintenance requirements associated with a visit. You can search for, view the details, the applicable tasks and the costing information for all maintenance requirements.

Prerequisites

- ❑ The maintenance requirement that you want to view details of must exist in the database and must have been associated with the visit.

To view maintenance requirements associated with a visit:

1. Retrieve the visit records that match your needs. See Retrieving Existing Maintenance Visit Records, page 9-16.
2. Select the visit that you want to view the maintenance requirements for and choose Maintenance Requirements from the drop down menu. The Search Maintenance Requirements page appears displaying a list of all the maintenance requirements.

View Maintenance Requirements - Search Maintenance Requirements page

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

Visit

Details
Visit Tasks
Maintenance Requirements
Cost Details
Visit Stages

Search Maintenance Requirements

Cancel

Visit Number **72** Visit Type **A Check** Item **VG0113**
Unit **UC0113** Start Date **2005-JAN-13** Organization **San Diego Manufacturing**
Serial Number **SN0113** End Date **2005-JAN-13** Department **Outside Processing**

Maintenance Requirement Description
Go Clear

Search Results

Add Unplanned Requirement Go

Previous 1-1 of 1 Next

Title	Description	Service Request	Service Request Summary	Item	Serial Number	Tasks	Cost/Price	Remove
MR0113				VG0113	SN0113			

Previous 1-1 of 1 Next

Unit Maintenance Plan | **Visit Work Package** | Long Term Planning | Home | CMRO
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3. Optionally, in the Search results list, click the Visit Number link of the record. This launches the Update Visit page if the visit record is in the Planning status. If the visit record is in the Released or Closed status, the application generates the View Visit Details page. Click maintenance requirements in the side navigation menu to view maintenance requirements.
4. To view task and cost/price information, click the corresponding icon in left-hand navigation panel.

View Cost/Price Details - Visit Cost and Price page

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

Visit

[Details](#)
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Visit Cost and Price

Visit Number **72** Visit Type **A Check** Item **VG0113**
Unit **UC0113** Start Date **2005-JAN-13** Organization **San Diego Manufacturing**
Serial Number **SN0113** End Date **2005-JAN-13** Department **Outside Processing**

Cost/Price Details

[Estimate Price](#) [Estimate Cost](#) [Price Snapshot](#) [Cost Snapshot](#) [Items Without Price](#) [Apply](#) [Revert](#)

☒ Visit for Outside Party

Price List Currency **EUR**

Estimated Cost **0** Actual Cost **0**
Estimated Price **180** Actual Price **0**
Estimated Profit **180** Actual Profit **0**

[Estimate Price](#) [Estimate Cost](#) [Price Snapshot](#) [Cost Snapshot](#) [Items Without Price](#) [Apply](#) [Revert](#)

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- To view the stages associated with the visit, click the Visit Stages link in the side navigation menu.

View Visit Stages

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

Visit

[Details](#)
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Visit Stages

Visit Stages

Visit Number **72** Visit Type **A Check** Item **VG0113**
Unit **UC0113** Start Date **2005-JAN-13** Organization **San Diego Manufacturing**
Serial Number **SN0113** End Date **2005-JAN-13** Department **Outside Processing**

Stage List

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

Previous 1-10 of 10 Next

Stage Number	Name	Duration	Planned Start Date	Planned End Date	Actual Date
1	1	0	2005-01-13 07:00:00.0	2005-01-13 07:00:00.0	
2	2	0	2005-01-13 07:00:00.0	2005-01-13 07:00:00.0	
3	3	0	2005-01-13 07:00:00.0	2005-01-13 07:00:00.0	
4	4	0	2005-01-13 07:00:00.0	2005-01-13 07:00:00.0	
5	5	0	2005-01-13 07:00:00.0	2005-01-13 07:00:00.0	
6	6	0	2005-01-13 07:00:00.0	2005-01-13 07:00:00.0	
7	7	0	2005-01-13 07:00:00.0	2005-01-13 07:00:00.0	
8	8	0	2005-01-13 07:00:00.0	2005-01-13 07:00:00.0	
9	9	0	2005-01-13 07:00:00.0	2005-01-13 07:00:00.0	
10	10	0	2005-01-13 07:00:00.0	2005-01-13 07:00:00.0	

Defining Visit Cost Structure

The following section provides detailed procedure on defining visit cost structures. A maintenance planner may not wish to export all planned visit definitions to Oracle

Projects. Using the Oracle Complex Maintenance, Repair, and Overhaul Long Term Planning module, the planner may define a set of visit options, called simulations. Each member of a simulation set is a complete visit definition. The planner uses the simulation set to determine the task package that is optimal with respect to the scheduling of repair facilities, and the materials necessary to complete each job.

Prerequisites

- ☐ The visit and tasks must exist in the database. The visit cost structure must be known for accounting purposes.

To define visit cost structure:

1. Retrieve the desired visit records from the database. See Retrieving Existing Visit Records, page 9-16.
2. On the Search Results list, click the Cost Structure icon corresponding to the visit for which you want to define or update cost structure. This launches the Visit Cost Structure page with the visit context information.

Define Visit Cost Structure - Cost Structure page

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Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Cost Structure

Visit Number 436

Unit

Serial Number 300

Visit Type A Check

Start Date 12-OCT-2004

End Date 14-OCT-2004

Item 737-800

Organization San Diego Manufacturing

Department Inspection Department

gantas mat req visit

737-800 Maintenance Check

RTS Route

R and R APU Generator

Cancel Revert Apply

Indicates required field

Cost Information

Estimated Cost

Actual Cost

Summary Task Header Info

Task Number 1

Task Name 737-800 Maintenance Che

Item 737-800

Maintenance Requirement 737-800 Maintenance Check

Cost Parent Task

Task Description

Department

Serial Number 300

Service Request

Originating Task

3. Enter the field values as required. Although several fields can be updated on this page, Cost Parent Task field determines which other task will be the current task's immediate predecessor in the cost accounting structure. The following fields can be updated by a maintenance planner who needs to modify a visit's task structure for costing purposes. The tree-structured task graphic shows the relationships between the tasks. Select the Task Name link corresponding to the task that you want to update. You can also search for a task using the Search icon. Use the information in the following table to enter details related to visit cost structure.

Description of fields in the Visit Cost Structure page

Field Name	Description
Task Name	Contains any name for the task that you consider meaningful. The task name can contain any letters or numbers.
Serial Number	Is the user-supplied part identifier to which this task applies.
Maintenance Requirement	Is the imminent requirement to which this task applies. Updating this field might require that the route association is also updated.
Service Request	Is the report identifier of the technical defect that is repaired by the accomplishment of the associated task.
Cost Parent Task	Is the mid-level task to which the current task is connected as a low-level task. Note that only low-level tasks can have associated cost transactions.
Originating Task	Is the identifier for a task that requires the inclusion of the current task in the visit task package. A task may not originate itself. The originating task usually is part of a scheduled maintenance requirement.
Description	Contains a description of the work that this task consists of. If the task does not have a corresponding route, you should provide a complete description, including the resources required to finish this job, in this field.

Visit Number, Serial Number, Visit Type, Start Date, Item, End Date, Task Number, and Duration are view-only visit context fields.

4. Click Apply to save the visit cost structure.

Visit Costing and Pricing

You can calculate the cost and/or price for a maintenance visit. Costs can be estimated at any stage of the visit planning, based on resource and material requirements. Actual costs are calculated based on the material and resource transactions for a job.

Prices are calculated for third-party maintenance visits. When performing third-party maintenance, a predefined price list is associated with the visit. Prices are estimated based on the required materials and resources. The actual price of the visit is generated out of the used materials and resources. Additionally, you can calculate the cost for such a visit, and determine the profit arising out of a service provided, by comparing it with the visit price. The difference between the visit price and the cost is your profit.

See:

Related Topics

Visit Costing, page 9-49

Visit Pricing, page 9-53

Visit Costing

Visit Costing is the collection of all costs incurred in executing a maintenance project. Costs arise out of the materials and resources allocated for the visit. You can estimate the cost of a visit based on these material and resource requirements. When the visit is pushed to production, the actual cost of the execution is calculated from the shop floor transactions. Costs are rolled up at every level of the visit's costing structure. You can view the cost at the task, maintenance requirement, and visit level.

Prerequisites

- ☐ Billing items must be setup in Oracle Inventory. Billing items are defined as non-stockable and non-transactable items. For each Maintenance Requirement, you must select the respective billing item in Fleet Maintenance Program at the MR header. Visits which include these MRs will have price information.

To estimate the cost of a visit:

- Create a visit, and associate tasks with it. For information, see *Creating Maintenance Visit Records*, page 9-4, and *Associating Tasks with Maintenance Visits*, page 9-20
- Navigate to the Update Visit page. Select Cost Details from the side navigation menu. The Visit Cost and Price page appears.

Estimate Visit Cost - Visit Cost and Price page

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Visit

Details
Visit Tasks
Maintenance Requirements
Cost Details

Visit Cost and Price

Cancel

Visit Number 454
Unit
Serial Number aps100

Visit Type A Check
Start Date 25-MAY-2004
End Date 26-MAY-2004

Item Radhika Item1 aps take2
Organization San Diego Manufacturing
Department Outside Processing

Cost/Price Details

☐ Visit for Outside Party

Price List
Estimated Cost

Currency ANY
Actual Cost

Estimate Cost

Estimate Cost

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Use the information in the following table to enter details associated with visit costs and prices.

Description of fields in the Visit Cost and Price page

Field Name	Description
Price List	A list containing the base selling price per unit for a group of items, item categories, or service offered. All prices in a price list are for the same currency.
Estimated Cost	It is the cost calculated based on the material and resource requirements for a job.
Actual Cost	It is the cost calculated based on the material and resource transactions for a job.
Estimated Price	It is the price quoted by a maintenance organization for performing a third- party service, and is based on the price of the required material and resources for the service.
Actual Price	It is the price for performing a service at a third party location, calculated based on the actual price of the used material and resources.
Estimated Profit	It is calculated by subtracting the estimated cost from the estimated price.
Actual Profit	It is calculated by subtracting the actual cost from the actual price.

3. Click Estimate Cost to initiate the cost estimation process. The cost will be displayed in the Cost/Price Details region.

The following can be applied to the cost estimation process:

- You will be prompted to re-estimate costs when tasks are added and/or deleted from the visit
- If you modify a material or resource requirement, and/or perform a material or resource transaction, the system automatically displays the updated estimated and actual costs.
- For an MR/Visit/Task that does not have an associated work order, a corresponding work order in Draft status is created in WIP, when you click the Estimate Cost Button.
- The actual task cost is the sum of the cost of the service item for the route, and actual cost calculated. When a task has an associated OSP work order, the actual cost will be sum of the cost of the OSP line and actual cost calculated. The estimated task cost is the same as the actual cost.
- The estimated cost of the MR is the sum of the estimated costs of the tasks in that MR. The actual cost of the MR is the sum of the actual costs of the tasks in that MR.
- The estimated cost of the visit is the sum of the estimated costs of the MRs and other tasks that are associated with the visit. The actual cost of the visit is the sum of the actual costs of the MRs and other tasks that are associated with the visit.

To view cost information:

1. Retrieve the visit task record, for which you want to view the cost information. For information, see Retrieving Existing Visit Task Records., page 9-29

2. To view the cost rollup, select the visit, and click the corresponding Cost Structure icon. The cost structure page appears. Nodes in the cost structure correspond to the Visit, and its associated MR and tasks.
3. Click on any node in the tree structure to view the cost details. If the node does not have a corresponding work order in WIP, then the Estimated Cost and Actual Cost fields will be empty
4. To view cost information at the visit level, select the visit in the Search Visits page, and choose Cost and Price Information from the drop-down menu. Click Go. The Visit Cost and Price page appears displaying the estimated and actual cost information.

View Cost Estimate - Visit Cost and Price page

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

Visit

Details
Visit Tasks
Maintenance Requirements
Cost Details

Visit Cost and Price

Cancel

Visit Number **424** Visit Type **A Check** Item **737-800**
 Unit Start Date **20-MAY-2004** Organization **San Diego Manufacturing**
 Serial Number **300** End Date **21-MAY-2004** Department **Outside Processing**

Cost/Price Details

Cost Snapshot

☐ Visit for Outside Party

Price List
Estimated Cost **2200** Currency **ANY**
Actual Cost **200**

Cost Snapshot

Unit Maintenance Plan | **Visit Work Package** | Long Term
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5. To view costs at the task level, click Visit Tasks in the side navigation menu. The Search Visit Task page appears, displaying a list all the tasks associated with the visit.
6. To view cost information for a task, select the corresponding Cost/Price icon. The Task Cost and Price page appears, displaying the estimated and actual task costs.

Task Cost and Price page

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Visit

[Details](#)

Cost Details

Task Cost and Price

Task Number 1
Service Request
Maintenance Requirement **737-800 Maintenance Check**
Zone

Task Name 737-800 Maintenance Check
Department
Route
Sub Zone

[Cancel](#)

Cost/Price Details

Price List
Estimated Cost **2200**

Currency **ANY**
Actual Cost **200**

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7. To view costs at the MR level, in the Visit Cost and Price page, click Maintenance Requirements in the side navigation menu. The Search Maintenance Requirement page appears, displaying the list of MRs associated with the visit.
8. To view cost of an MR, click the corresponding Cost/Price icon. The Maintenance Requirement Cost and Price page appears, displaying the cost details.

Maintenance Requirement Cost and Price page

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Visit

Maintenance Requirement Cost and Price

Visit Number 424
Unit
Serial Number **300**

Visit Type A Check
Start Date **20-MAY-2004**
End Date **21-MAY-2004**

Item 737-800
Organization **San Diego Manufacturing**
Department **Outside Processing**

[Cancel](#)

Maintenance Requirement Details

Title **737-800 Maintenance Check** Description **737-800 Maintenance Check**
Billing Item

Cost/Price Details

Currency **ANY**
Estimated Cost **2200**

Actual Cost **200**

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You can store the cost estimate that you are viewing, by selecting Cost Snapshot. This snapshot can be used for comparison with other snapshots of the same visit with different tasks or in a different location.

Note: If the visit cost has not been estimated, then the system will automatically calculate the actual and estimated costs, when a visit is closed.

Visit Pricing

A maintenance organization may perform a service for an outside party or customer. Pricing is the calculation of costs arising out of third-party maintenance. You can define a price list at visit level or at task level. The price list at task level is optional and supersedes the price list defined at visit level. For price information at task level, you have to define the material and resource requirements as price items in the price list. You can also calculate prices for Maintenance Requirements (MR). Billing items must be created, and linked to the maintenance requirement. Visit Work Package, then takes the price of the maintenance requirement from the price list associated at visit work package level.

Prerequisites

- ☐ The System Profile Option QP: Licensed For Product must be set to Oracle Complex MRO. A Service Request must be associated with the visit.

To calculate the price for a visit:

- Create a visit, and associate a service request with it. Save the record.
- In the Update Visit page, select Cost Details from the side navigation menu. The Visit Cost and Price page appears. Select the Visit for Outside Party check box.

Mark a Visit for Outside Party - Visit Cost and Price page

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Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Details
Visit Tasks
Maintenance Requirements
Cost Details

Visit Cost and Price

Cancel

Visit Number **471** Visit Type **A Check** Item **1319M11P04**
Unit Start Date **21 JUN 2004** Organization
Serial Number **SN001** End Date Department

Cost/Price Details

Estimate Cost Apply Revert

☒ Visit for Outside Party

Price List Currency
Estimated Cost Actual Cost

Estimate Cost Apply Revert

Unit Maintenance Plan | Visit Work Package | Long Term
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3. Select a Price List using the LOV icon. You can only associate a price list that has been created for the customer specified in the service request, and is valid for the period between the visit start and end date. Click Apply. The Estimate Price button appears in the Cost/Price Details region.

Estimate Price - Visit Cost and Price page

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Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Details
Visit Tasks
Maintenance Requirements
Cost Details

Visit Cost and Price Cancel

Visit Number **471** Visit Type **A Check** Item **1319M11P04**
Unit Start Date **21-JUN-2004** Organization
Serial Number **SN001** End Date Department

Cost/Price Details Estimate Price Estimate Cost Items Without Price Apply Revert

☒ Visit for Outside Party

Price List  Currency
Estimated Cost Actual Cost
Estimated Price Actual Price
Estimated Profit Actual Profit

Estimate Price Estimate Cost Items Without Price Apply Revert

Unit Maintenance Plan | **Visit Work Package** | Long Term
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4. Create tasks for the visit. For information, see Associating Tasks with Maintenance Visits, page 9-20.

Note: Each BOM resource used in the task resource requirements or work order transactions must be associated with an Item. For the system to be able to calculate price for a task, all the materials and resources' billing items should be orderable and defined in the price list associated with the task/visit.

5. Click Estimate Price in the Visit Cost and Price page, to initiate the price calculation process.

The following can be applied to the price calculation process:

- The price of a task, associated with a route, is estimated by adding the price of the materials and resources required to perform that task. The estimated price for a task without a route association is always zero. The actual price is calculated by adding the prices of the materials and resources transacted. If the task price is re-calculated, and the amount differs from the former estimate, then the MR and visit prices are adjusted accordingly.
- For an MR with a billing item associated, the estimated price is the price of the billing item. For an MR with no Billing Item associated, the estimated price is the sum of the estimated prices of the tasks in that MR. The actual price of the MR is calculated by adding the actual prices of the tasks in that MR. If the MR price is re-calculated, and the new price differs from the old one, then visit price will be adjusted accordingly.

- The estimated price of the visit is the sum of the estimated prices of the MRs and other tasks that are not through an MR. The actual price of the visit is the sum of the actual prices of the MRs and other tasks that are not through an MR. When an MR or a task is deleted from the visit, the MR/task price is subtracted from the visit price.

To view price information:

1. Retrieve the visit task record, for which you want to view the price information. For information, see Retrieving Existing Visit Task Records., page 9-29
2. To view the cost rollup, select the visit, and click the corresponding Cost Structure icon.
3. To view price information at the visit level, select the visit in the Search Visits page, and choose Cost and Price Information from the drop-down menu. Click Go. The Visit Cost and Price page appears displaying the estimated and actual prices.

View Prices - Visit Cost and Price page

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Unit Maintenance Plan Visit Work Package Long Term Planning

Visit

Details
Visit Tasks
Maintenance Requirements
Cost Details

Visit Cost and Price

Cancel

Visit Number **457** Visit Type **A Check** Item **VG0205**
Unit **Ud0206** Start Date **26-MAY-2004** Organization **San Diego Manufacturing**
Serial Number **SN0206** End Date **26-MAY-2004** Department **Outside Processing**

Cost/Price Details

Estimate Price Price Snapshot Cost Snapshot Items Without Price Apply Revert

☒ Visit for Outside Party

Price List	Price List 0204	Currency	ANY
Estimated Cost	171.9	Actual Cost	28.65
Estimated Price	299.46	Actual Price	49.91
Estimated Profit	127.56	Actual Profit	21.26

Estimate Price Price Snapshot Cost Snapshot Items Without Price Apply Revert

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4. To view price at the task level, click Visit Tasks in the side navigation menu. The Search Visit Task page appears, displaying a list all the tasks associated with the visit.

Find Tasks Associated With a Visit- Search Visit Task page

Search Visit Task

Visit Number **457**
Unit **Uc0206**
Serial Number **SN0206**

Visit Type **A Check**
Start Date **26-MAY-2004**
End Date **26-MAY-2004**

Item **VG0205**
Organization **San Diego Manufacturing**
Department **Outside Processing**

Task Number
Maintenance Requirement
Task Type
Work Order
Service Request
Item

Task Name
Route
Tasks Due By
Work Order Status
Department
Serial Number

Go Clear

Search Results

Previous 1-2 of 2 Next

Task Number	Task Name	Item	Serial Number	Maintenance Requirement	Route	Department	Start Time	End Time	Task Type	Hierarchy	Cost/Price
1	MR0421	VG0205	SN0206	MR0421					Summary		
2	Route0421	VG0205	SN0206	MR0421	Route0421		26-MAY-2004 7:00	26-MAY-2004 13:00	Unplanned		

Previous 1-2 of 2 Next

- To view the task price, select the corresponding Cost/Price icon. the Task Cost and Price page appears, displaying the estimated and actual task prices.

View Task Price - Task Cost and Price page

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Visit

Details

Cost Details

Task Cost and Price

Task Number **1**
Service Request
Maintenance Requirement **MR0421**
Zone

Task Name **MR0421**
Department
Route
Sub Zone

Cost/Price Details

Price List
Estimated Cost **171.9**
Estimated Price **299.46**
Estimated Profit **127.56**

Currency **ANY**
Actual Cost **28.65**
Actual Price **49.91**
Actual Profit **21.26**

Estimate Price Items Without Price

Estimate Price Items Without Price

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- To view price at the MR level, in the Visit Cost and Price page, click Maintenance Requirements in the side navigation menu. The Search Maintenance Requirement page appears, displaying the list of MRs associated with the visit.

7. To view the MR price, click the corresponding Cost/Price icon. The Maintenance Requirement Cost and Price page appears, displaying the price.

View Maintenance Requirement Price - Maintenance Requirement Cost and Price page

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Visit

Maintenance Requirement Cost and Price

Visit Number 457
Unit U0206
Serial Number S0206

Visit Type A Check
Start Date 26-MAY-2004
End Date 26-MAY-2004

Item VG0205
Organization San Diego Manufacturing
Department Outside Processing

Cancel

Maintenance Requirement Details

Title MR0421
Billing Item

Description

Estimate Price

Items Without Price

Cost/Price Details

Currency ANY
Estimated Cost 171.9
Estimated Price 299.46
Estimated Profit 127.56

Actual Cost 28.65
Actual Price 49.91
Actual Profit 21.26

Estimate Price

Items Without Price

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8. To view a list of the items not defined in the price list, for a task, MR and/or visit, click Items Without Price. The Items without Price page appears, displaying the items, if any.

Items without Price page

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Visit

Items without Price

Visit Number 457
Unit U0206
Serial Number S0206

Visit Type A Check
Start Date 26-MAY-2004
End Date 26-MAY-2004

Item VG0205
Organization San Diego Manufacturing
Department Outside Processing

Cancel

Previous 1-1 of 1 Next

Organization	Item	Item Description	Maintenance Requirement	Task Number	Task Name
San Diego Manufacturing	VG0415	New Item	MR0421	2	Route0421

Previous 1-1 of 1 Next

Cancel

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Working with Maintenance Visits 9-57

You can take a snapshot of the task, MR, or visit price by clicking Price Snapshot in the Visit Cost and Price page.

Note: The profit and loss information is displayed only when both the cost and price have been calculated for a visit. Profit is calculated by subtracting the cost from the price.

Managing Long Term Planning

This chapter covers the following topics:

- Overview
- What is Long Term Plan?
- Key Business Processes
- Finding Scheduled and Unscheduled Visits
- Assessing a Work Schedule
- Scheduling a Visit
- Uncheduling a Maintenance Visit
- Viewing Scheduled Visit Details
- Assigning Spaces to a Visit
- Material Demand Planning and Scheduling
- Material Demand Planning
- Supply Chain Planning
- Checking the Material Schedule
- Checking Material Availability
- Managing Simulation Plans
- Creating a New Simulation Plan
- Deleting a Simulation Plan
- Adding Visits to a Simulation Plan
- Viewing Simulation Plans
- Deleting a Simulation Visit
- Setting a Simulation Plan as Primary
- Deleting a Simulation Plan
- Copying a Visit to a New Simulation Plan
- Running Resource Leveling Plans

Overview

The Oracle Complex Maintenance, Repair, and Overhaul Long Term Plan module maximizes maintenance scheduling by balancing maintenance requirements with available maintenance capacity. It allows you to simulate a visit or sequence of visit combinations in order to find the optimal maintenance visit schedule.

This chapter discusses the key functions supported by the Oracle Complex Maintenance, Repair, and Overhaul Long Term Planning module. The chapter provides process-oriented, task based procedures for using the application to perform essential tasks for planning the long term maintenance needs of fleet units.

See:

- Finding Scheduled and Unscheduled Visits, page 10-4
- Assessing a Work Schedule, page 10-7
- Scheduling a Visit, page 10-9
- Uncheduling a Maintenance Visit, page 10-14
- Viewing Scheduled Visit Details, page 10-15
- Assigning Spaces to a Visit, page 10-16
- Material Demand Planning and Scheduling, page 10-17
- Checking Material Availability, page 10-27
- Checking the Material Schedule, page 10-25
- Managing Simulation Plans, page 10-30
- Creating a New Simulation Plan, page 10-30
- Deleting a Simulation Plan, page 10-32
- Adding Visits to a Simulation Plan, page 10-32
- Deleting a Simulation Visit , page 10-37
- Setting a Simulation Plan as Primary, page 10-37
- Deleting a Simulation Visit, page 10-37
- Copying a Visit to a New Simulation Plan, page 10-38
- Running Resource Leveling Plans, page 10-39

What is Long Term Plan?

The Long Term Planning (LTP) module is used by a maintenance planner to schedule maintenance visits based on the optimal use of capable maintenance facilities, available resources and material constraints. The maintenance planner using Long Term Plan is able to make a complete assessment of the maintenance resources available at all maintenance locations. The maintenance planner is able to do this by balancing visits created for forecasted maintenance requirement information from Unit Maintenance Plan against projected maintenance capacity. The planner will schedule maintenance visits, assess capacity and reserve required materials.

Key Business Processes

Create a Visit

A visit is created in Visit Work Package and is a group of events created by the maintenance planner made up of selected maintenance requirements —defined in Unit Maintenance Plan or directly from Fleet Maintenance Program— and associated routes, with projected compliance times based the unit's forecasted operational times. This visit is used to group events together for long and short term capacity planning, and to facilitate scheduling to a maintenance base. Visits are used for production through Visit Work Package and Production Planning. Creation of a maintenance visit consists of selecting and creating tasks for maintenance requirements and associated routes, and projecting compliance times based the unit's forecasted operational times.

Define a Visit's Resource Requirements

Maintenance visit resource requirements must be defined to allow accurate scheduling and capacity planning. Visit resource requirements are based on the maintenance requirement's associated routes—which are created in Route Management—and the man hour requirements by skill, skill level and certification, required tooling, required materials, duration and required completion times as defined by Unit Maintenance Plan.

Schedule a Visit

After a visit has been created it must be scheduled at a maintenance facility. Availability for this is based on currently scheduled visits, material constraints, and the forecast resources of the maintenance facility. The visit start time is set by considering due dates calculated for maintenance requirements by Unit Maintenance Plan. Required materials are reserved and the maintenance planner can determine if capacity is exceeded or does not fulfill requirements.

Schedule Required Materials

After a visit has been created and scheduled to a capable maintenance facility, the associated material requirements are factored into the supply chain plan through Oracle's Advanced Supply Chain Planning application. The visit's required materials, defined through the routes associated to each task, are scheduled based on the start date and time of each task for the applicable organization. LTP provides the planner, functionality to identify any schedule conflicts, when the required materials will not be available by the start date of the applicable visit task. Alternate items for these requirements may be selected and scheduled, or the planner may make scheduling changes to ensure that the materials will be available by the start of the associated work order.

Capacity Versus Work Load Requirements

You can compare resource capacity versus resources required for the projected workload, which is an essential tool for accurate scheduling and planning and ensures that available resources are used as efficiently as possible. This is accomplished through the Resource Leveling feature of Long Term Plan. To derive the optimal schedule, you must have the ability to adjust visit schedules, change maintenance locations, and remove and add visit requirements.

Simulations

The simulation function works in conjunction with both the scheduling and resource leveling functions of Long Term Plan. This allows the user to test different scheduling scenarios without changing the original visits. Visits can be copied into a simulation plan and their schedule or structure changed. After evaluating these visits, and taking into

account schedule and resource consumption, the changes can be implemented for the entire simulation plan, or for individual visits within the plan.

Finding Scheduled and Unscheduled Visits

The Search Visit page provides the ability to search and display all maintenance visits regardless of their status.

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

Prerequisites

- ☐ The visit you want to retrieve must exist in the database.

To find a visit:

- From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of the Unit Maintenance Plan module appears.
- Click on the Long Term Planning tab, then select the Visits secondary tab to launch the Search Visits page.

Search Visits page

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[Unit Maintenance Plan](#) [Visit Work Package](#) [Long Term Planning](#)

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Search Visits

Organization

Department

Item

Unit

Due From Date

Start Date From

Display Only

Serial Number

Visit Type

Visit Number

Visit Status

Due To Date

Start Date To

Service Category

Go

Clear

Visits

Select	Visit Number	Item	Visit Type	Serial Number	Organization	Department	Start Date	Planned End Date	End Date
No records were found matching the given criteria.									

- Use the information in the following table to enter information in the Search Visit Page. The Search Visits page is an overview for Long Term Planning. From here you can view all primary visits, scheduled and unscheduled. All visits that need to be associated to an item (model) or serial number, all visits of a certain visit type, all visits due during a defined period, or all visits associated to an organization and department.

Description of fields in the Search Visits page

Field	Description
Organization	Visits are associated to an "Organization" that represents the larger group, company, or division where maintenance is performed. All Organizations defined in Oracle HR associated to the user's responsibility can be selected.
Department	Departments are a sub group of Organizations. Visits are associated to a Department and all Departments are associated to an Organization. For example, an Organization may be SFO Airport, and a Department may be "Hangar 1." All Departments are defined in the Bill of Materials, associated to the selected Organization and also associated to the user's responsibility can be selected.
Item	The item refers to a part number or a model name—e.g., Boeing 747-200B— that the visit is associated to. All visits must be associated to an item. This field is not required for the search, but filtering the table of visits by item gives a basic picture of the maintenance workload required for a particular model. All items defined in the Inventory associated to the user's responsibility can be selected.
Due From, Due To	These two attributes allow the user to filter the displayed visits based on when a visit is due. The due date of a visit is defined by associated maintenance requirements from Unit Maintenance Plan. The maintenance requirements are associated to the visit's tasks. The earliest due date from the associated requirements is the due date of the visit. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.
Start From, Start To	Lists the date of the first day of effectivity of an operation.
Display Only	A drop down menu used to filter displayed visits by Scheduled, Unscheduled, or Visits with conflicting end dates. This field is empty by default. A visit is considered scheduled if its start date is defined and it is associated with a department and organization. Visits not assigned to any organization and/or department and with no Start Date are Unscheduled Visits. Conflicting visits are visits whose Derived End Date is greater than it's Planned End Date.

Field	Description
Visit Type	This defines what kind of maintenance visit is required, e.g, C-Check, D-Check, Preflight. The types are user defined. This allows maintenance to be classified into categories. Larger visits can include many different maintenance requirements, but can still be grouped together under one visit type. Filtering the table of visits by visit type is useful, as the visit type in general and indirectly represents visit's length and resource requirements.
Visit Number	All maintenance visits are assigned a unique visit number. All visit numbers for all visits that have been created are available for selection.

- Enter the schedule information in the fields for which you know the value. Click Go. The lower half of the page displays all of the spaces matching the search criteria you provided. Note that selected visits may be edited and/or deleted.

View Visit Search Results - Search Visits page

Search Visits

Organization	<input type="text"/>		Serial Number	<input type="text"/>	
Department	<input type="text"/>		Visit Type	<input type="text"/>	
Item	<input type="text"/>		Visit Number	<input type="text"/>	
Unit	<input type="text"/>		Visit Status	<input type="text" value="Planning"/>	
Due From Date	<input type="text"/>		Due To Date	<input type="text"/>	
Start Date From	<input type="text"/>		Start Date To	<input type="text"/>	
Display Only	<input type="text"/>		Service Category	<input type="text"/>	
<input type="button" value="Go"/> <input type="button" value="Clear"/>					

Visits

<input type="button" value="Plan Visit"/> <input type="button" value="Unschedule"/>									
<input type="button" value="Previous"/> 1-10 of 290 <input type="button" value="Next"/>									
Select	Visit Number	Item	Visit Type	Serial Number	Organization	Department	Start Date	Planned End Date	End Date
<input type="radio"/>	2	MRO-C1600	A Check	101	San Francisco Aviation Maintenance Center	MRO Satellite Department	04-JUN-2002		
<input type="radio"/>	7	MRO-C1600	A Check	101	San Francisco Aviation Maintenance Center	MRO Satellite Department	07-MAY-2004		
<input type="radio"/>	8	MRO-C1600	C Check	101	San Francisco Aviation Maintenance Center	MRO Headquarters	25-MAR-2002		
<input type="radio"/>	9	MRO-C1600	C Check	101	San Francisco Aviation Maintenance Center	MRO Headquarters	02-DEC-2003		
<input type="radio"/>	11	MRO-16T9001-831	A Check	4456555	San Diego Manufacturing	Outside Processing			

- To search for a visit, in production or in planning stage, whose derived end date has exceeded the manually defined planned end date, select Visits with Conflicition End Dates from the Display Only drop-down menu. Click Go. You can manually adjust the planned end date in the Schedule Visit UI. See Scheduling a Visit, page 10-9.

Assessing a Work Schedule

Long Term Planning allows quick identification of a maintenance base's workload. This assessment identifies the current scheduled visits at an organization's capable department and spaces for a given maintenance visit.

Prerequisites

- ☐ A primary plan with at least one visit must exist in the database. It is helpful if there are maintenance requirements, associated tasks and routes in also in the database.

To assess a work schedule:

1. Retrieve the visit schedule you want to assess (see Finding Scheduled and Unscheduled Visits, page 10-4). The search results appear in the lower half of the page.
2. Select the appropriate visit, then click Plan Visit. The Schedule Visit page appears.

Schedule Visit page

ORACLE Oracle Complex MRO

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Unit Maintenance Plan Visit Work Package Long Term Planning

Visits Simulations Resource Leveling

Schedule Visit

Scheduled Visits

Scheduled Materials

Material Availability

* Indicates required field

Cancel Apply

Visit Number 456

Duration / Hour

Due By

Serial Number SN0426

Item AHLITEM002

Simulation Plan Primary Plan

Unit UC0426

* Organization

* Department

* Start Date 26-MAY-2004

Planned End Date 31-MAY-2004

* Start Time Hours 05

Planned End Time Hours 08

* Visit Type A Check

Service Category Category 5

Assigned Spaces

Select Space

No records were found matching the given criteria..

Add More Rows

Cancel Apply

Unit Maintenance Plan Visit Work Package Long Term Planning

Planning Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

3. Click Scheduled Visits from the left-hand navigation panel. The Scheduled Visits page appears.
4. Enter the schedule information in the fields for which you know the value.

Scheduled Visits page

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Unit Maintenance Plan Visit Work Package Long Term Planning

Visits | Simulations | Resource Leveling

[Schedule Visit](#)
Scheduled Visits
[Scheduled Materials](#)
[Material Availability](#)

Scheduled Visits

* Indicates required field
 Available for schedule Unavailable for schedule Single visit scheduled Multiple visits scheduled

Visit Number	456	Visit Type	A Check
Visit Status	Planning	Service Category	Category 5
Unit	UC0426	Serial Number	SN0426
Organization		Item	AHLITEM002
Department		Simulation Plan	Primary Plan
Start Date	26-MAY-2004	Planned End Date	31-MAY-2004
End Date		Due By	

Search Scheduled Visits

Display Period * Start Date

* Organization Department

Space Service Category

Scheduled Visits

[View Department Space Service Category](#)

- Click Go. All Visits within the selected criteria are displayed, showing the Organization, Department, Space, and Category. The schedule is indicated by icons, which are defined at the top of the page. For example, there is an Available for Schedule icon, and a Single visit scheduled icon, etc.

iew Visit Schedule - Scheduled Visits page

Scheduled Visits

* Indicates required field
 Available for schedule Unavailable for schedule Single visit scheduled Multiple visits scheduled

Visit Number	456	Visit Type	A Check
Visit Status	Planning	Service Category	Category 5
Unit	UC0426	Serial Number	SN0426
Organization		Item	AHLITEM002
Department		Simulation Plan	Primary Plan
Start Date	26-MAY-2004	Planned End Date	31-MAY-2004
End Date		Due By	

Search Scheduled Visits

Display Period * Start Date

* Organization Department

Space Service Category

Scheduled Visits

Previous 1-1 of 1 Next

View	Department	Space	Service Category	02/02	03/02	04/02	05/02	06/02	07/02	08/02	09/02	10/02	11/02	12/02	13/02	14/02	15/02
	061120031																

Previous 1-1 of 1 Next

Scheduling a Visit

Long Term Plan permits maintenance organizations to schedule visits, which can be created specifically for a maintenance requirement. An empty visit can be created and later be associated to requirements.

Prerequisites

- ☐ The visit to be scheduled must exist in the database.

To schedule a visit:

1. Retrieve the visit you want to schedule (see Finding Scheduled and Unscheduled Visits, page 10-4). The search results appear in the lower half of the page.
2. Select the visit you want to schedule, then click the Plan Visit button. The Schedule Visit page appears. The Schedule Visit page is accessed from the Search Visits page or the View Simulation Plan page by selecting a visit and clicking on the Schedule button. The selected visit is displayed in context. This page allows you to assign a visit to an organization and department. You also must define its start date. All three of these attributes must be assigned and define a visit as “scheduled.” After a visit has been scheduled, spaces can be assigned and Long Term Planning’s resource leveling functionality can be used. You can also reschedule a visit from this screen as long as the visit is still in the “planning” status

Enter Schedule information - Schedule Visit page

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Unit Maintenance Plan Visit Work Package Long Term Planning

Visits | Simulations | Resource Leveling

Schedule Visit

Scheduled Visits
Scheduled Materials
Material Availability

* Indicates required field

Cancel Apply

Visit Number	456	Duration / Hour	26
Due By		Serial Number	SN0426
Item	AHLITEM002	Simulation Plan	Primary Plan
Unit	UC0426	Department	061120031
* Organization	Vision Project Mfg	Planned End Date	31-MAY-2004
* Start Date	26-MAY-2004	Planned End Time Hours	08
* Start Time Hours	05	Service Category	Category 5
* Visit Type	A Check		

Assigned Spaces

Select Space

No records were found matching the given criteria.

Add More Rows

Cancel Apply

Unit Maintenance Plan | Visit Work Package | Long Term Planning | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

3. Use information in the following table to enter schedule information.

Description of fields in the Schedule Visit page

Field	Description
Visit Number	All maintenance visits are assigned a unique visit number. All visit numbers for all visits that have been created are available for selection.
Duration	This is the total length of the visit in days. It is the sum total of the durations of the associated visit tasks. Maintenance visits can be any length, from an hour to an unlimited number of days. A D-Check on a larger aircraft might take 90 days, where a preflight on a small plane might only take 5 minutes.
Visit Type	Attribute of the visit in context selected from the previous screen. The visit type values are defined in Oracle Complex Maintenance, Repair, and Overhaul and represent all possible maintenance visits, C-Check, D-Check, Preflight, etc. This allows maintenance to be classified into categories. Some of the larger visits, like a D-Check, will often include many different maintenance requirements, but can still be grouped together under once visit type. Filtering the table of visits by visit type is useful, as the visit type in general and indirectly represents visit's length and resource requirements.
Due By	The due date of a visit is defined by the associated maintenance requirements from Unit Maintenance Plan. The maintenance requirements are associated to the visit's tasks. The earliest due date from the associated requirements is the due date of the visit. This is a required field. It is an attribute of the visit in context selected from the previous screen.
Item	The item is the model, Boeing 747, 737, etc., that the visit is associated to. All visits must be associated to an item. This is not a required field for the search parameters, but filtering the table of visits by item allows the user to see a basic picture of the maintenance workload required by a particular model. This field is an attribute of the visit in context selected from the previous screen.
Unit	Refers to the serial number of a specific item.

Field	Description
Simulation Plan	Attribute of the visit in context selected from the previous screen. This further identifies the visit by allowing the user to know which simulation plan the visit in context is part of or if it is a visit in the Primary Plan. When coming from the Search Visits screen, the visit will always be part of the Primary Plan. When coming from the View Simulation Plan screen, the value is defined by the plan in context.
Organization	All visits are associated to an Organization. An organization represents the larger group, company, division, etc., where the maintenance visit is to be performed. All Organizations defined in Oracle HR associated to the user's responsibility are available for selection.
Department	All visits are associated to a Department and all Departments are associated to an Organization. The Department represents the group below the organization, such as SFO Airport, or the hangar where the maintenance visit is to be performed.
Start Date	This is a required field. It is an attribute of the visit in context selected from the previous screen. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.
Planned End Date	Displays the planned end date of the visit.
Planned End Time	Displays the time at which the visit was planned to end.
Service Category	The service category attribute is used to filter the planned requirements.

You can also adjust the planned end date for a visit with conflicting planned and derived end dates.

You can schedule and re-schedule a visit while viewing current visit details in the Scheduled Visits UI. You can search for availability periods using the following search criteria:

- Display Period
- Start Date
- Organization
- Department
- Space
- Service Category

schedule and re-schedule visits using the Scheduled Visits UI:

- View Visit Header Information - Scheduled Visits page***

2. Enter information in the relevant fields to retrieve visit information based on the search criteria. Click Go. The schedule details appear in the Scheduled Visits results table.

View Detailed Visit Schedule - Scheduled Visit page

Search Scheduled Visits

Display Period * Start Date

* Organization Department

Space Service Category

Scheduled Visits

Previous 1-8 of 8 Next

View	Department	Space	Service Category	12/01	13/01	14/01	15/01	16/01	17/01	18/01	19/01	20/01	21/01	22/01	23/01	24/01	25/01
	Assembly Department																
	Inspection Department																
	Testing Department																
	Outside Processing																
	P3 Resource Department																
	Mechanical Workshop																
	MU Department																
	Outside Processing	Hanger 1, Dock A	Category 6														

Previous 1-8 of 8 Next

- Click on the intersecting icon between the start date and corresponding department or space to schedule the visit to the applicable organization, department and space. The Schedule Visit page appears.

Schedule a Visit - Schedule Visit page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visits Simulations Resource Leveling

Schedule Visit

* Indicates required field

Visit Number **46** Duration / Hour **5377**

Due By **DRW unit item 1** Serial Number **101**

Unit **DRW unit 1** Simulation Plan **Primary Plan**

* Organization * Department

* Start Date Planned End Date

* Start Time Hours Planned End Time Hours

* Visit Type Service Category

Assigned Spaces

Select	Space
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>

4. Enter the schedule details, and click Apply.
5. To reschedule a visit, click on the icon, denoting scheduled visit, in the results table. Make the necessary changes, and click Apply. Optionally, assign Spaces. For information, see Assigning Spaces to a Visit, page 10-16. The Space information is carried over to the Schedule Visit page for assignment.
6. To view the visit details assigned to a department or space, click on the View icon for the applicable row in the results table. When you click on the view icon for a row representing a department, the View Details UI has the department in context and all scheduled visits starting during the previously defined period are displayed. Similarly, when you click on the view icon for a row representing a space, the View Details UI has the space in context and the scheduled visits starting during the previously defined period are displayed.

Visit Details page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visits | Simulations | Resource Leveling

Visit Details

Organization: San Diego Manufacturing Space: Simulation Plan Primary Plan

Department: Outside Processing

Previous

Schedule

Select	Visit Number	Visit Name	Visit Type	Unit	Item	Serial Number	Start Date	Due By	End Date	Additional Spaces Assigned
<input type="radio"/>	61	DRW unplanned mat reqs, items 1, 2 & 3	A Check	DRW unit 1	DRW unit item 1	101	13-JAN-2004		13-JAN-2004	
<input type="radio"/>	62	DRW unplanned mat reqs, items 1, 2 & 3	A Check	DRW unit 1	DRW unit item 1	101	20-JAN-2004		20-JAN-2004	
<input type="radio"/>	50	DRW planned req, mr 1 & 2	A Check	DRW unit 1	DRW unit item 1	101	15-JAN-2004	27-JUN-2004	15-JAN-2004	
<input type="radio"/>	51	DRW planned req, mr 1 & 2	A Check	DRW unit 1	DRW unit item 1	101	22-JAN-2004	03-JUL-2004	22-JAN-2004	
<input type="radio"/>	67	DRW unplanned req, prod, items 1-4	A Check	DRW unit 1	DRW unit item 1	101	13-JAN-2004		13-JAN-2004	

Previous 1-5 of 5 Next

Schedule

The Additional Spaces Assigned column in the Visit Details page indicates whether or not additional spaces are assigned to the applicable visits. With a department in context, those visits that have a space assignment are identified by a 'Yes' in the Additional Space Assignment Column. With a space in context, those visits that have an additional space assignment, other than the space in context, are identified by a 'Yes' in the Additional Space Assignment Column.

7. To return to the Scheduled Visits page, select the visit and click Schedule.

Note: You cannot re-schedule a Visit if a time slot is designated as Unavailable.

Unscheduled a Maintenance Visit

Prerequisites

- ☐ The visit to be removed from the schedule must exist in the database.

To unschedule a maintenance visit:

1. Retrieve the visit you want to schedule (see Finding Scheduled and Unscheduled Visits, page 10-4). The search results appear in the lower half of the page.
2. Select the visit you want to remove from the schedule, then click the Unschedule button.
3. The visit is removed from the schedule and no longer appears in the Visits results. The Organization, Department, Start Date and any associated Spaces are removed from the visit.

Viewing Scheduled Visit Details

Prerequisites

- ☐ A scheduled visit must exist in the database.

To view scheduled visit details:

1. Retrieve the visit for which you want to view details (see Finding Scheduled and Unscheduled Visits, page 10-4). The search results appear in the lower half of the page.
2. Select the visit you want to view details for, then click the Plan Visit button. The Schedule Visit page appears, displaying the currently scheduled visits for the relevant visit number.

View Schedule Details - Schedule Visit page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visits | Simulations | Resource Leveling

Schedule Visit

Scheduled Visits

Scheduled Materials

Material Availability

Schedule Visit

* Indicates required field

Cancel Apply

Visit Number 46 Duration / Hour 7584

Due By

Item DRW unit item 1

Unit DRW unit 1

* Organization San Diego Manufacturing

* Start Date 09-FEB-2004

* Start Time Hours 10

* Visit Type A Check

Serial Number 101

Simulation Plan Primary Plan

* Department Outside Processing

Planned End Date 21-DEC-2004

Planned End Time Hours 10

Service Category Category 1

Assigned Spaces

Delete

Previous 1-1 of 1 Next

Select Space

Hanger 1, Dock A

Add More Rows

Previous 1-1 of 1 Next

Note: In the Schedule Visit page, you can edit the planned end date, department, and space assignments, for visits in Planning or Released Status.

Assigning Spaces to a Visit

Long Term Plan uses spaces to assign locations to the maintenance work required during a visit. One or more spaces may be assigned to a visit using the following process.

Prerequisites

- ☐ A visit must exist in the database, and it must be scheduled. A space must exist in the database and the space capabilities must match the visit in context. Additionally, the space must be active and available.

To assign spaces to a visit:

1. Retrieve the visit to which you want to assign a space (see Finding Scheduled and Unscheduled Visits, page 10-4). The search results appear in the lower half of the page.
2. Select the visit you want to assign a space to then click the Plan Visit button.
3. The Schedule Visit page appears. The Assigned Spaces information is displayed in the lower half of the page.

View Assigned Spaces - Schedule Visit page

The screenshot displays the 'Schedule Visit' page in the Oracle Complex MRO application. The page is divided into several sections:

- Navigation:** Includes links for Home, Engineering, Configuration, Planning, Administration, Execution, Profile, Sign Out, and Help. Below these are tabs for Unit Maintenance Plan, Visit Work Package, and Long Term Planning.
- Left Sidebar:** Contains links for Visits, Simulations, and Resource Leveling. Under Visits, there are links for Schedule Visit, Scheduled Visits, Scheduled Materials, and Material Availability.
- Schedule Visit Section:**
 - Indicates required field.
 - Buttons: Cancel, Apply.
 - Fields: Visit Number (12), Duration / Hour, Serial Number (45226), Simulation Plan (Primary Plan), Department (Outside Processing), Planned End Date (27-NOV-2003), Planned End Time Hours (10), Service Category (Category 5).
 - Fields: Organization (San Diego Manufacturing), Start Date (13-NOV-2003), Start Time Hours (15), Visit Type (A Check).
- Assigned Spaces Section:**
 - Buttons: Delete, Select, Space.
 - Table: Shows Space1113.
 - Buttons: Add More Rows.

4. To add spaces click Add More Rows. This will add several rows to the table. Enter information in the provided fields, then click apply to save the changes to the database.

Add Spaces - Schedule Visit page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visits | Simulations | Resource Leveling

Schedule Visit

* Indicates required field

Cancel Apply

Visit Number 12 Duration / Hour

Due By MRO-17C35-03

Item C-1600, Tail # 103

Unit C-1600, Tail # 103

* Organization San Diego Manufacturing

* Start Date 13-NOV-2003

* Start Time Hours 15

* Visit Type A Check

Serial Number 45226

Simulation Plan Primary Plan

* Department Outside Processing

Planned End Date 27-NOV-2003

Planned End Time Hours 10

Service Category Category 5

Assigned Spaces

Delete

Previous 1-1 of 1 Next

Select	Space
<input type="checkbox"/>	Space1113
<input type="checkbox"/>	Space2

- Spaces may be deleted by selecting the applicable rows and clicking on the Delete button. When a space is deleted, the table refreshes reflecting the change.
- Click Cancel to return to the previous page.

Material Demand Planning and Scheduling

Oracle CMRO's integration with Oracle Advanced Planning and Scheduling (APS) provides comprehensive material planning, scheduling and rescheduling capabilities. Planners have complete visibility into forecasted, planned, and unplanned material requirements. You can plan materials well in advance to accommodate fluctuations in demand and supply for both planned and unplanned material requirements. You can also maintain optimum stock to meet specific service levels under the defined inventory budget constraints. The APS integration includes the following:

- Material Demand Planning** - Material demand arises out of the planned maintenance requirements forecasted by Unit Maintenance Plan (UMP), defining when they must be accomplished. This forecast is based on the utilization of the applicable units. The material demand for all planned maintenance requirements in UMP is automatically stored every time the utilization forecast is updated or the "build unit effectivities" process is run. The replace and rework percentages defined in the disposition lists and the material requirements defined for the routes are factors influencing material demand. Material demand associated to unplanned, non-routine maintenance requirements is discovered during the production phase. Additionally, unplanned demand can be predicted based on the historical demand for each organization. This unplanned demand can be refined based on the historical relationship between the planned maintenance requirements, associated units and the unplanned material requirements.

Demand Planning collects these material requirements, factors them into the global demand, and feeds the global demand to Inventory planning and supply chain planning. The forecast/demand variability along with the supply variability (like

supplier capacity and lead-times) is then used to specify time phased safety stock recommendations for the supply chain.

- **Supply Chain Planning** - After the planned maintenance requirements have been associated with a visit work package and scheduled to capable maintenance facilities, the required materials are scheduled through Oracle Advanced Supply Chain Planning. The Planning engine will first net existing supplies, and then generate planned orders to procure the required materials.

Related Topics

Material Demand Planning, page 10-18

Supply Chain Planning, page 10-22

Material Demand Planning

The three primary material streams into the APS engine are global material demand from forecasted maintenance requirements, scheduled maintenance requirements and historical non-routine material requirements. Demand Planning factors the required materials into global material demand; and pushes it into Inventory Planning where the supply and demand variability is considered to compute safety stocks at all locations. Demand plans created in the process, provide visibility into the upcoming material requirements long before the applicable maintenance is scheduled to a facility.

Demand Planning includes the following procedures:

Create Demand Plans:

1. Change responsibility to Demand Planning System Administrator. From the navigator, choose Demand Plans. The Demand Plans window appears.

Demand Plans window

Demand Plans (TST:PM)

Name: **TEST**
Description:
Base UOM: **Ea**
Status: **Invalid**
☐ Calculate Dependent Demand
Explode Demand Using:

Lowest Time Levels
Gregorian:
Manufacturing: **Day**
Fiscal:
Composite:

Dimensions | Input Parameters | Scenarios | Events | Price Lists | Options | Scope

Dimension	User Dimension
<input checked="" type="checkbox"/> Ship from Location	Ship from Location
<input type="checkbox"/> Product	Product
<input type="checkbox"/> Time	Time
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

2. Create a Demand Plan. For information on creating a Demand Plan, refer to the *Oracle Demand Planning User's Guide*.
3. You must define the following Input Parameters:
 - Material Requirements - Scheduled
 - Material Usage History - Unplanned
 - Material Usage History - Planned
 - Material Requirements - Planned

Enter Input Parameters - Demand Plans window

Name:

Description:

Base UOM:

Status:

☐ Calculate Dependent Demand

Explode Demand Using:

Lowest Time Levels

Gregorian:

Manufacturing:

Fiscal:

Composite:

Dimensions | **Input Parameters** | Scenarios | Events | Price Lists | Options | Scope

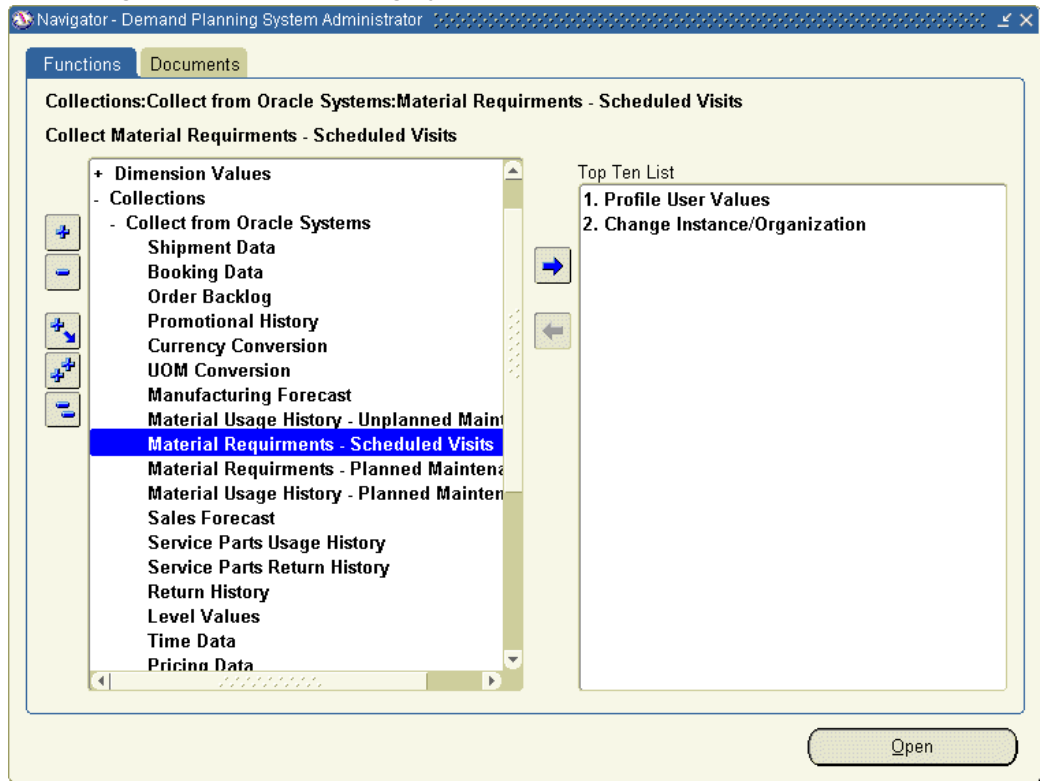
Type	Name	Forecast by	Start Date	End Date
Material Requirements-		Request Date	01-APR-2004	31-DEC-2004
Material Requirements-		Request Date	01-APR-2004	31-DEC-2004
Material Usage History-		Request Date	01-JAN-2003	31-MAY-2004
Material Usage History-		Request Date	01-JAN-2003	31-MAY-2004

These streams account for global demand from Unit Maintenance Plan, scheduled requirements in Long Term Planning and historical requirements from non-routine maintenance defined during the production process.

Run data collections:

1. From the navigator, choose Collections > Collect from Oracle Systems.

View Navigator - Demand Planning System Administrator window



2. Select the CMRO streams, and run collections. This process collects the material requirements from CMRO and populates demand plans with it.

Custom Stream Collection window

Custom Stream Collection

Data Stream Name **Material Requirements - Scheduled Visits**

Source of Data ERP

Collection Parameters

Collection Type **Collect** Single Step Collection ☒

Instance

Complete Refresh ☒ Validate Data ☒

Stream Designator

Start Date

End Date

Submit and Schedule Submit Cancel

Build Demand Plans:

Once a demand plan has been defined in the Demand Planning Server, you build the demand plan in the Demand Planning Engine.

1. From the Navigator, select Demand Plan Administration. A list of Demand Plans appears.
2. Select the demand plan that you want to work with, and build it. This process will build the Demand Planning databases, and download data from the Demand Planning server to these databases.

Refer to the *Oracle Demand Planning User's Guide*, for information on all the procedures mentioned above.

Supply Chain Planning

When maintenance requirements, forecast, routine, and non-routine, are scheduled to an organization through a visit, the associated material requirements are automatically picked up through Oracle Advanced Supply Chain Planning's (ASCP) collection process. The required materials are pegged against the applicable visit and task. Material requirements associated with the scheduled visits then appear in the Scheduled Materials page as scheduled. Scheduled materials are then removed from the global demand defined for planned MRs to ensure that the requirements are not counted twice by the planning engine.

The scheduled dates and quantities are displayed in the Scheduled Materials UI. The collection process also returns exception dates, i.e. the dates on which the material is required but will not be available. If for a particular material requirement, either the scheduled date or the scheduled quantity is unsatisfactory, the maintenance planner can select alternate items, and schedule it using the same process.

The planner then creates an ASCP Plan to process the net existing supplies and generate Planned Orders. Material Demand is reflected as Sales Order in ASCP. The Sales Order number is displayed as concatenated visit number, task number and Complex MRO. (Ex. 100.2.Complex MRO). When the sales order is released, the Scheduled date and Scheduled quantity is automatically updated.

Supply Chain Planning involves the following processes:

Create an ASCP Plan:

1. Change responsibility to Oracle Advanced Supply Chain Planner. From the Navigator, choose Supply Chain Plan > Names. The Supply Chain Names window appears.
2. Create a supply chain plan. Make it ATP enabled.

Supply Chain Plan Names window

Supply Chain Plan Names (TST:P3)

Name	Description	Production			Plan Type	Inactive Date
		ATP		Notifications		
<input type="checkbox"/> CMRO-1	for ASCP - CMRO testing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Manufacturing Plan	
<input checked="" type="checkbox"/> CMRO-APS-4	CMRO APS Testing -- IDC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Manufacturing Plan	
<input type="checkbox"/> DRW-plan-1	do not use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Manufacturing Plan	
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Master Plan	
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Master Plan	
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Master Plan	
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Master Plan	
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Master Plan	
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Master Plan	
<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Master Plan	

Run data collections:

1. From the Navigator, choose Collections > Oracle Systems > Standard Collections. The Planning Data Collection window appears

Planning Data Collection window

Run this Request...

Request Set **Planning Data Collection** Copy...

Program	Stage	Parameters	Language
<input checked="" type="checkbox"/> Planning Data Pull	Planning Data Pull		American English
<input type="checkbox"/> Planning ODS Load	Planning ODS Load		American English
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

Options...

At these Times...

As Soon As Possible Schedule...

Help (A) Submit Cancel

2. Click in the Parameters field for Planning Data Pull. The Parameters window opens. The following two parameters must be set up to collect data from Oracle CMRO:
 - Select the applicable CMRO instance from the Instance list of values.
 - Select Yes from the Sales Orders LOV.

Planning Parameters window

The screenshot shows a window titled "Parameters" with a list of planning parameters and their corresponding values. The parameters are listed on the left, and the values are in a column on the right. The values are mostly "Yes", with "Sourcing History" set to "No". The "Sales Orders" value is highlighted in blue. At the bottom right, there are buttons for "OK", "Cancel", "Clear", and "Help".

Parameter	Value
On Hand	Yes
Planning Parameters	Yes
Planners	Yes
Projects/Tasks	Yes
Purchase Orders/Purchase Requisitions	Yes
Reservations	Yes
Resources Availability	Yes
Safety Stock	Yes
Sales Orders	Yes
Sourcing History	No
Sourcing Rules	Yes
Subinventories	Yes
Supplier Responses	Yes
Suppliers/Customers/Orgs	Yes
Transportation Details	Yes
Unit Numbers	Yes
Units of Measure	Yes

This ensures that material requirements from CMRO are collected as sales orders for the correct organization and instance.

3. Launch the plan.

Checking the Material Schedule

Oracle Complex Maintenance, Repair, and Overhaul Long Term Plan provides the ability to check the material schedule in order to assess available material resources. When a visit is planned, materials are automatically scheduled. The scheduled materials show up in the Scheduled Materials UI. ASCP collections run on a regular basis to collect the requirements and provides exception dates if the material will not be available by the required date. When a conflict exists between a maintenance visit and the associated material schedule, the planner can select alternate items or reschedule the applicable visit, tasks within a visit, or maintenance requirement.

Prerequisites

- ☐ Disposition lists must be defined in Route Management and tasks must be associated with the routes.

To check the material schedule:

1. Retrieve the visit, for which you want to check the scheduled materials (see Finding Scheduled and Unscheduled Visits, page 10-4). The search results appear in the lower half of the page.
2. Select the appropriate visit and click the Plan Visit button.

3. The Schedule Visit page appears. Click Scheduled Materials from the left-hand menu.
4. The Scheduled Materials page appears displaying information about the materials scheduled for the visit. The scheduled date and quantity is displayed for each scheduled material requirement. ASCP collection, that is set up to run on a regular basis, collects the requirements and provides any exception dates when the material will not be available by the required date.

View Scheduled Materials - Scheduled Materials page

[Schedule Visit](#)
[Scheduled Visits](#)
[Scheduled Materials](#)
[Material Availability](#)

Scheduled Materials

Visit Number	456	Visit Type	A Check
Visit Status	Planning	Service Category	Category 5
Unit	UC0426	Serial Number	SN0426
Organization	Vision Project Mfg	Item	AHLITEM002
Department	061120031	Simulation Plan	Primary Plan
Start Date	26 MAY 2004	Planned End Date	31 MAY 2004
End Date	27 MAY 2004	Due By	

Search Materials

Task	<input type="text"/>	Display Only	<input type="text"/>
Item	<input type="text"/>		
Replace % >=	<input type="text"/>	Rework % >=	<input type="text"/>
<input type="button" value="Go"/> <input type="button" value="Clear"/>			

Materials

Previous 1-8 of 8 Next										
Position Path	Sub Configuration	Item	For Task	Order Number	Required Date	Quantity	UOM	Exception Date	Replace %	Rework %
		AHLITEM003		AHLPAR001	26-MAY-2004	10	Each		10	
		0932B13		AHLPAR001	26-MAY-2004	1	Each		60	
		R-ITEM3-Non-Trat		AHLPAR001	26-MAY-2004	20	Each		40	

Items defined with a 100% replacement percentage in the associated disposition list are automatically planned and scheduled by ASCP. Items defined as material requirements in Route Management are assumed to be 100 % replacement items. Planners must manually specify the quantity to be scheduled for non 100 % replacement items. Only items that are scheduled will flow into workorders as material requirements.

5. To manually check for exception dates when collections have not run, select Schedule Conflicts from the Display Only drop-down menu. Click Go. The exception dates will be displayed in the Materials table.
6. Optionally, you can search for and plan materials using the following search criteria:
 - To search for material requirements for a specific task or item, use the Task and Item LOV.
 - To search for materials by disposition percentage, enter a Replace% or Rework%. These percentages indicate the likelihood of the materials being required when executing the task.
7. Click Go. The lower half of the page displays the results matching the search criteria you provided.

View Exception Dates - Scheduled Materials page

Visits | Simulations | Resource Leveling

Schedule Visit
Scheduled Visits
Scheduled Materials
Material Availability

Scheduled Materials
Visit Number **46**
Visit Status **Planning**
Unit **DRW unit 1**
Organization **San Diego Manufacturing**
Department **Inspection Department**
Start Date **12-JAN-2004**
End Date **21-NOV-2004**
Visit Type **A Check**
Service Category **Category 1**
Serial Number **101**
Item **DRW unit item 1**
Simulation Plan **Primary Plan**
Planned End Date **21-DEC-2004**
Due By

Search Materials
Task
Item
Replace % >=
Display Only
Rework % >=
Go Clear

Materials
Cancel Apply
Previous 1-1 of 1 Next

Position Path	Sub Configuration	Item	For Task	Order Number	Required Date	Quantity	UOM	Exception Date	Replace %	Rework %
		VG0430A	Route0419 Complex MRO	46.9.	12-JAN-2004	3	Each	24-JUN-2004		

Previous 1-1 of 1 Next

- Click the Item LOV icon to select an alternative item to replace the item that appears by default in the Materials list. For a sub-configuration or position, the item that is installed is automatically selected to be planned. When no item is installed, the planning engine picks up the alternates defined based on priority. Set the quantity to be scheduled. To incorporate the changes in the sub-configuration, item, or scheduled quantity, and schedule the items for the workorder, click the Apply button.
- Click Cancel to return to the previous page.

Checking Material Availability

Oracle Complex Maintenance, Repair, and Overhaul's Long Term Planning module provides the ability to check the availability of materials for task starting time and location through Oracle's Available to Promise application. The ASCP collection runs periodically to automatically schedule materials, when visits are assigned to organizations. Alternatively, maintenance planners can also manually schedule materials through the Material Availability UI.

Prerequisites

- ☐ The material requirements must be defined in Route Management and tasks must be associated to the routes.

To check material availability:

- Retrieve the visit, for which you want to check material availability (see Finding Scheduled and Unscheduled Visits, page 10-4). The search results appear in the lower half of the page.
- Select the visit for which you want to check availability, and then click the Plan Visit button.

3. The Schedule Visit page appears. Click Material Availability from the left-hand menu.
4. The Check Availability For page appears, displaying the material availability for the visit plan in context.

Material Availability page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visits | Simulations | Resource Leveling

Schedule Visit
Scheduled Visits
Scheduled Materials
Material Availability

Material Availability

Visit Number	456	Visit Type	A Check
Visit Status	Planning	Service Category	Category 5
Unit	UC0426	Serial Number	SN0426
Organization	Vision Project Mfg	Item	AHLITEM002
Department	061120031	Simulation Plan	Primary Plan
Start Date	26-MAY-2004	Planned End Date	31-MAY-2004
End Date	27-MAY-2004	Due By	

Materials Availability for Selected Visit/Task

Cancel Check Availability For All Schedule Materials For All

Check Availability Schedule Materials

Previous 1-8 of 8 Next

Select	Item	For Task	Required Arrival Date	Available Quantity	Exception Date	Required Quantity	UOM
<input type="checkbox"/>	AHLITEM003	AHLPAR001	26-MAY-2004			10	Each
<input type="checkbox"/>	8932B13	AHLPAR001	26-MAY-2004			1	Each
<input type="checkbox"/>	R-ITEM3-Non-Trackable	AHLPAR001	26-MAY-2004			20	Each
<input type="checkbox"/>	VG0324A	AHLPAR001	26-MAY-2004			345	Each
<input type="checkbox"/>	AHLITEM003	AHLPAR001	26-MAY-2004			10	Each
<input type="checkbox"/>	8932B13	AHLPAR001	26-MAY-2004			1	Each
<input type="checkbox"/>	R-ITEM3-Non-Trackable	AHLPAR001	26-MAY-2004			20	Each

5. If needed, you can use the filter to search material requirements by the department that is associated to the route/operation's associated task.
6. To schedule materials, based on current material supply against given organization, select the relevant material requirement, and click Schedule Materials. The applicable requirements are passed through ATP and scheduled into the correct ASCP plan. Optionally, you can select Schedule Materials for All to schedule all the materials in the visit. When scheduling items, if the required quantity is not available by the required date, a warning will be displayed.

Note: This feature enables the maintenance planner to manually initiate the scheduling process, and determine conflicts if any, between the available quantities and the required quantities. This may be required for visits that have been recently scheduled or re-scheduled, or when additional maintenance requirements have been associated with a visit.

Schedule Materials Manually- Material Availability page

[Schedule Visit](#)

[Scheduled Visits](#)

[Scheduled Materials](#)

Material Availability

Confirmation • The Selected Materials have been Scheduled Successfully

Material Availability

Visit Number 456	Visit Type A Check	Visit Status Planning
Unit UC0426	Service Category Category 5	Serial Number SN0426
Organization Vision Project Mfg	Item AHLITEM002	Simulation Plan Primary Plan
Department 061120031	Planned End Date 31-MAY-2004	Due By
Start Date 26-MAY-2004		
End Date 27-MAY-2004		

[Materials Availability for Selected Visit/Task](#)

Previous 1-8 of 8 Next

Select	Item	For Task	Required Arrival Date	Available Quantity	Exception Date	Required Quantity	UOM
<input type="checkbox"/>	AHLITEM003	AHLPAR001	26-MAY-2004			10	Each
<input type="checkbox"/>	8932B13	AHLPAR001	26-MAY-2004			1	Each
<input type="checkbox"/>	R-ITEM3-Non-Trackable	AHLPAR001	26-MAY-2004			20	Each
<input type="checkbox"/>	VG0324A	AHLPAR001	26-MAY-2004			345	Each
<input type="checkbox"/>	AHLITEM003	AHLPAR001	26-MAY-2004			10	Each
<input type="checkbox"/>	8932B13	AHLPAR001	26-MAY-2004			1	Each
<input type="checkbox"/>	R-ITEM3-Non-Trackable	AHLPAR001	26-MAY-2004			20	Each
<input type="checkbox"/>	VG0324A	AHLPAR001	26-MAY-2004		28-JUN-2004	345	Each

Previous 1-8 of 8 Next

7. To check availability for all the materials, click Check Availability For All. Optionally, to check material availability for one material at a time, select an item, and click Check Availability. If the material will not be available by the required date, a warning is displayed.

Check Availability - Material Availability page

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[Schedule Visit](#)

[Scheduled Visits](#)

[Scheduled Materials](#)

Material Availability

Warning • For Item AHLITEM003, Cannot meet request date or latest acceptable date

Material Availability

Visit Number 456	Visit Type A Check	Visit Status Planning
Unit UC0426	Service Category Category 5	Serial Number SN0426
Organization Vision Project Mfg	Item AHLITEM002	Simulation Plan Primary Plan
Department 061120031	Planned End Date 31-MAY-2004	Due By
Start Date 26-MAY-2004		
End Date 27-MAY-2004		

[Materials Availability for Selected Visit/Task](#)

Previous 1-8 of 8 Next

Select	Item	For Task	Required Arrival Date	Available Quantity	Exception Date	Required Quantity	UOM
<input type="checkbox"/>	AHLITEM003	AHLPAR001	26-MAY-2004			10	Each
<input type="checkbox"/>	8932B13	AHLPAR001	26-MAY-2004			1	Each
<input type="checkbox"/>	R-ITEM3-Non-Trackable	AHLPAR001	26-MAY-2004			20	Each
<input type="checkbox"/>	VG0324A	AHLPAR001	26-MAY-2004			345	Each
<input type="checkbox"/>	AHLITEM003	AHLPAR001	26-MAY-2004			10	Each

Previous 1-8 of 8 Next

8. Click Cancel to return to the previous page.

Managing Simulation Plans

An important function of Long Term Planning is to balance the resources of work load requirements versus maintenance base resource capacity. This is important for scheduling purposes, to assure that the available resources are used as efficiently as possible. Simulation plans allow you to compare various plans before implementing them to enable selection of the most efficient maintenance plan.

See:

Related Topics

- Viewing Simulation Plans, page 10-35
- Creating a New Simulation Plan, page 10-30
- Deleting a Simulation Plan, page 10-32
- Adding Visits to a Simulation Plan, page 10-32
- Deleting a Simulation Visit , page 10-37
- Setting a Simulation Plan as Primary, page 10-37

Creating a New Simulation Plan

Prerequisites

- ☐ There must be a primary plan in the database. At least one visit associated to the primary plan must exist in the database.

To create a new simulation plan:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of the Unit Maintenance Plan module appears.
2. Click on the Long Term Planning tab, then select the Simulations secondary tab to bring up the Simulations Plan page. Use the information in the following table to define a simulation plan.

Field	Description
Plan Name	Refers to the name of the simulation plan. All visits are associated with a simulation plan. These plans are used in the scheduling process, and allow you to create different schedule scenarios. The optimal plan is identifying the optimal plan based on resource consumption and schedule flow. After determining the optimal plan, the changes made to the visits within the plan can be implemented, either for the entire plan or for individual visits.
Primary Plan	Indicates whether or not the plan is set as the primary plan. When visits are created in Visit Work Package, they are automatically included in the primary plan. Copies of these visits can then be added to other simulation plans
Number of Visits in Plan	Indicates how many visits are included in the specified plan.

- Click Add More Rows to add several rows to the table. Enter information in the provided fields according to plans you wish to add.

Define Plan Name - Simulation Plans page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visits | **Simulations** | Resource Leveling

Simulation Plans

Cancel Apply

Set Plan as Primary View Plan

Previous 1-2 of 2 Next

Select	* Plan Name	Primary Plan	Number of Visits in Plan	Delete
<input checked="" type="radio"/>	Primary Plan	Y	288	
<input type="radio"/>	Simulation Plan 1	N	7	
	Sim Plan 2			

Add More Rows

Previous 1-2 of 2 Next

Set Plan as Primary View Plan

- Click Apply to save the changes to the database.

Add New Simulation Plan - Simulation Plans page

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Unit Maintenance Plan Visit Work Package Long Term Planning

Visits | **Simulations** | Resource Leveling

Simulation Plans

Cancel Apply

Set Plan as Primary View Plan

Previous 1-3 of 3 Next

Select	* Plan Name	Primary Plan	Number of Visits in Plan	Delete
<input type="radio"/>	Primary Plan	Y	288	
<input type="radio"/>	Simulation Plan 1	N	7	
<input type="radio"/>	Sim Plan 2	N	0	

Add More Rows

Previous 1-3 of 3 Next

Set Plan as Primary View Plan

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5. Click Cancel to return to the previous page.

Deleting a Simulation Plan

Prerequisites

- ☐ There must be a primary plan in the database. A non-primary plan with a visit and at least one visit associated to the primary plan must exist in the database.

To delete a simulation plan:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of the Unit Maintenance Plan module appears.
2. Click on the Long Term Planning tab, then select the Simulations secondary tab to bring up the Simulations Plan page.
3. Click the Select button next to the simulation plan you want to delete.
4. Click on the Delete button. If the Simulation Plan is not the Primary Plan, it is deleted.

Adding Visits to a Simulation Plan

Prerequisites

- ☐ A primary plan, a non-primary plan with a visit, and at least one visit associated to the primary plan must exist in the database.

To add a visit to a simulation plan:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of the Unit Maintenance Plan module appears.
2. Click on the Long Term Planning tab, then select the Simulations secondary tab to bring up the Simulations Plan page.
3. Click the Select button next to the simulation plan to which you want to add a visit.
4. Click the View Plan button. The View Simulation Plan page appears. Click Add More Rows to add several rows to the table.

Add visits to simulation plan - View Simulation Plan page

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Unit Maintenance Plan Visit Work Package Long Term Planning











Visits | Simulations | Resource Leveling

View Simulation Plan

Simulation Plan **Sim Plan 2**

[Visit List](#)

Cancel

Select	Primary Visit Number	Deleted	Item	Visit Type	Serial Number	Organization	Department	Start Date
	25	 No	DRW unit item	A Check	101	San Diego Manufacturing	Inspection Department	19-DEC-2003
	42	 No	VG1210	A Check	SN1210	San Diego Manufacturing	Outside Processing	11-DEC-2003
								
								
								

Add More Rows

Use the information in the following table to add visits to simulation plan.

Description of fields in the View Simulation Plan page

Field	Description
Visit Number	All maintenance visits are assigned a unique visit number. All visit numbers for all visits can be selected.
Item	The item refers to a model name—e.g., Boeing 747-200B— that the visit is associated to. All visits must be associated to an item. This field is not required for the search, but filtering the table of visits by item gives a basic picture of the maintenance workload required for a particular model. All items defined in the Inventory associated to the user's responsibility can be selected.
Visit Type	Visit type defines what kind of maintenance visit is required. This allows maintenance to be classified into categories. Larger visits can include many different maintenance requirements, but can still be grouped together under one visit type. Filtering the table of visits by visit type is useful, as the visit type in general and indirectly represents visit's length and resource requirements.
Unit	Refers to the serial number of a specific item.
Organization	Visits are associated to an "Organization" that represents the larger group, company, or division where maintenance is performed. All Organizations defined in Oracle HR associated to the user's responsibility can be selected.
Department	Departments are a sub group of Organizations. Visits are associated to a Department and all Departments are associated to an Organization. For example, an Organization may be SFO Airport, and a Department may be "Hangar 1." All Departments are defined in the Bill of Materials, associated to the selected Organization and also associated to the user's responsibility can be selected.
Start Date	Lists the date of the first day of effectivity of this operation

5. Click Apply to save the changes to the database.

Save Visit Record - View Simulation Plan page

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Unit Maintenance Plan Visit Work Package Long Term Planning

Visits | **Simulations** | Resource Leveling

View Simulation Plan

Simulation Plan **Sim Plan 2**

[Visit List](#)

Cancel Apply

Set Visit as Primary Toggle Simulated Delete Schedule Unschedule Copy to a New Plan Edit

Previous 1-2 of 2 Next

Select	Primary Visit Number	Deleted	Item	Visit Type	Serial Number	Organization	Department	Start Date	Delete
<input type="radio"/>	42	No	VG1210	A Check	SN1210	San Diego Manufacturing Outside Processing		11-DEC-2003	
<input type="radio"/>	25	No	DRW unit item 4 A Check	101		San Diego Manufacturing Inspection Department		19-DEC-2003	

Add More Rows

Previous 1-2 of 2 Next

Set Visit as Primary Toggle Simulated Delete Schedule Unschedule Copy to a New Plan Edit

6. Click Cancel to return to the previous page.

Viewing Simulation Plans

Prerequisites

- ☐ There must be a primary plan in the database. At least one visit associated to the primary plan must exist in the database.

To view simulation plans:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of the Unit Maintenance Plan module appears.
2. Click on the Long Term Planning tab, then select the Simulations secondary tab to bring up the Simulations Plan page.

Simulation Plans page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visits | **Simulations** | Resource Leveling

Simulation Plans

Cancel Apply

Set Plan as Primary View Plan

Previous 1-2 of 2 Next

Select	* Plan Name	Primary Plan	Number of Visits in Plan	Delete
<input type="radio"/>	Primary Plan	Y	288	
<input type="radio"/>	Simulation Plan 1	N	7	

Add More Rows

Previous 1-2 of 2 Next

Set Plan as Primary View Plan

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- All simulation plans are displayed, showing for each the number of visits in the plan, and if the plan is set to primary. Plan names may be changed, but must remain unique.
- To view the visits within a plan, select the plan and click on the View Plan button. The View Simulation Plan page appears, displaying the visit list.

View Simulation Plan page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visits | **Simulations** | Resource Leveling

View Simulation Plan

Simulation Plan **Primary Plan**

Visit List

Schedule Unschedule Copy to a New Plan Edit

Previous 1-10 of 288 Next

Select	Visit Number	Item	Visit Type	Serial Number	Organization	Department	Start Date	Delete
<input type="radio"/>	25	DRW unit item 4	A Check	101	San Diego Manufacturing Inspection Department		19-DEC-2003	
<input type="radio"/>	42	VG1210	A Check	SN1210	San Diego Manufacturing Outside Processing		11-DEC-2003	
<input type="radio"/>	43	VG1211	D Check	55			08-DEC-2003	
<input type="radio"/>	44	VG1201	B Check	T59			10-JUN-1996	
<input type="radio"/>	63	DRW unit item 1	A Check	101	San Diego Manufacturing Outside Processing		05-JAN-2004	
<input type="radio"/>	71	DRW unit item 1	A Check	101	San Diego Manufacturing		05-JAN-2004	
<input type="radio"/>	113	DRW unit item 4	A Check	101	San Diego Manufacturing Outside Processing		16-JAN-2006	
<input type="radio"/>	122	R-ITEM1-Trackable A Check		ctr-sno-1000	San Diego Manufacturing Outside Processing		28-JAN-2004	
<input type="radio"/>	127	DRW unit item 1	A Check	101	San Diego Manufacturing Outside Processing		18-MAY-2004	
<input type="radio"/>	128	DRW unit item 1	A Check	101	Vision Project Mfg	061120031	15-JUN-2004	

Deleting a Simulation Visit

Prerequisites

- ☐ A primary plan, a non-primary plan with a visit, and at least one visit associated to the primary plan must exist in the database.

To delete a simulation visit:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of the Unit Maintenance Plan module appears.
2. Click on the Long Term Planning tab, then select the Simulations secondary tab to bring up the Simulations Plan page.
3. Click the Select button next to the simulation plan with the visit you want to delete.
4. Click the View Plan button. The View Simulation Plan page appears.
5. Click the Delete icon next to the visit you want to delete. The page refreshes with the visit deleted.

Setting a Simulation Plan as Primary

Prerequisites

- ☐ A simulation plan with at least one visit and a primary plan with at least one visit must exist in the database.

To calculate maintenance requirement due dates:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of the Unit Maintenance Plan module appears.
2. Click on the Long Term Planning tab, then select the Simulations secondary tab to bring up the Simulations Plan page.
3. Click the Select button next to the simulation plan you want to set as the primary plan.

Set Plan as Primary - Simulation Plans page

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Unit Maintenance Plan Visit Work Package Long Term Planning

Visits | **Simulations** | Resource Leveling

Simulation Plans

Cancel Apply

Set Plan as Primary View Plan

Previous 1-3 of 3 Next

Select	* Plan Name	Primary Plan	Number of Visits in Plan	Delete
<input type="radio"/>	Primary Plan	Y	288	
<input type="radio"/>	Simulation Plan 1	N	7	
<input checked="" type="radio"/>	Sim Plan 2	N	1	

Add More Rows

Previous 1-3 of 3 Next

Set Plan as Primary View Plan

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4. Click on the Set Plan as Primary button.

Deleting a Simulation Plan

You can use Unit Maintenance Plan to estimate due dates and any repetitive maintenance requirement for the selected unit.

Prerequisites

- ☐ A primary plan, a non-primary plan with a visit, and at least one visit associated to the primary plan must exist in the database.

To delete a simulation plan:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of the Unit Maintenance Plan module appears.
2. Click on the Long Term Planning tab, then select the Simulations secondary tab to bring up the Simulations Plan page.
3. Click the Delete icon next to the plan you want to delete. The page refreshes with the plan deleted.

Copying a Visit to a New Simulation Plan

Prerequisites

- ☐ A primary plan with at least one visit and a simulated plan must exist in the database. Visits may only be added to non-primary plans from Long Term Plan. The visit that will be copied, must be in Planning status.

To copy a visit to a new simulation plan:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of the Unit Maintenance Plan module appears.
2. Click on the Long Term Planning tab, then select the Simulations secondary tab to bring up the Simulations Plan page.
3. Click the Select button next to the simulation plan with the visit you want to copy.
4. Click the View Plan button. The View Simulation Plan page appears.
5. Click the Select button next to the visit you want to copy, then click the Copy to a New Plan button. The Copy to a New Plan page appears. The visit and space information for that visit is displayed.

Copy to a New Plan page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Unit Maintenance Plan Visit Work Package Long Term Planning

Visits Simulations Resource Leveling

Copy to a New Plan

* Indicates required field

Cancel Apply

Visit Details

Assoc. Primary Visit Number	42	Visit Type	A Check
Item	VG1210	Serial Number	SN1210
Start Date	11-DEC-2003	End Date	11-DEC-2003
		* Simulation Plan	Simulation Plan 1

Assigned Space List

Organization	Department	Space
No records were found matching the given criteria..		

Cancel Apply

6. Select the plan you want to copy the visit to from the Simulation plan pull-down menu. When a primary visit is copied to a simulation plan, the new visit inherits all the unit effectivities associated with the parent visit. You can view the applicable visit's due by date, derived from the associated unit effectivities.
7. Click Apply to save the changes to the database.
8. Click Cancel to return to the previous page.

Running Resource Leveling Plans

Long Term Plan allows you to assess resources associated with the maintenance requirements of scheduled visits against the capacity of maintenance locations. Ideally, a certain percentage of maintenance capacity is kept free to allow for non routine maintenance needs. The resource leveling feature of Long Term Plan identifies shortcomings in your plan so that you can reschedule a visit or adjust it in Visit Work Package in order to better utilize available resources. Running resource leveling on

different simulation plans allows you to identify the best plan with regards to resource capacity.

Resource leveling takes task level department assignments into consideration. Resource leveling procedure allows you to filter and display only those required resources that exceed a defined level of capacity.

Note: Resource leveling can display only those required resources that exceed a defined level of capacity. This means that the full set of procedures must now be run at the beginning of the process, as opposed to the previous function that drilled into each resource requirement before making these calculations. Enter a value in the Required Capacity field to set the reserve level.

The resource leveling procedure allows you to easily identify where a potential problem exists with regards to conflicts or shortages in available resources. When planning visits, a scheduler needs to be able to leave a certain percentage of resources available in anticipation of non-routine maintenance. If the planned requirements consume too much of these resources, the over plan must be changed by either rescheduling entire visits, tasks within a visit or maintenance requirements associated with a visit. Setting a reserve with the Required Capacity field resolves this need in Long Term Plan. A resource's unused capacity is defined by summing the required units, subtracting these from the total number of applicable people or machines defined for the applicable department, and dividing that by the number of available units. Available units are the total number of persons or machines minus those that are not available due to existing work order assignments.

Results in Resource Leveling can be filtered to display only those required resources that exceed a defined level of capacity.

Note: Resource leveling can only be done for one organization and simulation plan at a time and if all of the applicable resources and resource requirements have been setup correctly.

Prerequisites

- ☐ A visit with tasks associated to a maintenance requirement from Fleet Maintenance Program, and a route from Route Management must exist in the database.

To run resource leveling:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Planning link. The Search Unit Maintenance Plan page of the Unit Maintenance Plan module appears.
2. Click on the Long Term Planning tab, then select the Resource Levelling secondary tab to bring up the Resource Leveling page.

Resource Leveling page

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[Unit Maintenance Plan](#) [Visit Work Package](#) [Long Term Planning](#)

Visits | Simulations | **Resource Leveling**

Resource Leveling


* Indicates required field


* Organization % 

Department 

* Simulation Plan

Available Capacity <= %

* Start Date 

* End Date 

* Period UOM

Resource Capacity and Requirements

Select Date	Resource Type	Resource Name	Available Capacity %	Department
No records were found matching the given criteria..				

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3. Enter values in the fields provided. Department selection is optional, which allows you to view the resources for one department or for the selected simulation plan across many departments. For tasks without a department association, the visit's department is substituted. Asterisks indicate mandatory fields. Use the information in the following table to enter information related to resource levelling.

Description of fields in the Resource Leveling page

Field	Description
Organization	All visits are associated to an Organization. An organization represents the larger group, company, division, etc., where the maintenance visit is to be performed. All Organizations defined in Oracle HR associated to the user's responsibility are available for selection.
Department	All visits are associated to a Department and all Departments are associated to an Organization. The Department represents the group below the organization, such as SFO Airport, or the hangar where the maintenance visit is to be performed.
Start Date	This is a required field. It is an attribute of the visit in context selected from the previous screen. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.
End Date	This is a required field. It is an attribute of the visit in context selected from the previous screen. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.
Simulation Plan	Attribute of the visit in context selected from the previous screen. This further identifies the visit by allowing the user to know which simulation plan the visit in context is part of or if it is a visit in the Primary Plan. When coming from the Search Visits screen, the visit will always be part of the Primary Plan. When coming from the View Simulation Plan screen, the value is defined by the plan in context.
Required Capacity %	This field sets the percentage of capacity that you want to hold in reserve. The table of required resources will be filtered by this percentage. All resources required for each period for all visits in the selected simulation plan are balanced against the total available resources.

4. Click Go. The lower half of the page displays all of the spaces matching the search criteria you provided.
5. Click the Select button next to the visit you want more information on, and click View Resources.
6. The Resource Availability page appears. Select the resource you want more information on, then click View Details.

7. The Resource Consumption Details page appears. Select the Visit or task column to edit the respective visit or task in Visit Work Package.

Administration

This chapter covers the following topics:

- Overview
- Key Business Processes
- Creating Department Shift Records
- Retrieving Department Shift Records
- Creating a Maintenance Space
- Finding Maintenance Spaces
- Deleting Maintenance Spaces
- Finding a Space's Unavailable Period
- Setting a Space as Unavailable
- Editing a Space's Unavailable Period
- Deleting a Space's Unavailable Period

Overview

This chapter discusses the key administrative functions related to the Visit Work Package and Long Term Planning modules.

See:

- Creating Department Shift Records, page 11-2
- Retrieving Department Shift Records, page 11-4
- Finding Maintenance Spaces, page 11-7
- Creating a Maintenance Space, page 11-5
- Deleting Maintenance Spaces , page 11-9
- Finding a Space's Unavailable Period, page 11-10
- Setting a Space as Unavailable, page 11-13
- Editing a Space's Unavailable Period, page 11-15
- Deleting a Space's Unavailable Period, page 11-15

Key Business Processes

Departmental Work Shift Schedule Definition

Efficient maintenance planning seeks to smooth the workload curve. Before a shop visit duration can be accurately determined, an organization's skilled workers' schedules must be considered. Using Visit Work Package, the planner can select shift schedules for the workers who will accomplish the inspections and repairs. As the task-to-shift matching is completed, the time required for the visit tasks to be completed can be calculated.

Creating Department Shift Records

Department shifts are created to define the working hours of a maintenance department. In order to derive the completion date of the maintenance visit, a departmental work shift must be created and factored into the derivation. The shift records for each department specify the actual daily work calendar for your skilled workforce.

Use the following procedure to create department shifts.

Prerequisites

- ☐ The maintaining organization, department, shift number, and work days must have been recorded in the database.

To create department shifts:

1. Click the Administration link at the top right corner of the Oracle Complex Maintenance, Repair, and Overhaul Home page to access the Visit Work Package tab.
2. Select the Department Shift tab. This launches the Search Department Shift page.

Search Department Shift page

3. Click Create to launch the Create Department Shift page.

Create Department Shift page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Approvals Workflow **Department Shift** Spaces Space Unavailability

Create Department Shift

Cancel Apply

* Indicates required field

Shift Info

* Organization

* Department

* Calendar

* Shift Number

Start Time

End Time

* Work Days

Days On

Days Off

Cancel Apply

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4. Use the information in the following table to create a department shift record.

Description of Fields in the Create Department Shift page

Field	Description
Organization	Is the identifier of the business entity or division where calendars for workers have been created.
Department	Is the organization subdivision where the maintenance work is accomplished, and to which skilled workers are assigned.
Calendar	Is the identifier of the work calendar for the employees who are assigned to the current department.
Shift Number	Is the identifier of the shift that is to be associated with the departmental calendar.
Start Time	Is derived from the departmental shift number and is view-only.
End Time	Is also derived from the departmental shift number and is view-only.
Work Days	Identifies the workday patterns associated with the shift number, calendar and department.
Days On and Days Off	Derived from the work calendar and is view-only.

Note: Asterisks indicate mandatory fields.

- Click Apply to save the record.

Retrieving Department Shift Records

Once departmental shift records have been created, they can be retrieved from the database, viewed, and if necessary, deleted. Shift records cannot be updated; they must be deleted and recreated.

Prerequisites

- ☐ Shift records for a department within an organization must already have been created.

To retrieve departmental shift records:

- Click the Administration link at the top right corner of the Oracle Complex Maintenance, Repair, and Overhaul Home page to access the Visit Work Package tab.
- Select the Department Shift tab. This launches the Search Department Shift page.
- Enter values for the Organization and Department where you want to view the shift records.
- Click Go. The lower half of the screen displays the list of all matching records in the database.

Department Shift Search Results - Search Department Shift page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Approvals Workflow **Department Shift** Spaces Space Unavailability

Search Department Shift

Organization

Department

Search Results

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Organization	Department	Shift Number	Days On	Days Off	Start Time	End Time	Remove
San Diego Manufacturing	Outside Processing	1	5	2	7:00	15:00	
San Francisco Aviation Maintenance Center MRO Headquarters		4	5	2	4:00	20:00	
San Francisco Aviation Maintenance Center MRO Satellite Department 4		5	5	2	4:00	20:00	
San Diego Manufacturing	P3 Resource Department 1	1	5	2	7:00	15:00	
Vision Project Mfg	061120031	2	7	0	16:00	24:00	
San Diego Manufacturing	Inspection Department	1	5	2	7:00	15:00	
San Diego Manufacturing	Assembly Department	2	7	0	16:00	24:00	

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

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

- To remove a department shift record, click the Remove icon corresponding to that record.

Creating a Maintenance Space

A maintenance space is used in Long Term Plan as a subgroup of Departments. They provide define specific locations where maintenance tasks take place, the type of work that can be performed there and the item the work can be done on.

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

Prerequisites

- ☐ You should know the Organization and Department that the space is part of, the category it belongs to, as well as the name of the space you want to create. These fields are all required.

To create a maintenance space:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Administration link. The Search Approval Rules page appears.
2. Click the Spaces secondary tab to launch the Search Spaces page.
3. Click the Create button to open the Add Space page.

Add Space page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Approvals Workflow Department Shift Spaces Space Unavailability

Add Space

* Indicates required field

Cancel Apply

Space Details

* Organization

* Department

* Service Category

* Space Name

Cancel Apply

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4. Use the information in the following table to complete the fields in the Add Space page.

Description of fields related to maintenance spaces

Field	Description
Organization	Visits are associated to an “Organization” that represents the larger group, company, or division where maintenance is performed. All Organizations defined in Oracle HR associated to the user’s responsibility can be selected.
Department	Departments are a subgroup of Organizations. Visits are associated to a Department and all Departments are associated to an Organization. For example, an Organization may be an airline, and a Department may be “SFO Airport.” All Departments are defined in the Bill of Materials, associated to the selected Organization and also associated to the user’s responsibility can be selected.
Space Name	Spaces are created as subdivisions of a maintenance department and are used to refer to the specific locations where all of the actual maintenance takes place. For example, if a Department is “SFO Airport,” then a Space might be “Hangar 1”, or even “Dock 1” within a hangar. Spaces might further subdivide a hangar into separate docks or maintenance bays. Spaces also define the maintenance capabilities of a department. Spaces break down a department into sub groups representing smaller maintenance areas. Each space can be assigned maintenance capabilities based on item and visit type and are assigned a maintenance category.
Service Category	Service Category represents the level of maintenance that can be performed in a space. It is the user defined category of the maintenance requirement. A common method of categorization would be based on the equipment type to which the maintenance requirement applies. For example, Airframe, Power plant, Ground Service Equipment.
Status	Refers to the state of the space, which is either “active” or “inactive”. Inactive spaces are no longer used or considered in the scheduling process.
Item	The item refers to a model name—e.g., Boeing 747-200B— that the visit is associated to. All visits must be associated to an item. This field is not required for the search, but filtering the table of visits by item gives a basic picture of the maintenance workload required for a particular model. All items defined in the Inventory associated to the user’s responsibility can be selected.
Visit Type	Visit Type defines what kind of maintenance visit is required, e.g, C-Check, D-Check, Preflight. The user defined list of maintenance visits are listed here. This allows maintenance to be classified into categories. Filtering the table of visits by visit type is useful, as the visit type indicates the visit’s length and resource requirements.
Item Capability	Refers to the items that can be maintained at the space.
Visit Type Capability	Refers to the visits that the space is capable of handling.

5. Click the Apply button to save the space to the database. The Edit Space page appears.

Edit Space page

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Approvals Workflow Department Shift **Spaces** Space Unavailability

Edit Space

* Indicates required field Cancel Apply

Space Details

Organization **Vision Project Mfg**
Department **061120031**
* Space Name
Service Category
Status

Capabilities

Select	Item	Visit Type
No records were found matching the given criteria..		
Add More Rows		

Cancel Apply

6. Define the space's capabilities. Capabilities are defined based on the combination of item and visit type.

Add Capabilities Information - Edit Space page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Approvals Workflow Department Shift **Spaces** Space Unavailability





Edit Space

* Indicates required field Cancel Apply

Space Details

Organization **Vision Project Mfg**
Department **061120031**
* Space Name
Service Category
Status

Capabilities

Select	Item	Visit Type
	<input type="text" value="00PKANT"/>	<input type="text" value="A Check"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>

Finding Maintenance Spaces

Oracle Complex Maintenance, Repair, and Overhaul helps you retrieve any Long Term Planning spaces that exist in the database by organization, item capability, department, visit type, or space name, in order to identify or edit a space's

capabilities. You can also retrieve all records in the database by providing no search criteria and clicking Search.

Prerequisites

- ☐ The space you want to retrieve must exist in the database.

To search maintenance spaces:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Administration link. The Search Approval Rules page appears.
2. Click the Spaces secondary tab to launch the Search Spaces page.

Search Spaces page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Approvals Workflow Department Shift **Spaces** Space Unavailability

Search Spaces

Organization

Department

Space

Status

Item Capability

Visit Type Capability

Service Category

Spaces

Space	Organization	Department	Service Category	Status	Delete
No records were found matching the given criteria.					

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3. Enter information in the fields based on your search criteria. For information, see Description of fields related to maintenance spaces, page 11-6.
4. Click Go. The lower half of the page displays all of the spaces matching the search criteria you provided. Note that selected spaces may be edited and/or deleted.




View Search Result - Search Spaces page



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Approvals Workflow Department Shift **Spaces** Space Unavailability







Search Spaces

Organization 
Department 
Space 
Status

Item Capability 
Visit Type Capability 
Service Category

Spaces

Previous 1-10 of 22 Next

Space	Organization	Department	Service Category	Status	Delete
Admin Test Space	San Diego Manufacturing	Pre-Fabrication Department	Category 6	Active	
Bav A-1	San Diego Manufacturing	Inspection Department	Category 1	Active	
Bav A-2	San Diego Manufacturing	Inspection Department	Category 1	Active	
CMRO Space 1	San Diego Manufacturing	Outside Processing	Category 6	Active	
Dock 1	San Francisco Aviation Maintenance Center MRO Headquarters		Category 1	Active	
Dock 2	San Francisco Aviation Maintenance Center MRO Headquarters		Category 2	Active	

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

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

Deleting Maintenance Spaces

If a space is no longer needed, you can delete it using the Edit Space page.

Prerequisites

- ☐ The maintenance space that you want to delete must exist in the database and must not be scheduled to any open maintenance visits.

To delete a space:

1. Retrieve the space that you want to edit (see Finding Maintenance Spaces, page 11-7). The search results appear in the lower half of the page.
2. Click the Space name link from the search results to launch the Edit Space page for that record, where you can edit the space and its attributes.

Edit Space Record - Edit Space page

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Approvals Workflow Department Shift Spaces Space Unavailability

Edit Space

* Indicates required field

Cancel Apply

Space Details

Organization Vision Project Mfg

Department 061120031

* Space Name Spac10

Service Category Category 4

Status Active

Capabilities

Delete

Previous 1-1 of 1 Next

Select	Item	Visit Type
<input type="checkbox"/>	00PIKANT	A Check

Add More Rows

Previous 1-1 of 1 Next

3. Click the Delete button in the Capabilities section. If there are no visits associated to the space it is deleted; however, if there are still associated visits an error will display stating a space cannot be deleted until all visits are removed. This space cannot be deleted if there were previous visits that were associated to the space that are now closed. You can set it as inactive.

Finding a Space's Unavailable Period

Prerequisites

- ☐ The maintenance space that you are checking must exist in the database.

To find the unavailability of a space:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Administration link. The Search Approval Rules page appears.
2. Click on the Space Unavailability secondary tab to launch the Search Availability Restrictions page.



Search Availability Restrictions page



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Search Availability Restrictions

Organization 
Department 
Space 

Unavailable From Date 
Unavailable To Date 

Availability Restrictions

Select	Space	Organization	Department	Unavailable From Date	Unavailable To Date	Description
No records were found matching the given criteria..						

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3. Use the information in the following table to enter values in the Search Availability Restrictions page.

Description of fields in the Search Availability Restrictions page

Field	Description
Organization	Visits are associated to an "Organization" that represents the larger group, company, or division where maintenance is performed. All Organizations defined in Oracle HR associated to the user's responsibility can be selected.
Department	Departments are a sub group of Organizations. Visits are associated to a Department and all Departments are associated to an Organization. For example, an Organization may be SFO Airport, and a Department may be "Hangar 1." All Departments are defined in the Bill of Materials, associated to the selected Organization and also associated to the user's responsibility can be selected.
Space	Spaces are a subdivision of Departments and are used to refer to a specific location where maintenance takes place. For example, if a Department is "SFO Airport," then a Space might be "Hangar 1." Spaces might further subdivide a hangar into separate docks or maintenance bays. Spaces also define the maintenance capabilities of a department. Spaces break down a department into sub groups representing smaller maintenance areas. Each space can be assigned maintenance capabilities based on item and visit type and are assigned a maintenance category.
Unavailable From	Specifies the date after which the space is not available for scheduling. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.
Unavailable To	Specifies the date after which the space is available for scheduling. Enter a date directly, or click on the icon beside the date field to bring up the calendar. Click on a date to insert it in the field.

4. Click Go. The lower half of the page displays all of the spaces matching the search criteria you provided.

View Search Results - Search Availability Restrictions page

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Approvals Workflow Department Shift Spaces **Space Unavailability**

Search Availability Restrictions

Organization Unavailable From Date
Department Unavailable To Date
Space

Availability Restrictions

Previous 1-5 of 5 Next

Select	Space	Organization	Department	Unavailable From Date	Unavailable To Date	Description
<input type="checkbox"/>	Bay A-2	San Diego Manufacturing	Inspection Department	21-MAY-2004	31-MAY-2004	Facility maintenance
<input type="checkbox"/>	Dock 1	San Francisco Aviation Maintenance Center MRO Headquarters		14-APR-2003	24-DEC-2003	Paint Hanger Floor
<input type="checkbox"/>	Dock 2	San Francisco Aviation Maintenance Center MRO Headquarters		14-APR-2003	17-APR-2003	Paint Hanger Floor
<input type="checkbox"/>	Space0213	San Diego Manufacturing	Outside Processing	24-JUN-2004	25-JUN-2004	Space
<input type="checkbox"/>	Space0627	San Diego Manufacturing	Outside Processing	29-JUN-2003	30-JUN-2003	

Previous 1-5 of 5 Next

Setting a Space as Unavailable

Prerequisites

- ☐ The space to be set as unavailable must exist in the database.

To set a space as Unavailable:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, select the Administration link. The Search Approval Rules page appears.
2. Click the Space Unavailability secondary tab to launch the Search Availability Restrictions page.
3. Click the Create button to open the Add Availability Restriction page.

Add Availability Restriction page

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Approvals Workflow Department Shift Spaces Space Unavailability

Add Availability Restriction

* Indicates required field

Cancel Apply

Availability Restriction Details

* Organization

* Department

* Space

* Unavailable From Date

* Unavailable To Date

Description

Cancel Apply

4. Enter values on the Add Availability Restriction page in the fields provided. For information, see Descriptions of fields in the Search Availability Restrictions page, page 11-12.

Enter Restriction Details - Add Availability Restrictions page

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Approvals Workflow Department Shift Spaces Space Unavailability

Add Availability Restriction

* Indicates required field

Cancel Apply

Availability Restriction Details

* Organization

* Department

* Space

* Unavailable From Date

* Unavailable To Date

Description

Cancel Apply

5. Click the Apply button to save the space to the database. If there are no visit scheduled to this space during this period the Edit Availability Restriction page is displayed with the space's unavailable period shown. If there are any visits scheduled to this space during this period an error is displayed.

Edit Availability Restriction page

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Edit Availability Restriction


* Indicates required field


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

Organization **Vision Project Mfg**

Department **061120031**

Space **Spac10**

* Unavailable From Date 

* Unavailable To Date 

Description

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

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Editing a Space's Unavailable Period

Prerequisites

- ☐ The maintenance space that you want to edit must exist in the database.

To edit a space's unavailable period:

1. Retrieve the space with the unavailable period that you want to edit (see Find a Space's Unavailable Period, page 11-10). The search results appear in the lower half of the page.
2. Select a space, and click the corresponding Space name link to launch the Edit Availability Restriction page for that record, where you can edit the space and its attributes.
3. Make any necessary changes in the fields provided.
4. Click Apply to store the changes in the database.
5. The Edit Availability Restriction page displays confirming your changes.

Deleting a Space's Unavailable Period

Prerequisites

- ☐ The relevant maintenance space and the period you want to delete must exist in the database.

To delete a space's unavailable period:

1. Retrieve the space with the unavailable period that you want to edit (see Find a Space's Unavailable Period), page 11-10. The search results appear in the lower half of the page.
2. Select the desired unavailable period from the list using the check box next to it.

Delete Unavailable Period - Search Availability Restrictions page

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Approvals Workflow Department Shift Spaces Space Unavailability

Search Availability Restrictions

Organization Unavailable From Date

Department Unavailable To Date

Space

Go Clear

Availability Restrictions

Create

Previous 1-5 of 5 Next

Select	Space	Organization	Department	Unavailable From Date	Unavailable To Date	Description
<input type="checkbox"/>	Bay A-2	San Diego Manufacturing	Inspection Department	21-MAY-2004	31-MAY-2004	Facility maintenance
<input type="checkbox"/>	Dock 1	San Francisco Aviation Maintenance Center MRO Headquarters		14-APR-2003	24-DEC-2003	Paint Hanger Floor
<input type="checkbox"/>	Dock 2	San Francisco Aviation Maintenance Center MRO Headquarters		14-APR-2003	17-APR-2003	Paint Hanger Floor
<input type="checkbox"/>	Space0213	San Diego Manufacturing	Outside Processing	24-JUN-2004	25-JUN-2004	Space
<input checked="" type="checkbox"/>	Space0627	San Diego Manufacturing	Outside Processing	29-JUN-2003	30-JUN-2003	

Previous 1-5 of 5 Next

Delete

3. Click Delete to remove the selected unavailable period(s).
4. Click the corresponding Space name link to launch the Edit Availability Restriction page for that record, where you can edit the space and its attributes.

Production Planning and Production

This chapter covers the following topics:

- Overview
- What is Production Planning?
- What is Production?
- What is a Routine Task?
- What is a Non-Routine Task?
- Key Business Processes
- Managing Workorders
- Finding Workorders
- Updating Operations
- Updating Operation Details
- Completing Operations
- Entering QA results for an Operation
- Creating Non-Routine Workorders
- Updating/Viewing Non-Routine Workorders
- Releasing Workorders
- Completing Workorders
- Deferring Workorders
- Entering QA Results for a Workorder
- Signing Off Maintenance Requirements
- Deferring Maintenance Requirements (MR)
- Scheduling Workorders using the Scheduler Workbench
- Viewing the Scheduling Hierarchy
- Performing Part Removal/Install
- Changing the Serial Number of Items Associated with Workorders
- Viewing the Serial Number Change History
- Working with Maintenance Requirements

- Viewing Material Requirements
- Updating Material Requirements
- Updating Material Requirement Details
- Viewing Employee Assignments
- Viewing Documents
- Viewing Resource Requirements
- Editing Resource Requirements
- Updating Resource Requirement Details
- Viewing Resource Assignments
- Editing Resource Assignments
- Charging Resources
- Working with Material Transactions
- Viewing and Issuing Materials Across WorkOrders
- Returning Materials Across Workorders
- Identifying the Employee that Items are Issued To or Returned By
- Viewing the Material Transaction History
- Item Disposition
- Disposition Association during Material Transaction
- Updating Dispositions
- Quality Collection Plans Setup
- Viewing Item/Part Service History
- My Workorders Interface

Overview

In the maintenance, repair, and overhaul industry, it is necessary to identify, perform, and track maintenance execution to form a complete history of an unit while maintaining the units condition to ensure service availability and capturing the costs associated with the maintenance execution. While maintaining the unit it is necessary to identify defects, the corrective action steps, material, and resource requirements as well as charging resources, performing material transactions, and maintaining the quality for a job.

This chapter discusses the key features related to the execution of routine tasks and maintenance requirements associated with a visit and creation and execution of non-routine tasks for a visit.

The Production Planning user interface is used by production planners to manage shop floor activities, assign personnel and equipment to jobs, fine tune work schedules, manage procurement, create material requirements for unplanned maintenance, and track components sent out for repair against the maintenance visit.

This interface is also used by maintenance personnel to execute the organizations' maintenance program. Technicians and supervisors can view job assignments, view component and material availability, record maintenance activities; material and

component consumption; and job completion, update maintenance compliance details, issue quality inspection results to satisfy regulatory requirements, and initiate new service requests for unplanned maintenance discovered during planned maintenance visits.

See

- Managing Workorders, page 12-6
 - Finding Workorders, page 12-7
 - Updating Operations, page 12-11
 - Updating Operation Details, page 12-12
 - Completing Operations, page 12-13
 - Entering QA results for an Operation, page 12-14
 - Creating Non-Routine Workorder, page 12-14
 - Updating/Viewing Non-Routine Workorders, page 12-17
 - Releasing Workorders, page 12-18
 - Completing Workorders, page 12-18
 - Deferring Workorders, page 12-19
 - Entering QA Results for a Workorder, page 12-20
 - Signing Off Maintenance Requirements, page 12-21
 - Deferring Maintenance Requirements (MR), page 12-23
 - Scheduling Jobs using the Scheduler Workbench, page 12-26
 - Viewing the Scheduling Hierarchy, page 12-29
 - Performing Part Removal/Install, page 12-30
 - Changing the Serial Number of Items Associated with Workorders, page 12-34
 - Viewing the Serial Number Change History, page 12-35
- Working with Maintenance Requirements, page 12-36
- Working with Material Requirements
 - Viewing Material Requirements, page 12-39
 - Updating Material Requirements, page 12-41
 - Updating Material Requirement Details, page 12-42
- Viewing Employee Assignments, page 12-44
- Viewing Documents, page 12-45
- Working with Resource Requirements
 - Viewing Resource Requirements, page 12-49
 - Editing Resource Requirements, page 12-49
 - Updating Resource Requirement Details, page 12-51
- Working with Resource Assignments

- Viewing Resource Assignments, page 12-52
- Editing Resource Assignments, page 12-53
- Charging Resources, page 12-54
- Working with Material Transactions, page 12-56
 - Viewing and Issuing Materials Across WorkOrders, page 12-56
 - Returning Materials Across Workorders, page 12-58
 - Identifying the Employee that Items are Issued To or Returned By, page 12-61
 - Viewing the Material Transaction History, page 12-61
- Item Disposition, page 12-62
- Disposition Association during Material Transaction, page 12-70
- Updating Dispositions, page 12-72
- Quality Collection Plans Setup, page 12-72
- Viewing Item/Part Service History , page 12-75
- My Workorders Interface, page 12-79

What is Production Planning?

The objective of Production Planning is to evaluate a work package and develop a feasible project plan, including resource allocation by mechanics' skill, material, breakdown man hour by zone/process, and estimate turn time for each major process. When a Visit Work Package is updated with non-routine or repair jobs, the production plan will include these.

What is Production?

Production is an Oracle Complex Maintenance, Repair and Overhaul module designed for the execution of Routine Tasks and Maintenance Requirements associated with a Visit and creation and execution of Non-Routine Tasks for a Visit. The Production module supports the execution of the tasks against an Install Base Tracked Item. Production is the actual execution of the work required for a maintenance visit. The execution of the visit accumulates the entire history of work performed, the inspection findings, and component changes. The production activity thus provides the information necessary for the records that is required for commercial and regulatory purposes. Production manages key processes such as receiving a unit for service, disassembling, cleaning and inspecting it as well as dispositioning the parts.

The Production Planning module automates production tasks like job creation, maintenance and job completions. Once a job is released to the floor, it can be executed and vouchered to. The execution of a job can be routine, disassembly, inspection, assembly, disposition that can lead to scrap, and part request and repair job creation to correct a deviance. All costs associated with the jobs are collected throughout the repair cycle.

What is a Routine Task?

A Routine task is a job that has been generated from a predefined Route setup in Route Management which may be part of a Maintenance Requirement defined in Fleet Maintenance Program. If defined through a Maintenance Requirement it may have a schedule and due date as defined by Unit Maintenance Plan. The task has been associated with a maintenance visit in Visit Work Package and released to Production, optionally scheduled by Long Term Plan, and optionally has resources scheduled by Production Planning.

What is a Non-Routine Task?

A Non-Routine Task consists of a Service Request, which tracks the defect or problem statement, and a Job that tracks the steps required to resolve the Service Request. It may have additional Routine Routes associated with it in Visit Work Package to support the resolution of the Service Request. A Non-Routine Task is generated in the production environment, associated with a maintenance visit, and optionally has resources scheduled by Production Planning. A Non-Routine job is a dynamically created work definition including operation creation, material requirement definition, and the resource requirement definition required to perform the job.

Key Business Processes

The Production module of Oracle Complex Maintenance, Repair, and Overhaul supports the following business processes:

Search for Routine and Non-Routine Workorders

After a Routine workorder or Non-Routine workorder is created, the workorder can be selected from the results of a search using the desired filtering elements.

Create workorders from visit tasks for Scheduled, Unscheduled, and Convenience maintenance

Workorders are created in Production when the tasks are pushed to Production from Visit Work Package or when a Service Request, from Oracle Complex Maintenance, Repair, and Overhaul Production, is created in a Visit where the tasks have been pushed to Production.

Create Service Requests to track reported problems

Service Requests are created when an item has a service difficulty, requiring an action to address the issue. During the Service Request creation a Visit Task is created and a job is created if the Visit's Tasks have been pushed to Production. The Service Request creation will also be generated when an Install Base tracked item is returned or removed in the Unserviceable or MRB condition.

Create Operations to Non-Routine workorders for work definition and tracking

For Non-Route based workorders the user is allowed to create operations to describe the steps required to correct the service difficulty. For Route based workorders the operation steps are created from the definition in Route Management including the associated material and resource requirements that are valid for the execution organization.

Maintain Workorders

The user maintains the workorder by adjusting the schedule, the status, completing, deferring, and selecting the actual start and end for a workorder. In addition, the user

can select if the workorder is confirming the jobs necessity by selecting the confirmed failure flag. When a workorder is completed it triggers a check to determine if the workorder is the last as part of a maintenance requirement. If the workorder was the last workorder to be completed for a maintenance requirement, the counters are reset as defined by Fleet Maintenance Program and Unit Maintenance Plan is updated to reflect the maintenance requirement is complete.

Maintain Operations

The user maintains the operations by updating the operations, adding, removing, or updating the material and resource requirements, captures costs by Charging Resources, Issuing, and Returning Materials, viewing the resource assignments, recording part changes, and completing the operations.

Maintain Quality

Quality is maintained using the Route setup from Route Management for the workorder and operation compliance and from the profile options for Non-Routine Workorder and Operation compliance, Job Deferral, MRB part disposition support, and by capturing counter readings at the job completion. The quality results are captured based on the setup storing them in Oracle Quality.

View Service History

During the planning phase of a service or the execution of a work order, planners access the history of service performed against a Unit/part. Planners will then compare the current/future requirements and schedule the tasks to be performed. Planners can also review the past, current and future maintenance requirements against a part/item.

Managing Workorders

The Production module provides users the interface to perform various activities related to workorders. Users can update, release, cancel, defer, and complete workorders as well as create non-routine workorders arising out of maintenance needs discovered on the production floor. Users can also view documents, scheduling hierarchy, material, and resource requirements associated with workorders.

See:

- Finding Workorders, page 12-7
- Updating Operations, page 12-11
- Updating Operation Details, page 12-12
- Completing Operations, page 12-13
- Entering QA results for an Operation, page 12-14
- Creating Non-Routine Workorder, page 12-14
- Updating/Viewing Non-Routine Workorders, page 12-17
- Releasing Workorders, page 12-18
- Completing Workorders, page 12-18
- Deferring Workorders, page 12-19
- Entering QA Results for a Workorder, page 12-20
- Signing Off Maintenance Requirements, page 12-21

- Deferring Maintenance Requirements (MR), page 12-23
- Scheduling Jobs using the Scheduler Workbench, page 12-26
- Viewing the Scheduling Hierarchy, page 12-29
- Performing Part Removal/Install, page 12-30
- Changing the Serial Number of Items Associated with Workorders, page 12-34
- Viewing the Serial Number Change History, page 12-35

Also see Quality Collection Plans Setup, page 12-72

Finding Workorders

Prerequisites

- ☐ A relevant workorder must exist in the database.

To search for workorders:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Workorder Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All workorders matching your search criteria appear in the Workorder List Results table.

Workorder Overview page

Workorder Overview

Organization

Department

Department Class

Serial Number

Item

Visit Number

Visit Task

Unit Name

Maintenance Requirement

Start Date

Workorder Number

Project

Project Task

Accounting Class

Priority

Confirmed Failure

Workorder Status

Non-Routine Workorder

Workorder Description

End Date

Workorder List

Update Workorder

Select	Workorder Number	Task Number	Workorder Description	Non-Routine Workorder	OSP Order Number	Scheduled Start Date	Scheduled End Date	Status
<input type="radio"/>	CMRO323	4	29-030-02-00			2005-JAN-05	2005-JAN-05	Unreleased

The following table provides information about fields in the Workorder Overview page.

Description of fields in the Workorder Overview page

Field Name	Description
Organization	The organization name.
Department	The department name.
Department Class	The class of department. Commonly used to distinguish Vendor class department for outside processing.
Item	The tracked item for which the workorder has been created against.
Serial Number	Enter the serial number if you want to display the jobs that are for a specific serialized part.
Visit Number	The number generated for a visit.
Task Number	The number generated for a task within a specific visit.
Unit Name	The name used to distinguish a configuration defined in Unit Configuration.
Start Date	The scheduled start date from which to begin the search.
Workorder Number	The name generated for a workorder.
Project	The project name associated with the workorder from Visit Work Package.
Project Task	The project task name associated with the visit task and the workorder.
Accounting Class	The maintenance type accounting class name.
Maintenance Requirement	Through the associated routes, effectivity and threshold, the requirement defines the maintenance that needs to be performed, what it needs to be performed on, and when it needs to be done.
Priority	The priority of the workorder.
Confirmed Failure	Used to search for workorders in which the user validated the justified need for the workorder to be executed.
Workorder Status	The current status of a workorder.
Service Request	The service request incident number for which a workorder was generated.
End Date	The scheduled end date for which you want to limit the workorder search.

3. Choose one of the following from the drop-down menu to initiate an associated action against the selected workorder:
 - Release Workorder
 - Complete Workorder
 - UpdateWorkorder
 - Defer

- Record Workorder QA Results
 - Record Maintenance Requirement QA Results
 - Sign Off
 - View Documents
 - View OSP
 - View Scheduling Hierarchy
4. Select a workorder and choose Update Workorder from the drop-down menu. The Workorder Operation page appears. You can view the workorder details in this page.

Workorder Operations page

The screenshot displays the 'Workorder Operations' page. On the left is a navigation menu with links: Operations (selected), Materials, Resources, Assignments, Resource Transactions, and Dispositions. The main content area is titled 'Workorder Operations' and includes a 'Cancel' button, a 'Revert' button, an 'Apply' button, and a 'Complete Workorder' dropdown menu with a 'Go' button. Below this is a 'Workorder Details' section with fields for Workorder Number (CMR0323), Workorder Description (29-030-02-00), Maintenance Requirement (29-030-02), Route (29-030-02-00), Priority, Item (MRO-C1600), Visit Number (71), Workorder Status (Unreleased), Completion Sub Inventory, and Lot Number. To the right of these fields is a dropdown menu with options: Defer, Complete Workorder, Create Non-Routine Workorder, Update/View Non-Routine Workorder, Perform Part Removal/Install, Change Serial Number, Record Workorder QA Results, Record Maintenance Requirement QA Results (highlighted), Sign Off Maintenance Requirement, Release Visit Workorder, Release Maintenance Workorder, Cancel Workorder, and Close Visit. Below the details section are fields for Scheduled Workorder Start Date (2005-JAN-05), Scheduled Workorder Start Time (Hrs 09, Mins 00), Actual Workorder Start Date, Actual Workorder Start Time, Scheduled Workorder End Date (2005-JAN-05), Scheduled Workorder End Time (Hrs 10, Mins 45), Actual Workorder End Date, and Actual Workorder End Time. At the bottom is a table with columns: Select, Operation Sequence, Operation Code, Operation Description, Actual Start Date, Actual End Date, Scheduled Start Date, Scheduled End Date, Department, and Operation Status. The table contains one row with data: 10, 29.11.41.000.801.00, EMDP Case Drain Filter Element Removal, and MRO Headg. The Operation Status is 'Uncomplete'.

Select	Operation Sequence	Operation Code	Operation Description	Actual Start Date	Actual End Date	Scheduled Start Date	Scheduled End Date	Department	Operation Status
<input type="radio"/>	10	29.11.41.000.801.00	EMDP Case Drain Filter Element Removal			2005-JAN-05	2005-JAN-05	MRO Headg	Uncomplete

The following table provides information about fields in the Workorder Operations page associated with workorder details.

Description of fields associated with workorder details

Field Name	Description
Department	The department owning or responsible for the workorder.
Workorder Status	The current status for the workorder.
Completion Sub Inventory	The sub inventory to complete the item, if the item is to be issued to the workorder.
Locator	The locator within the sub inventory to complete the item, if the item is under locator control and the item is to be issued to the workorder.
Confirmed Failure	The indicator for the workorder to show if the user has confirmed the justification / necessity for the workorder.
Scheduled Workorder Start Date	The date on which the workorder is scheduled to start.
Scheduled Workorder Start Time	The time of day the workorder is scheduled to start.
Scheduled Workorder End Date	The date on which the workorder is scheduled to end.
Scheduled Workorder End Time	The time of day the workorder is scheduled to end.
Actual Workorder Start Date	The date on which the workorder actually starts. Required to complete or defer the workorder.
Actual Workorder Start Time	The time of day the workorder actually starts. Required to complete or defer the workorder.
Actual Workorder End Date	The date on which the workorder actually ends. Required to complete or defer the workorder.
Actual Workorder End Time	The time of day the workorder actually ends. Required to complete or defer the workorder.

5. You can select one of the following options from the drop-down menu:

- Defer
- Record Maintenance Requirement QA Results
- Sign Off Maintenance Requirement
- Perform Part Removal/Install
- Change Serial Number
- Create Service Request
- Update/View Service Request
- Record Workorder QA Results
- CompleteWorkorder

Updating Operations

Prerequisites

- ❑ A workorder with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. The WIP Mass Load Concurrent Program must be running. The operation must have Uncomplete or Pending QA status.

To Update Operations:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Workorder Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All workorders matching your search criteria appear in the Workorder List Results table.
3. Select the Workorder number and choose Update Workorder from the drop-down menu. The Workorder Operations page appears. Use the information in the following table to update operations.

Description of fields associated with operations

Field Name	Description
Operation Sequence	The workorder operation sequence number. Required on creation.
Operation Code	The standardized code for an operation. Selectable on a non-route based job, if the operation description has not been defined.
Operation Description	The description of the work to be performed on an operation.
Actual Start Date	The date for which the operation is scheduled to start. Required to complete an operation.
Actual End Date	The date for which the operation is scheduled to end. Required to complete an operation.
Scheduled Start Date	The date for which the operation is scheduled to start. Required on Creation.
Scheduled End Date	The date for which the operation is scheduled to end. Required on Creation.
Department	The department in which the operation is to be performed.
Operation Status	The current status for the operation.

4. Make any necessary changes and click **Apply**. Click **Revert** to cancel any changes and return to the previous page.

Updating Operation Details

Prerequisites

- ❑ A workorder with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. The WIP Mass Load Concurrent Program must be running. The operation must have a Uncomplete or Pending QA status.

To update operation details:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Workorder Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All workorders matching your search criteria appear in the Workorder List Results table.
3. Select the Workorder number and choose Update Workorder from the drop-down menu. The Workorder Operations page appears.
4. Select the operation that you want to update, and click **Details**. The Operation (Detail) page appears.

Operation(Detail) page

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Operation (Detail)

* Indicates required field

Cancel Revert Apply Complete Operation Operation QA Results

Workorder Number	156	Organization	San Diego Manufacturing
Workorder Status	Unreleased	Department	Outside Processing
Workorder Description	28.020.01.00	Project	24
Maintenance Requirement	28.020.01	Project Task	28.020.01.00
Route	28.020.01.00	Serial Number	105
Priority		Unit Name	C-1600, Tail # 105
Item	MRO-C1600	Visit Task	23
Visit Number	24	Locator	
Accounting Class	CMRO-Maint	Scheduled Workorder End Date	2005-APR-23 08:00
Completion Sub Inventory		Actual Workorder End Date	
Scheduled Workorder Start Date	2005-APR-23 06:00		
Actual Workorder Start Date			

Operation Details

Operation Sequence	10	Department	Outside Processing
Description	Pressure Relief Valve Pressure Check	Operation Code	28.13.41.200.801.00
Auto Charge	Manual	Operation Type	System Check
		Operation Status	Uncomplete
* Scheduled Start Date	2005-APR-23	* Scheduled End Date	2005-APR-23
Scheduled Start Time	Hrs 06 Mins 00	Scheduled End Time	Hrs 08 Mins 00
Actual Start Date		Actual End Date	
Actual Start Time	Hrs Mins	Actual End Time	Hrs Mins

Use the information in the following table to update operation details.

Description of fields in the Operation Detail page

Field Name	Description
Operation Sequence	The workorder's operation sequence number.
Operation Code	The standardized code for an operation. Selectable on a non-route based job, if the operation description has not been defined.
Operation Type	The type of operation being performed.
Operation Description	The description of the work to be performed on an operation.
Actual Start Date	The date on which the operation is actually started. Required to complete an operation.
Actual End Date	The date on which the operation ends. Required to complete an operation.
Scheduled Start Date	The date for which the operation is scheduled to start.
Scheduled End Date	The date on which the operation is scheduled to end.
Department	The department in which the operation is to be performed.
Operation Status	The current status for the operation.
Scheduled Start Time (Hours & Minutes)	The time of day the workorder is scheduled to start.
Scheduled End Time (Hours & Minutes)	The time of day the workorder is scheduled to end.
Actual Start Time (Hours & Minutes)	The time of day the workorder is started. Required to complete or defer the workorder.
Actual End Time (Hours & Minutes)	The time of day the workorder ends. Required to complete or defer the workorder.

5. Make any necessary changes and click **Apply**. Click **Cancel** to cancel any changes.

Completing Operations

Prerequisites

- ☐ A workorder with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. The WIP Mass Load Concurrent Program must be running. The operation must have a Uncomplete or Pending QA status. The Operation Description, Actual Start Date, and Actual End Date must be complete. The Operation QA Results must be complete, if associated in Route Management or defined in the profile for a non-route based workorder.

To complete an operation:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Workorder Overview page appears.

2. Enter information in the fields for which you know the value then click **Go**. All workorders matching your search criteria appear in the Workorder List Results table.
3. Select the workorder number and choose Update Workorder from the drop-down menu. The Workorder Operations page appears.
4. Select the operation that you want to complete, and click **Complete Operation**.

Entering QA results for an Operation

Prerequisites

- ☐ A workorder with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. The Quality Collection plan must be set up and the inspection type associated with the operation in Route Management or associated to the Non-Routine Operation Inspection profile option. See Setup Quality Collection Plans.

To Enter QA results for an Operation:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Workorder Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All workorders matching your search criteria appear in the Workorder List Results table.
3. Select the workorder number and choose Update Workorder from the drop-down menu. The Workorder Operations page appears.
4. To enter quality results, select an operation and click Operation QA Results. The Submit Quality Results page appears.
5. Enter information required for the Quality Collection Plan and click **Apply**. Click **Cancel** to cancel any changes.

Note: QA results fields are custom defined for your installation. However, the base elements required to link the results to the job should not be removed or set as disabled.

Creating Non-Routine Workorders

The Production user can create non-routine workorders originating from other inspection/repair tasks or for problems discovered in the production floor when a workorder is being executed. During this process a Service Request, an Un-associated Task and a Workorder are created.

Prerequisites

- ☐ A workorder with a status of Released, Part Hold, Hold, Complete, or Pending QA must exist in the database. The Service Request Profile Options must be setup. The EAM Activity Priority and Service Request Severities must be configured to match for an available priority.

To create a non-routine workorder against an existing workorder:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Workorder Overview page appears.
2. Enter information in the fields for which you know the value, then click **Go**.
3. Select the workorder from the from the Workorder List results. Choose **Create Non-Routine Workorder** from the drop-down menu. The Create Non-Routine Workorder page appears.

Create Non-Routine Workorder page

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Create Non-Routine Workorder

* Indicates required field

Cancel Revert Apply

Create Non-Routine Workorder

Report By Type CMRO Non Conformance

* Report Type Organization

* Contact Type Employee

Date

Severity High

Origination Visit y test1

Origination Task 24-030-01-00

Item MRO-C1600

Serial Number 105

* Summary

Estimated Duration 1

Problem Code

* Name Business World

* Contact Smith, Mr. Tom

* Status Open

Urgency

Target Visit y test1

* Instance Number 70257

Lot

UOM Hours

Resolution Code

Cancel Revert Apply

Use the information in the following table to create non-routine workorders.

Description of fields in the Create Non-Routine Workorder page

Field Name	Description
Report Type	The default Service Request type setup in the AHL Profile Options.
Report By Type	The reporting type related to the name.
Name	The name of the reporting entity defaulted from the AHL Profile Option Default SR Customer Name.
Contact Type	The type associated to the contact.
Contact	The entity to contact in reference to the service request.
Date	The date on which the service difficulty is reported.
Status	The current status of the service request defaulted from the AHL Profile Option Default SR Status.
Severity	The severity of the service request defaulted from the AHL Profile Option Default SR Severity and is formed from the common listing defined using the EAM Activity Priority and the Service Request Severities.
Urgency	The urgency in which the service request needs to be addressed.
Origination Visit	The visit associated with the originating job.
Origination Task	The task number associated with the job from which the service request is being generated.
Target Visit	The visit in which the task will be placed upon creation.
Part Number	The part number of the item for which the service request will be created.
Instance Number	The Install Base Instance Number of the tracked item for which the service request will be created.
Serial Number	The serial number, if serial controlled, of the tracked item for which the service request will be created.
Lot	The Lot Number, if Lot controlled, of the tracked item for which the service request will be created.
Summary	The summary of the service difficulty being reported.
Estimated Duration	The estimated hours it will take to resolve the service difficulty defaulted from the AHL Profile Option Default Estimated Duration.
Problem Code	The code associated with the problem being reported or resolved.
Resolution Code	The code associated with the resolution of the service difficulty.

4. Enter information in the fields for which you know the value. Click **Apply** to create the Non-Routine Workorder and initiate the visit task and corrective action job creation.

Note: You can also create non-routine workorders from the Workorder Operation and Employee Assignments page.

Updating/Viewing Non-Routine Workorders

Prerequisites

- ☐ A job must have been initiated by a Service Request Creation and the related Service Request must be open.

To view and/or update an existing non-routine workorder:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Workorder Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All workorders matching your search criteria appear in the Workorder List Results table.
3. Select the workorder with an associated non-routine workorder, and choose **Update/View Non-Routine Workorder** from the drop-down menu. The Update or View Non-Routine Workorder page appears.

View Non-Routine Workorder

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View Non-Routine Workorder

View Non-Routine Workorder Cancel

Report By Type	CMRO Non Conformance	Incident Number	24672
Report Type	Organization	Name	Business World
Contact Type		Contact	
Date	2004-DEC-08	Status	Open
Severity	Medium	Urgency	Respond - 24
Origination Visit	SEN VISIT SR TEST2		
Origination Task		Target Visit	SEN VISIT SR TEST2
Item	MRO-C1600	Instance Number	70255
Serial Number	103	Lot	
Summary	SEN SR 2		
Estimated Duration		UOM	Hours
Problem Code		Resolution Code	

Cancel

Use the information in the following table to update service requests.

Field Name	Description
Contact Type	The type associated to the Contact.
Contact	The entity to contact in reference to the Service Request.
Status	The current status of the Service Request defaulted from the AHL Profile Option Default SR Status.
Urgency	The urgency in which the service request needs to be addressed.
Problem Code	The code associated with the problem being reported or resolved.
Resolution Code	The code associated with the resolution of the service difficulty.

4. Make any necessary changes and click **Apply**. Click **Revert** to cancel any changes and return to the previous page.

Note: You can also view and/or update non-routine workorders from the Workorder Operation and Employee Assignments page.

Releasing Workorders

Prerequisites

- ☐ A workorder with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database.

To release a workorder:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Workorder Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All jobs matching your search criteria appear in the Workorder List Results table.
3. Select the workorder that you want to release and choose **Release Workorder** from the drop-down menu. Optionally, you can navigate to the Workorder Operations page and update the workorder status to Released.
4. To release all the workorders within a particular visit, select Release Visit Workorder from the drop-down menu. Optionally, you can also navigate to the Search Visit page under the Production Planning subtab. Search for a visit and release all workorders associated with that visit.
5. To release workorders for a particular maintenance requirement, choose Release Maintenance Workorder from the drop-down menu in the Workorder List table. This option is also available in the Search Maintenance Requirements page under the Production Planning subtab.

Completing Workorders

Prerequisites

- ☐ A workorder with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. Any required QA results must be entered. All tracked parts must be returned or installed and all operations must be complete.

To complete a workorder:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Workorder Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All workorders matching your search criteria appear in the Workorder List Results table.
3. Select the workorder that you want to complete and choose **Complete Workorder** from the drop-down menu. Optionally, you can complete the workorder in the Workorder Operations page.

Complete Workorder

Workorder Overview

Organization Workorder Number

Department Project

Department Class Project Task

Serial Number Accounting Class

Item Priority

Visit Number Confirmed Failure

Visit Task Workorder Status

Unit Name Non-Routine Workorder

Maintenance Requirement Workorder Description

Start Date End Date

Workorder List

Complete Workorder

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Select	Workorder Number	Task Number	Workorder Description	Non-Routine Workorder	OSP Order Number	Scheduled Start Date	Scheduled End Date	Status
<input checked="" type="radio"/>	CMRO3	2	Service Item Route	Non-Routine Workorder	12000	2004-NOV-08	2004-NOV-09	Released(1)

Note: If the workorder is the final workorder completed as part of a planned maintenance requirement, the workorder completion will also complete the maintenance requirement and update the unit's maintenance requirement accomplishment in Unit Maintenance Plan. The MR gets completed only if there is no QA plan associated with the MR and if the Auto Complete attribute is set up for the MR in Fleet Maintenance Program.

Deferring Workorders

Prerequisites

- ☐ A workorder with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. Any required QA results must be entered. All tracked parts must be returned or installed and all operations must be complete.

To defer a workorder:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Workorder Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All workorders matching your search criteria appear in the Workorder List Results table.
3. Select a workorder, and choose **Defer** from the drop-down menu. Optionally, you can defer the workorder from the Workorder Operations page.

Defer Workorder

Workorder Overview

Organization Workorder Number

Department Project

Department Class Project Task

Serial Number Accounting Class

Item Priority

Visit Number Confirmed Failure

Visit Task Workorder Status

Unit Name Non-Routine Workorder

Maintenance Requirement Workorder Description

Start Date End Date

Workorder List

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Select	Workorder Number	Task Number	Workorder Description	Non-Routine Workorder	OSP Order Number	Scheduled Start Date	Scheduled End Date	Status
<input type="radio"/>	202	3	28-020-01-00			2004-DEC-08	2004-DEC-08	Unreleased

Entering QA Results for a Workorder

Prerequisites

- ☐ A workorder with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. The Quality Collection plan must be set up and the inspection type associated with the Job Deferral Inspection Type profile option, or with the route header in Route Management, or to the Non-Routine Job Inspection profile option. See Setup Quality Collection Plans.

To enter QA results for a workorder:

- From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Workorder Overview page appears.
- Enter information in the fields for which you know the value then click **Go**. All workorders matching your search criteria appear in the Workorder List Results table.
- Select the workorder and choose **Record Workorder QA Results** from the drop-down menu. The Submit Quality Results page appears. Click Add More Rows. Enter quality results in the fields provided. Optionally, you can update the QA results from the Workorder Operations page.

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Submit Quality Results - TEST QA PLAN P3

Workorder Number **180**

Workorder Status **Released(1)**

Quality Results List

* Approved By
Walker, Mr. Kenneth
<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"/>

Signing Off Maintenance Requirements

Prerequisites

- To sign off maintenance requirements:**

- Production Planning and Production 12-21

3. To record quality results, select the workorder, and choose Record Maintenance Requirement QA Results. The Submit Quality Results page appears. Enter quality results. Click Apply.
4. Return to the Workorder Overview page. To sign off the maintenance requirement associated with the workorder, select the workorder, and choose Sign Off from the drop-down menu.

You can also sign off Maintenance Requirements using one of the following options:

- Workorder Operations UI - From the Workorder Overview page, select a workorder, and choose Update Workorder from the drop-down menu. The Workorder Operations page appears. Choose Sign Off Maintenance Requirement from the drop-down menu.
- Maintenance Requirement Workorders UI - From the Search Maintenance Requirements page, choose View Workorders from the drop-down menu. The Maintenance Requirement Workorders page opens. Select the workorder for which you want to sign off the maintenance requirement, then select Signoff from the actions drop down menu.

Sign Off MR from the Maintenance Requirement Workorders page

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Maintenance Requirement Workorders

Maintenance Requirement 21-040-00
Visit 45
Visit Start Date 2004-DEC-10 14:00
Status Released

Organization San Diego
Department Outside
Unit C-1600
Actual End Date

Cancel Defer
Submit Maintenance Requirement QA Results
Signoff
Release Visit Workorders
Release Maintenance Requirement Workorders
Close Visit

Workorders List

Select a Workorder and... Submit Workorder QA Results Complete Cancel

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Select	Workorder Number	Description	Non-Routine Workorder	Actual Start Date	Actual End Date	Status	Update
<input checked="" type="radio"/>	193	21-040-00-00				Released(1)	
<input type="radio"/>	194	00-000-00-00				Released(1)	

Previous 1-2 of 2 Next

Select a Workorder and... Submit Workorder QA Results Complete Cancel

Cancel Release Visit Workorders

- Search Maintenance Requirements UI - Search for the MR. From the results table, select the MR that you want to sign off, and click Signoff.

Sign Off Maintenance Requirement- Search Maintenance Requirements page

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Search Maintenance Requirements

Visit Maintenance Requirement

Organization Non-Routine Workorder

Department Unit

Visit Start Date Status

Maintenance Requirement Results

Select Maintenance Requirement and...

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Select	Maintenance Requirement	Visit	Visit Start Date	Unit	Organization	Date
<input type="radio"/>	21-040-00	34	2004-12-08 23:00:00.0	C-1600, Tail # 101	San Diego Manufacturing	
<input checked="" type="radio"/>	21-040-00	45	2004-12-10 13:00:00.0	C-1600, Tail # 102	San Diego Manufacturing	
<input type="radio"/>	21-040-00	145	2005-04-05 23:00:00.0	C-1600, Tail # 102	San Diego Manufacturing	
<input type="radio"/>	21-040-00	24	2005-04-21 23:00:00.0	C-1600, Tail # 105	San Diego Manufacturing	
<input type="radio"/>	21-150-00	34	2004-12-08 23:00:00.0	C-1600, Tail # 101	San Diego Manufacturing	
<input type="radio"/>	21-150-00	45	2004-12-10 13:00:00.0	C-1600, Tail # 102	San Diego Manufacturing	
<input type="radio"/>	21-150-00	92	2005-02-25	C-1600, Tail # 102	San Diego Manufacturing	

Defer
Submit Quality Results
Signoff
View Workorders
View Relationships
Release Visit Workorders
Release Maintenance Requirement Workorders
Close Visit

Assembly Department Unreleased 2005-04-05 23:00:00.0
Outside Processing All Jobs Cancelled 2005-04-21 23:00:00.0
Outside Processing Signed off 2005-01-09 01:00:00.0
Outside Processing Released 2004-12-10 13:00:00.0
Outside Processing Released 2005-02-25

Deferring Maintenance Requirements (MR)

You can defer routine and/or non-routine maintenance requirements, which cannot be completed during a visit, either due to shortage of material and resource, or because the unit was put back into service for an emergency assignment. You can also defer maintenance requirements belonging to a group MR. The group MR is signed off at the end of the visit, and the deferred MR is carried out on a later date, and accomplished with the group MR on the next group Maintenance Requirement event. Maintenance requirements can be deferred to a future date (hard date when this MR will be performed), and/or they can be based on counter threshold values. A deferred maintenance requirement with a new due date is created in Unit Maintenance Plan.

You can skip a planned maintenance requirement to the next repetitive one, and also push the next due date based on the deferred date

Prerequisites

- ☐ The maintenance requirement that you want to defer, must exist in the database. You cannot defer a maintenance requirement in Released status.

To defer a maintenance requirement:

- From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Workorder Overview page appears.
- Enter information in the fields for which you know the value then click **Go**. All workorders matching your search criteria appear in the Workorder List Results table.
- Select the workorder, which has the associated maintenance requirement that you want to defer, and choose **Defer** from the drop-down menu. The Workorder Operations page appears. Choose **Defer** from the drop-down menu in the Workorder Operations page. The Maintenance Requirement Deferral Details page appears.

- Optionally, you can navigate to this page through the Maintenance Requirements sub-tab. Select the Maintenance Requirements sub-tab. The Search Maintenance Requirements page appears. Enter your search criteria, and click Go.

Search Maintenance Requirements page

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Search Maintenance Requirements

Visit Maintenance Requirement

Organization Non-Routine Workorder

Department Unit

Visit Start Date Status

Maintenance Requirement Results

Select Maintenance Requirement and...

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Select	Maintenance Requirement	Visit	Visit Start Date	Unit	Organization	Department	Status	Actual End Date
<input type="radio"/>	21-040-00	34	2004-12-08 23:00:00.0	C-1600, Tail # 101	San Diego Manufacturing	Outside Processing	Signed off	2005-01-09 01:00:00.0
<input type="radio"/>	21-040-00	45	2004-12-10 13:00:00.0	C-1600, Tail # 102	San Diego Manufacturing	Outside Processing	Released	2004-12-10 13:00:00.0
<input checked="" type="radio"/>	21-040-00	145	2005-04-05 23:00:00.0	C-1600, Tail # 102	San Diego Manufacturing	Assembly Department	Unreleased	2005-04-05 23:00:00.0
<input type="radio"/>	21-040-00	24	2005-04-21 23:00:00.0	C-1600, Tail # 105	San Diego Manufacturing	Outside Processing	All Jobs Cancelled	2005-04-21 23:00:00.0
<input type="radio"/>	21-150-00	34	2004-12-08 23:00:00.0	C-1600, Tail # 101	San Diego Manufacturing	Outside Processing	Signed off	2005-01-09 01:00:00.0
<input type="radio"/>	21-150-00	45	2004-12-10 13:00:00.0	C-1600, Tail # 102	San Diego Manufacturing	Outside Processing	Released	2004-12-10 13:00:00.0

- From the search results, select the maintenance requirement that you want to defer, and click Defer. The Maintenance Requirement Deferral Details page appears.

Maintenance Requirement Deferral Details page

Maintenance Requirement Deferral Details

Title **21-040-00**

Description **Replace the electrical and electronic compartment supply fan filter.**

Visit Number **145**

Due Date

Status **Unreleased**

Maintenance Requirement Type **Manually Planned**

Reason

☐ Facility ☐ Labor

☐ Material ☐ Other

☐ Technical Assistance Required ☐ Time Constraint

☐ Tool ☐ Warranty Claim

Remarks

Approver Notes

Schedule

☒ Optional Fields are ignored if cancelled

☐ Cancel Maintenance ☐ Affect Due Date Calculation

Requirement

Defer To * Deferral Effective On

Date

Remove	Counter Name	Deferral Type	Counter Value	Unit Of Measure
No records were found matching the given criteria.				

Use the information in the following table to enter deferral details.

Description of fields in the Maintenance Requirement Deferral Details page

Field Name	Description
Title	The title of the maintenance requirement, that you want deferred.
Description	Maintenance requirement description.
Visit Number	Is an alphanumeric value that uniquely identifies the visit definition that you wish to retrieve.
Due date	Due date of the maintenance requirement.
Status	Seeded workorder status of the maintenance requirement.
Reasons	User-defined reasons, displayed for the user to select.
Remarks	Multiple lines field to allow the user to enter additional information related to his/her deferral request.
Approver Notes	Multiple lines field to allow the approver to enter approval or rejection information.
Defer To Date	The date to which the maintenance requirement is going to be deferred.
Deferral effective on	Defaults to the system date, when the deferral is being created.
Counter Name	Fleet Maintenance Requirement threshold counter name.
Deferral Type	Deferred By counter UOM or Deferred To counter UOM value.

6. Choose the deferral reasons by checking the corresponding check boxes in the Reasons region. You can select more than one deferral reason. Enter Remarks.
7. To defer the maintenance requirement to a later date, enter a date in the Defer To Date field. Alternatively, select from the Oracle Calendar.
8. Enter a date in the Deferral Effective On field. Alternatively, select from the Oracle Calendar.
9. To defer the maintenance requirement based on counter readings, select Add More Rows, and enter the counter threshold values.
10. Select Counter Name from the LOV. The Unit of Measure is returned based on the selected Counter Name.
11. Choose Defer By or Defer To from the Deferral Type drop-down menu. Enter a counter value.

Note: The system will return an error message if the deferred date or deferred counter is equal or greater than the next due date/due counter for the repetitive maintenance requirement.

12. If you select the Affect Due Date Calculation check box, Unit Maintenance Plan uses the new deferred date or counter value, to calculate when repetitive requirements will be due again.
13. To remove this instance of the requirement from Unit Maintenance Plan without affecting subsequent forecasted requirements, select the Skip Maintenance check box.

14. Click Apply to save the record. Click Cancel to cancel the transaction.
15. Select View Workorder Details to navigate to Workorder Overview UI, and to view all workorders related to the requested MR for deferral.

View Workorders Associated with the MR - Workorder Overview page

Workorder Overview

Organization Workorder Number

Department Project

Department Class Project Task

Serial Number Accounting Class

Item Priority

Visit Number Confirmed Failure

Visit Task Workorder Status

Unit Name Non-Routine Workorder

Maintenance Requirement Workorder Description

Start Date End Date

Workorder List

1-2 of 2

Select	Workorder Number	Task Number	Workorder Description	Non-Routine Workorder	OSP Order Number	Scheduled Start Date	Scheduled End Date	Status
<input type="radio"/>	743	18	21-040-00-00			2005-APR-06	2005-APR-06	Unreleased
<input type="radio"/>	744	19	00-000-00-00			2005-APR-06	2005-APR-06	Unreleased

1-2 of 2

16. To submit the deferral for approval, select Submit For Approval. The status changes to Approval Pending.
 - When the Deferral is submitted for approval, all the workorders associated with the MR are put on-hold.
 - On approval, all workorders in Released status and associated with the MR are completed, and all Unreleased workorders are cancelled. A new UMP is created to track the deferred requirement in Unit Maintenance Plan, in case the Deferral is not to skip the MR.
 - If the Deferral is rejected, all associated jobs statuses are reverted to their previous statuses. You can rectify the errors and re-submit for approval.

Note: You cannot submit a Deferral for approval, if a child MR is pending deferral approval.

Scheduling Workorders using the Scheduler Workbench

Before a workorder is executed, the planner needs to balance the requirements (resource & materials) with the available supply/capacity, also known as resource leveling. The planner assigns the workorders in such a way that the resources are consumed in a steady rate, thus avoiding the peak-valley situations. The Scheduler Workbench provides a graphical user interface of the Visit's work hierarchy, and enables the planner to schedule workorders and operations, manage dependencies, and assign resources. The scheduling decisions are validated against the applicable maintenance visit's start and end dates, as well as the defined technical dependencies between production workorders.

A large maintenance operation can have multiple visits and thousands of workorders at a single facility. The Scheduler Workbench allows the planner to quickly schedule and reschedule workorders, while viewing the required and available resources, and the workorder dependencies.

The scheduling hierarchy and the completion dependencies of a visit are pushed to Oracle Work-In-Process (WIP). Completion Dependencies are the technical dependencies between visit tasks in Visit Work Package. For example, Task 3 is executed after Task 1.

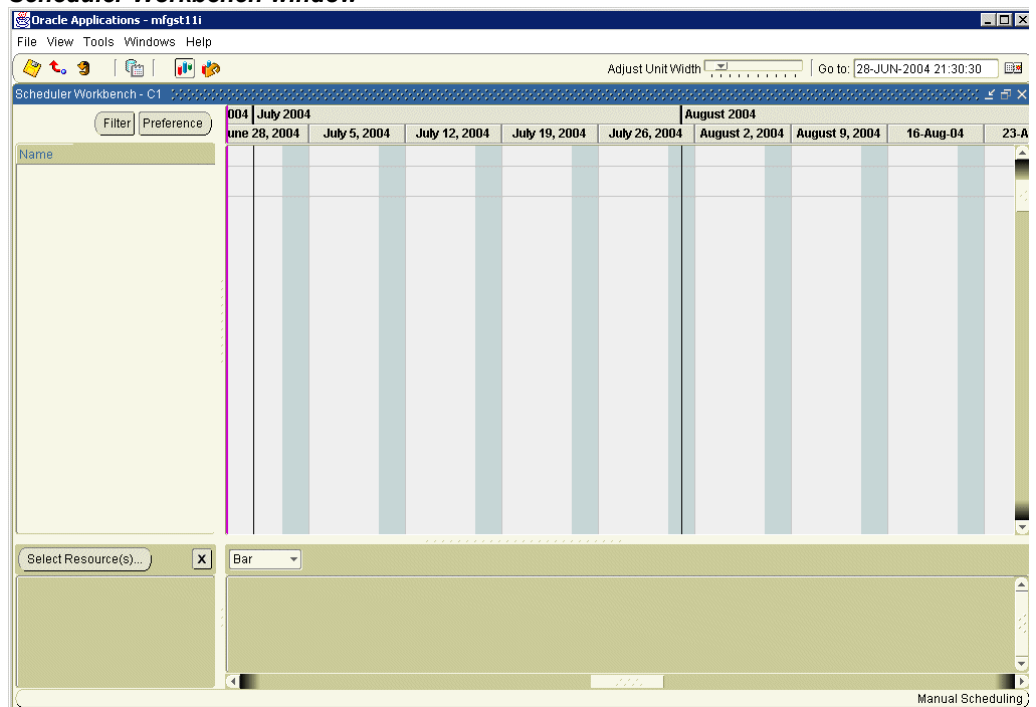
Prerequisites

- ☐ To use Enterprise Asset Management's Scheduler Workbench, workorders must have already been created. After creating a visit in Visit Work Package, associating the applicable maintenance requirements and scheduling the visit to an available organization and department, workorders are created by pushing the visit to production. Non-routine workorders are created manually in Production Planning.

To schedule workorders using the Scheduler Workbench:

1. Change responsibility to Oracle Enterprise Asset Management. From the Navigator, choose Work Order Planning > Scheduler Workbench. This will launch the Scheduler Workbench.

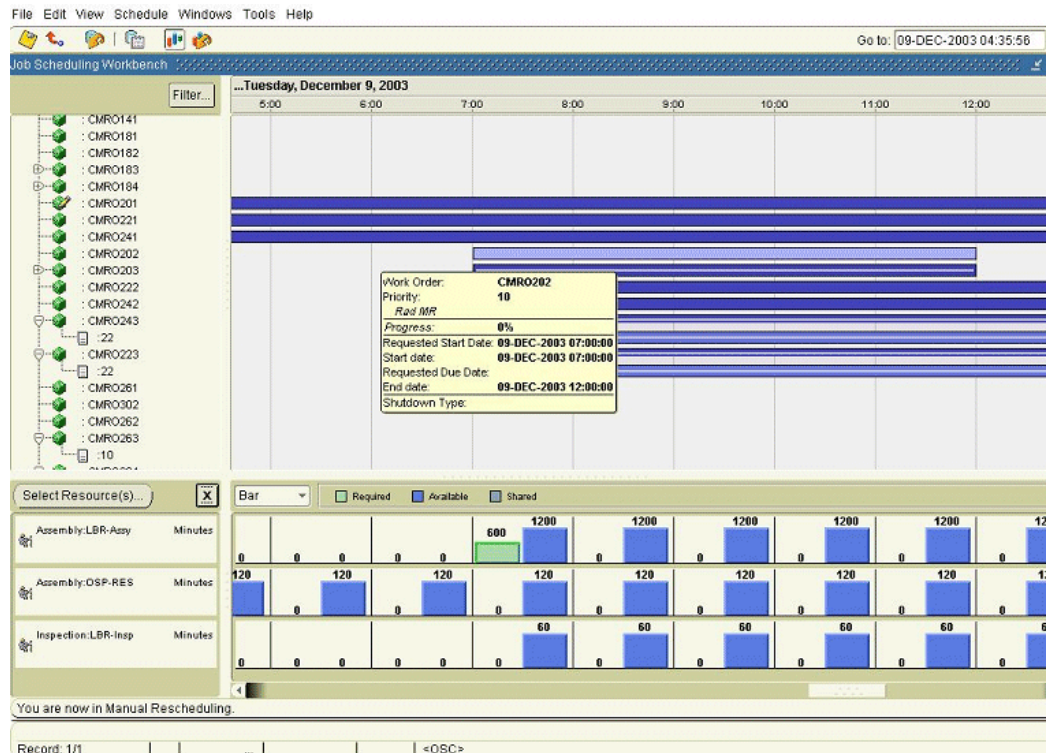
Scheduler Workbench window



2. Select Filter to specify the search criteria for your workorders. The Filter window appears displaying the filter conditions. Enter the filter values, and Click Apply. The workbench is refreshed with the data based on filter conditions. The following filter options are provided:
 - Project/Task Number

- Date Range
- Resource Type
- Part Number/Item Number/Unit Number
- Department
- Workorder number
- Workorders without resource assignments
- Workorder Status

View Workorders - Scheduler Workbench



3. You can do the following in the Scheduler Workbench:

- View workorders - The workorder display comprises two panes. On the left pane the workorders are listed. On the right pane the dates associated with the workorders are displayed in a Gantt Chart. If the workorders have dependency then the workorder will have a + symbol next to it. You can expand and collapse the workorder tree structure. View the workorder dependency from the top node to the bottom node, in the Gantt Chart. You can adjust the display period to minutes, hours, days, weeks, or months.
- Maintain a workorder dependency hierarchy - For workorders with dependencies, you can view the dependency in the workbench and manage the workorder schedules either through drag and drop operation or manual editing. The workorder dependency for CMRO workorders can be defined on the following two levels:

- An operation cannot be moved beyond the start- and end-date of the workorder. The workorder cannot be moved beyond the start- and end-date of a visit.
- The workbench also respects dependencies between work orders. In this case, the forward/backward scheduling of a work order affects its child work orders.

You can schedule and/or reschedule workorders by dragging the workorder to the desired start time or date. To schedule a workorder on an earlier date, drag the beginning of the workorder to the left. To schedule the workorder to a later date, drag the beginning of the workorder to the right. Same applies when you move the end of the workorder.

Note: If you grab the workorder in the middle and move it either to the left or right, then the start and end date of the workorder will be changed by the offset, however the duration of the workorder will remain the same.

- Assign resources to workorders - While managing the workorders, you can identify the workorder operation resource requirements and match it with available resource instances. You can identify available instances of employees and machines from your organization, and have a graphical view of the combined resource load/capacity. You can then assign the employees/machines to the workorder operations.
- View Resource load/capacity - The resources view consists of two panes. The left pane shows the list of resources and the right pane shows the load/capacity for each time bucket. The load/capacity can be displayed as bar chart or form. These panes overlap with the workorder left/right panes. You can display/hide the resource related panes.

For information on how to use the Scheduler Workbench, refer to the *Oracle Manufacturing Scheduling User's Guide*.

Viewing the Scheduling Hierarchy

You can view the completion dependencies for a workorder in the View Workorder Scheduling Hierarchy user interface. The selected workorder information is displayed as read-only Context.

Prerequisites

- ☐ The workorder record that you want to view the scheduling hierarchy for, must exist in the database.

To view the scheduling hierarchy:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Workorder Overview page appears.

Enter information in the fields for which you know the value then click **Go**. All workorders matching your search criteria appear in the Workorder List Results table.

2. Select the workorder, and choose View Scheduling Hierarchy from the drop-down menu. Click Go. The Work Order Scheduling Hierarchy page appears, displaying the workorder details, and the related workorders.

Work Order Scheduling Hierarchy page

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Workorder Scheduling Hierarchy

Workorder Number223Workorder StatusCompleteWorkorder Description21-040-00-00Maintenance Requirement21-040-00-00Route21-040-00-00PriorityItemMRO-C1600Visit Number34Accounting ClassCMRO-MaintCompletion Sub InventoryScheduled Workorder Start Date2004-DEC-09 06:00Actual Workorder Start Date2004-DEC-08 23:00

OrganizationSan Diego ManufacturingDepartmentOutside ProcessingProject34Project Task21-040-00-00Serial Number101Unit NameC-1600, Tail # 101Visit Task2LocatorScheduled Workorder End Date2004-DEC-09 08:00Actual Workorder End Date2005-JAN-09 01:00

CancelRevert

Related Workorders

Previous1-1 of 1Next

Focus	Workorder Number	Relationship	Scheduled Workorder Start Date	Scheduled Workorder Start Time	Scheduled Workorder End Date	Scheduled Workorder End Time	Workorder Status	Non-Routine Workorder	OSP Order Number
	223		2004-DEC-09	07:00:00	2004-DEC-09	09:00:00	Complete		

Previous1-1 of 1Next

CancelRevert

3. To focus on a workorder to view it's relationships, clicking the Focus Icon in the Related Work Orders result set.
4. To navigate to the Workorder Operations user interface, click the Workorder Number link in the Related Work Orders result set.

Performing Part Removal/Install

During installations, assemblies are mapped based on the position key, the position reference, sub-configuration, and item. If the position association is undeterminable, the part / sub-assembly is displayed as an extra. You can manually map the hierarchy to the correct positions. If a position reference has been modified in the higher assemblies master configuration, the position reference is automatically updated to reflect the correct installation position. In addition to the structure of the hierarchy being validated during the installation, the configuration rules are validated, ensuring that the assembly complies with the rules established in master configuration. Maintenance personnel thus have increased visibility into missing and extra items, and/or sub-assemblies.

You can assign the extra items and sub-assemblies to the appropriate sibling positions for which installation is allowed. Identifying parts that need to be installed or removed is easily accomplished through the use of the missing and extra icons. In addition to parts issued to a work order, any installed sibling identified as an extra item, which meets the installation criteria, will appear in the search results for an empty position.

Prerequisites

- ❑ A workorder with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database

To perform part removal and/or install:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Workorder Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All workorders matching your search criteria appear in the Workorder List Results table.
3. Navigate to the Workorder Operations page. For the selected workorder, choose Perform Part Removal/Install from the drop-down menu. The Item Part Changes or Unit Configuration Part Changes page appears.
 - If on Configuration, select the sub-configuration to install, remove, or replace.
 - If on Item Parts Change, select the Item to remove, replace or install.

View Configuration Tree - Unit Configuration Part Changes page

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Unit Configuration Part Changes

Workorder Number 156
Workorder Status Released(1)
Workorder Description 28-020-01-00
Maintenance Requirement 28-020-01
Route 28-020-01-00
Priority
Item MRO-C1600
Visit Number 24
Accounting Class CMRO-Maint
Completion Sub Inventory
Scheduled Workorder Start Date 2005-APR-23 06:00
Actual Workorder Start Date

Organization San Diego Manufacturing
Department Outside Processing
Project 24
Project Task 28-020-01-00
Serial Number 105
Unit Name C-1600, Tail # 105
Visit Task 23
Locator
Scheduled Workorder End Date 2005-APR-23 08:00
Actual Workorder End Date

Configuration Details
Unit Configuration C-1600, Tail # 105
Master Configuration C-1600 Aircraft
Position HP Compressor Assy
Revision 1
* Operation Seq

Removal Details
Item MRO-45856-2
Serial Number 575985
Lot Number
Quantity 1
Condition
Removal Code
Instance Number 70404
Item Revision
UOM Ea
Reason
Removal Date

4. Enter the Removal or Installation details. For information, see the following table.

Field name	Description
Operation Seq	The jobs operation sequence number on which the Remove, Replace, or Install / Add Component is to be performed.
Estimated Duration	The time in hours that it is estimated to correct the service difficulty if removing in either the condition associated with unserviceable or MRB parts which generates a Service Request.
Condition	The condition of the part being removed.
Subinventory	The sub inventory, if desired, to return the part.
Locator	The locator within the sub inventory to return the part, required if locator controlled.
Reason	The reason code for the part being removed.
Removal Date	The date on which the removal was performed.
Problem Code	The code associated with the problem being reported or resolved.
Severity	The severity of the service difficulty, if the part is being removed in the unserviceable or MRB condition.
Summary	The summary of the service difficulty, if the part is being removed in the unserviceable or MRB condition.
Part Number	The part number of the Item being installed.
Instance Number	The Install Base Instance Number of the part being installed.
Installation Date	The date the part was installed.

5. Select the Operation Sequence.

Remove Item Instance - Unit Configuration Part Changes page

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Configuration Details Submit QA Results Remove Replace Cancel Revert

Unit Configuration **C-1600, Tail # 105** Position **HP Compressor Assy**
Master Configuration **C-1600 Aircraft** Revision **1**
* Operation Seq

Removal Details

Item **MRO-45856-2** Instance Number **70404**
Serial Number **575985** Item Revision
Lot Number
Quantity **1** UOM **Ea**
* Condition
* Reason
* Removal Code Removal Date
Non-Conformance Details
Problem Code
Severity
Estimated Duration
Summary

Installation Details

Item
Serial Number
Lot Number
Quantity
Instance Number
Item Revision
Installation Date
UOM

Disposition Details

Immediate Disposition Status

Configuration Details

Unit Configuration **C-1600, Tail # 105** Position **Airframe**
Master Configuration **C-1600 Aircraft** Revision **1**
* Operation Seq

* Indicates required field

- Make any necessary changes and click **Remove** to remove a part.

View Missing Item - Unit configuration Part Changes page

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Unit Configuration Part Changes

Workorder Number **156** Organization **San Diego Manufacturing**
Workorder Status **Released(1)** Department **Outside Processing**
Workorder Description **28-020-01.00**
Maintenance Requirement **28-020-01** Project **24**
Route **28-020-01.00** Project Task **28-020-01.00**
Priority
Item **MRO-C1600** Serial Number **105**
Visit Number **24** Unit Name **C-1600, Tail # 105**
Accounting Class **CMRO-Maint** Visit Task **23**
Completion Sub Inventory
Scheduled Workorder Start Date **2005-APR-23 06:00** Scheduled Workorder End Date **2005-APR-23 08:00**
Actual Workorder Start Date
Actual Workorder End Date

Configuration Details Cancel

Unit Configuration **C-1600, Tail # 105** Position **Airframe**
Master Configuration **C-1600 Aircraft** Revision **1**
* Operation Seq

* Indicates required field

- Click **Install** to add a position.

Install Missing item - Unit Configuration Part Changes page

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Unit Configuration Part Changes

Workorder Number: 156
 Workorder Status: Released(1)
 Workorder Description: 28-020-01-00
 Maintenance Requirement: 28-020-01
 Route: 28-020-01-00
 Priority:
 Item: MRO-C1600
 Visit Number: 24
 Accounting Class: CMRO-Maint
 Completion Sub Inventory:
 Scheduled Workorder Start Date: 2005-APR-23 06:00
 Actual Workorder Start Date:
 Organization: San Diego Manufacturing
 Department: Outside Processing
 Project: 24
 Project Task: 28-020-01-00
 Serial Number: 105
 Unit Name: C-1600, Tail # 105
 Visit Task: 23
 Locator:
 Scheduled Workorder End Date: 2005-APR-23 08:00
 Actual Workorder End Date:

Configuration Details

Unit Configuration: C-1600, Tail # 105
 Master Configuration: C-1600 Aircraft
 Position: HP Compressor Assy
 Revision: 1

Installation Details

Item: MRO-45856-2
 Serial Number: 575985
 Lot Number:
 Quantity: 1
 Instance Number: 70404
 Item Revision:
 Installation Date:
 UOM: Ea

Disposition Details

Immediate Disposition: Use As Is
 Status: Material Transaction Required

8. If full validation is not successful, the configuration tree is displayed. Select the error positions or items and:

- Remove the excess or incorrect unit.
- Map the item/sub-configuration to the correct position by clearing the current extra position reference, refreshing the UI, then selecting the associated instance from the target position.
- Assign the missing item.

Apply the necessary changes.

9. Click **Revert** to clear any changes. Click **Cancel** to cancel any changes and return to the previous page.

Changing the Serial Number of Items Associated with Workorders

You can change the serial number of a tracked configuration component, in the Serial Number Change UI. This process will update the applicable unit configuration, as well as the Installed Base item instance.

Prerequisites

- ☐ At least one workorder must exist for the item whose serial number has to be changed. Any Maintenance Requirement effectivities must be updated/created manually in the Fleet Maintenance Program module to account for this new serial number and its individual requirements.

To change the Serial Number:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Workorder Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All workorders matching your search criteria appear in the Workorders List Results table. Select a workorder, and navigate to the Workorder Operations page by choosing Update Workorder from the drop-down menu. .
3. Select Change Serial Number from the drop-down menu. Click Go. The Serial Number Change page appears.

Serial Number Change page

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Serial Number Change

Cancel View History Apply

Workorder Number	156	Organization	San Diego Manufacturing
Workorder Status	Released(1)	Department	Outside Processing
Workorder Description	28-020-01-00	Project	24
Maintenance Requirement	28-020-01	Project Task	28-020-01-00
Route	28-020-01-00	Serial Number	105
Priority		Unit Name	C-1600, Tail # 105
Item	MRO-C1600	Visit Task	23
Visit Number	24	Locator	
Accounting Class	CMRO-Maint	Scheduled Workorder End Date	2005-APR-23 08:00
Completion Sub Inventory		Actual Workorder End Date	
Scheduled Workorder Start Date	2005-APR-23 06:00		
Actual Workorder Start Date			

* Indicates required field

* New Serial Number 105 Serial Tag

Cancel View History Apply

Use the information in the following table to make serial number changes.

Field Name	Description
New Serial Number	The serial number as entered by the user.
Serial Tag	A unique identifier for the service provider.

4. Enter a number in the New Serial Number field. Optionally, select a Serial Tag from the Serial Tag list of values.
5. Click Apply. The new serial number is updated in Installed Base for the workorder item instance.

Viewing the Serial Number Change History

You can view all the Serial Number changes, performed on the work order item instance, in the View History UI.

Prerequisites

- ☐ The Serial number of the selected item instance must have been changed at least once.

To view the serial number change history:

- Navigate to the Serial Number Change UI. For information, see Changing the Serial Number of Items Associated with Jobs, page 12-34.
- Click View History. The View Serial Number Change History page appears, displaying the following information about the serial number changes:
 - Date
 - Old Serial Number
 - Old Serial Tag
 - New Serial Number
 - New Serial Tag

Serial Number History page

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Serial Number History

Cancel

Workorder Number156
Workorder StatusReleased(1)
Workorder Description28-020-01-00
Maintenance Requirement28-020-01
Route28-020-01-00
Priority
ItemMRO-C1600
Visit Number24
Accounting ClassCMRO-Maint
Completion Sub Inventory
Scheduled Workorder Start Date2005-APR-23 06:00
Actual Workorder Start Date

OrganizationSan Diego Manufacturing
DepartmentOutside Processing

Project24
Project Task28-020-01-00
Serial Number105
Unit NameC-1600, Tail # 105
Visit Task23

Locator
Scheduled Workorder End Date2005-APR-23 08:00
Actual Workorder End Date

Serial Number Changes

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Date	Old Serial Number	Old Serial Tag	New Serial Number	New Serial Tag
2002-NOV-06			105	Temporary
2002-NOV-06				Temporary
2005-MAY-18				Temporary

Previous1-3 of 3Next

Cancel

Working with Maintenance Requirements

You can search for maintenance requirements associated with workorders and perform all actions related to MRs including deferring, signing off, submitting quality results, viewing relationships and so on through the related maintenance requirements UIs under the Maintenance Requirements secondary tab.

Prerequisites

- ☐ The maintenance requirements you want to query and work on must exist in the database.

To work with maintenance requirements:

1. Under the Production Planning tab click the Maintenance Requirements secondary tab. The Search Maintenance Requirements page appears. Enter your search criteria and click Go. A list of maintenance requirements will appear in the results table.

View All Maintenance Requirements Associated with Workorders - Search Maintenance Requirements page

Search Maintenance Requirements

Visit Maintenance Requirement
Organization Non-Routine Workorder
Department Unit
Visit Start Date Status

Maintenance Requirement Results

Select Maintenance Requirement and...

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Select	Maintenance Requirement	Visit	Visit Start Date	Unit	Organization	Department	Status	Actual End Date
<input type="radio"/>	21-040-00	34	2004-12-08 23:00:00.0	C-1600, Tail #101	San Diego Manufacturing	Outside Processing	Signed off	2005-01-09 01:00:00.0
<input type="radio"/>	21-040-00	45	2004-12-10 13:00:00.0	C-1600, Tail #102	San Diego Manufacturing	Outside Processing	Released	2004-12-10 13:00:00.0
<input type="radio"/>	21-040-00	145	2005-04-05 23:00:00.0	C-1600, Tail #102	San Diego Manufacturing	Assembly Department	Unreleased	2005-04-05 23:00:00.0
<input type="radio"/>	21-040-00	24	2005-04-21 23:00:00.0	C-1600, Tail #105	San Diego Manufacturing	Outside Processing	All Jobs Cancelled	2005-04-21 23:00:00.0
<input type="radio"/>	21-150-00	34	2004-12-08 23:00:00.0	C-1600, Tail #101	San Diego Manufacturing	Outside Processing	Signed off	2005-01-09 01:00:00.0
<input type="radio"/>	21-150-00	45	2004-12-10 13:00:00.0	C-1600, Tail #102	San Diego Manufacturing	Outside Processing	Released	2004-12-10 13:00:00.0

2. You can select a maintenance requirement and do the following:
 - Defer
 - Submit Quality Results
 - Sign off
 - View associated workorders
 - View relationships
3. Click the Maintenance Requirement link to navigate to the View Maintenance requirement page from where you can view MR details, associated documents, routes, effectivities, relationships, and effected items.

View Details- View Maintenance Requirement page

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View Maintenance Requirement

Maintenance Requirement Information

Cancel

Title	21-040-00	Status	Complete	Version 2
Revision Number				
Category	Airframe			
Program Type	Letter Check			
Program Subtype	C			
Service Type	On			
Implement Status	Mandatory	Auto Sign Off	No	
Repetitive	Yes	Show	All	
Whichever Comes	First			
Effective From	2002-NOV-13			
Follows After Accomplishment of Billing Item				
Quality Inspection Type				
Visit Category				
Description	Replace the electrical and electronic compartment supply fan filter.			
Comments				
Copy Accomplishments	No			
Down Time				

Cancel

- Optionally, select a maintenance requirement and click View Workorders. The Maintenance Requirement Workorders page appears displaying information about the workorders associated with a maintenance requirement. You can do the following :
 - Submit quality results and complete work order
 - Navigate to the Update Workorder Operations UI by clicking the Update Icon in the work order result set
 - Navigate to the View Service Request UI by clicking the Service Request Hyperlink in the work order result set
 - Submit quality results, sign off and defer the maintenance requirement

Maintenance Requirement Workorders page

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Maintenance Requirement Workorders

Maintenance Requirement **21-040-00**
Visit **45**
Visit Start Date **2004-DEC-10 14:00**
Status **Released**

Organization **San Diego Manufacturing**
Department **Outside Processing**
Unit **C-1600, Tail # 102**
Actual End Date

Workorders List

Select a Workorder and...

Previous 1-2 of 2 Next

Select	Workorder Number	Description	Non-Routine Workorder	Actual Start Date	Actual End Date	Status	Update
<input type="radio"/>	193	21-040-00-00				Released(1)	
<input type="radio"/>	194	00-000-00-00				Released(1)	

Previous 1-2 of 2 Next

Select a Workorder and...

Viewing Material Requirements

The Required Materials UI provides an overview of all material requirements, across workorders. You can query for a workorder number and view material requirements for that particular workorder. Optionally, you can query for an item and view requirements against that item across all workorders. You can also update the quantity of item required and the date on which it is required. The following information is displayed in this UI:

- Workorder Number
- Operation Sequence
- Item
- Required Quantity
- Scheduled Quantity
- Unit of Measure(UOM)
- Required Date
- Scheduled Date
- Workorder Status
- Issue Quantity (for all workorders in Released status)

To view material requirements:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Workorder Overview page appears.
2. Select the Material tab. The Required Materials page appears.

Required Materials page

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Required Materials

Workorder Number Item

Go Clear

Materials

Revert Apply

Select	Workorder Number	Operation Sequence	Item	Scheduled Quantity	UOM	* Required Date	Exception Date	Workorder Status	Issue Quantity
No records were found matching the given criteria.									

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- To view material requirements across all workorders, click GO. Material requirements for all workorders and against all items appear in the Materials result table.

View Materials List - Required Materials page

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Required Materials

Workorder Number Item

Go Clear

Materials

Revert Apply

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Select	Workorder Number	Operation Sequence	Item	Scheduled Quantity	UOM	* Required Date	Exception Date	Workorder Status	Issue Quantity
<input type="checkbox"/> 883		1	RB211-E4B	1	Each	2005-APR-29		Released(1)	0
<input type="checkbox"/> 883		1	Non-Tracked Rev Specific	6	Each	2005-APR-29		Released(1)	6
<input type="checkbox"/> 845		10	MRO-101054-3	10	Each	2005-APR-22		Cancelled	0
<input type="checkbox"/> 837		10	MRO-8932B12	2	Each	2005-APR-22		Released(1)	0
<input type="checkbox"/> 830		10	MRO-101054-3	10	Each	2005-MAY-24		Unreleased	0
<input type="checkbox"/> 826		10	MRO-101054-3	10	Each	2005-APR-22		Released(1)	0
<input type="checkbox"/> 823		10	MRO-42F7373-2	5	Each	2005-APR-22		Released(1)	0
<input type="checkbox"/> 706		1	Non-Tracked Rev Specific	7	Each	2005-APR-05		Released(1)	0
<input type="checkbox"/> 706		1	RB211-E4B	1	Each	2005-APR-05		Released(1)	0
<input type="checkbox"/> 706		1	MRO-85652	1	Each	2005-APR-05		Released(1)	0
<input type="checkbox"/> 743		10	MRO-21775-02	1	Each	2005-APR-07		Unreleased	0

- To view material requirements for a particular workorder number, enter information in the Workorder Number field and click Go. All requirements matching your search criterion appear in the Materials result table.
- To view material requirements against a particular item, enter information in the Item field and click Go. All requirements matching your search criterion appear in the Materials result table.

- To update the required quantity and/or the required date for a workorder, select the job number and enter information in the corresponding fields. Click Apply to save the changes.
- To navigate to the Workorder Operations page, click the workorder number. The Workorder Operations page appears.

Updating Material Requirements

Prerequisites

- ☐ A workorder with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. The WIP Mass Load Concurrent Program must be running. The operation must have a Uncomplete or Pending QA status.

To update material requirements:

- From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Workorder Overview page appears.
- Enter information in the fields for which you know the value then click **Go**. All workorders matching your search criteria appear in the Workorder List Results table.
- Select the workorder number and choose Update Workorder from the drop-down menu. The Workorder Operations page appears.
- Select Materials from the left-hand navigation bar. The Update Material Requirement page appears.

Update Material Requirements page

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Update Material Requirements

Workorder Number: **CMR0323**
 Workorder Status: **Released(1)**
 Workorder Description: **29-030-02-00**
 Maintenance Requirement: **29-030-02**
 Route: **29-030-02-00**
 Priority: **71**
 Item: **MRO-C1600**
 Visit Number: **71**
 Accounting Class: **Maintenanc**
 Completion Sub Inventory: **2005-JAN-05 09:00**
 Scheduled Workorder Start Date: **2005-JAN-05 09:00**
 Actual Workorder Start Date: **2005-JAN-05 09:00**

Organization: **San Francisco Aviation Maintenance Center**
 Department: **MRO Headquarters**
 Project: **71**
 Project Task: **29-030-02-00**
 Serial Number: **102**
 Unit Name: **C-1600, Tail # 102**
 Visit Task: **4**
 Location: **2005-JAN-05 10:45**
 Scheduled Workorder End Date: **2005-JAN-05 10:45**
 Actual Workorder End Date: **2005-JAN-05 10:45**

Material Requirements

Cancel Revert Apply Remove Details

Previous 1-1 of 1 Next

Select	Operation Sequence	* Item	Description	Scheduled Quantity	UOM	* Required Date	Exception Date	Issued Quantity
<input type="radio"/>	10	MRO-8932B12	Filter, Hydraulic Pump	2	Each	2005-JAN-05		0

Add More Rows

Previous 1-1 of 1 Next

Use the information in the following table to update material requirements.

Description of fields in the Update Material Requirements page

Field Name	Description
Operation Sequence	The workorders operation sequence number.
Item	The Item Number for the requirement.
Description	The Description of the item defined.
Required Quantity	The quantity desired for the requirement.
Scheduled Quantity	The quantity scheduled by the Long Term Plan.
UOM	The unit of measure for the Item's quantity.
Required Date	The date on which the requirement is expected.
Scheduled Date	The date on which the quantity is scheduled by Long Term Plan.
Issued Quantity	The quantity issued to an operation (only for a work order in Released Status)

5. You can then perform the following:
 - Select the Item, Required Quantity, and a Required Date and click **Apply** to save your changes.
 - Select the requirement and click **Remove** to remove the requirement.
 - Click **Add More Rows** to add additional requirements.
6. Click **Cancel** to cancel any changes.

Note: When changing an existing requirement defined in Route Management, the selection is limited to the alternates for the Item.

Updating Material Requirement Details

Prerequisites

- ☐ A workorder with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. The WIP Mass Load Concurrent Program must be running. The operation must have a Uncomplete or Pending QA status.

To update material requirement details:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Workorder Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All workorders matching your search criteria appear in the Workorder List Results table.
3. Click the Workorder number. The Workorder Operations page appears.
4. Select Materials from the left-hand navigation bar. The Update Material Requirement page appears.

- Select the material requirement that you want to update, and click **Details**. The Material Requirement (Detail) page appears.

Material Requirement (Detail) page

* Indicates required field

Cancel Revert Apply

Workorder Number CMR0323
 Workorder Status Released(1)
 Workorder Description 29.030.02.00
 Maintenance Requirement 29.030.02
 Route 29.030.02.00
 Priority
 Item MRO-C1600
 Visit Number 71
 Accounting Class Maintenan
 Completion Sub Inventory
 Scheduled Workorder Start Date 2005-JAN-05 09:00
 Actual Workorder Start Date

Organization San Francisco Aviation Maintenance Center
 Department MRO Headquarters

Project 71
 Project Task 29.030.02.00
 Serial Number 102
 Unit Name C-1600, Tail # 102
 Visit Task 4

Locator
 Scheduled Workorder End Date 2005-JAN-05 10:45
 Actual Workorder End Date

Material Details

Operation Sequence 10
 Item MRO-8932B12
 Operation Code 29.11.41.000.801.00
 Description Filter, Hydraulic Pump
 * Scheduled Quantity 2
 Issued Quantity 0
 UOM Each
 Qty Per Assembly 2
 * Required Date 2005-JAN-05
 Exception Date

Use the information in the following table to modify material requirement details.

Description of fields in the Material Requirement (Detail) page

Field Name	Description
Operation Sequence	The jobs operation sequence number.
Operation Code	The standardized operation code, if selected.
Item	The Item Number for the requirement.
Description	The description of the item defined.
Required Quantity	The quantity desired for the requirement.
Scheduled Quantity	The quantity scheduled by the Long Term Plan.
UOM	The unit of measure for the item's quantity.
Required Date	The date on which the requirement is expected.
Scheduled Date	The date on which the quantity is scheduled by Long Term Plan.
Issued quantity	Part quantity issued.
Quantity per Assembly	Part usage quantity.

- Make the required changes, and click **Apply**. Click **Cancel** to cancel any changes and return to the previous page.

Note: When changing an existing requirement defined in Route Management, the selection is limited to the alternates for the Item.

Viewing Employee Assignments

For a workorder or an associated operation, you can assign employee and machinery to the resource requirement. You can view these employee assignments, and perform all of the production functions applicable to the assignment and associated workorder, in the Search Employee Assignments UI. You can search for employee assignments by the employee's name, number, the associated workorder job number, department, and other related criteria.

To view employee assignments:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Workorder Overview page appears.
2. Select the Resources tab. The Employee Assignments page appears.

Employee Assignments page

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Employee Assignments

Organization Department

Employee Number Employee Name

Shift Number Visit Number

Priority Workorder Status

Start Date End Date

Work order Number

Search Results

Select	Work order Number	Operation Sequence	Employee Number	Employee Name	Assignment Start Time	Assignment End Time	Workorder Status	Operation Status	Remove
No records were found matching the given criteria.									

3. Enter information in the fields for which you know the value and click Go. All assignments matching your search criteria appear in the Results table.

View Search Results - Employee Assignments page

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Employee Assignments

Organization Department

Employee Number Employee Name

Shift Number Visit Number

Priority Workorder Status

Start Date End Date

Work order Number

Search Results

Select a Workorder and ... Update Workorder

Previous 1-1 of 1 Next

Select	Work order Number	Operation Sequence	Employee Number	Employee Name	Assignment Start Time	Assignment End Time	Workorder Status	Operation Status	Remove
<input type="radio"/>	285	10	404	Aaron, Mrs. Tamara	2004-DEC-28	2005-JAN-12	Cancelled	Uncomplete	<input type="button" value="Remove"/>

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Select a Workorder and ... Update Workorder

4. You can select a workorder and perform the following actions, which are available as selections in a drop down menu:
 - Update Workorder
 - Resource Transactions
 - Perform Parts Change
 - View Documents
 - Complete Workorder
 - Complete Operation
 - Record Workorder QA Results
 - Record Operation QA Results
 - Sign Off Maintenance Requirements
 - Record Maintenance Requirement QA Results
 - View Resource Transactions
 - Create Service Requests

Viewing Documents

Documents may be associated with maintenance requirements, routes, and operations. You can view all the documents pertaining to work orders, workorder operations, and material requirements in the View Documents UI.

Prerequisites

- ☐ The document references must exist in the database.

To view documents associated with workorders:

1. From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Workorder Overview page appears.
2. Enter information in the fields for which you know the value then click **Go**. All workorders matching your search criteria appear in the Workorder List Results table.
3. To view documents associated with a workorder's route, select the workorder and choose View Documents from the drop-down menu. The View Documents page appears, displaying the workorder details and the documents defined for the routes associated with the workorder.

View Documents page

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View Documents

Workorder Number223

Workorder StatusComplete

Workorder Description21-040-00-00

Maintenance Requirement21-040-00

Route21-040-00-00

Priority

ItemMRO-C1600

Visit Number34

Accounting ClassCMRO-Maint

Completion Sub Inventory

Scheduled Workorder Start Date2004-DEC-09 06:00

Actual Workorder Start Date2004-DEC-08 23:00

OrganizationSan Diego Manufacturing

DepartmentOutside Processing

Project34

Project Task21-040-00-00

Serial Number101

Unit NameC-1600, Tail # 101

Visit Task2

Locator

Scheduled Workorder End Date2004-DEC-09 08:00

Actual Workorder End Date2005-JAN-09 01:00

Operation

Cancel

Select a Document and...

View Document

Previous

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Next

Select	Route Number	Route Title	Document Number	Type	Title	Revision	Chapter	Section	Note	Figure	Subject	Page	Electronic File
<input type="radio"/>	21-040-00-00	E/E cooling supply fan filter 21-27-02		Aircraft	Equipment Cooling Fan 1					401			

Previous

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Next

Select a Document and...

View Document

The following table provides information about fields in the View Documents page.

Description of fields in the View Documents page

Field Name	Description
Route Number	It is the user-assigned identifier for a maintenance route.
Route Title	It refers to the text description of the maintenance route.
Document Number	It contains a unique identifier, generated by the organization to identify a maintenance document. If you do not know the document number, enter the generic substitution meta character% in the field, and click on the LOV icon to launch the Select Doc Number page that displays all the document references in the database.
Type	Represents the major topic such as powerplant, fleet unit, and ground support equipment that is described by the document in question.
Title	Refers to the title of the maintenance document.
Revision	Is a field that holds a user-assigned document revision identifier.
Chapter	Refers to a specific chapter in the associated document. The value is defined by the user when the association is created.
Section	Refers to a specific section in the associated document. The value is defined by the user when the association is created.
Note	Refers to a specific note in the associated document. The value is defined by the user when the association is created.
Figure	Refers to a specific figure in the associated document. The value is defined by the user when the association is created.
Subject	Refers to a specific subject in the associated document. The value is defined by the user when the association is created.
Page	Refers to a specific page in the associated document. The value is defined by the user when the association is created.

Select the document and click View Documents. you can view the details of the document in the View Revision page.

View Revision page

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View Revision Cancel

Title	Equipment Cooling Fan	Revision Num	1
Document Number	21-27-02	Source	World of Business
File		Sub Type	Maintenance Manual
Type	Aircraft	Item Type	
Operator		Subscribed To	No
Subscription Available	Yes		

Revision No	1	Revision Type	Temporary Revision
Revision Date	2004-OCT-27	Status	Current
Volume		Issue	
Issue Number		Issue Date	
Date Received		Media Type	Electronic File
Effective Date		Obsolete Date	
Approved By		Approved Date	
Remarks			

- To view documents associated with the workorder's operations, click Operation.
- To view documents associated with maintenance requirements, select the Maintenance Requirement sub-tab under the Production Planning tab. The Search Maintenance Requirements page appears.
- Enter your search criteria and click Go. The Maintenance Requirements matching your search criteria are displayed in the Maintenance Requirements Results table.
- Click the Maintenance Requirement link to navigate to the View Maintenance Requirement page.

View Maintenance Requirement page

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View Maintenance Requirement Cancel

Maintenance Requirement Information

Title	21-040-00	Status	Complete Version 2
Revision Number			
Category	Airframe		
Program Type	Letter Check		
Program Subtype	C		
Service Type	On		
Implement Status	Mandatory	Auto Sign Off	No
Repetitive	Yes	Show	All
Whichever Comes	First		
Effective From	2002-NOV-13		

Follows After Accomplishment of

Billing Item

Quality Inspection Type

Visit Category

Description

Comments

Copy Accomplishments

Down Time

Replace the electrical and electronic compartment supply fan filter.

No

8. Click the Documents link in the side navigation menu. The View Attached Documents page appears, displaying the documents associated with the maintenance requirement.

Viewing Resource Requirements

Prerequisites

- ☐ A visit or workorder with associated resources must exist in the database.

To view resource requirements for a workorder:

1. Find the workorder or operation you want to view dependencies for. See Finding Workorders, page 12-7.
2. Select the workorder, and choose Update Workorder from the drop-down menu. The Workorder Operations page appears displaying the relevant information for that workorder.
3. Select Resources from the left-hand navigation panel. The Resource Requirements page appears.

Resource Requirements page

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Resource Requirements

Workorder Number: CMR0323
Workorder Status: Released(1)
Workorder Description: 29.030.02.00
Maintenance Requirement: 29.030.02
Route: 29.030.02.00
Priority: MRO-C1600
Item: 71
Visit Number: Maintenance
Accounting Class: 71
Completion Sub Inventory: 2005-JAN-05 09:00
Scheduled Workorder Start Date: 2005-JAN-05 09:00
Actual Workorder Start Date:
Organization: San Francisco Aviation Maintenance Center
Department: MRO Headquarters
Project: 71
Project Task: 29.030.02.00
Serial Number: 102
Unit Name: C-1600, Tail # 102
Visit Task: 4
Locator: 2005-JAN-05 10:45
Scheduled Workorder End Date: 2005-JAN-05 10:45
Actual Workorder End Date:

Resource Requirements List

Cancel Revert Apply

Select a Resource Requirement and ... Details Remove

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Select	Operation Sequence	Resource Sequence	Resource Type	Resource	Duration	UOM	Quantity	Start Date	End Date
<input type="radio"/>	10	10	Person	MROAF	1	Hour	1	2005-JAN-05	2005-JAN-05
<input type="radio"/>	10	20	Machine	MROM2	1	Each	1	2005-JAN-05	2005-JAN-05

Add More Rows

Previous 1-2 of 2 Next

Select a Resource Requirement and ... Details Remove

Editing Resource Requirements

Prerequisites

- ☐ A visit or workorder with associated requirements must exist in the database.

To edit resource requirements and view summaries and details:

1. Find the workorder or operation you want to edit. See Finding Workorders., page 12-7
2. Navigate to the Resource Requirements page.
3. Make any necessary changes to the items displayed in the Resource Requirement list. To add requirements, click **Add More Rows**. Add a resource requirement.

Add Resource Requirement - Resource requirement page

Resource Requirements

Workorder Number: CMR0323
 Workorder Status: Released(f)
 Workorder Description: 29-030-02-00
 Maintenance Requirement: 29-030-02
 Route: 29-030-02-00
 Priority: 71
 Item: MRO-C1600
 Visit Number: 71
 Accounting Class: Maintenance
 Completion Sub Inventory:
 Scheduled Workorder Start Date: 2005-JAN-05 09:00
 Actual Workorder Start Date:
 Organization: San Francisco Aviation Maintenance Center
 Department: MRO Headquarters
 Project: 71
 Project Task: 29-030-02-00
 Serial Number: 102
 Unit Name: C-1600, Tail # 102
 Visit Task: 4
 Locator:
 Scheduled Workorder End Date: 2005-JAN-05 10:45
 Actual Workorder End Date:
Resource Requirements List

Select	Operation Sequence	Resource Sequence	Resource Type	Resource	Duration	UOM	Quantity	Start Date	End Date
<input type="radio"/>	10	10	Person	MROAF	1	Hour	1	2005-JAN-05	2005-JAN-05
<input type="radio"/>	10	20	Machine	MROM2	1	Each	1	2005-JAN-05	2005-JAN-05
<input type="radio"/>	10	30	Machine	MROM1	2	Each	2	2005-JAN-05	2005-JAN-05
<input type="radio"/>	10							2005-JAN-05	2005-JAN-05

Use the information in the following table to modify resource requirements.

Description of fields related to resource requirements

Field Name	Description
Operation Sequence	The workorders operation sequence number.
Resource Sequence	The sequence number for the resource within an operation.
Resource Type	The type of resource requirement.
Resource	The resource name within the operations department.
Duration	The length of time required.
UOM	The unit of measure for the time required.
Quantity	The quantity of resources required.
Start Date	The start date for the resource.
End Date	The end date for the resource.

- Click **Apply** to save your changes; click **Cancel** to cancel changes and return to the Workorder Overview page.

Updating Resource Requirement Details

Prerequisites

- ☐ A workorder with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. The WIP Mass Load Concurrent Program must be running. The operation must have a Uncomplete or Pending QA status.

To update the resource requirement details:

- From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Workorder Overview page appears.
- Enter information in the fields for which you know the value then click **Go**. All workorders matching your search criteria appear in the Workorder List Results table.
- Click the workorder number. The Workorder Operations page appears.
- Select Resources from the left-hand navigation bar. The Update Resource Requirement page appears.
- Select the requirement you want to update and click **Details**. The Resource Requirement Detail page appears.

Resource Requirement Detail page

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Resource Requirement Detail

Workorder Number	CMR0323	Organization	San Francisco Aviation Maintenance Center
Workorder Status	Released(1)	Department	MRO Headquarters
Workorder Description	29-030-02-00	Project	71
Maintenance Requirement	29-030-02	Project Task	29-030-02-00
Route	29-030-02-00	Serial Number	102
Priority		Unit Name	C-1600, Tail # 102
Item	MRO-C1600	Visit Task	4
Visit Number	71		
Accounting Class	Maintenanc		
Completion Sub Inventory		Locator	
Scheduled Workorder Start Date	2005-JAN-05 09:00	Scheduled Workorder End Date	2005-JAN-05 10:45
Actual Workorder Start Date		Actual Workorder End Date	

* Indicates required field

Requirement Detail Information

Operation Sequence	10	Resource Sequence	10
* Resource Type	Person	* Resource	MROAF
* Duration	1	UOM	Hour
* Quantity	1	Total Required	1
Applied	0	Open	1
* Charge Type	Manual	Standard Rate	<input checked="" type="checkbox"/> Yes
* Basis	Item	* Scheduled	<input checked="" type="checkbox"/> Yes
Operation Start Time	2005-JAN-05	Operation End Time	2005-JAN-05
* Start Date	2005-JAN-05	* End Date	2005-JAN-05

The following table provides information about the fields in the Resource Requirement Detail page.

Description of fields in the Resource Requirement Detail page

Field Name	Description
Operation Sequence	The workorder operation sequence number.
Resource Sequence	The sequence number for the resource within an operation.
Resource Type	The type of resource requirement.
Resource	The resource name within the operations department.
Duration	The length of time required.
UOM	The unit of measure for the time required.
Quantity	The quantity of resources required.
Total Required	The total amount of time required derived by multiplying the duration with the quantity.
Applied	The duration of the resource charged to date.
Open	The duration of the resource difference between the Total Required and the Applied amount.
Charge Type	The expected method of charging the resource.
Standard Rate	Determines if the resource is to be charged at the standardized rate.
Basis	Provides the basis for determining the resource requirement.
Operation Start Time	The date on which the operation is scheduled to start.
Operation End Time	The date on which the operation is scheduled to end.
Start Date	The start date for the resource.
End Date	The end date for the resource.

6. Make the required changes, and click **Apply**. Click **Cancel** to cancel any changes and return to the previous page.

Note: When changing an existing requirement defined in Route Management, the selection is limited to the alternates for the Item.

Viewing Resource Assignments

Prerequisites

- ☐ A workorder with associated assignments must exist in the database.

To view a resource assignment:

1. Find the workorder you want to view assignments for. See Finding Workorders., page 12-7
2. Navigate to the Workorder Operations page. Select Assignments from the left-hand navigation panel. The Resource Assignments page appears.

The following table provides information about the fields in the Resource Assignments page.

Description of fields in the Resource Assignments page

Field Name	Description
Operation Sequence	The workorder's operation sequence number.
Resource Sequence	The sequence number for the resource within an operation.
Operation Status	The status of the operation.
Operation Start Time	The date on which the operation is scheduled to start.
Operation End Time	The date on which the operation is scheduled to end.
Resource Type	The type of resource requirement.
Employee Number	The number assigned to identity the employee.
Employee Name	The full name of the employee.
Serial Number	The Serial Number used for non-person type resources.
Start Date	The start date for the assignment.
End Date	The end date for the assignment.

3. Make any necessary changes to the items displayed in the Resource Assignment list. To add assignments, click **Add More Rows**.
4. Click **Apply** to save your changes; click **Cancel** to cancel changes and return to the Workorder Overview page.

Editing Resource Assignments

Prerequisites

- ☐ A visit or workorder must exist in the database.

To edit resource assignments:

1. Find the workorder with the assignments that you want to edit. See Finding Workorders., page 12-7
2. Navigate to the Resource Assignments page. Make any necessary changes to the items displayed in the Resource Assignment list. To add assignments, click **Add More Rows**.

Add a Resource Assignment - Resource Assignments page

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Resource Assignments

Workorder Number	CMR0323	Organization	San Francisco Aviation Maintenance Center
Workorder Status	Released(1)	Department	MRO Headquarters
Workorder Description	29-030-02-00	Project	71
Maintenance Requirement	29-030-02	Project Task	29-030-02-00
Route	29-030-02-00	Serial Number	102
Priority		Unit Name	C-1600, Tail # 102
Item	MRO-C1600	Visit Task	4
Visit Number	71	Locator	
Accounting Class	Maintenanc	Scheduled Workorder End Date	2005-JAN-05 10:45
Completion Sub Inventory		Actual Workorder End Date	
Scheduled Workorder Start Date	2005-JAN-05 09:00		
Actual Workorder Start Date			

Resource Assignment List

Cancel Revert Apply

Select	Operation Sequence	Resource Sequence	Operation Start Time	Operation End Time	Resource Type	Employee Name	Employee Number	Serial Number	Start Date	End Date
	10	10	2005-JAN-0	2005-JAN-0	Person	Scott, Fran	928	10	2005-JAN-05	2005-JAN-05
	10		2005-JAN-0	2005-JAN-0					2005-JAN-05	2005-JAN-05
	10		2005-JAN-0	2005-JAN-0					2005-JAN-05	2005-JAN-05

- Click **Apply** to save your changes; click **Cancel** to cancel changes and return to the Workorder Overview page.

Charging Resources

Prerequisites

- ☐ A workorder with a status of Draft, Unreleased, Parts Hold, Hold, or Pending QA status must exist in the database. The Cost Manager Concurrent Program must be running. The operation must have a Uncomplete or Pending QA status.

To charge resources:

- From the Oracle Complex Maintenance, Repair, and Overhaul Home page, click **Execution**. Select the Production Planning tab. The Workorder Overview page appears.
- Enter information in the fields for which you know the value then click **Go**. All workorders matching your search criteria appear in the Workorder List Results table.
- Click the workorder number. The Workorder Operations page appears.
- Select Resources Transactions from the left-hand navigation bar. The Perform Resource Transactions page appears.

Perform Resource Transactions page

Perform Resource Transactions

Workorder Number: **CMR0323** Organization: **San Francisco Aviation Maintenance Center**
 Workorder Status: **Released(1)** Department: **MRO Headquarters**
 Workorder Description: **29.030.02.00** Project: **71**
 Maintenance Requirement: **29.030.02** Project Task: **29.030.02.00**
 Route: **29.030.02.00** Serial Number: **102**
 Priority: **71** Unit Name: **C-1600, Tail # 102**
 Item: **MRO-C1600** Visit Task: **4**
 Visit Number: **71** Accounting Class: **Maintenanc** Locator: **2005-JAN-05 10:45**
 Completion Sub Inventory: **2005-JAN-05 09:00** Scheduled Workorder End Date: **2005-JAN-05 10:45**
 Actual Workorder Start Date: **2005-JAN-05 09:00** Actual Workorder End Date: **2005-JAN-05 10:45**

*Operation Seq	*Resource Seq	Resource	Department	Employee	Serial Number	Quantity	UOM	Activity	Reason	Reference
10			MRO Dept							
10			MRO Dept							
10			MRO Dept							
10			MRO Dept							
10			MRO Dept							
10			MRO Dept							
10			MRO Dept							

The following table provides information about fields in the Perform Resource Transactions page.

Description of fields in the Perform Resource Transactions page

Field Name	Description
Operation Sequence	The workorder's operation sequence number.
Resource Sequence	The sequence number for the resource within an operation.
Resource	The resource name within the operations department.
Department	The department within the organization to be charged.
Employee	The employee number to be charged.
Serial Number	The serial number, if serial controlled, of the tracked item for which the service request will be created.
Quantity	The quantity of resources to be charged.
UOM	The unit of measure for the quantity to be charged.
Reason	The reason for charging the resource.
Reference	User defined reference information.

- You can then perform the following:
 - Make any necessary changes and click **Apply** to save your changes.
 - Click **Add More Rows** to add charged resources.
 - Click **Revert** to clear any changes.
- Click **Cancel** to cancel any changes.

Working with Material Transactions

Using the Production Planning module, users can issue and return materials to Inventory with a single work order in context, identify the employee that items are issued to or returned by, and view the material transaction history. This allows a user to perform material transactions across workorders rather than having to drill into each and every work order.

See:

- Viewing and Issuing Materials Across WorkOrders, page 12-56
- Returning Materials Across Workorders, page 12-58
- Identifying the Employee that Items are Issued To or Returned By, page 12-61
- Viewing the Material Transaction History, page 12-61

Viewing and Issuing Materials Across WorkOrders

Users can view material requirements, identify the materials previously issued against these requirements and determine which items need to be issued for each job, based on the defined requirements.

Prerequisites

- ☐ The workorder must have been created, assigned to an operation. Material requirements must be associated with the workorder.

To view material requirements and issue materials across workorders:

1. Under the Execution link, click the Material Transactions tab. The Material Issue page appears under the Issues secondary tab. Enter search criteria and click Go. Material requirements across workorders matching your search criteria are displayed in the Workorder Requirements table.

Material Issue page

Select	Work Order	Operation Seq	Item	Description	Required quantity	Issued quantity	Uom	Issue Quantity	Issue UOM	Recipient	Serial Number	Details	Disposition
<input type="checkbox"/>	706	1	MRO-85652	LPT Turbine	1	0	Each	1	Each				
<input type="checkbox"/>	691	10	MRO-17C35-01	Main Battery	11	0	Each	11	Each				
<input type="checkbox"/>	688	10	MRO-16S100-801	Gun Assembly	10	0	Each	10	Each				
<input type="checkbox"/>	685	10	MRO-42F7373-2	HPT Rotor Front Shaft	5	0	Each	5	Each				
<input type="checkbox"/>	677	10	MRO-42F7373-2	HPT Rotor Front Shaft	5	0	Each	5	Each				

- The item and the required quantity is displayed against each workorder. The quantity to be issued defaults from the material requirements. You can change the quantity as required. Select the UOM and the Recipient (the employee who will receive the item) from the corresponding list of values. If the issued quantity is 1, select the serial number of the item from the Serial Number list of values. Optionally, you can associate disposition to the material issued by selecting it from the Disposition list of values.

Enter Issue Details - Material Issue page

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Issues | Returns | View Material Transactions

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Material Issue

Locate Workorder Requirements

Workorder Priority

Organization Item

Required Date From Required Date To

Service Request Visit Number

Department

Workorder Requirements

Previous 26-28 of 28 Next

Select	Work Order	Operation Seq	Item	Description	Required quantity	Issued quantity	Uom	Issue Quantity	Issue UOM	Recipient	Serial Number	Details	Disposition
<input type="checkbox"/>	526	10	CM20804	Pin	3	0	Each	3	Each	A Bakker			Use As
<input type="checkbox"/>	466	10	MRO-16S100-801	Gun Assembly	0	0	Each		Each				

- Optionally, click the Details icon to navigate to the Material Issue Details page and enter lot, revision, locator, and subinventory information if the item is controlled in inventory. Click Done to apply this information and return to the Material Issue page.

Material Issue Details page

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Material Issue Details

To save the information permanently Click on the Apply Button on the Material Issue Screen.

Workorder Details

Work Order 526 Operation Seq 10

Item CM20804 Serial Number

Additional Details

Lot

Revision

Subinventory RIP

Locator 1.1.2..

Transaction Date 2005-MAY-27

- Select the workorder or workorders for which you have entered issue details and click Apply. The required items are issued to the workorder.

View Material Issued - Material Issue page

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IssuesReturnsView Material Transactions

Material Issue

Locate Workorder Requirements

Workorder

Organization

Required Date From

Service Request

Department

Priority

Item

Required Date To

Visit Number

GoClear

Workorder Requirements

Apply

Previous26-28 of 28Next

Select	Work Order	Operation Seq	Item	Description	Required quantity	Issued quantity	Uom	Issue Quantity	Issue UOM	Recipient	Serial Number	Details	Disposition
<input type="checkbox"/>	526	10	CM20804	Pin	3	3	Each		Each				
<input type="checkbox"/>	466	10	MRO-16S100-801	Gun Assembly	0	0	Each		Each				

Returning Materials Across Workorders

Users can query for items that have already been returned or that need to be returned and also search for items that were issued, but not completely used to complete the applicable job. Multiple items can be returned at the same time without the user having to navigate to a single job or associated visit in context. Users can also manually identify the issued items that will replace the non-tracked parts which will be returned.

Prerequisites

- ☐ The Workorder should be in Released, Complete, Pending QA, or Parts On Hold status.

To return materials across workorders:

- Under the Material Transactions tab, click the Returns secondary tab. The Material Returns page appears.

Material Returns page


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Material Returns


























Locate Workorder Returns

Workorder 
 Organization 
 Service Request 
 Department 

Priority 
 Item 
 Visit Number 
 Disposition 

Workorder Return Results

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Select	Work Order	Operation Seq	Item	Description	Disposition	Condition	Serial Number	Issued quantity	Return	UOM	Received From	Quality	Details
<input type="checkbox"/>	63		CM20804	Pin				2	2	Each			
<input type="checkbox"/>	84		CM20804	Pin				9	7	Each			
<input type="checkbox"/>	84		CM20804	Pin				9	7	PACK			
<input type="checkbox"/>	146		AS20001	Aircraft Engine Assembly				20	20	Each			
<input type="checkbox"/>	526		CM20804	Pin				3	2	Each			

- Enter your search criteria and click Go. The workorders matching your search criteria are listed in the Workorder Return Results table. The following two types of material are available for return:
 - Material that was issued to the job. If the material has associated Dispositions, then each Disposition is shown as a separate return line. For non-serialized items, net quantity available to return will be defaulted to (Total of all Issues – Total of all Returns) for the given Material. The returned material should not be more than disposition quantity if disposition is associated.
 - Material that was not issued to the job but has a Disposition associated to it. (For tracked items removed from the Unit Configuration, a Disposition will be created automatically, if it does not already exist).

View Materials Available for Return -Workorder Return Results table

Workorder Return Results

Apply

Previous 1-23 of 23 Next												
Select	Work Order	Operation Seq	Item	Description	Disposition	Condition	Serial Number	Issued quantity	Return	UOM	Received From	Quality Details
<input type="checkbox"/>	63		CM20804	Pin				2	2	Each		
<input type="checkbox"/>	84		CM20804	Pin				9	7	Each		
<input type="checkbox"/>	84		CM20804	Pin				9	7	PACK		
<input type="checkbox"/>	146		AS20001	Aircraft Engine Assembly				20	20	Each		
<input type="checkbox"/>	526		CM20804	Pin				3	2	Each		
<input type="checkbox"/>	883		Non-Tracked Rev Specific for testing	Non-Tracked Rev Specific for testing				6	6	Each		
<input type="checkbox"/>	883		Non-Tracked Rev Specific for testing	Non-Tracked Rev Specific for testing	Non-Conformance	Unserviceable		6	6	Each		
<input type="checkbox"/>	706		Non-Tracked Rev Specific for testing	Non-Tracked Rev Specific for testing	Use As Is	Active		2	2	Each		
<input type="checkbox"/>	706		Non-Tracked Rev Specific for testing	Non-Tracked Rev Specific for testing	Use As Is	Active		1	1	Each		
<input type="checkbox"/>	603	1	SB47710	Connecting Rod (Finished)	Non-Conformance	MRB		1	1	Each		
<input type="checkbox"/>	526		CM20804	Pin	Use As Is	Active		4	3	Each		
<input type="checkbox"/>	526		CM20804	Pin	Use As Is	Active		3	3	Each		
<input type="checkbox"/>	243		CM20804	Pin	Bad From Stock	Active		5	5	Each		
<input type="checkbox"/>	190		MRO-17C35-03	Main Battery	Return To Vendor	Serviceable	45226	1	1	Each		

- The item and the issued quantity is displayed against each workorder. Enter the quantity to be returned. The quantity to be returned must be 1 if the item number is serial number controlled and should not be more or greater than the Issued quantity. When a disposition is associated to the return, the quantity to be returned should not be more than the net disposition quantity.

Select the UOM and the employee from which it is received from the UOM and Received From list of values respectively. Optionally, choose the condition in which item is returned. The condition defaults when a disposition is associated.

Enter Return Details - Material Returns page

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Issues | Returns | View Material Transactions

Material Returns

Locate Workorder Returns

Workorder

Organization

Service Request

Department

Priority

Item

Visit Number

Disposition

Go Clear

Workorder Return Results

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Select	Work Order	Operation Seq	Item	Description	Disposition	Condition	Serial Number	Issued quantity	Return	UOM	Received From	Quality Details
<input type="checkbox"/>	63	2	CM20804	Pin		Obsolete		2	2	Each	Aalto, M	
<input type="checkbox"/>	84		CM20804	Pin				9	7	Each		
<input type="checkbox"/>	84		CM20804	Pin				9	7	PACK		

- To enter additional information, click the Details icon. The Material Return Details page appears. Serial, lot, and locator information must be provided if the item is controlled in inventory.

The Locator and SubInventory fields are populated with values defaulting from WIP_PARAMETERS. The Transaction Date should not be more than the system date. The Reason and Problem Code will not be displayed if a disposition is associated with the item. Click Done to apply changes and return to the Material Returns page.

Material Return Details page

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Production Planning Outside Processing Service History **Material Transactions** Outside Processing

Issues | Returns | View Material Transactions

Material Return Details

Workorder Details

Workorder 63
Part Number CM20804
Status Cancelled

Serial Number
Operation Number 2

Additional Details

Lot

Revision

Subinventory RIP

Locator 1.1.2.

Reason

Problem Code

Summary

Transaction Date 2005-MAY-27

Clear Done

5. You must enter quality results if the condition is MRB and when no disposition is associated with the material return. To enter quality results, click the Quality icon.
6. After entering the required details, select the workorder and Click Apply to return materials. A service request is created for all unserviceable tracked parts being returned.

Identifying the Employee that Items are Issued To or Returned By

A high level of accountability is maintained whenever a material transaction is performed. Material transaction details like item, or multiple items, serial numbers (if applicable), quantity, employee, operations and the date of the transaction are stored. Organizations track each issue and return made against workorders. Users can identify the employees to whom the material is issued and also the employees who return the items. The profile: AHL_MTL_ISSUE_RETURN_EMPLOYEE must be set to Yes. Users can query for employee names using the Recipient and Received From list of values in the Material Issue and Material Return pages respectively.

Viewing the Material Transaction History

The View Material Transactions page displays a summary of the all material requirements and their associated transactions.

Prerequisites

- ☐ Valid workorders must exist, and materials associated with and transacted against them.

To view the material transaction history:

- Under the Material Transaction tab, click the View Material Transactions secondary tab. The View Material Transactions page appears. Enter your search criteria and click Go. The results display both issue and return transactions history.

View Material Transactions page

View Material Transactions

Locate Workorder Requirements

Workorder	<input type="text"/>	Priority	<input type="text"/>
Organization	<input type="text"/>	Item	<input type="text"/>
Transaction Date From	<input type="text"/>	Transaction Date To	<input type="text"/>
Service Request	<input type="text"/>	Visit Number	<input type="text"/>
Department	<input type="text"/>	Workorder Status	<input type="text"/>
Transaction Type	<input type="text"/>		
<input type="button" value="Go"/> <input type="button" value="Clear"/>			

View Material Transaction Results

Associate Dispositions

View Service Request Details

Previous1-15 of 15Next

Select	Details	Transaction Date	Work Order	Operation Seq	Item	Description	Quantity	Transaction Type	Service Request	Condition	Quality
<input checked="" type="radio"/>		2005-APR-25	150	1	MRO-72W56-20-4	Valve, Shutoff, Hydraulic System 1		WIP Component Return		Active	
<input type="radio"/>		2005-APR-22	150	1	MRO-72W56-20-4	Valve, Shutoff, Hydraulic System 1		WIP component issue			
<input type="radio"/>		2005-MAY-27	146	10	AS20001	Aircraft Engine Assembly	20	WIP component issue			
<input type="radio"/>		2005-APR-10	526	10	CM20804	Pin	1	WIP Component Return		Active	
<input type="radio"/>		2005-MAY-27	526	10	CM20804	Pin	3	WIP component issue			
<input type="radio"/>		2005-APR-28	883	1	Non-Tracked Rev Specific	Non-Tracked Rev Specific for testing	6	WIP component issue			
<input type="radio"/>		2004-DEC-27	84	10	CM20804	Pin	2	WIP Component Return		Active	

- You can perform the following actions:
 - View the details of the transaction by clicking the Details icon
 - Associate the transaction to existing dispositions
 - View the Service Request details
 - Click the Workorder number link to navigate to the Workorder Operations page and view details associated with the workorder

Item Disposition

Disposition lists are defined in Route Management as a subset of a composition list or master configuration to compliment material requirements and to setup planning percentages. Disposition Lists can also act as a superset if additional materials are defined for the item or configuration. When a workorder is created based on a route, the disposition list associated with the route is carried over into production where the maintenance user can specify the disposition details as well as add items from the composition list, which have not been previously defined in engineering. Maintenance or inspection personnel use the disposition details to transact the material (serviceable/non-serviceable) and initiate overhaul, repair or scrap requirements accordingly. Maintenance or inspection personnel can create and view the

discrepancies/non-conformances recorded, create a material requirement based on the disposition item, initiate the removal and installation of tracked parts, and initiate the capturing of the MRB quality disposition information.

Prerequisites

- ❑ Items must have been set up in inventory. A composition list must exist for the item. A disposition list must have been created for the item- route or the master configuration- route combination. There must be a workorder for which to disposition the item or position against.

To disposition items in production:

1. From the Workorder Overview page, select a workorder and navigate to the Workorder Operations page. Click Dispositions in the side navigation menu. The Workorder Dispositions page appears displaying the disposition list associated with the workorder. The Disposition List includes all the default dispositions which are automatically generated when the workorder is created (based on the route_id associated with this workorder), dispositions created by the user and the dispositions created or updated by the corresponding part changes.

Workorder Dispositions page

Workorder Dispositions

[Cancel](#)

<p>Workorder Number CMR03</p> <p>Workorder Status Released(1)</p> <p>Workorder Description Service Item Route</p> <p>Maintenance Requirement Test OSP MR</p> <p>Route Service Item Route</p> <p>Priority</p> <p>Item MRO-C1600</p> <p>Visit Number 14</p> <p>Accounting Class Maintenanc</p> <p>Completion Sub Inventory</p> <p>Scheduled Workorder Start Date 08-NOV-2004 03:00</p> <p>Actual Workorder Start Date 30-NOV-2004 23:00</p>	<p>Organization San Francisco Aviation Maintenance Center</p> <p>Department MRO Satellite Department</p> <p>Project 14</p> <p>Project Task Service Item Ro</p> <p>Serial Number 101</p> <p>Unit Name C-1600, Tail # 101</p> <p>Visit Task 2</p> <p>Locator</p> <p>Scheduled Workorder End Date 09-NOV-2004 17:00</p> <p>Actual Workorder End Date 01-DEC-2004 23:00</p>
---	--

Filter Dispositions By

<p>Position <input type="text"/></p> <p>Item <input type="text"/></p> <p>Immediate Disposition <input type="text"/></p> <p>Status <input type="text"/></p>	<p>Item Group <input type="text"/></p> <p>Item Type <input type="text"/></p> <p>Secondary Disposition <input type="text"/></p> <p>Condition <input type="text"/></p>
--	--

[Go](#) [Clear](#)

Disposition List










[Create](#)

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View Disposition List - Workorder Disposition page

Disposition List

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Position	Off Item	Off Serial Number	Off Lot Number	Off Quantity	Off UOM	Immediate Disposition	Secondary Disposition	Status	Condition	On Item	On Serial Number	On Lot Number	On Quantity	On UOM	Details
Radome	MRO-284A1801-5	882526		1	Ea	Use As Is		Terminated	Active						
Radome						Use As Is		Installation Required	Active						
Indicator, Rate of Climb						Not Received		Installation Required	Active						
Antenna, VHF	MRO-671250-19	34789				Bad From Stock		Secondary Disposition Required	QC Fail						
	OSPItem					Not Received		Active							
Fan, Equipment Cooling	MRO-74101054-2	5932		1	Ea	Use As Is		Material Transaction Required	QC Fail	MRO-74101054-2	5932		1	Ea	
Relief Valve, Positive Pressure	MRO-8720737-8	35893		1	Ea	Return To Vendor		Material Transaction Required	QC Fail	MRO-8720737-8	35893		1	Ea	
HP Compressor Assy						Not Removed		Installation Required	Active						
Bus Power Control Unit	MRO-762187F-3	5793				Not Received		QC Fail							

You can do the following:

- Create a new entry by clicking the Create button
- Edit or view an existing record by clicking the Details icon
- View position information by clicking the Position link

The on /off log displays the removal and installation information as they are accomplished, and the disposition status reflects the progression of the disposition. You can query for specific dispositions by entering your search criteria in the Filter Dispositions By region.

- Click the Details icon corresponding to the item that you want to disposition. The Disposition Details page appears. You can disposition both tracked as well as non-tracked items.

You can select the item and instance information if the process of combining the disposition list definition with the instance information did not result in an instance being found for some of the defined positions or alternate part groups. If you select an item group, the item list of values will comprise only items allowed for the configuration position and item group.

- Select the immediate disposition. The immediate disposition and secondary disposition types drive the transaction requirements. The disposition options and actions are different for a tracked and non-tracked item.

Tracked Item Disposition

The following table describes the immediate disposition types and the action that the user needs to perform consequently for a tracked item.

Immediate Disposition - Tracked Item

Disposition Type	User Action
BFS (Bad From Stock)	Enter Non-Conformance and Secondary Disposition
Not Applicable	No Action Required
Non-Conformance	Enter Non-Conformance and Secondary Disposition
Not Received	No Action Required
Not Removed	No Action Required
RTC (Return to Customer)	Remove Instance
RTV (Return to Vendor)	Remove Instance
Scrap	Enter Non-Conformance, Removal Details, and MRB QA results
Use As Is	Remove Instance from Install Base keeping the item in serviceable condition

When the immediate disposition and condition is selected, the secondary disposition is enabled if applicable. The following table describes the secondary disposition types and user actions for a tracked item.

Secondary Disposition - Tracked Item

Disposition Type	User Action
Hold	Further Secondary Action Required
Rework – Removal Not Required	No Further Action Required
Rework – Removal Required	Remove Item Instance
RTC (Return to Customer)	Remove Item Instance
RTV (Return to Vendor)	Remove Item Instance
Scrap	Remove Item Instance and Enter MRB QA

Disposition Details - Tracked Item

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Production Planning

Outside Processing

Service History

Material Transactions

Outside Processing

Disposition Details

* Indicates required field

Cancel Terminate Material Requirement Submit QA Results Apply

Unit Configuration C-1600, Tail # 101

Master Configuration C-1600 Aircraft

Position Bus Power Control Unit

Item MRO-762187F-3

Operation Sequence

Serial Number 5793

Quantity 1

Immediate Disposition Non-Conformance

Secondary Disposition

Comment

Workorder CMR03

Revision 1

Item Group

Item Revision

Instance Number 70217

Lot Number

UOM Ea

Status

* Condition QC Fail

Removal Details

Reason

Estimated Duration Hours

Removal Code

Removal Date

Installation Details

Removal Details

Reason

Estimated Duration Hours

Removal Code

Removal Date

Installation Details

Item

Instance Number

Serial Number

Lot Number

Quantity

UOM

Installation Date

Primary Nonconformance

Problem Code

Summary

Severity

Nonconformance Log

Create

Incident Number	Date	Status	Severity	Primary	Problem Code	Resolution Code	Summary
-----------------	------	--------	----------	---------	--------------	-----------------	---------

No records were found matching the given criteria..

Cancel Terminate Material Requirement Submit QA Results Apply

- If the disposition is for a position, click the position link to navigate to the View Position Path page to view the position path across all sub configurations.
- A service request is created when you enter the primary non-conformance information. Click Create to create additional non-conformances. The Non Conformance Log lists all the service requests associated to this disposition either directly or indirectly (through Parts Change or Material transaction). The Primary column indicates if the Non Conformance is a primary (Auto generated) one or not. You can enter the Problem code, summary and severity fields (Primary Non Conformance section) only when the Immediate type is Non Conformance or BFS and the condition is Unserviceable or MRB.

Click the Incident number link in the Non Conformance Log section to navigate to the View/Edit SR page to view or edit the service request details.

- Click Material Requirement to create a material requirement for the disposition item and quantity.
- Click Submit QA Results to navigate to the quality collection user interface to enter the MRB quality results. You can enter quality results only when the item condition is set to MRB when defining the item in Inventory.
- Click Terminate to close the disposition.
- Click Apply to save the changes made or click Cancel to discard the changes.

Non-Tracked Item Disposition

The following table describes the immediate disposition types and the user action for a non-tracked item.

Immediate Disposition - Non-Tracked Item

Disposition Type	User Action
Non-Conformance	Secondary Disposition Required
Not Received	No Action Required
Not Removed	No Action Required
RTC (Return to Customer)	Material Transaction Required
RTV (Return to Vendor)	Material Transaction Required
Scrap	Material Transaction Required
Use As Is	No Action Required

When the immediate disposition and condition is selected the secondary disposition is enabled if applicable. The secondary disposition types and actions are as follows:

Secondary Disposition - Non-Tracked Item

Disposition Type	User Action
Hold	Further Secondary Action Required
RTC (Return to Customer)	Material Transaction Required
RTV (Return to Vendor)	Material Transaction Required
Scrap	Material Transaction Required

Disposition Details - Non-Tracked Item

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Production Planning Outside Processing Service History Material Transactions Outside Processing

Workorders Resources Materials Maintenance Requirements My Workorders Visits

Disposition Details

* Indicates required field

Unit Configuration **C-1600, Tail # 101** Workorder **CMR03**

Master Configuration **C-1600 Aircraft** Revision **1**

Position

Item **OSPItem** Item Group

Operation Sequence Item Revision

Serial Number Instance Number

Quantity **1** Lot Number

Immediate Disposition **Not Received** UOM **Ea**

Secondary Disposition Status

Comment * Condition **Active**

Cancel Terminate Material Requirement Apply

- Click the Terminate button to close the disposition.
 - Click the Material Requirement button to create a material requirement for the disposition item and quantity.
 - Click Apply to save the changes made and click Cancel to discard the values entered.
4. To create a new disposition record, click Create in the Workorder Dispositions page. The Create Disposition page appears. Select an item to disposition using the Position, Item Group or Instance search criteria. Enter the disposition details as required. Select the condition in which to disposition.

Create Disposition page

Create Disposition

* Indicates required field

Unit Configuration **C-1600, Tail # 101** Workorder **CMR03**

Master Configuration **C-1600 Aircraft** Revision **1**

Position Item Group

select position by clicking on the flashlight icon

Item Item Revision

Operation Sequence Instance Number

Serial Number Lot Number

Quantity UOM

Immediate Disposition **Use As Is** Status

Secondary Disposition * Condition

Comment

Cancel Submit QA Results Apply

Primary Nonconformance

Problem Code Summary

Severity

Cancel Submit QA Results Apply

- Click Apply. The page will refresh with the applicable disposition details listed in the lower half of the page. If the item being dispositioned is a tracked item, you need to perform the parts change as required. If the item being dispositioned is non-tracked, you can associate the appropriate material transactions with it.

Additionally, you can create material requirements to support the disposition, submit quality results if submitting for MRB review, or create additional service requests if needed.

Disposition Items from the Parts change user interface:

- You can enter disposition details when performing an item or a unit configuration parts change. Navigate to the Workorder Operations page and select Perform Part Removal/Install. The Unit Configuration Part Changes page appears displaying the configuration tree. Select the position against which you want to perform the disposition. The page refreshes displaying the position details. The input parameters for disposition appear in the lower half of the page.

Enter Disposition Information - Unit Configuration Part Changes page

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- Airframe
 - Indicator, Rate of Climb
 - Fan, Equipment Cooling
 - Relief Valve, Positive Pressure
 - Antenna, VHF
 - Main Battery**
 - Bus Power Control Unit
 - Hydraulic System Shutoff Valve
 - Digital Flight Data Recorder
 - Transfer Unit, Ammo
 - Radome
 - #1 Engine
 - #2 Engine
 - Shock Strut MLG LH
 - Shock Strut MLG RH

Unit Configuration Part Changes

Workorder Number	CMR03	Organization	San Francisco Aviation Maintenance
Workorder Status	Released(1)	Department	MRO Satellite Department
Workorder Description	Service Item Route		
Maintenance Requirement	Test OSP MR	Project	14
Route	Service Item Route	Project Task	Service Item Ro
Priority		Serial Number	101
Item	MRO-C1600	Unit Name	C-1600, Tail # 101
Visit Number	14	Visit Task	2
Accounting Class	Maintenanc		
Completion Sub Inventory		Locator	
Scheduled Workorder Start Date	08-NOV-2004 03:00	Scheduled Workorder End Date	09-NOV-2004 17:00
Actual Workorder Start Date	30-NOV-2004 23:00	Actual Workorder End Date	01-DEC-2004 23:00

[Configuration Details](#)
[Submit QA Results](#)
[Remove](#)
[Replace](#)
[Cancel](#)
[Revert](#)

Unit Configuration	C-1600, Tail # 101	Position	Main Battery
Master Configuration	C-1600 Aircraft	Revision	1

* Operation Seq

Removal Details

Item	MRO-17C35-02	Instance Number	70216
Serial Number	745932	Item Revision	

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Production Planning Outside Processing Service History Material Transactions Outside Processing

Workorders Resources Materials Maintenance Requirements My Workorders Visits

- Airframe
 - Indicator Rate of Climb
 - Fan Equipment Cooling
 - Relief Valve Positive Pressure
 - Antenna VHF
 - Main Battery**
 - Bus Power Control Unit
 - Hydraulic System Shutoff Valve
 - Digital Flight Data Recorder
 - Transfer Unit Ammo
 - Radome
 - #1 Engine
 - #2 Engine
 - Shock Strut MLG LH
 - Shock Strut MLG RH

Removal Details

Item **MRO-17C35.02** Instance Number **70216**

Serial Number **745932** Item Revision

Lot Number

Quantity **1** UOM **Ea**

* Condition

* Removal Code

* Reason

Removal Date

Non-Conformance Details

Problem Code

Severity

Estimated Duration

Summary

Installation Details

Item

Instance Number

Serial Number

Item Revision

Lot Number

Installation Date

Quantity

UOM

Disposition Details

Immediate Disposition Use As Is Status

7. Enter the required information.

Disposition Association during Material Transaction

From the Material Issue UI

When issuing materials to a workorder from the Material Issue page, you can associate the existing dispositions for that workorder and issue parts directly to disposition. Click the Disposition search icon in the Workorder Requirements table to navigate to the Select Disposition page and select the appropriate disposition.

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Production Planning Outside Processing Service History **Material Transactions** Outside Processing

Issues Returns View Material Transactions

Material Issue

Locate Workorder Requirements

Workorder **984** Priority

Organization

Item

Required Date From

Required Date To

Service Request

Visit Number

Department

Go Clear

Workorder Requirements

Previous 1-3 of 3 Next

Select	Work Order	Operation Seq	Item	Description	Required quantity	Issued quantity	Uom	Issue Quantity	Issue UOM	Recipient	Serial Number	Details	Disposition
<input type="checkbox"/>	984	1	SB47710	Connecting Rod (Finished)	4	0	Each	4	Each				
<input type="checkbox"/>	984	1	8932B13	Hydraulic Filter	2	0	Each	2	Each				

From the Material Return UI

When returning materials issued to a workorder, the dispositions associated with the workorder if any appear in the Workorder Return Results table. This allows for the disposition to be directly associated with a material transaction.

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Production Planning Outside Processing Service History **Material Transactions** Outside Processing

Issues | **Returns** | View Material Transactions

Material Returns

Locate Workorder Returns

Workorder: Priority:
 Organization: Item:
 Service Request: Visit Number:
 Department: Disposition:

Workorder Return Results

Previous 1-2 of 2 Next

Select	Work Order	Operation Seq	Item	Description	Disposition	Condition	Serial Number	Issued quantity	Return	UOM	Received From	Quality	Details
<input type="checkbox"/>	983		SB47710	Connecting Rod (Finished)	Non-Conformance	MRB		8	8	Each			
<input type="checkbox"/>	983		MRO-42F7373-2	HPT Rotor Front Shaft	Non-Conformance	Unserviceable		1	1	Each			

From the View Material Transactions UI

You can associate a disposition to a material transaction for a non-tracked item after the transaction has occurred. Query for the material transaction in the View material Transaction page. Select the transaction and clicking Associate Dispositions to navigate to the Update Associated Dispositions page to select the disposition(s) to associate. Select from the available dispositions to associate with the material transaction.

View Material Transactions

Locate Workorder Requirements

Workorder: Priority:
 Organization: Item:
 Transaction Date From: Transaction Date To:
 Service Request: Visit Number:
 Department: Workorder Status:
 Transaction Type:

View Material Transaction Results

Previous 1-1 of 1 Next

Select	Details	Transaction Date	Work Order	Operation Seq	Item	Description	Quantity	Transaction Type	Service Request	Condition	Quality
<input type="radio"/>	<input type="button" value="Details"/>	07-JUN-2005	983	1	SB47710	Connecting Rod (Finished)	8	WIP component issue			

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Collection Plans window

Collection Plans (EM2)

Collection Plan

Description

Effective 29-JUN-2004 -

Plan Type

Views...

Copy Elements... Transactions Specifications...

Quality Collection Elements

	Name	Seq	Prompt	Mandatory	Enabled	Read-Only	Displayed	
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Values Actions

2. Define the Collection Plan name. Select the Plan Type.
3. Click **Copy Elements**.
4. Select the appropriate plan templates. For example, choose from Template Job Deferral, Template MRB Disposition, Template Op Completion, Template Route Completion, or Template Counter Readings.
5. Set any elements as Mandatory, Enabled, and Displayed.

Note: Do not disable or remove base elements required to associate the collection to the transaction.

Define Collection Elements - Collection Plans window

Name	Seq	Prompt	Mandatory	Enabled	Read-Only	Displayed
<input checked="" type="checkbox"/> Maintenance WorkOrder	10	Work Order	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Maintenance Job Status	20	Work Order Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Maintenance Requirement	30	Maintenance Requir	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Item	40	Item	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Item Instance	50	Item Instance	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Buttons: Values, Actions

6. Select **Transactions**. The Quality Collection Transactions Form appears.

Collection Transactions window

Transaction Description	Mandatory	Background	Enabled
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Trigger Name	Condition	From	To

7. From the Transaction Description list of values., choose MRB Disposition, Maintenance Job Deferral, Maintenance Operation Completion, and Maintenance Route Completion. Set any necessary elements as Mandatory, Background, and Enabled.
8. Select Inspection Type for Trigger Name.

- Select equals (=) for Condition.

Enter Transaction Details - Collection Transactions window

Collection Transactions (EM2) - TEST CMRO PLAN

Quality Collection Transactions

Transaction Description	Mandatory	Background	Enabled
MRB Disposition (Advanced Service Online)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintenance Job Deferral (Advanced Service Online)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintenance Operation Completion (Advanced Service Online)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintenance Route Completion (Advanced Service Online)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Collection Triggers (all conditions must be met for data collection)

Trigger Name	Condition	From	To
Inspection Type	equals (=)		

- Click **Save** to complete.

Note: Steps 7-12 are not required for the counter readings plan.

For information on creating Quality Plans, refer to the *Oracle Quality User's Guide*.

Viewing Item/Part Service History

Maintenance planners can access the history of service performed against a unit/part during the planning phase of a service or the execution of a work order. The history of the performed service, enables the planner to plan and execute decisions about the currently planned service, as well as provides support for the maintenance engineer during workorder execution. The planner or maintenance engineer is able to view a detailed service history on a workorder part such as maintenance requirements, jobs and operations that have been performed on the part and all the visits it has been part of. The service history includes both in-house service as well as supplier-performed service.

To view the service history of an item/serial number, you must enter the item and serial number or the instance number. You can either search for workorders for the entered part/serial number or search for maintenance requirements associated to the part/serial number. You can restrict the search by providing additional filters like workorder scheduled Start/End date range, workorder Actual Start/End dates, mechanic, organization, department, machine, visit, program type, and so on.

To view work order history:

- Under the Execution link, click the Service History tab. The Search Workorders page appears. Enter your search criteria and click Go.

Search Workorders page

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Production Planning Outside Processing **Service History** Material Transactions

Work Orders | Maintenance Requirements

Search Workorders

Item Number and one of either Serial Number or Instance Number are required fields to perform a search.

Item Number: Serial Number: Instance Number:

Organization: Department: Mechanic:

Actual Start Date: Actual End Date: Machine:

Visit: Summary: Problem Code:

Resolution Code: Workorder Status:

Workorder List

Select Workorder and ...

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Select	Workorder Number	Description	Actual Start Date	Actual End Date	Non-Routine Workorder	Status	OSP Order	Visit Task	Maintenance Requirement
<input type="radio"/>	766	00-000-00-00				Released	00-000-00-00	28-020-01	28-020-01
<input type="radio"/>	765	28-020-01-00				Released	28-020-01-00	28-020-01	28-020-01
<input type="radio"/>	308	28-020-01-00	2004-DEC-20	2004-DEC-28		Complete	28-020-01-00	Test Mr 1.2	Test Mr 1.2
<input type="radio"/>	307	Route Test 1	2004-DEC-20	2004-DEC-28		Complete	Route Test 1	Test Mr 1.2	Test Mr 1.2
<input type="radio"/>	305	Prithwi test 1	2004-DEC-20	2004-DEC-28		Complete	Prithwi test 1	Test Mr 1.1	Test Mr 1.1
<input type="radio"/>	303	test route 1				Released	test route 1	Test Mr 1.0	Test Mr 1.0

- Click the Workorder Number link to navigate to the Workorder Operations page and view the work order details, the materials, resources, assignments, resource transactions, and dispositions associated to the work order.

View Work order details - Workorder Operations page

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Production Planning Outside Processing **Service History** Material Transactions

Work Orders | Maintenance Requirements

Workorder Operations

* Indicates required field

Workorder Details

Workorder Number: 766 Organization: San Diego Manufacturing

Workorder Description: 00-000-00-00 Department: Assembly Department

Maintenance Requirement: 28-020-01 Project: 172

Route: 00-000-00-00 Project Task: 00-000-00-00

Priority: MRO-C1600 Serial Number: 101

Item: C-1600, Tail # 101

Visit Number: 172 Visit Task: 3

Workorder Status: Released Accounting Class: CMRO-Maint

Completion Sub Inventory: Locator

Lot Number: Confirmed Failure: No

* Scheduled Workorder Start Date: 2005-APR-11 * Scheduled Workorder End Date: 2005-APR-11

Scheduled Workorder Start Time: Hrs 18 Mins 00 Scheduled Workorder End Time: Hrs 18 Mins 15

Actual Workorder Start Date: Actual Workorder End Date:

Actual Workorder Start Time: Hrs Mins Actual Workorder End Time: Hrs Mins

Operations

Previous 1-1 of 1 Next

Select	* Operation Sequence	Operation Code	Operation Description	Actual Start Date	Actual End Date	* Scheduled Start Date	* Scheduled End Date	Department	Operation Status
<input type="radio"/>	10		Default Operation			2005-APR-11	2005-APR-11	Assembly D	Uncomplete

Previous 1-1 of 1 Next

- You can do the following:
 - Select a work order with an associated OSP order number and click View OSP Details to view the order details.

- View the visit task details
- View maintenance requirements associated with the visit
- View service requests associated with the visit

To view maintenance requirements history:

1. Click the Maintenance Requirements subtab under Service History. The Search by Maintenance Requirements page appears. Enter your search criteria and click Go. The date range filter must be applied against the MR's effective from and effective to date. Maintenance requirements meeting your search criteria are listed in the maintenance requirements results table.

Search by Maintenance Requirements page

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Production Planning Outside Processing **Service History** Material Transactions

Work Orders | Maintenance Requirements

Search by Maintenance Requirements

Item Number and one of either Serial Number or Instance Number are required fields to perform a search.

Item Number: Serial Number: Instance Number:

Category: Program Type: Sub Type:

Job Actual Start Date: Mechanic: Machine:

End Date: Title: Version:

Description: Unit Effectivity Status:

Maintenance Requirements Results

Previous 1-10 of 16 Next

Workorder Details	Maintenance Requirement	Version	Accomplished Date	Program Type	Unit Effectivity Status	Visit Number	Relationships
	test.mr.1	1		Letter Check	Released	19	
	21-040-00	2	2004-DEC-09	Letter Check	Signed off	34	
	21-040-00	2	2005-JAN-09	Letter Check	Signed off	34	
	21-150-00	2	2005-JAN-09	Letter Check	Signed off	34	
	TestResrc	1		Corrosion	Released	54	

2. Click the Maintenance Requirement link to view the details of the selected maintenance requirement.
3. To view work orders associated with the maintenance requirement, click the Workorder Details icon. The Maintenance Requirements Workorders Listing page appears displaying the details of the associated work orders. Click the Workorder Number link to navigate to the Workorder Operations page and view all the materials, resources, assignments, resource transactions, and dispositions associated with the work order.

Maintenance Requirements Workorders Listing page

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Production Planning Outside Processing **Service History** Material Transactions

Work Orders | Maintenance Requirements

Maintenance Requirements Workorders Listing

Item Number **MRO-C1600** Serial Number **101** Instance Number **70211**
 Title **21-040-00** Description **Replace the electrical and electronic compartment supply fan filter.** Program Type **Letter Check**
 Version **2**

Details of Workorders Visit Task Details

Previous 1-2 of 2 Next

Select	Workorder Number	Workorder Description	Workorder Status	Visit Type	Visit Task
<input type="radio"/>	223	21-040-00-00	Complete	B Check	21-040-00-00
<input type="radio"/>	224	00-000-00-00	Complete	B Check	00-000-00-00

Previous 1-2 of 2 Next

Details of Workorders Visit Task Details

Cancel

- Click the Visit Task Details button to view the visit details, hierarchy, and cost information pertaining to the visit associated with the work order.

View Visit Task Details page

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Production Planning Outside Processing **Service History** Material Transactions

Work Orders | Maintenance Requirements

View Visit Task Details

Visit Number **34** Visit Type **B Check** Item **MRO-C1600**
 Unit **C-1600, Tail # 101** Start Date **2004-DEC-09** Organization **San Diego Manufacturing**
 Serial Number **101** End Date **2004-DEC-09** Department **Outside Processing**

Cancel

Task Header Information

Task Number	2	Task Name	21-040-00-00
Department	Outside Processing	Task Type	Unplanned
Task Status	Closed	Serial Number	101
Item	MRO-C1600	Route	21-040-00-00
Maintenance Requirement	21-040-00	Sub Zone	E&E
Zone	FUSE_LWR	Service Request	
Route Type		Originating Task	1
Cost Parent Task	1	Duration /Hour	2
Start From Hours		End Time	2004-DEC-09 12:00
Start Time	2004-DEC-09 10:00	Workorder Status	Complete
Stage			
Workorder Number	223		
Project Task Number			
Task Description			

Cancel

Production Planning | Outside Processing | **Service History** | Material Transactions | Home | CMRO
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- To view relationships for a Group MR, click the Relationships icon in the Maintenance Requirements Results table. The Maintenance Requirement Relationships Listing page appears displaying all the child MRs.

My Workorders Interface

The My Work orders user interface displays all the work orders for the user logged in the system. Employees can record labor time and sign off for the work orders and operations assigned to them, from one central location. Thus users can sign off and transact simple work orders especially those associated with standard line maintenance visit. Additionally, users can also perform other work order execution functionality like parts change, non-routine creation, quality recording, and so on if required.

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Production Planning Outside Processing Service History Material Transactions Outside Processing

Workorders Resources Materials Maintenance Requirements **My Workorders** Visits

My Workorders

* Indicates required field

* Employee Name * Employee Number Resource

Workorder Number Workorder Status Workorder Start Date

Operation Sequence Operation Status Workorder End Date

Visit Number Flight Number Flight Date

Workorder Results

Complete Operation	Workorder	Operation Sequence	Resource Number	Resource	Workorder Status	Operation Status	Hours Transacted	Hours
No records were found matching the given criteria..								

Managing Outside Processing

This chapter covers the following topics:

- Overview
- What is an OSP Work Order?
- What is a Loan or Borrow Order?
- What is an Exchange Order?
- Key Business Processes
- Working With Outside Processing Work Orders
- Creating an OSP Order
- Finding OSP Work Orders
- Editing an OSP Work Order
- Closing an OSP Work Order
- Submitting an OSP Work Order
- Working With Purchase Orders
- Reviewing Purchase Orders
- Synchronizing Outside Processing Work Orders with Purchase Orders
- Updating and Approving Purchase Orders
- Shipping and Receiving
- Shipping Parts
- Receiving Parts
- Accepting Supplier Services
- Working with Loan and Borrow Orders
- Creating a Loan or Borrow Order
- Finding a Loan or Borrow Order
- Editing a Loan or Borrow Order
- Submitting a Loan or Borrow Order
- Closing a Loan or Borrow Order
- Initiating Contracts

- Working with Exchange Orders
- Creating an Exchange Order
- Editing Exchange Orders
- Converting Service/Exchange OSP to Exchange/Service OSP

Overview

In the maintenance, repair, and overhaul industry, there will be occasions when a part needs to be serviced outside of the organization. This may be due to lack of resources, skilled/certified personnel or cost considerations. The planner needs to have the flexibility of determining when, where and how the service will be performed at the most cost effective manner. In addition a planner needs to have the ability to Borrow parts from third parties when the same is not available in inventory, as well as Loan a parts to a third parties when it is requested.

This chapter discusses the key functions supported by the Oracle Complex Maintenance, Repair, and Overhaul Outside Processing module and covers the key Outside Processing (OSP) functions supported by the Oracle Complex Maintenance, Repair, and Overhaul Production Planning module. The processes for creating and maintaining OSP work orders and managing the Loan/Borrow of parts are explained.

See:

- Working With Outside Processing Work Orders, page 13-6
 - Creating an OSP Work Order, page 13-6
 - Finding an OSP Work Order, page 13-11
 - Editing an OSP Work Order, page 13-15
 - Closing an OSP Work Order, page 13-20
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- Working With Purchase Orders, page 13-21
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- Initiating Contracts, page 13-40
- Working with Exchange Orders, page 13-41
 - Creating an Exchange Order, page 13-41
 - Editing Exchange Orders, page 13-47
 - Converting Service/Exchange OSP to Exchange/Service OSP, page 13-48

What is an OSP Work Order?

An OSP Work Order is an order that contains the information required to service parts by a third party organization. It contains information about the supplier, the parts that need to be serviced, what services will be performed, and when and where the part will be shipped and received. If parts have to be shipped out to a third party there is a shipment order associated with the OSP Work Order.

What is a Loan or Borrow Order?

A Loan or Borrow Order is used to ship or receive parts to and from outside organizations. Before a Loan or Borrow Order can be created there must be an approved legal contract that documents the terms and conditions of the loan or borrowing arrangement. A Loan Order contains information about the customer and the associated legal contract. A table on the order shows the parts being shipped and when they are shipped and received. A Borrow Order contains information about the supplier, the associated legal contract, the parts being received, and the dates of receipt and return. Each Loan or Borrow Order has an associated shipment order and available line items to handle the shipping and receiving of parts.

What is an Exchange Order?

An Exchange Order is used to replace an item/part with another similar or dissimilar part from a supplier. The exchange can be of two types; Simple Exchange or Advanced Exchange. In Simple Exchange the servicing organization sends out the item in repair to a supplier and gets an item of similar kind. In Advanced Exchange the supplier sends the replacement item ahead of time. An Exchange Order is created for an existing CMRO job scheduled to a vendor class department. Outside Processing work orders that require an item exchange are identified at the work order header. These Exchange Orders contain information about the parts that will be shipped out and received back from the supplier, including: the inbound and outbound part number and serial numbers, the shipment and return dates, and the costs of item exchange through an interface to the procurement system.

Key Business Processes

The Outside Processing module of Oracle Complex Maintenance, Repair, and Overhaul supports the following business processes:

Assign production jobs for third party service

After it is determined that the job will be performed by a third party organization, you can assign the production job to any department with a class of 'Vendor'. This

assignment to a outside department can be done either in Long Term Planning or in Production Planning. To be included in an Outside Processing Work Order the job must be assigned to a department with a department class of 'Vendor'.

Assign production jobs to an OSP Work Order

After assigning a job to an outside department, create an OSP Work Order and add to it the jobs that the third party organization will perform. You can include or restrict jobs with multiple parts or jobs for a single instance of a part. An OSP Work Order can be issued for one supplier and can have multiple jobs associated with it.

Determine the supplier for outside processing

Determine which supplier should perform the service based on the service history of the part, warranties that may be applicable and then pick a supplier from a specified approved vendor list.

Add or remove production jobs to an existing OSP Work Order

You can add production jobs to an existing OSP Work Order if the order has not yet been submitted for Purchase Order creation. Or, if a job is not needed you can remove it, provided the order has not been submitted. Once an OSP Work Order is submitted to create a Purchase Order in Oracle Purchasing, any additions or deletions must be performed in the Oracle Purchasing Module.

Determine shipping and receiving logistics

Determine how and when the parts will be shipped to the supplier by creating a shipping order against the OSP Work Order. You define the shipment date, receipt date, freight terms and carrier. The shipment of the parts do not occur until the OSP Work Order has been submitted to create a Purchase Order in Oracle Purchasing and the buyer has approved the Purchase Order.

Create and Approve Purchase Orders

After required services from a supplier are finalized, 'submit' them to create a Purchase Order. The Purchase Order is created in Oracle Purchasing. The buyer completes the Purchase Order by providing shipping and accounting distribution details. When the Purchase Order is ready to be shared with the Supplier, the buyer approves it in Oracle Purchasing. Upon approval, the Shipment Order is marked as ready for the shipping clerk to pick, pack, and ship the parts. Any deletion or cancellation of Purchase Order line items are reflected in the corresponding OSP Work Order—meaning the production job is no longer associated with the OSP Work Order. It is up to the planner to decide on the disposition of the production job. If the buyer adds new line items to a Purchase Order, the planner must decide if those items have to be included in the OSP Work Order. The Planner also must use a manual process to associate the new Purchase Order line items to existing eligible production jobs.

Shipping & receiving of parts

Once the Purchase Order is approved, the shipping clerk can pick, pack and ship the parts. The shipping clerk receives a notification of the Shipment Order number that indicates the parts are ready to be shipped. The Shipping Order provides shipping details such as ship to organization and location, part number, quantity, serial numbers, the location to pick the part from, and any shipping or packing instructions. Every time the part is shipped and received, the current location of the part and ownership is automatically reflected in the Oracle Install Base module. Shipping is taken care of with Oracle Shipping. Receipt of parts after servicing is done with Oracle Purchasing.

Inspect parts after service

After receipt of the part that has been serviced by a supplier and received into inventory, the production planner will re-assign to the same production job that initiated the outside processing to an internal department.

The designated technician assigned to this job uses the Production module to complete and document the QA process. This ensures that the service has been performed correctly per maintenance requirement and the part is in good condition.

Acknowledge supplier service

In order to pay the supplier for the service provided, the Purchase Order line may specify that the service has to be accepted (Received) without any QA or the service has to be accepted and approved by QA team (Inspected). If the Purchase Order line has 'Receipt required' specified then the technician has to 'Receive' the service in Oracle Purchasing module (three-way matching). If the Purchase Order line has 'Inspection required' specified then the technician has to 'Receive' the service and enter the QA code (four-way matching). It is possible that the buyer may indicate that in the Purchase Order line that the services need not be received, in which case the supplier is paid upon the approval of the Purchase Order.

Close OSP Work Order

You can close the OSP Work Order provided that all shipped parts have been received back, the serviced parts are in good condition, all of the production jobs associated with the OSP Work Order are closed, and the Purchase Order is closed. If any one of the conditions fails, the OSP Work Order cannot be closed.

Borrow Parts from a third party organization

There are times when parts may be borrowed from a supplier instead of purchased. If you decide to borrow parts (a lease decision) there must be a legally binding contract with the supplier. Contracts are created in Oracle Procurement Contracts. The Borrow Order is created in Outside Processing. Contract terms include financial, warranty and shipment/return terms. Create a borrow order only after the contract approval. In order to receive the parts from the supplier there must be a production job. Shipping parts back requires another production job. A job must be assigned to a department with a class of 'Vendor' to be included in a Borrow Order. Each Borrow Order has an associated Shipment Order which provides any receiving and shipping details.

Loaning Parts to a third party organization

Use Oracle Order Management to perform shipping and invoicing for loaning parts in inventory to a third party organization. If the parts must be removed or disassembled; however, the loan process must be done in Oracle Complex Maintenance, Repair, and Overhaul.

There must be an approved contract with the customer before you create a Loan Order. The contract is entered in Oracle Contracts for Service. The Loan Order is entered in Oracle Complex Maintenance, Repair, and Overhaul. If the part needs to be removed from its existing assembly or some other operation on the part is necessary to make it ready for loan there must be a production job for it before you ship the part. The job must have a department class of 'Vendor'. There must be another production job to receive the loan back. Each Loan Order has an associated Shipment Order which provides the shipping and receiving details for the loaned parts.

Approve Loan or Borrow Orders

Submit a Loan or Borrow Order when you are ready to receive or ship the parts. This allows the shipping clerk to pick, pack, ship, or receive the parts. The shipping is done with the Oracle Shipping module; for receipts use the Oracle Purchasing module.

Close Loan or Borrow Order

The order can be closed provided that all parts have been shipped or received, and all the production jobs that were part of the Loan or Borrow are closed. The Loan or Borrow Order cannot be closed if any of these conditions are not met.

Perform Item Exchange

Replace an item/part with another part from a supplier. Item exchange is an integral part of the production process in most service industries. Most service stations send out specialized components to be repaired at outside repair facilities. The item exchange process speeds up the production process by allowing like parts to be sent and received without waiting for the repair of the originals.

Working With Outside Processing Work Orders

An Outside Processing Work Order allows you to group together production jobs that have been earmarked for outside servicing. You can base the creation of purchase orders, which describe the services ordered from the supplier and ship orders, which describe the shipping and receiving logistics of the serviceable parts on Outside Processing Work Orders.

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

Related Topics

Creating an OSP Work Order, page 13-6

Finding an OSP Work Order, page 13-11

Editing an OSP Work Order, page 13-15

Closing an OSP Work Order, page 13-20

Submitting an OSP Work Order, page 13-21

Creating an OSP Order

Prerequisites

- ☐ A production job that requires outside processing and is not currently assigned to Outside Processing Work Orders must exist in the database.

To create an OSP Work Order:

1. On the Oracle Complex Maintenance, Repair, and Overhaul Home page, select **Execution**. The Job Overview page of the Production Planning module appears.
2. Select the Outside Processing tab. The Search OSP Order page appears. Click **Create OSP**. The Search Job page appears.

Search Job page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Production Planning Outside Processing

Overview | Create Instance

Search Job

Job Number Task Name Serial Number
Service Item Item Department
Project Name Instance Number

Jobs Search Results

Select	Job Number	Item	Instance Number	Serial Number	Service Item	Service Item Description	Department	Suggested Vendor
No records were found matching the given criteria.								

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3. Enter information in the fields for which you know the value, then click **Go**. The lower half of the page displays all of the production jobs matching the search criteria you provided.

View Jobs Search Results - Search Job page

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Production Planning Outside Processing

Overview | Create Instance

Search Job

Job Number Task Name Serial Number
Service Item Item Department
Project Name Instance Number

Jobs Search Results

Select Jobs and...

Previous 1-10 of 112 Next

Select	Job Number	Item	Instance Number	Serial Number	Service Item	Service Item Description	Department	Suggested Vendor
<input type="checkbox"/>	CMRO568	DRW unit item 3	83529	101			Outside	
<input type="checkbox"/>	CMRO570	DRW unit item 3	83529	101			Outside	
<input type="checkbox"/>	CMRO572	DRW unit item 3	83529	101			Outside	
<input type="checkbox"/>	CMRO577	DRW unit item 1	83526	101			Outside	
<input type="checkbox"/>	CMRO64	RADITEM1-APS-Trackable	83026	123-trackable			Outside	
<input type="checkbox"/>	CMRO88	RADITEM1-APS-Trackable	83026	123-trackable			Outside	
<input type="checkbox"/>	WO1163	R-ITEM1-Trackable	85653	a3			Outside	
<input type="checkbox"/>	WO1220	R-ITEM1-Trackable	88750	ctr-sno-1000			Outside	

Use the information in the following table to enter search criteria in the Search Work Order page.

Description of fields in the Search Work Order page

Field	Description
Job Number	The number generated for a job.
Task Name	Select the task name if you want to group all the jobs that have the same task.
Serial Number	Enter the serial number if you want to group all the jobs that are for a specific serialized part.
Service Item Number	Enter the service item number if you want to group all jobs that have the same service requirements.
Part Number	The part number of the relevant item.
Department	Departments are a sub group of Organizations. Visits are associated to a Department and all Departments are associated to an Organization. For example, an Organization may be SFO Airport, and a Department may be "Hangar 1." All Departments are defined in the Bill of Materials, associated to the selected Organization and also associated to the user's responsibility can be selected.
Project Name	Select the project name if you want to group all jobs that belong to the same project.
Instance Number	Enter the instance number if you want to group all the jobs that are for a specific instance of a part.

4. Select each job that you want to include in the OSP Work Order, and click Create OSP. The Create OSP Order page appears.

Create OSP Order page

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Overview | Create Instance

Production Planning | Outside Processing

Create OSP Order

Cancel Apply

Order Number

Order Type **Service**

Description

* Vendor Name

* Vendor Location

* Single Instance No

* Buyer Name Smith, Mr. Tom

Order Status **Entered**

Order Date **29-JUN-2004**

OSP Order Lines

Previous 1-3 of 3 Next

Select	Job Number	Item	Line Status	Instance Number	Service Item Quantity
	CMRO572	DRW unit item 3	Entered	83529	1
	CMRO570	DRW unit item 3	Entered	83529	1
	CMRO568	DRW unit item 3	Entered	83529	1

Previous 1-3 of 3 Next

Cancel Apply

Production Planning | **Outside Processing** | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out

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

5. Use the information in the following table to enter details in the Create OSP Order page.

Description of fields in the Create OSP Order page

Field	Description
Order Number	Displays the order number.
Order Type	Select the type of order from the list provided.
Service Description	Describe the service being performed.
Vendor Name	Select a vendor name from the list of vendors that will perform the service.
Vendor Location	Select the vendor location.
Buyer Name	Enter the name of the buyer.
Order Status	<p>This is display only information about the order status. Possible values are:</p> <p>'Entered' - the OSP Work Order is still in processing mode; edits to OSP Work Order is allowed.</p> <p>'Submitted' -the OSP Work Order has created a Purchase Order in Oracle Purchasing; no edits allowed. Further edits should be done in Oracle Purchasing.</p> <p>'Submit Failed'-the OSP Work Order has failed to successfully create a Purchase Order in Oracle Purchasing. Edits to OSP Work Order are allowed. Re-submit the OSP Work Order when all edits are completed.</p> <p>'Closed' -the OSP Work Order has been closed and no further activity will be allowed.</p>
Order Date	Enter the date of Ship Order. Defaults to the current date.

Note: Fields marked with asterisks require an entry.

- For each line item displayed in OSP Order Lines, enter information in the fields for which you know the value.

Note: You must fill in Line Type for any production job line item that requires the creation of a related Purchase Order line item.

Enter Header Information - Create OSP Order page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out

Production Planning Outside Processing

Overview | Create Instance

Create OSP Order

Order Number Order Type **Service** Description

* Vendor Name Advanced Network Device * Vendor Location SANTA CLARA * Single Instance No

* Buyer Name Smith, Mr. Tom Order Status **Entered** Order Date **29-JUN-2004**

OSP Order Lines

Select	Job Number	Item	Line Status	Instance Number	Service Item Quantity
	CMRO572	DRW unit item 3	Entered	83529	1
	CMRO570	DRW unit item 3	Entered	83529	1
	CMRO568	DRW unit item 3	Entered	83529	1

Cancel Apply

Production Planning Outside Processing Home Engineering Configuration Planning Administration Execution Profile Sign Out

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- Click **Apply** to create the OSP Work Order. Click **Cancel** to cancel the work order and return to the Search OSP Order page.

Edit OSP Order page

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Production Planning Outside Processing

Overview | Create Instance

Edit OSP Order

Shipments

Edit OSP Order

Confirmation • Order Created

Order Number **10422** Order Type **Service** Description

* Vendor Name Advanced Network Device * Vendor Location SANTA CLARA * Single Instance No

* Buyer Name Smith, Mr. Tom Order Status **Entered** Order Date **29-JUN-20**

OSP Order Lines

Previous 1-3 of 3 Next

Line Number	Job Number	Item	Line Status	Instance Number	Service Item Quantity	Delete
1	CMRO568	DRW unit item 3	Entered	83529		
2	CMRO570	DRW unit item 3	Entered	83529		
3	CMRO572	DRW unit item 3	Entered	83529		

Previous 1-3 of 3 Next

Cancel Submit

Finding OSP Work Orders

Prerequisites

- ☐ The OSP Work Orders you are looking for must exist in the database.

To find an OSP Work Order:

- 1. On the Oracle Complex Maintenance, Repair, and Overhaul Home page, select **Execution**. The Job Overview page of the Production Planning module appears.
- 2. Select the Outside Processing tab. The Search OSP Order page appears.

Search OSP Order page

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Overview | Create Instance

Production PlanningOutside Processing

Search OSP Order

PO Synch

Order Number

Job Number

Item

Description

Project Name

Serial Number

Order Type

Task Name

Has New PO Line(s)

Order Status

Vendor Name

Department

Go

Clear

OSP Order Search Results

Create OSP

Select	Order Number	Description	Date	Order Type	Order Status	PO Number	Shipment Order Number	Delete
No records were found matching the given criteria..								

PO Synch

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Use the information in the following table to enter your search criteria.

Description of fields in the Search OSP Order page

Field	Description
Order Number	Displays the order number.
Job Number	The number generated for a job.
Part Number	The part number of the relevant item.
Description	The description of the relevant item.
Project Name	Select the project name if you want to group all jobs that belong to the same project.
Serial Number	Enter the serial number if you want to group all the jobs that are for a specific serialized part.
Order Type	Select the type of order from the list provided.
Task Name	Select the task name if you want to group all the jobs that have the same task.
Order Status	<p>This is display only information about the order status. Possible values are:</p> <p>'Entered' - the OSP Work Order is still in processing mode; edits to OSP Work Order is allowed.</p> <p>'Submitted' -the OSP Work Order has created a Purchase Order in Oracle Purchasing; no edits allowed. Further edits should be done in Oracle Purchasing.</p> <p>Failed'-the OSP Work Order has failed to successfully create a Purchase Order in Oracle Purchasing. Edits to OSP Work Order are allowed. Re-submit the OSP Work Order when all edits are completed.</p> <p>'Submit 'Closed' -the OSP Work Order has been closed and no further activity will be allowed.</p>
Vendor Name	Select a vendor name from the list of vendors that will perform the service.
Department	Departments are a sub group of Organizations. Visits are associated to a Department and all Departments are associated to an Organization. For example, an Organization may be SFO Airport, and a Department may be "Hangar 1." All Departments are defined in the Bill of Materials, associated to the selected Organization and also associated to the user's responsibility can be selected.

3. Enter information in the fields for which you know the value, then click **Go**. The results matching your search criteria appear in the lower half of the page. You can do the following:

- Create a Purchase Order in the Oracle Purchasing module.
- Close the OSP Work Order permanently.
- Delete the associated Ship Order.

View OSP Order Search Results - Search OSP Order page

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Production Planning Outside Processing

Overview | Create Instance

Search OSP Order

PO Synch

Order Number Job Number Item

Description Project Name Serial Number

Order Type Task Name Has New PO Line(s)

Order Status Vendor Name Department

Go Clear

OSP Order Search Results

Create OSP

Select OSP Order and... Close Submit Delete Shipment

Previous 1-10 of 36 Next

Select	Order Number	Description	Date	Order Type	Order Status	PO Number	Shipment Order Number	Delete
<input type="radio"/>	10422		29-JUN-2004	Service	Entered			
<input type="radio"/>	10382		11-MAY-2004	Service	Entered		31	
<input type="radio"/>	10365		05-MAY-2004	Exchange	PO Created	30275	32	
<input type="radio"/>	10364		05-MAY-2004	Exchange	Entered			

Note: To remove an OSP Work Order from the database, select the corresponding Delete icon. When the work order is deleted, all jobs formerly associated with that order will be available for any other OSP Work Order.

4. Click **PO Synch** to synchronize changes between an OSP Work Order and an Oracle Purchasing Order.

Initiate PO Synch - Search OSP Order page

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Overview | Create Instance

Confirmation • Purchase Order Synch Completed Successfully

Search OSP Order

PO Synch

Order Number Job Number Item

Description Project Name Serial Number

Order Type Task Name Has New PO Line(s)

Order Status Vendor Name Department

Go Clear

OSP Order Search Results

Create OSP

Select OSP Order and... Close Submit Delete Shipment

Previous 1-10 of 36 Next

Select	Order Number	Description	Date	Order Type	Order Status	PO Number	Shipment Order Number	Delete
<input type="radio"/>	10422		29-JUN-2004	Service	Entered			
<input type="radio"/>	10382		11-MAY-2004	Service	Entered		31	

5. Click **Create OSP** to create a new OSP Work Order. See Creating an OSP Work Order, page 13-6.
6. To view or edit an OSP Work Order, click the Order Number.

Editing an OSP Work Order

Prerequisites

- ☐ The OSP Work Order you want to edit must have a status of 'Entered' or 'Submit-failed'. You must have authorization to edit the OSP Work Order.

To edit an OSP Work Order:

1. Retrieve the OSP Work Order you want to edit. See Finding OSP Work Orders, page 13-11.
2. Select the OSP Order to edit, and click the order number. The Edit OSP Work Order page appears.

Edit Order Details - Edit OSP Order page

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Overview | Create Instance

Edit OSP Order

Shipments

Edit OSP Order

Order Number10422

Order TypeService

Description

Vendor NameAdvanced Network Device

Vendor LocationSANTA CLARA

Single InstanceNo

Buyer NameSmith, Mr. Tom

Order StatusEntered

Order Date29-JUN-20

OSP Order Lines

Previous1-3 of 3Next

Line Number	Job Number	Item	Line Status	Instance Number	Service Item	Quantity	Delete
1	CMRO568	DRW unit item 3	Entered	83529			
2	CMRO570	DRW unit item 3	Entered	83529			
3	CMRO572	DRW unit item 3	Entered	83529			

Previous1-3 of 3Next

Cancel

Submit

C

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Use the information in the following table to enter details in the Edit OSP Order page.

Description of fields in the Edit OSP Order page

Field	Description
Order Number	Displays the order number.
Order Type	Select the type of order from the list provided.
Order Description	Enter a brief description of the order.
Vendor Name	Select a vendor name from the list of vendors that will perform the service.
Vendor Location	Select the location from the list. This will be the ship to location of the supplier.
Single Instance Flag	Select the value 'Yes' if you want to ensure that all the services to be performed in this OSP Work Order are against a single instance of a part. If it is set to 'No' then the system will allow you to mix jobs that have different instances of parts.
Buyers Name	Select the buyer's name from the list that will be handling the Purchasing activity.
Status	<p>This is display only information. Possible values are:</p> <p>'Entered' - the OSP Work Order is still in processing mode; edits to OSP Work Order is allowed.</p> <p>'Submitted' -the OSP Work Order has created a Purchase Order in Oracle Purchasing; no edits allowed. Further edits should be done in Oracle Purchasing.</p> <p>'Submit Failed'-the OSP Work Order has failed to successfully create a Purchase Order in Oracle Purchasing. Edits to OSP Work Order are allowed. Re-submit the OSP Work Order when all edits are completed.</p> <p>'Closed' -the OSP Work Order has been closed and no further activity will be allowed.</p>

3. Make the required changes, and click **Apply**. Click **Cancel** to discard any changes and return to the Search OSP Order page.
4. Click **Submit** to create a related Purchase Order in Oracle Purchasing.
5. Click **Delete Shipment** to remove the shipping order associated with the current OSP Work Order.
6. Click **Close** to permanently close the current OSP Work Order. This will be successful if:
 - All parts shipped out have been received back.
 - All listed production jobs are closed.
 - The associated Purchase Order is closed.

7. To edit an Order Line, click the Line Number. The Edit OSP Line page appears. You can enter values for Line Type, Service Item Number, Service Item description, UOM, and Need By Date. These values default, if the job has an associated service request.

Edit OSP Line page

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Edit OSP Line

Cancel Apply

OSP Details

Order Number10422

Description

StatusEntered

Order TypeService

Order Date29-JUN-2004

Vendor NameAdvanced Network Devices

Line Number1

Line StatusEntered

Need By Date

Job Details

Job NumberCMR0568

ItemDRW unit item 3

Instance Number83529

Serial Number101

Project Name62

Task NameDRW route 2.3

Service Details

Service Item

Service Item Description

Service Item Quantity

UOM

Line Type

8. To create a new Order Line, select Create Order Line. The Create OSP Line page appears.

Create OSP Line page

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Overview | Create Instance

Production Planning

Outside Processing

Create OSP Line

Cancel Apply

OSP Details

Order Number10422

Description

StatusEntered

Order TypeService

Order Date29-JUN-2004

Vendor NameAdvanced Network Devices

Line Number4

Line StatusEntered

Need By Date

Job Details

* Job Number

Item

Instance Number

Serial Number

Project Name

Task Name

Service Details

Service Item

Service Item Description

Service Item Quantity

UOM

Line Type

9. Select the job from the Job Number list of values. Enter the required information. If the selected job's route has a pre-defined service associated with it, the service item number, UOM, and Service Item Description fields will populate with the relevant information.

Enter OSP Details - Create OSP Line page

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Create OSP Line

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

OSP Details

Order Number	10422	Description	
Status	Entered	Order Type	Service
Order Date	29-JUN-2004	Vendor Name	Advanced Network Devices
Line Number	4	Line Status	Entered
Need By Date	30-JUN-2004		

Job Details

* Job Number	CMRO88	Item	RADITEM1-APS-Trackable
Instance Number	83026	Serial Number	123-trackable
Project Name	16	Task Name	rsfgd

Service Details

Service Item	CMRO Service Item	Service Item Description	CMRO Service Item
Service Item Quantity	1	UOM	DZ
Line Type			

10. Click Apply to save the record.

Save Record - Edit OSP Line page

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Edit OSP Line

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OSP Details

Order Number	10422	Description	
Status	Entered	Order Type	Service
Order Date	29-JUN-2004	Vendor Name	Advanced Network Devices
Line Number	4	Line Status	Entered
Need By Date	30-JUN-2004		

Job Details

Job Number	CMRO88	Item	RADITEM1-APS-Trackable
Instance Number	83026	Serial Number	123-trackable
Project Name	16	Task Name	rsfgd

Service Details

Service Item	CMRO Service Item	Service Item Description	CMRO Service Item
--------------	-------------------	--------------------------	-------------------

Note: If the 'Single Instance' flag is set to 'Yes' and you associate a job with an instance number that is different from other line items you cannot save the OSP Work Order line.

Note: If you want to physically ship the part associated with the newly created line then you must create a new Ship Order line.

Closing an OSP Work Order

If no further activity will be done to an OSP Work Order, you can close it. You cannot work on the order again once it is closed.

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

Prerequisites

- ☐ All shipped parts must be received from the supplier. All parts must be in good condition and the inspector has approved the performed service. The associated Purchase Order and all associated jobs must be closed.

To close an OSP Work Order:

1. Retrieve the OSP Work Order that you want to close. See Finding OSP Work Orders, page 13-11.
2. Select the OSP Order, and click Close. The Close button is also available in the Edit OSP Order page. If all prerequisites are met, the OSP Work Order will be closed.

Close OSP Order - Search OSP Order page

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Search OSP Order

PO Synch

Order Number

Description

Order Type

Order Status

Job Number

Project Name

Task Name

Vendor Name

Item

Serial Number

Has New PO Line(s)

Department

PO Created

Go

Clear

OSP Order Search Results

Create OSP

Select OSP Order and...

Close

Submit

Delete Shipment

Previous

1-10 of 11

Next

Select	Order Number	Description	Date	Order Type	Order Status	PO Number	Shipment Order Number	Delete
<input checked="" type="radio"/>	10365		05-MAY-2004	Exchange	PO Created	30275	32	
<input type="radio"/>	10323	test	13-FEB-2004	Exchange	PO Created	30206	80192	
<input type="radio"/>	10302	test	11-FEB-2004	Exchange	PO Created	30193	80186	
<input type="radio"/>	10243	test exch - 185	06-FEB-2004	Exchange	PO Created	30185	80176	

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Submitting an OSP Work Order

Create a purchase order in Oracle Purchasing for an OSP Work Order.

Prerequisites

- ☐ The OSP Work Order must have a status of Entered or Submit-failed.

To submit an OSP Work Order:

1. Retrieve the OSP Work Order you want to submit. See Finding OSP Work Orders, page 13-11.
2. Select the OSP Work Order, and click **Submit**. This will create a Purchase Order in Oracle Purchasing.

Submit OSP Order - Search OSP order page

ORACLE Oracle Complex MRO

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Production Planning Outside Processing

Overview | Create Instance

Confirmation • Order Submitted

Search OSP Order

PO Sync

Order Number Job Number Item
Description Project Name Serial Number
Order Type Task Name Has New PO Line(s)
Order Status Vendor Name Department

Go Clear

OSP Order Search Results

Create OSP

Select OSP Order and... Close Submit Delete Shipment

Previous 11-20 of 36 Next

Select	Order Number	Description	Date	Order Type	Order Status	PO Number	Shipment Order Number	Delete
<input checked="" type="radio"/>	10344	05-MAY-2004 Exchange	Submitted					
<input type="radio"/>	10343	05-MAY-2004 Service	Entered					

Working With Purchase Orders

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

Related Topics

Reviewing Purchase Orders, page 13-22

Synchronizing Outside Processing Work Orders with Purchase Orders, page 13-25

Updating and Approving Purchase Orders, page 13-26

Reviewing Purchase Orders

Prerequisites

- ☐ There must be a complete, submitted OSP Work Order in the database. An associated purchase from Oracle Purchasing with an Entered status must be in the database.

To review a purchase order:

1. Retrieve the OSP Work Order that you want to review. See Finding OSP Work Orders , page 13-11.
2. Navigate to the Edit OSP Work Order page for the selected work order.

Modify OSP Order - Edit Exchange Order page

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Production Planning Outside Processing

Overview | Create Instance

Edit OSP Order

PO Details

Shipments

Edit Exchange Order

Cancel Close Convert Apply

Order Number 10344 Order Type Exchange Description

Vendor Name Allied Manufacturing Vendor Location SAN JOSE-PM Single Instance No

Buyer Name Smith, Mr. Tom Order Status PO Created Order Date 05-MAY-2004

OSP Order Lines

Previous 1-1 of 1 Next

Line Number	Job Number	Item	Line Status	Instance Number	Exchange Instance	Service Item	Quantity
1	CMR01821	VG0318	PO Created	100018	100000	1	

Previous 1-1 of 1 Next

Cancel Close Convert Apply

Production Planning | Outside Processing | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out | Help

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3. Click **PO Details** on the left-hand navigation panel. The Purchase Order Details page appears, displaying summary information about the related OSP Work Order. Below this is the Purchase Order information and the line item details.

Purchase Order Details page

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Production Planning Outside Processing

Overview | Create Instance

Edit OSP Order

Purchase Order Details

Cancel

OSP Order Header

Order Number **10344** Order Date **05-MAY-2004** Description
 Order Type **Exchange** Status **PO Created** Shipment Number

Purchase Order Header

PO Number **30357** Revision **0** Date **29-JUN-2004**
 Amount **0.01** Currency **ANY** Buyer **Smith, Mr. Tom**
 Vendor Name **Allied Manufacturing** Vendor Location **SAN JOSE-PM**
 Closure Status **Open** Cancelled **No** Approval Status **Never Approved**

Purchase Order Lines

Select Line and view ... PO Shipments Receipts

Previous 1-1 of 1 Next

Select	Line	Item	Item	Instance Number	Item Description	Qty Ordered	Qty Received	UOM	Unit Price	Project Name	Task Name	Job Number
C	1	CMRO Service Item	VG0318	100018	CMRO Service Item	1	0	Dozen	0.01	278	test	CMRO1821

Previous 1-1 of 1 Next

- Select a line item to view associated shipping or receiving details for that item.

Note: A list of errors will appear if the Purchase Order was not successfully created. Edit the relevant OSP Work Order to fix any errors, then submit the Purchase Order again.

- Click **PO Shipment** to view the Purchase Order Shipments.

View Purchase Order Shipments page

ORACLE Oracle Complex MRO

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Production Planning Outside Processing

Overview | Create Instance

View Purchase Order Shipments

Cancel

Purchase Order Header

PO Number **30357** Date **29-JUN-2004** Currency **ANY** Amount **0.01**
 Vendor Name **Allied Manufacturing** Vendor Site **SAN JOSE-PM** Status **Open**

Purchase Order Line

Line Number **1** Item **CMRO Service Item** Description **CMRO Service Item**
 Quantity **1** UOM **Dozen**

Shipment Line Details

Select a Shipment Line and... Accounting Distributions

Previous 1-1 of 1 Next

Select	Shipment Number	Need By Date	Promised Date	Quantity Ordered	Quantity Received	Quantity Accepted	Quantity Billed	UOM	Ship To Organization	Ship To Location
C	1	30-JUN-2004		1	0	0	0	Dozen	San Diego Manufacturing	P3- San Diego

Previous 1-1 of 1 Next

Select a Shipment Line and... Accounting Distributions

Cancel

6. Select a shipment number and click **Accounting Distributions** to view accounting distributions associated with the Purchase Order Shipment.

View Purchase Accounting Distributions page

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Overview | Create Instance

Production Planning Outside Processing

View Purchase Accounting Distributions Cancel

Purchase Order Shipment

PO Number	30357	PO Line Number	1	Shipment Number	1
Quantity Ordered	1	Quantity Received	0	Quantity Accepted	0
UOM		Ship To Location	P3- San Diego	Ship To Organization	San Diego Manufacturing
Promised Date		Need By Date	30-JUN-2004		

Accounting Distributions

Line Number	Charge Account	Ordered Quantity	Amount Billed	Quantity Billed	Project Name	Task Name	WIP Number
No records were found matching the given criteria.							

Cancel

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7. Click **Receipts** in the Purchase Order Details page to view receipts associated with the Purchase Order line item. To view QA results for the receipt, select a receipt and click **QA Result**.

View Receipts page

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Overview | Create Instance

Production Planning Outside Processing

View Receipts Cancel

Purchase Order Header

PO Number	30357	Date	29-JUN-2004	Currency	ANY	Amount	0.01
Vendor Name	Allied Manufacturing	Vendor Site	SAN JOSE-PM	Status	Open		

Purchase Order Line

Line Number	1	Item	CMRO Service Item	Description	CMRO Service Item
Quantity	1	UOM	Dozen		

Receipt Details

Select	Receipt Number	Receipt Date	Shipment Number	Quantity	UOM	Sub Inventory	Receipt Exception	QC Grade
No records were found matching the given criteria.								

Cancel

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Note: There may be a delay between the submission and actual creation of a Purchase Order in Oracle Purchasing. If you notice that the submission request has a Pending status for a long time, notify your system administrator. Review submission status on the Concurrent Requests page.

Synchronizing Outside Processing Work Orders with Purchase Orders

A buyer may add additional Purchase Order Lines manually after a Purchase Order has been created in Oracle Purchasing through a Submit action in OSP Work Order. If you decide that the newly added Purchase Order Lines should be reflected in the source OSP Work Order then you must assign the new Purchase Order Lines to existing production jobs.

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

Prerequisites

- ☐ A completed OSP Work Order must exist in the database with an associated Purchase Order that has relevant line items created by the buyer.

To synchronize an OSP Work Order with a Purchase Order:

1. Retrieve the OSP Work Order you want to synchronize. See Finding OSP Work Orders, page 13-11.
2. Click the OSP Order Number to navigate to the Edit OSP Work order page. Click **PO Details** on the left-hand navigation panel.
3. The Purchase Order Details page appears, displaying summary information about the related OSP Work Order. Below this is the Purchase Order information and the line item details. If there are line items without job numbers, the items need to be added to the current OSP Work Order. Select a job number and click **Apply**.
4. A list of jobs appear with the following conditions:

If the Purchase Order line has a service item number:

- List of jobs that have same service item number associated with job's route.
- List of jobs that have no service item number associated with job's route.

If the Purchase Order line does not have a service item number then you will see a list of jobs that have no service item number associated with job's route.

Note: If the selected OSP Work Order has 'Single Instance' flag set to 'Yes', then all jobs associated with the new Purchase Order line must have the same Instance number as other OSP Order Lines.

5. Click **Apply** to save your edits. Click **Cancel** to discard any changes and return to the Search OSP Order page.

Updating and Approving Purchase Orders

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

Prerequisites

- ❑ A completed OSP Work Order must be submitted in the database. An associated purchase order with an Entered status is in Oracle Purchasing. Additionally, you must have buyer privileges and access to Oracle Purchasing to make these changes.

To update or approve a Purchase Order:

1. Retrieve the OSP Work Order associated with the purchase order that you want to approve or update. See Finding OSP Work Orders, page 13-11.
2. Click the order number. The Edit OSP Work Order page appears. Click **PO Details** on the left-hand navigation panel.
3. The Purchase Order Details page appears, displaying summary information about the related OSP Work Order. Note the Purchase Order number.

View Purchase Order Details - Purchase Order Details page

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Production Planning Outside Processing

Overview | Create Instance

Edit OSP Order

PO Details

Shipments

Purchase Order Details

Cancel

OSP Order Header

Order Number 10140 Order Date 20-JAN-2004 Description test exch

Order Type Exchange Status PO Created Shipment Number 80139

Purchase Order Header

PO Number 30110 Revision 0 Date 20-JAN-2004

Amount 10 Currency ANY Buyer Smith, Mr. Tom

Vendor Name Allied Manufacturing Vendor Location SAN JOSE-PM

Closure Status Open Cancelled No Approval Status Never Approved

Purchase Order Lines

Select Line and view ... PO Shipments Receipts

Previous 1-1 of 1 Next

Select Line	Item	Item	Instance Number	Item Description	Qty Ordered	Qty Received	UOM	Unit Price	Project Name	Task Name	Job Number
C 1	CMRO Service Item	R-ITEM1-Trackable-noatp	85670	CMRO Service Item	1	0	Each	10	97	task	WO951

Previous 1-1 of 1 Next

4. Change to the Purchasing responsibility assigned to you. Navigate to Purchase Orders > Purchase Orders. The Purchase Orders window appears.

Purchase Orders window

Purchase Orders (Vision Project Mfg) - [New]

PO, Rev	0	Type	Standard Purchase Order	Created	29-JUN-2004 23:50:42
Supplier		Site		Contact	
Ship-To	P3- San Diego	Bill-To	PM- HQ Location (LA)	Currency	ANY
Buyer	Smith, Mr. Tom	Status	Incomplete	Total	0.00
Description					
P-Card					

Lines Price Reference Reference Documents More Agreement Temporary Labor

Num	Type	Item	Rev	Job	Category	Description	UOM	Quantity	Price

Item

Catalog... Currency... Terms Shipments Approve...

- Query for the Purchase Order number. The form is populated with the purchase order details. Make changes if required.

View Lines Details - Line Tab (Purchase Orders window)

Purchase Orders (Vision Project Mfg) - 30110

PO, Rev	30110	Type	Standard Purchase Order	Created	20-JAN-2004 09:38:03
Supplier	Allied Manufacturing	Site	SAN JOSE-PM	Contact	
Ship-To	P2- Los Angeles	Bill-To	PM- HQ Location (LA)	Currency	ANY
Buyer	Smith, Mr. Tom	Status	Incomplete	Total	10.00
Description	AHL OSP Order 10140 - test exch				
P-Card					

Lines Price Reference Reference Documents More Agreement Temporary Labor

Num	Type	Item	Rev	Job	Category	Description	UOM	Quantity	Price
1	Services	CMRO Service Item			MISC.MISC...	CMRO Service Item	Each	1	10

Item CMRO Service Item CMRO Service Item

Catalog... Currency... Terms Shipments Approve...

- Click Approve to initiate the order approval process. The Approve Document appears.

Approve Document window

Approve Document window

Approve Document (Vision Project Mfg) - 30110

Approval Details | Additional Options

Encumbrance

☐ Reserve ☐ Unreserve Unreserve Date
☐ Use GL Override ☐ Use Document GL Date to Unreserve Accounting Date

Approval

☒ Submit for Approval Forward From
☐ Forward Approval Path
Forward To
Note
Change Summary

Transmission Methods

☐ Print ☐ XML
☐ Fax FAX Number
☐ E-Mail E-Mail Address ☐ EDI

OK Cancel

- Click Ok. The Purchase order is submitted for approval, and its status changes to Approved.

For more information on using Oracle Purchasing, see *Oracle Purchasing User's Guide, Release 11i*.

Shipping and Receiving

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

See:

Related Topics

Shipping Parts, page 13-28

Receiving Parts, page 13-35

Accepting Supplier Services, page 13-36

Shipping Parts

Create a Ship Order for OSP Work Orders that involve parts that need to be shipped for outside service. An OSP Work Order can have only one associated Ship Order.

Prerequisites

- ☐ An OSP Work Order with a status other than Closed must exist in the database.

To create a Ship Order:

1. Retrieve the OSP Work Order associated to the items you want to ship. See Finding OSP Work Orders, page 13-11.
2. Click the relevant order number from the OSP Order Search Results. The Edit OSP Work Order page appears. Click **Shipments** on the left-hand navigation panel.
3. The Create Shipment Header page appears. Enter the required information and click **Apply**.

Edit Shipment Header page

The screenshot displays the 'Edit Shipment Header' page in the Oracle Complex MRO system. The page is titled 'Edit Shipment Header' and includes a navigation menu on the left with options like 'Overview', 'Create Instance', 'Edit OSP Order', and 'Shipments'. The main content area contains several sections for data entry:

- OSP Order Number:** 10382
- Shipment Order Number:** 31
- Order Type:** Service
- Shipment Order Type:** P-Mixed
- Order Date:** 11-MAY-2004
- Booked:** No
- Cancelled:** No
- Open:** Yes
- Price List:** Pricing Test CMRO 0114
- Tax Exempt:** Standard
- Tax Exempt Reason:**
- Payment Terms:** 20/60
- Tax Exempt Number:**
- Vendor Name:** AT&T Universal Card
- Vendor Number:** 1005
- Location:** Jacksonville (PJM)
- Contact:** Peterson, Jane Ms.
- Warehouse:** CMRO Org
- Shipment Method:**
- Shipment Priority:**
- FOB:** Destination
- Freight Terms:** Prepaid
- Packing Instructions:**
- Shipping Instructions:**

At the bottom of the page, there is a link to 'Shipment Lines'.

To delete a Ship Order:

1. Retrieve the OSP Work Order associated to the ship order you want to delete. See Finding OSP Work Orders, page 13-11.
2. Select the OSP Work Order from the results table, and click **Delete Shipment**.

Delete Shipment - Search OSP Order page

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Search OSP Order

[PO Synch](#)

Order Number	<input type="text"/>	Job Number	<input type="text"/>	Item	<input type="text"/>
Description	<input type="text"/>	Project Name	<input type="text"/>	Serial Number	<input type="text"/>
Order Type	<input type="text"/>	Task Name	<input type="text"/>	Has New PO Line(s)	<input type="text"/>
Order Status	<input type="text"/>	Vendor Name	<input type="text"/>	Department	<input type="text"/>
<input type="button" value="Go"/> <input type="button" value="Clear"/>					

OSP Order Search Results

[Create OSP](#)

Select OSP Order and...

1-10 of 36

Select	Order Number	Description	Date	Order Type	Order Status	PO Number	Shipment Order Number	Delete
<input type="radio"/>	10422		29-JUN-2004	Service	Entered			<input type="button" value="Delete"/>
<input type="radio"/>	10382		11-MAY-2004	Service	Entered		31	<input type="button" value="Delete"/>
<input checked="" type="radio"/>	10365		05-MAY-2004	Exchange	PO Created	30275	32	<input type="button" value="Delete"/>
<input type="radio"/>	10364		05-MAY-2004	Exchange	Entered			<input type="button" value="Delete"/>

Note: This action cannot be undone. All associated ship line items will be deleted with the ship order. You cannot delete a ship order if parts related to the order have already shipped.

To create a Ship Order line:

1. Retrieve the OSP Work Order associated to the ship order you want to delete. See Finding OSP Work Orders, page 13-11.
2. Navigate to the Edit OSP Work Order page. Click **Shipments** on the left-hand navigation panel. The OSP Work Order page appears.

View Shipment Header Information - Edit Shipment Header page

[Edit OSP Order](#)

[Shipments](#)

Edit Shipment Header

OSP Order Number

10242

Shipment Order Number

80175

Booked

No

Order Type

Exchange

Shipment Order Type

P-Mixed

Cancelled

No

Description

test ex

Order Date

06-FEB-2004

Open

Yes

* Price List

Project Manufacturing

* Tax Exempt

Standard

Tax Exempt Reason

* Vendor Name

AT&T Universal Card

* Location

Jacksonville (PJM)

* Warehouse

San Diego Manufacturing

Shipment Priority

Freight Terms

Prepaid

Packing Instructions

Shipping Instructions

* Payment Terms

IMMEDIATE

Tax Exempt Number

Vendor Number

1005

Contact

Peterson, Jane Ms.

Shipment Method

FOB

Destination

[Create Shipment Line](#)

Remove	Line Number	Line Type	Item	Instance Number	Serial Number	Quantity	UOM	Scheduled Shipment Date	Booked
No records were found matching the given criteria..									

- Click **Create Shipment Line**. The Create Shipment Line page appears.

Create Shipment Line page

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Create Shipment Line

OSP Order Number

10242

* Line Type

P-Return (Receipt)

* Job Number

* Scheduled Shipment Date

* Inventory Organization

FOB

Destination

Freight Terms

Prepaid

Receive Reason

Packing Instructions

Sub-Inventory

Shipment Priority

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- Use information in the following table to create a ship order.

Description of fields related to a ship order

Field	Description
OSP Order Number	Display only field.
Order Type	Displays OSP Order's type. Display only field.
Description	OSP Order description. Display only field.
Ship Order Number	Automatically generated. Display only field.
Ship Order Type	Display only field.
Booked	Status of the Ship Order. Display only field
Cancelled	Status of the Ship Order. Display only field
Order Date	Enter the date of Ship Order. Defaults to the current date
Tax Handling	Indicates how you wish to handle taxes on the parts being shipped. If you want the shipments tax exempted the select a value other than 'Standard' and enter value in the Tax Exempt Reason field. Otherwise select the value 'Standard'.
Vendor Name	Select a value from the selection list. Please ensure that the Vendor name is the same as the Vendor name entered in OSP Work Order. If it is different the system will give you a warning but will allow you proceed.
Contact	Select a value from the selection list.
Warehouse	Select the warehouses from where the part will be shipped out.
Shipment Method	Enter the shipment method from the selection list.
Shipment Priority	Enter the shipment priority from the selection list.
FOB	Enter the Freight On Board terms from the selection list.
Freight Carrier	Enter the freight carriers name from the selection list.
Freight Terms	Enter the freight terms from the selection list.
Packing and Shipping Instructions	Enter the information that the shipping clerk wants to see.
Line Type	Select 'Ship Only' if you are shipping a part out. Select 'Receive' if you are expecting a part to be received into inventory.
OSP Line Number	Display only field. Shows the associated OSP Line.

Field	Description
Schedule shipment date	Enter the date on which the part will be shipped out. This is a required field.
Inventory Organization	Enter the Inventory Organization from which the part will be shipped. If the line type is 'Receipt' this will be the receiving Organization. This is a required field.
Sub-Inventory	Enter the sub-inventory identifier from which the part will be shipped or received. This is a required field.
Freight On Board	This will be automatically populated if you had entered this in the header section.
Shipment Priority	This will be automatically populated if you had entered this in the header section.
Freight Carrier	This will be automatically populated if you had entered this in the header section.
Freight Terms	This will be automatically populated if you had entered this in the header section.
Receive Reason	If the line type is 'Receipt' you need to enter the reason for receipt.
Packing Instructions	This will be automatically populated if you had entered this in the header section.
Job Number	Select the job number from the list of jobs that you have entered in OSP Work Order line/Loan Order line/Borrow Order line.

5. Select the job number using the Search icon. The job numbers listed are from the OSP Order line items.

Enter Shipment Line Details - Create Shipment Line page

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Create Shipment Line

OSP Order Number **10242**

* Line Type

P-Standard (Line Invoicing)

* Job Number

WO1399

Item

R-ITEM1-Trackable

Shipment Quantity

1

Project Name

184

Instance Number

83846

* Scheduled Shipment Date

17-FEB-2006

* Inventory Organization

San Diego Manufacturing

FOB

Destination

Freight Terms

Prepaid

Receive Reason

Packing Instructions

Serial Number

ctr-sno-1

Shipment UOM

Ea

Task Name

task

Exchange Instance

91735

Sub-Inventory

Shipment Priority

Cancel

Apply

Cancel

Apply

6. Click **Apply** to save your edits. Click **Cancel** to discard any changes and return to the Ship Order page.

To edit and/or delete a Ship Order line:

1. Retrieve the OSP Work Order associated to the ship order you want to delete. See Finding OSP Work Orders, page 13-11.
2. Navigate to the Edit OSP Work Order page. Click **Shipments** on the left-hand navigation panel.
3. In the Edit Shipment Header page, click the Line Number for the shipment line that you want to edit. The Edit Shipment Line page appears.

Edit Shipment Line page

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Production Planning Outside Processing

Overview | Create Instance

Edit Shipment Line

OSP Order Number **10202**

* Line Type **P-Standard (Line Invoicing)**

Item **R-ITEM1-Trackable**

Shipment Quantity **1**

Project Name

Instance Number **85652**

* Scheduled Shipment Date **06-JAN-2006**

* Inventory Organization **San Diego Manufacturing**

FOB **Destination**

Freight Terms **Prepaid**

Receive Reason

Packing Instructions

Serial Number **a2**

Shipment UOM **Ea**

Task Name

Exchange Instance

Sub-Inventory

Shipment Priority

Cancel Apply

Associated Jobs

Previous 1-1 of 1 Next

Job Number
WO1199

4. Make changes to the shipment line as required, and click Apply.
5. To delete a shipment line, select the Remove check box corresponding to the line number, in the Edit Shipment Header page.

Note: Delete cannot be undone. When you select the 'Delete' trash can, the item on that line is removed from the database immediately. You cannot delete a line item if associated parts have already been shipped.

6. Click **Apply** to save your edits. Click **Cancel** to discard any changes and return to the Ship Order page.

Receiving Parts

Parts are received in Oracle Purchasing using a sales order return line.

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

Prerequisites

- ☐ The received part must be part of an OSP Work Order, Loan Order, or Borrow Order. There must be a booked sales order with relevant Return lines in Oracle Purchasing.

To receive a part:

1. Select the available responsibility in Oracle Purchasing.
2. Navigate to the Receiving page and enter the sales order number.

3. Select the Return line item you want to receive into inventory.
4. Enter the available receipt information and save it in the database.
5. If there is a quality plan for this part, complete the QA plan.

For details on how to receive parts with Oracle Purchasing, see Oracle Purchasing User's Guide Release 11i.

Accepting Supplier Services

A Purchase Order may specify that supplier performed services must be acknowledged before payment. In such cases, receive the service using Oracle Purchasing.

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

Prerequisites

- ☐ The part must be received from the supplier in good condition and must be associated to an OSP Work Order. The inspector must approve of the service performed on the part. There must be an approved Purchase Order associated to the OSP Work Order and the relevant purchase order line item must be marked as Receipt Required.

To accept a service:

1. Select the available responsibility in Oracle Purchasing.
2. Navigate to the Receiving page.
3. Select the purchase order line item you want to receive into inventory.
4. Enter the available receipt information and save it in the database.

For details on how to receive parts with Oracle Purchasing, see Oracle Purchasing User's Guide Release 11i.

Working with Loan and Borrow Orders

During the material-planning phase of a job the planner (either in Long Term Plan or in Production Plan) may decide that it would be better to 'Borrow' a part from a supplier than buy it outright. The decision may be based on expediency of job execution or cost considerations. Similarly the planner may receive a request to 'Loan' a part to a customer that is part of an existing assembly. In the case of 'Borrow' process the planner needs to have an install job that should receive the part from supplier, inspect it and install into an assembly. In the case of 'Loan' the planner needs to have a removal job that will remove the part, inspect and make it ready for shipping. Both the install job and remove job should have a department with a department class 'Vendor'. In order create a Loan/Borrow Order there should exists an approved legal contract between the parties to handle the financial transactions, since the Loan/Borrow handles the physical shipments/receipts of the parts.

While entering the search criteria, use the generic substitution meta character% to represent any string of zero or more characters. Use _ to represent any single

character. For example, if the database contains a record with the value “ENGINE” in a field, typing “E%” will return all records where the field value begins with “E”.

Related Topics

Creating a Loan or Borrow Order, page 13-37

Finding a Loan or Borrow Order, page 13-39

Editing a Loan or Borrow Order, page 13-39

Submitting a Loan or Borrow Order, page 13-40

Closing a Loan or Borrow Order, page 13-40

Initiating Contracts, page 13-40

Creating a Loan or Borrow Order

Prerequisites

- ☐ A Production job that requires outside processing and is not associated to an OSP Work Order must exist in the database. There must be an approved contract to loan or borrow parts.

To create a loan or borrow order:

1. On the Oracle Complex Maintenance, Repair, and Overhaul Home page, select **Execution**. The Job Overview page of the Production Planning module appears.
2. Select the Outside Processing tab. The Search OSP Order page appears.
3. Click **Create OSP** under the OSP Order Search Results header. The Search Work Order page appears. Enter your search criteria in the fields and click **Go**. The Search results appear in the lower half of the page. Click **Clear** if you want to clear all fields and start the search over.

Search Job Records - Search Job page

ORACLE Oracle Complex MRO

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Production Planning **Outside Processing**

Overview | Create Instance

Search Job

Job Number Task Name Serial Number
 Service Item Item Department
 Project Name Instance Number

Jobs Search Results

Select Jobs and...

Previous 1-10 of 108 Next

Select Job Number	Item	Instance Number	Serial Number	Service Item	Service Item Description	Department	Suggested Vendor
<input type="checkbox"/> CMRO577	DRW unit item 1	83526	101			Outside	
<input type="checkbox"/> CMRO64	RADITEM1-APS-Trackable	83026	123-trackable			Outside	
<input type="checkbox"/> WO1163	R-ITEM1-Trackable	85653	a3			Outside	
<input type="checkbox"/> WO1220	R-ITEM1-Trackable	88750	ctr-sno-1000			Outside	
<input type="checkbox"/> WO1222	R-ITEM2-Trackable	88751	ctr-sno-1001			Outside	
<input type="checkbox"/> WO1259	R-ITEM1-Trackable	85652	a2			Outside	
<input type="checkbox"/> WO1321	R-ITEM1-Trackable	83087	11			Outside	
<input type="checkbox"/> WO1340	R-ITEM1-Trackable	83846	ctr-sno-1			Outside	

- Under Job Search Results, select each production job you want to include in the Loan or Borrow Order.
- Click **Create Loan** to create a loan order; click **Create Borrow** to create a borrow order. The Create Loan or the Create Borrow page appears.

Create Loan Order page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out

Production Planning **Outside Processing**

Overview | Create Instance

Create Loan Order

Order Number Order Type **Loan** Description
 * Company Name Order Date **30 JUN 2004** Order Status **Entered**
 * Contract Number

OSP Order Lines

Previous 1-1 of 1 Next

Select	Job Number	Item	Line Status	Instance Number	Service Item Quantity
<input type="checkbox"/>	CMRO577	DRW unit item 1	Entered	83526	1

Previous 1-1 of 1 Next

Production Planning | **Outside Processing** | Home | Engineering | Configuration | Planning | Administration | Execution | Profile | Sign Out

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- Use the information in the following table to create a loan or borrow order.

Description of fields related to loan and/or borrow order

Field	Description
Order Number	Displays the order number.
Order Type	Select the type of order from the list provided.
Description	Describe what is being borrowed.
Order Date	Enter the date of Ship Order. Defaults to the current date.
Order Status	This is display only information about the order status. Possible values are Entered, Submitted, Submit Failed, and Closed.
Vendor Name	Select a vendor name from the list of vendors that will perform the service.
Contract Number	Displays the relevant contract number.

7. Click **Apply** to create the loan or borrow. Click **Cancel** to discard any changes and return to the Search OSP Order page.

Finding a Loan or Borrow Order

Prerequisites

- ☐ The Loan or Borrow orders you are looking for must exist in the database.

To find a loan or borrow order:

1. On the Oracle Complex Maintenance, Repair, and Overhaul Home page, select **Execution**. The Job Overview page of the Production Planning module appears.
2. Select the Outside Processing tab. The Search OSP Order page appears.
3. Enter your search criteria in the fields and click **Go**. If you are looking for a specific entry, enter the order number and select Loan or Borrow from Order Type. Click **Clear** if you want to clear all fields and start the search over.

Editing a Loan or Borrow Order

Prerequisites

- ☐ The loan or borrow order you want to edit must have an Entered status.

To edit a loan or borrow order:

1. Retrieve the loan or borrow order you want to edit. See Finding a Loan or Borrow Order, page 13-39.
2. Click the order number you want to edit from the OSP Order Search results.
3. The Edit Loan Order page appears.

- Click **Add More Rows** to add additional line items to the order. Select the trash can next to any line item you want to delete
 - Click **Submit** to ship or receive parts for this order.
 - Click **Delete Shipment** to remove the associated Shipment Order.
4. Click **Apply** to create the loan or borrow. Click **Cancel** to discard any changes and return to the Search OSP Order page.

Note: Delete cannot be undone. When you select the 'Delete' trash can, the item on that line is removed from the database immediately.

Submitting a Loan or Borrow Order

Prerequisites

- ☐ The loan or borrow order you want to submit must have an Entered status.

To submit a loan or borrow order:

1. Retrieve the loan or borrow order you want to submit. See Finding a Loan or Borrow Order , page 13-39.
2. Select the order you want to submit from the OSP Order Search results.
3. Click **Submit**. Once you click submit, you cannot undo this operation.

Closing a Loan or Borrow Order

Prerequisites

- ☐ All associated jobs must be closed, and all of the associated parts must have a shipped or received status.

To close a loan or borrow order:

1. Retrieve the loan or borrow order you want to close. See Finding a Loan or Borrow Order, page 13-39.
2. Select the order you want to close from the OSP Order Search results.
3. Click **Close**. The Loan or Borrow order's status changes to Closed.

Initiating Contracts

An approved contract must exist with the pertinent third parties before parts are borrowed or shipped to them for service. Contracts associated with Loan Orders are maintained by the Oracle Service Contracts module. Contracts associated with Borrow Orders are maintained by Oracle Contracts for Procurement.

For details on how to enter and maintain contracts in Oracle Service Contracts please refer to *Oracle Service Contracts Concepts and Procedures*.

For details on how to enter and maintain contracts in Oracle Service Contracts please refer to *Oracle Procurement Contracts Implementation and Administration Guide*.

Working with Exchange Orders

During the production planning or execution process, the planner may decide to replace an item/part with another similar or dissimilar part from a supplier. The servicing organization may ship out the item first (simple exchange) and then receive the exchange item or may receive the exchange item from the supplier first (advanced exchange) and then ship the item out. Exchange Orders are created for each item being shipped, and contains information about the parts that will be shipped out and received back from the supplier, the shipment and return dates, and the costs of item exchange through an interface to the procurement system.

An exchange instance must be created in Install Base, and associated to an order line before an item can be received in exchange.

An exchange order can be converted into a service order and vice versa so long as the return shipment has not occurred.

- Creating an Exchange Order
- Editing Exchange Orders
- Converting an Exchange OSP to a Service OSP

Creating an Exchange Order

Prerequisites

- ☐ A production job that requires outside processing and is not currently assigned to Outside Processing Work Orders must exist in the database.

To create an exchange order:

1. On the Oracle Complex Maintenance, Repair, and Overhaul Home page, select **Execution**. The Job Overview page of the Production Planning module appears.
2. Select the Outside Processing tab. The Search OSP Order page appears.
3. Click **Create OSP** under the OSP Order Search Results header. The Search Work Order page appears.
4. Enter your search criteria in the fields and click **Go**. The production jobs matching your search criteria are displayed. Click **Clear** if you want to clear all fields and start the search over.
5. Under Job Search Results, select the production job you want to include in the Exchange Order. Click **Create Exchange**. The Create Exchange Order page appears.

Create Exchange Order page

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Oracle Complex MRO

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[Overview](#) | [Create Instance](#)

[Production Planning](#) [Outside Processing](#)

Create Exchange Order

CancelApply

Order Number

* Vendor Name

* Vendor Location

* Buyer Name

Order Type

Order Status

Description

* Single Instance

Order Date

Exchange

Entered

No

30 JUN 2004

OSP Order Lines

Select	Job Number	Item	Line	Status	Instance Number	Exchange Instance	Service Item	Quantity
No records were found matching the given criteria.								

CancelApply

[Production Planning](#) | [Outside Processing](#) | [Home](#) | [Engineering](#) | [Configuration](#) | [Planning](#) | [Administration](#) | [Execution](#) | [Profile](#) | [Sign Out](#)

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Use the information in the following table to enter details in the Create Exchange Order page.

Description of fields in the Create Exchange Order page

Field	Description
Order Number	Displays the order number.
Order Type	Displays the order type of exchange for the Exchange work orders.
Vendor Name	Select a vendor name from the list of vendors that will perform the service.
Vendor Location	Select the location from the list. This will be the ship to location of the supplier.
Single Instance	Select the value 'Yes' if you want to ensure that all the services to be performed in this OSP Work Order are against a single instance of a part. If it is set to 'No' then the system will allow you to mix jobs that have different instances of parts.
Buyer Name	Name of the buyer.
Order Status	<p>This is display only information about the order status. Possible values are:</p> <p>'Entered' - the OSP Work Order is still in processing mode; edits to OSP Work Order is allowed.</p> <p>'Submitted' -the OSP Work Order has created a Purchase Order in Oracle Purchasing; no edits allowed. Further edits should be done in Oracle Purchasing.</p> <p>'Submit Failed'-the OSP Work Order has failed to successfully create a Purchase Order in Oracle Purchasing. Edits to OSP Work Order are allowed. Re-submit the OSP Work Order when all edits are completed.</p> <p>'Closed' -the OSP Work Order has been closed and no further activity will be allowed.</p>
Order Date	Enter the date of Ship Order. Defaults to the current date.
Job Number	The number generated for a job.
Item	The tracked item for which the job has been created against.
Line Status	The current status for each delivery line.
Instance Number	The Install Base Instance Number of the tracked item.
Exchange Instance	Instance of the item that will be received as part of the exchange.
Service Item Quantity	Quantity of the Service Item required.

Enter Exchange Order Header Details - Create Exchange Order page

ORACLE Oracle Complex MRO

Home Engineering Configuration Planning Administration Execution Profile Sign Out

Overview | Create Instance

Create Exchange Order

Order Number: Order Type: **Exchange** Description:

* Vendor Name: Advanced Network Device * Vendor Location: SANTA CLARA * Single Instance: No

* Buyer Name: Smith, Mr. Tom Order Status: **Entered** Order Date: **30-JUN-2004**

OSP Order Lines

Select	Job Number	Item Line	Status	Instance Number	Exchange Instance	Service Item	Quantity
No records were found matching the given criteria..							

Cancel Apply

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- Click Apply to save the records. The Edit Exchange order page appears.

Edit Exchange Order page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Overview | Create Instance

Edit OSP Order

Shipments

Confirmation • Order Created

Edit Exchange Order

Order Number: **10482** Order Type: **Exchange** Description:

* Vendor Name: Advanced Network Device * Vendor Location: SANTA CLARA * Single Instance: No

* Buyer Name: Smith, Mr. Tom Order Status: **Entered** Order Date: **30-JUN-2004**

OSP Order Lines

Line Number	Job Number	Item Line	Status	Instance Number	Exchange Instance	Service Item	Quantity	Delete
No records were found matching the given criteria..								

Cancel Submit

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- Click Shipments in the side navigation menu. The Create Shipment Header page appears. Enter information in the fields for which you know the value. For field descriptions, see Fields related to a ship order, page 13-32.

Enter Shipment Information - Create Shipment Header page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Production Planning Outside Processing

Overview | Create Instance

[Edit OSP Order](#)

Shipments

Create Shipment Header

OSP Order Number **10482** Order Type **Exchange** Description

Shipment Order Type **Mixed** Order Date

* Price List Pricing Test CMRO 0114 * Payment Terms KH-down

* Tax Exempt Standard Tax Exempt Number

Tax Exempt Reason

* Vendor Name AT&T Universal Card Vendor Number **1005**

* Location Jacksonville (PJM) Contact

* Warehouse Los Angeles Manufacturin Shipment Method

Shipment Priority FOB

Freight Terms

Packing Instructions

Shipping Instructions

Cancel Apply

8. Click Apply to save the information. Navigate to the Edit OSP Order page to define Order Lines.
9. Click Create Order Line. The Create OSP Line page appears.

Create Order Line - Create OSP Line page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Production Planning Outside Processing

Overview | Create Instance

Create OSP Line

Cancel Apply

OSP Details

Order Number **10482** Description

Status **Entered** Order Type **Exchange**

Order Date **30-JUN-2004** Vendor Name **Advanced Network Devices**

Line Number **1** Line Status **Entered**

Need By Date

Job Details

* Job Number Instance Number Item Serial Number

Project Name Task Name

Service Details

Service Item Service Item Description

Service Item Quantity UOM

Line Type

10. Enter the following information:
 - Need by date

- **Service Details** - In this region, the user can select the service to be purchased corresponding to the exchange transaction. In an Exchange order, the OSP line may be associated with any service item (subject to the some restrictions like the item should not be an inventory item, should be purchasable etc. already used for a service item) even if the associated job has a different service item
- **Exchange Details** - In this region, the user picks an exchange instance that the supplier would be sending in place of the job's existing instance. For an Exchange order, the user should have picked an exchange instance before he can create a return shipment line. The Exchange Item is the item that will be exchanged.

Enter Service and Exchange Details - Create OSP Line page

Create OSP Line

CancelApply

OSP Details

Order Number10482

Description

StatusEntered

Order TypeExchange

Order Date30-JUN-2004

Vendor NameAdvanced Network Devices

Line Number1

Line StatusEntered

Need By Date07-JUL-2004

Job Details

Job NumberWO1259

ItemR-ITEM1-Trackable

Instance Number85652

Serial Numbera2

Project Name173

Task Namettt

Service Details

Service Item

Service Item Description

Service Item Quantity1

UOM

Line Type

Exchange Details

Exchange ItemR-ITEM1-Trackable

Exchange Instance101301

Note: Multiple items may be exchanged with a supplier using a single Exchange Order (multiple lines).

11. Click Apply to save the record.

Save OSP Details - Edit OSP Line page

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Overview | Create Instance

Confirmation • New OSP Line Created.

Edit OSP Line Cancel Apply

OSP Details

Order Number	10482	Description	
Status	Entered	Order Type	Exchange
Order Date	30-JUN-2004	Vendor Name	Advanced Network Devices
Line Number	1	Line Status	Entered
Need By Date	07-JUL-2004		

Job Details

Job Number	W01259	Item	R-ITEM1-Trackable
Instance Number	85652	Serial Number	a2
Project Name	173	Task Name	ttt

Service Details

Service Item		Service Item Description	
--------------	--	--------------------------	--

Editing Exchange Orders

Prerequisites

- ☐ Exchange orders must exist in the database

To edit an exchange order:

1. On the Oracle Complex Maintenance, Repair, and Overhaul Home page, select **Execution**. The Job Overview page of the Production Planning module appears.
2. Select the Outside Processing tab. The Search OSP Order page appears.
3. Enter information in the fields for which you know the value. The Order type should be Exchange. Click Go. The exchange orders matching your search criteria appear in the OSP Order Search Results table.
4. Click the Order Number link. The Edit Exchange Order page appears.

Modify Exchange Order - Edit Exchange Order page

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Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Production Planning Outside Processing

Overview | Create Instance

Edit OSP Order

Shipments

Edit Exchange Order

Cancel Submit Delete Shipment

Order Number **10423** Order Type **Exchange** Description **Test**

* Vendor Name **Advanced Network Device** * Vendor Location **SANTA CLARA** * Single Instance **No**

* Buyer Name **Smith, Mr. Tom** Order Status **Entered** Order Date **03-JUN**

OSP Order Lines

Previous 1-1 of 1 Next

Line Number	Job Number	Item	Line Status	Instance Number	Exchange Instance	Service Item	Quantity	Delete
1	WO3319	R-ITEM1-Trackable	Entered	83088	116765	1		

Previous 1-1 of 1 Next

Cancel Submit Delete Shipment

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- Make the necessary changes and click Apply to save the record. Click Cancel to discard any changes and return to the Search OSP order page.
- Select the work order and click Submit to create a related Purchase Order in Oracle purchasing. You can view the PO details by selecting the corresponding icon in the Edit OSP Order page.
- Click Delete Shipment to remove the shipping order associated with the current OSP Work order.
- Click **Close** to permanently close the current OSP Work Order. This will be successful if:
 - The item requested in exchange has been received.
 - All listed production jobs are closed.
 - The associated Purchase Order is closed.

Converting Service/Exchange OSP to Exchange/Service OSP

You can change an Exchange order to a Service Order and vice versa if the return shipment has not occurred.

Prerequisites

- ☐ If the Exchange Order is in the Closed state, conversion will not be possible
- If there is a return shipment line with the received quantity greater than zero, conversion cannot be done

To convert an OSP order:

- On the Oracle Complex Maintenance, Repair, and Overhaul Home page, select **Execution**. The Job Overview page of the Production Planning module appears.

2. Select the Outside Processing tab. The Search OSP Order page appears.
3. Enter information in the fields for which you know the value. The OSP orders matching your search criteria are displayed.
4. Click the Order Number link to navigate to the Edit OSP Order page.

Edit Order - Edit OSP Order page

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Production Planning **Outside Processing**

Overview | Create Instance

Edit OSP Order

Shipments

Order Number **10382** Order Type **Service** Description

* Vendor Name Advanced Network Device * Vendor Location NEW LOC * Single Instance No

* Buyer Name Smith, Mr. Tom Order Status Entered Order Date 11-MAY-

OSP Order Lines

Previous 1-1 of 1 Next

Line Number	Job Number	Item	Line Status	Instance Number	Service Item	Quantity	Delete
1	WO1106	R-ITEM1-Trackable	Entered	84806			

Previous 1-1 of 1 Next

Cancel Submit Delete Shipment

Production Planning **Outside Processing** Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

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5. Click the Convert button. You will get a notification that all return shipment lines will be deleted. Select Yes to continue. You will get a notification that the order had been converted.

Convert OSP Order - Edit Exchange Order page

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Production Planning **Outside Processing**

Overview | Create Instance

Edit OSP Order

Shipments

Confirmation

- Order Converted
- Order Updated

Edit Exchange Order

Order Number **10382** Order Type **Exchange** Description

* Vendor Name Advanced Network Device * Vendor Location NEW LOC * Single Instance No

* Buyer Name Smith, Mr. Tom Order Status Entered Order Date 11-MAY-2

OSP Order Lines

Previous 1-1 of 1 Next

Line Number	Job Number	Item	Line Status	Instance Number	Exchange Instance	Service Item	Quantity	Delete
1	WO1106	R-ITEM1-Trackable	Entered	84806				

Previous 1-1 of 1 Next

Cancel Submit Delete Shipment

Production Planning **Outside Processing** Home Engineering Configuration Planning Administration Execution Profile Sign Out Help

Windows and Navigation Paths

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 navigation paths for the user interfaces(UI) in Oracle Complex Maintenance, Repair, and Overhaul(CMRO). Some of the pages can be accessed using buttons and/or links in various UIs. The following table provides only one of the navigational paths that you may use to view these pages.

The various entities in the UIs are represented as follows:

- Brackets surrounding an entity in a path indicates a button selection. For example, [Create] represents the Create button that you must choose.
- Braces surrounding an entity indicates a drop-down menu option. For example, {Close} indicates that you must choose Close from the drop-down menu.
- Tabs, Secondary tabs, Links, and Icons are mentioned within brackets for the related entity. For example, Engineering (tab), Overview (secondary tab), and so on.
- 'Select Record' indicates that you must select a specific record from the search results list before proceeding to the next action.

Note: For all navigation paths where the responsibility is not specified, it is Oracle Complex Maintenance, Repair, and Overhaul by default. For windows that you access using different responsibilities, the specific responsibility is mentioned in the navigation path.

Default Navigation Paths for Standard Application Windows

Window Name	Navigation Path
Search Maintenance Requirements	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab)
Create Maintenance Requirements	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab) > [Create]

Window Name	Navigation Path
Update Maintenance Requirement	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab) > select record > click Title (link)
Update Attached Routes	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab) > select record > click Title (link) > Routes (link)
Update Attached Documents	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab) > select record > click Title (link) > Documents (link)
Route Dependencies	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab) > select record > click Title (link) > Routes (link) > Dependency (icon)
Update Attached Actions	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab) > select record > click Title (link) > Actions (link)
Update Effectivity	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab) > select record > click Title (link) > Effectivities
Update Effectivity Details	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab) > select record > click Title (link) > Effectivities > Effectivity Details (icon)
Update Interval Threshold	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab) > select record > click Title (link) > Effectivities > Interval Threshold (icon)
Maintenance Requirement Relationships	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab) > select record > click Title (link) > Relationships
View Affected Items	Engineering (link) > Fleet Maintenance Program (tab) > Overview (secondary tab) > select record > click Title (link) > Affected Items (link)
Search Operation	Engineering (link) > Route Management (tab) > Operations (secondary tab)
Create Operation	Engineering (link) > Route Management (tab) > Operations (secondary tab) > [Create]
Create Route	Engineering (link) > Route Management (tab) > Routes (secondary tab) > [Create]
Search Route	Engineering (link) > Route Management (tab) > Routes (secondary tab)
Update Route	Engineering (link) > Route Management (tab) > Routes (secondary tab) > select record > click Route Number (link)

Window Name	Navigation Path
Edit Operation	Engineering (link) > Route Management (tab) > Operations (secondary tab) > select record > click Operation (link)
Attach Reference Documents (for an Operation)	Engineering (link) > Route Management (tab) > Operations (secondary tab) > select record > click Operation (link) > Reference Documents (link)
Attach Reference Documents (for a route)	Engineering (link) > Route Management (tab) > Routes (secondary tab) > select record > click Route Number (link) > Reference Documents (link)
Define Resource Requirements (for an operation)	Engineering (link) > Route Management (tab) > Operations (secondary tab) > select record > click Operation (link) > Resource Requirements (link)
Define Resource Requirements (for a route)	Engineering (link) > Route Management (tab) > Routes (secondary tab) > select record > click Route Number (link) > Resource Requirements (link)
Update Costing Parameters (for an operation)	Engineering (link) > Route Management (tab) > Operations (secondary tab) > select record > click Operation (link) > Resource Requirements > Costing Parameters (icon)
Update Costing Parameters (for a route)	Engineering (link) > Route Management (tab) > Routes (secondary tab) > select record > click Route Number (link) > Resource Requirements > Costing Parameters (icon)
Define Material Requirements (for an operation)	Engineering (link) > Route Management (tab) > Operations (secondary tab) > select record > click Operation (link) > Material Requirements (link)
Define Material Requirements (for a route)	Engineering (link) > Route Management (tab) > Routes (secondary tab) > select record > click Route Number (link) > Material Requirements (link)
Associate Operations	Engineering (link) > Route Management (tab) > Routes (secondary tab) > select record > click Route Number (link) > Associate Operations (link)
Associate Major Zone To Item Type	Engineering (link) > Route Management (tab) > Major Zones (secondary tab)
Associate Sub Zone To Item Type	Engineering (link) > Route Management (tab) > Sub Zones (secondary tab)
Search Resources	Engineering (link) > Route Management (tab) > Resources (secondary tab)
Create Resources	Engineering (link) > Route Management (tab) > Resources (secondary tab) > [Create]

Window Name	Navigation Path
Search BOM Resource	Engineering (link) > Route Management (tab) > Resources (secondary tab) > [Create] > [Attach]
Update Resources	Engineering (link) > Route Management (tab) > Resources (secondary tab) > select record > click Resource (link)
Search Item Compositions	Engineering (link) > Route Management (tab) > Item Compositions (secondary tab)
Create Composition List	Engineering (link) > Route Management (tab) > Item Compositions (secondary tab) > Create
Update Composition List	Engineering (link) > Route Management (tab) > Item Compositions (secondary tab) > select record > click Item (link)
Define Disposition Associations	Engineering (link) > Route Management (tab) > Routes (secondary tab) > select record > click Route Number (link) > Disposition Associations
Disposition List Details	Engineering (link) > Route Management (tab) > Routes (secondary tab) > select record > click Route Number (link) > Disposition Associations > Disposition Details (icon)
Composition Selection	Engineering (link) > Route Management (tab) > Routes (secondary tab) > select record > click Route Number (link) > Disposition Associations > Disposition Details (icon) > [Select from Composition]
Search Document	Engineering (link) > Document Index (tab)
Create Document	Engineering (link) > Document Index (tab) > [Create]
Associate Document Sub Type To Document Type	Engineering (link) > Document Index (tab) > Associate type (secondary tab)
Edit Document	Engineering (link) > Document Index (tab) > Search (secondary tab) > select record > click Document Num (link)
Edit Subscription Information	Engineering (link) > Document Index (tab) > Search (secondary tab) > select record > click Document Num (link) > Subscription
Supplier Information	Engineering (link) > Document Index (tab) > Search (secondary tab) > select record > click Document Num (link) > Supplier
Distribution Information	Engineering (link) > Document Index (tab) > Search (secondary tab) > select record > click Document Num (link) > Distribution
Create New Revision	Engineering (link) > Document Index (tab) > Search (secondary tab) > select record > [Create New Revision]

Window Name	Navigation Path
Edit Revision	Engineering (link) > Document Index (tab) > Search (secondary tab) > select record > [Edit Revision]
Electronic File Upload	Engineering (link) > Document Index (tab) > Search (secondary tab) > select record > [Upload]
Search Master configuration	Configuration (link) > Master Configuration (tab) > Overview (secondary tab)
Create Master Configuration	Configuration (link) > Master Configuration (tab) > Overview (secondary tab) > Create
Edit Master Configuration	Configuration (link) > Master Configuration (tab) > Overview (secondary tab) > select record > click Name (link)
Edit Rules	Configuration (link) > Master Configuration (tab) > Overview (secondary tab) > select record > click Name (link) > {Rules}
Create Rule	Configuration (link) > Master Configuration (tab) > Overview (secondary tab) > select record > click Name (link) > {Rules} > [Create Rule]
Edit Document Associations	Configuration (link) > Master Configuration (tab) > Overview (secondary tab) > select record > click Name (link) > {Documents}
Search Alternate Items	Configuration (link) > Master Configuration (tab) > Alternate Parts (secondary tab)
View Composition Lists	Configuration (link) > Master Configuration (tab) > Composition List (secondary tab)
Add Alternates	Configuration (link) > Master Configuration (tab) > Alternate Parts (secondary tab) > [Create]
Edit Alternates	Configuration (link) > Master Configuration (tab) > Alternate Parts (secondary tab) > select record > click Group Name (link)
Edit Associated Positions	Configuration (link) > Master Configuration (tab) > Alternate Parts (secondary tab) > select record > {View Positions} > [Go]
Search Unit Configuration	Configuration (link) > Unit Configuration (tab) > Search Unit (secondary tab)
Create Unit Configuration	Configuration (link) > Unit Configuration (tab) > Create From Master (secondary tab) > [Create Unit configuration]
Edit Unit Configuration	Configuration (link) > Unit Configuration (tab) > Search Unit (secondary tab) > select record > Edit (icon)
View Item Instance Utilization	Configuration (link) > Unit Configuration (tab) > Search Unit (secondary tab) > select record > Edit (icon) > [View Utilization]

Window Name	Navigation Path
Unit Configuration Validation Results	Configuration (link) > Unit Configuration (tab) > Search Unit (secondary tab) > select record > [Validate]
Migrate Unit Configuration	Configuration (link) > Unit Configuration (tab) > Search Unit (secondary tab) > select record > [Migrate]
Search Product Classification	Configuration (link) > Product Classification (tab)
Create Product Classification	Configuration (link) > Product Classification (tab) > [Create]
Copy Product Classification	Configuration (link) > Product Classification (tab) > [Copy]
Update Attached Documents (for a product classification)	Configuration (link) > Product Classification (tab) > select record > Tree (icon) > Documents (link)
Edit Product Classification	Configuration (link) > Product Classification (tab) > select record > Tree (icon)
Update Attached Units	Configuration (link) > Product Classification (tab) > select record > Tree (icon) > Units/Items (link)
View Maintenance Requirement (for a product classification)	Configuration (link) > Product Classification (tab) > select record > Tree (icon) > Maintenance Requirements
Search Unit Maintenance Plan	Planning (link) > Unit Maintenance Plan (tab) > Overview (secondary tab)
View Maintenance Requirement Detail & History	Planning (link) > Unit Maintenance Plan (tab) > Overview (secondary tab) > select record > {View Details & History}
Group Maintenance Requirement	Planning (link) > Unit Maintenance Plan (tab) > Overview (secondary tab) > select record > {View Group MR} > [Go]
Initialize Maintenance Requirement	Planning (link) > Unit Maintenance Plan (tab) > Overview (secondary tab) > select record > {Initialize MR} > [Go]
View Maintenance Requirement (for an Unit Maintenance Plan)	Planning (link) > Unit Maintenance Plan (tab) > Overview (secondary tab) > select record > {View MR Details} > [Go]
Unit Maintenance Plan - View Threshold	Planning (link) > Unit Maintenance Plan (tab) > Overview (secondary tab) > select record > {View Threshold} > [Go]
Search Item	Planning (link) > Unit Maintenance Plan (tab) > Utilization Forecast (secondary tab)
Update Item Utilization Forecast	Planning (link) > Unit Maintenance Plan (tab) > Utilization Forecast (secondary tab) > select record > [Utilization Forecast]

Window Name	Navigation Path
Service Request	Oracle Customer Support (responsibility): Service Request > Create Service Requests
Search Visit	Planning (link) > Visit Work Package (tab)
Create Visit	Planning (link) > Visit Work Package (tab) > [Create]
Visit Errors	Planning (link) > Visit Work Package (tab) > select record > {Validate} > [Go]
Visit Cost and Price	Planning (link) > Visit Work Package (tab) > select record > {Cost and Price Information} > [Go]
Search Maintenance Requirements (for a visit)	Planning (link) > Visit Work Package (tab) > select record > {Maintenance Requirements} > [Go]
Search Visit Task	Planning (link) > Visit Work Package (tab) > select record > {Search Tasks} > [Go]
Cost Structure	Planning (link) > Visit Work Package (tab) > select record > Cost structure (icon)
Update Visit	Planning (link) > Visit Work Package (tab) > select record > Visit number (link)
Create Unassociated Task	Planning (link) > Visit Work Package (tab) > select record > Visit number (link) > Visit Tasks (link) > [Create Unassociated Task]
Create Planned Task	Planning (link) > Visit Work Package (tab) > select record > Visit number (link) > Visit Tasks (link) > [Create Planned Task] > select unit maintenance plan > {Associate to Visit} > [Go]
Create Unplanned Task	Planning (link) > Visit Work Package (tab) > select record > {Search Task} > Create Unplanned Task > select maintenance requirement > [Associate to Visit]
Update Task Header	Planning (link) > Visit Work Package (tab) > select record > {Search Tasks} > [Go] > select task > Task Number (link)
Task Hierarchy	Planning (link) > Visit Work Package (tab) > select record > {Search Tasks} > [Go] > select task > Task Number (link) > Hierarchy
Task Cost and Price	Planning (link) > Visit Work Package (tab) > select record > {Search Tasks} > [Go] > select task > Cost/Price (icon)
Maintenance Requirement Cost and Price	Planning (link) > Visit Work Package (tab) > select record > {Cost and Price Information} > [Go] > Maintenance Requirements (link) > select requirement > Cost/Price (icon)

Window Name	Navigation Path
Items without Price	Planning (link) > Visit Work Package (tab) > select record > {Cost and Price Information} > [Go] > Maintenance Requirements (link) > select requirement > Cost/Price (icon) > [Items Without Price]
Search Department Shift	Administration (link) > Department Shift (tab)
Create Department Shift	Administration (link) > Department Shift (tab) > [Create]
Search Visits	Planning (link) > Long Term Planning (tab) > Visits (secondary tab)
Schedule Visit	Planning (link) > Long Term Planning (tab) > Visits (secondary tab) > select record > [Plan Visit]
Scheduled Visits	Planning (link) > Long Term Planning (tab) > Visits (secondary tab) > select record > [Plan Visit] > Scheduled Visits (link)
Visit Details	Planning (link) > Long Term Planning (tab) > Visits (secondary tab) > select record > [Plan Visit] > Scheduled Visits (link) > View (icon)
Demand Plans	Oracle Demand Planning System Administrator (responsibility): Demand Plans
Supply Chain Plan Names	Oracle Advanced Supply Chain Planner (responsibility): Supply Chain Plans > Names
Planning Data Collection	Oracle Advanced Supply Chain Planner (responsibility): Collections > Oracle Systems > Standard Collections
Scheduled Materials	Planning (link) > Long Term Planning (tab) > Visits (secondary tab) > select record > [Plan Visit] > Scheduled Materials (link)
Material Availability	Planning (link) > Long Term Planning (tab) > Visits (secondary tab) > select record > [Plan Visit] > Material Availability
Search Spaces	Administration (link) > Spaces (tab)
Add Space	Administration (link) > Spaces (tab) > [Create]
Edit Space	Administration (link) > Spaces (tab) > Space (link)
Search Availability Restrictions	Administration (link) > Space Unavailability (tab)
Add Availability Restriction	Administration (link) > Space Unavailability (tab) > [Create]
Edit Availability Restriction	Administration (link) > Space Unavailability (tab) > select record > Space (link)

Window Name	Navigation Path
Simulation Plans	Planning (link) > Long Term Planning (tab) > Simulations (secondary tab)
View Simulation Plan	Planning (link) > Long Term Planning (tab) > Simulations (secondary tab) > select record > [View Plan]
Copy to a New Plan	Planning (link) > Long Term Planning (tab) > Simulations (secondary tab) > select record > [View Plan] > select record > [Copy To a New Plan]
Resource Leveling	Planning (link) > Long Term Planning (tab) > Resource Leveling
Job Overview	Execution (link) > Production Planning (tab) > Jobs (secondary tab)
Job Operations	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go]
Update Material Requirements	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go] > Materials (link)
Resource Requirements	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go] > Resources (link)
Resource Assignments	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go] > Assignments (link)
Perform Material Transactions	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go] > Material Transactions
Unit Configuration Parts Change/Item Instance Parts Change	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go] > {Perform Part Removal/Install} > [Go]
Create Service Request (in the Execution module)	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Create Service Request} > [Go]
Submit Quality Results (for a job)	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Record Job QA Results} > [Go]
Scheduler Workbench	Oracle Enterprise Asset Management (responsibility): Work Order Planning > Scheduler Workbench
Work Order Scheduling Hierarchy	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {View Scheduling Hierarchy} > [Go]

Window Name	Navigation Path
Update Service Request (in the Execution module)	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update/View Service Request} > [Go]
Serial Number Change	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go] > {Change Serial Number} > [Go]
Serial Number History	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go] > {Change Serial Number} > [Go] > [View History]
Search Maintenance Requirements (in the Execution module)	Execution (link) > Production Planning (tab) > Maintenance Requirements (secondary tab)
Maintenance Requirement Deferral Details	Execution (link) > Production Planning (tab) > Maintenance Requirements (secondary tab) > select record > [Defer]
Operation (Detail)	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go] > select operation record > [Details]
Required Materials	Execution (link) > Production Planning (tab) > Materials (secondary tab)
Material Requirement (Detail)	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go] > Materials (link) > select requirement > [Details]
View Documents	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {View Documents} > [Go]
View Maintenance Requirement	Execution (link) > Production Planning (tab) > Maintenance Requirements (secondary tab) > select record > Maintenance Requirement (link)
Resource Requirement Detail	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go] > Resources (link) > select requirement > [Details]
Perform Resource Transactions	Execution (link) > Production Planning (tab) > Jobs (secondary tab) > select record > {Update Job} > [Go] > Resource Transactions (link)
Collection Plans	Oracle Manufacturing and Distribution Manager (responsibility): Quality > Setup > Collection Plans
Collection Transactions	Oracle Manufacturing and Distribution Manager (responsibility): Quality > Setup > Collection Plans > [Transactions]
Search OSP Order	Execution (link) > Outside Processing (tab)
Create OSP Order	Execution (link) > Outside Processing (tab) > {Create OSP} > select job record > [Create OSP]

Window Name	Navigation Path
Edit OSP Order	Execution (link) > Outside Processing (tab) > select record > Order Number (link)
Edit OSP Line	Execution (link) > Outside Processing (tab) > select record > Order Number (link) > Line Number (link)
Create OSP Line	Execution (link) > Outside Processing (tab) > select record > Order Number (link) > [Create Order Line]
Purchase Order Details	Execution (link) > Outside Processing (tab) > select record > Order Number (link) > PO Details
View Purchase Order Shipments	Execution (link) > Outside Processing (tab) > select record > Order Number (link) > PO Details > select line item > [PO Shipments]
View Purchase Accounting Distributions	Execution (link) > Outside Processing (tab) > select record > Order Number (link) > PO Details > select line item > [PO Shipments] > select Shipment Number > [Accounting Distributions]
View Receipts	Execution (link) > Outside Processing (tab) > select record > Order Number (link) > PO Details > select line item > [Receipts]
Purchase Orders	Oracle Manufacturing and Distribution Manager (responsibility): Purchasing > Purchase Orders > Purchase Orders
Approve Document	Oracle Manufacturing and Distribution Manager (responsibility): Purchasing > Purchase Orders > Purchase Orders > [Approve]
Edit Shipment Header	Execution (link) > Outside Processing (tab) > select record > Order Number (link) > Shipments (link)
Create Shipment Line	Execution (link) > Outside Processing (tab) > select record > Order Number (link) > Shipments (link) > [Create Shipment Line]
Edit Shipment Line	Execution (link) > Outside Processing (tab) > select record > Order Number (link) > Shipments (link) > select record > Line Number (link)
Create Loan Order	Execution (link) > Outside Processing (tab) > {Create OSP} > select job record > [Create Loan]
Create Exchange Order	Execution (link) > Outside Processing (tab) > {Create OSP} > select job record > [Create Exchange]
Edit Exchange Order	Execution (link) > Outside Processing (tab) > select record > order number (link)

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