Oracle® Depot Repair

Implementation Guide

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Oracle Depot Repair Implementation Guide, Release 12.0

Part No. B25722-02

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Preface

Intended Audience

Welcome to Release 12.0 of the *Oracle Depot Repair Implementation Guide.*

See Related Information Sources on page x for more Oracle Applications product information.

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Structure

1 Introduction to Oracle Depot Repair

This chapter discusses the key concepts, features, and process flows of Oracle Depot Repair.

2 Overview of Setting Up

This chapter provides an overview of the steps required to set up Oracle Depot Repair.

3 Oracle Depot Repair-Specific Setup Steps

This chapter describes implementation tasks that are specific to Oracle Depot Repair.

A Oracle Depot Repair Public APIs

This appendix presents information on the Oracle Depot Repair public API.

B Oracle Depot Repair Lookup Codes

This appendix presents the seeded Oracle Depot Repair lookup codes and values.

C Oracle Depot Repair Update Programs

This appendix presents the Oracle Depot Repair update programs.

Related Information Sources

Oracle Depot Repair User Guide

Oracle Common Application Components Implementation Guide

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data

Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

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

Because Oracle Applications tables are interrelated, any change you make using 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.

1

Introduction to Oracle Depot Repair

This chapter discusses the key concepts, features, and process flows of Oracle Depot Repair.

This chapter covers the following topics:

- What is Oracle Depot Repair?
- Oracle Depot Repair Key Features
- Customer Management
- Service Request Management
- Repair Type Processing
- Repair Job Management
- Repair Resolution Management
- Business Process Flows
- Logistics and Maintenance with Call Center Facility
- Logistics and Maintenance without Call Center Facility
- Internal Party Repairs
- Integration with Other Oracle Modules
- Business Function Impacts

What is Oracle Depot Repair?

Oracle Depot Repair is part of the Oracle E-Business Suite and offers an enterprise-wide solution for managing depot repair processing. It targets the repair business market from simple, quick repairs to routine maintenance. Oracle Depot Repair integrates with other Oracle E-Business Suite modules to provide an integrated comprehensive solution for the repair business sector.

The depot repair process includes the return of broken and serviceable items, their

diagnoses and repair job estimates, customer approvals and repairs management, and subsequent return of items to customers. You use the collection of charges for materials, labor, and expenses for the repairs to invoice the customer.

The depot repair process also includes the processing of item refurbishments, where the items either belong to an internal party, or the items are received from a field service warehouse and then returned to the warehouse after repair.

Customers expect quick and seamless repair processing. Oracle Depot Repair provides end-to-end repair management functionality for service organizations that are committed to delivering a total service solution.

Oracle Depot Repair enables service organizations to meet customer expectations, and draw maximum benefit by improving service readiness.

Oracle Depot Repair Key Features

The major features of Oracle Depot Repair include:

- Customer Management, page 1-2
- Service Request Management, page 1-3
- Repair Type Processing, page 1-4
- Repair Job Management, page 1-6
- Repair Resolution Management, page 1-6

Customer Management

Oracle Depot Repair can use a call center environment to improve customer interaction with service depots. Customers can use an access number to contact the relevant service depot where they can log Service Requests. The primary focus of the service representatives in the call center is to understand the customer's issue and resolve it on the first call, if possible, thereby avoiding escalations or call transfers. This lets service agency experts focus on their areas of expertise without the constant distraction of explaining well-documented issues and solutions.

Oracle Depot Repair also supports scenarios in which customers walk in at service depots for repair needs.

Oracle Depot Repair provides service organizations with the right tools and knowledge for responding effectively to the repair issues that customers have.

Key customer management features include:

Oracle Depot Repair Workbench

The Repair Orders window in Oracle Depot Repair provides the service agent instant access to information about the customer and enables the agent to effectively address the needs of the customer. The customer Profile menu option enables service agents to view the number of open Repair Orders, open Service Requests, active contracts, and other details for a selected customer. In the Find Repair Orders window, service agents can query for Repair Orders, to see the Repair Order statuses, repair jobs, and repair tasks.

Relationship Management

Oracle Depot Repair lets service agents capture the contact's relationship with others in the concerned organization, or other organizations, enabling service agents to engage knowledgeably with customers and other service agencies.

Customer Data Store

Oracle Depot Repair enables service agencies to maintain a comprehensive database of all customer interactions with the agency. Oracle Depot Repair maintains detailed service history to trace the origin of a repair issue and the follow up actions that solved it.

Service Request Management

Oracle Depot Repair enables service agencies to offer customers the convenience of accessing service through telephone or over the counter. Key Service Request management processes include:

- Entering Service Requests
- Searching the Oracle Knowledge Management Database

Service Request Builder

Oracle Depot Repair lets you enter new Service Requests to gather appropriate data. It lets service agents record customer information and attempt problem resolution to solve issues in the very first interaction.

Searchable Oracle Knowledge Management Database

Oracle Depot Repair makes available a database of solutions, which the service agents can search with a view to solving the problem while the customer interaction is in progress. The Oracle Knowledge Management database can also provide information, such as guides, policies, procedures, and FAQs.

Where the problem affecting the current Repair Order item is matched up with the

solution in the Oracle Knowledge Management database, Oracle Knowledge Management can assist in the Repair Order processing by providing charge lines for WIP and Task estimates, and Bills and Routings for WIP Repair Jobs.

Repair Type Processing

Oracle Depot Repair provides Repair Types that enable service providers to be more efficient in managing the repair through process automation. Repair Types help to classify the Repair Order and determine the repair management processes and logistics to fulfill the repair process.

Oracle Depot Repair supports the following Repair Types:

- Repair and Return, page 1-4
- Loaner, Repair and Return, page 1-4
- Exchange, page 1-5
- Advance Exchange, page 1-5
- Loaner, page 1-5
- Replacement, page 1-5
- Standard, page 1-5
- Refurbishment, page 1-5

Repair and Return

Use this Repair Type when a customer returns the broken or damaged item to the service depot for repair. After completion of the repair, you return the repaired item to the customer. This Repair Type requires:

- A return materials authorization (RMA), or Return line, to receive the customer's broken or damaged item.
- A Sales Order, or Ship line, to ship the repaired item and invoice the customer.

Loaner, Repair and Return

This Repair Type combines two Repair Types, the Repair and Return, with the Loaner. The loaner concept indicates that service depot sends the customer the loaner before the receipt of the customer's broken or damaged item. To track the shipping and return of both the loaner and the broken or damaged item, the system creates four charge lines. This Repair Type requires two RMA Orders and two Sales Orders. Use this Repair Type when a customer uptime is critical.

Exchange

This Repair Type represents a scenario when the service depot sends an exchange item to the customer after receiving the customer's broken or damaged item. The Exchange Repair Type assumes that the repaired item does not return to the customer. The system can generate an internal Repair Order for the returned item, but there is not necessarily an association between the repaired item and the original exchange item.

Advance Exchange

This Repair Type is the same as the Exchange Repair Type except that the service depot can send the item to the customer before the service organization receives the customer's broken item.

Loaner

Use this Repair Type when the service depot sends an item to the customer solely for the purpose of renting. This Repair Type requires a Sales Order to ship the loaner item to the customer and to create an invoice, and an RMA order to track the return of the loaner item. A deposit and return due date may be requirements. The customer has no expectation of repairs.

Replacement

A Replacement Repair Type refers to a scenario when the service depot sends an item to the customer without expecting a return. In this scenario, the service provider sends the customer an item to replace the customer's item. The service organization can:

- Link the replacement item to the original item in the Oracle Installed Base.
- Change the status of the replaced item to indicate that it is out of service and that the new item has replaced it.

Standard

Use this Repair Type when the service agent is uncertain about the customer's needs. This Repair Type is flexible however, and requires the manual creation of RMAs and Sales Orders.

Refurbishment

A Repair Order and its associated Service Request can be created in the Spares Management module of Oracle Field Service as a result of a demand for refurbishment or replenishment. The Repair Order has a Repair Type of Refurbishment, and has two transaction lines, Move In and Move Out.

The Move In line tracks the shipment of the defective item from Spares Management, and its reception into the depot. The Move Out line processes the shipment of the

repaired item back to Spares Management.

The processing of Move In and Move Out lines leverages existing Internal Order and Internal Requisition functionality. From the depot's perspective, defective items are received via the Internal Requisition, and usable/repaired items are shipped via the Internal Order.

Repair Job Management

Use either of the following repair modes to manage repairs:

- WIP (Work In Process): Recommended for use when the repairs require a series of sequential steps and materials management. The WIP mode leverages the costing of items through Oracle Costing.

- Task: Recommended for use when the repairs require minimal steps that do not necessarily require a series of sequential steps. In contrast to WIP mode, Task mode does not integrate with Oracle Costing.

You implement and manage either of these repair modes on separate tabs in the Oracle Depot Repair area.

During implementation, you associate the WIP or Task mode with Repair Types. Though a service organization can have different Repair Types associated with different repair modes, it is recommended that a service organization select only one repair mode for all Repair Types.

Repair Resolution Management

Oracle Depot Repair improves operational efficiency by providing the following key repair resolution management features:

- Automatically creating charge lines based on Repair Type.

- Creating and approving estimates.

- Leveraging of the service depot knowledge base throughout repair processing.

- Creating Repair Jobs and releasing them to shop floor.

- Providing flexible options for receiving items and shipping items.

- Invoicing of final charges.

Business Process Flows

Oracle Depot Repair supports the following business process flows:

- Logistics and Maintenance with Call Center Facility, page 1-7
- Logistics and Maintenance without Call Center Facility, page 1-7
- Internal Repairs, page 1-7

You can use either Oracle Work In Process (WIP) or the Task Manager (in Oracle Common Application Components) to manage the repair process. Based on your choice, the Repair Type for a given Repair Order determines which repair management process to use.

Logistics and Maintenance with Call Center Facility

This business flow starts with a Service Request, where the call center service agent records a problem. If the service agent cannot resolve the problem using information in Oracle Knowledge Management, the service agent refers the Service Request to a service depot repair agent. The service depot agent can then create a Repair Order and an estimate (if required) and seek approval from the customer for further processing.

Depending on the Repair Type, the service depot repair agent completes the different RMA and Sales Order lines to assist the completion of the repair process. The repair mode (associated to the Repair Type) determines whether to use Oracle WIP or the Task Manager in Oracle Common Application Components to manage the Repair Job. After the repair completion, the service depot returns the repaired item to the customer. The system captures the material, labor, and expenses that the repair needed as charges and transfers that information to Oracle Order Management for invoicing.

Logistics and Maintenance without Call Center Facility

This process is similar to the Call Center, Logistics, and Maintenance business process except that there is no call center.

Businesses that do not incorporate a call center facility, or those that integrate their call center into the depot, can use this process, but it requires that their customers to send serviceable items directly to a service depot.

Internal Party Repairs

You can refurbish items that your organization already owns. Oracle Depot Repair lets you process internal repairs in such cases. The customer is an internal party in the corresponding Service Request, and is defined as an internal party either in the Oracle Installed Base Install Parameters, or with an Internal classification type in Oracle Order Management, or both. RMAs and Sales Orders are not required to process internal party repairs. This is under the assumption that items already exist in a subinventory within the organization letting you create Repair Jobs.

Integration with Other Oracle Modules

Oracle Depot Repair integrates with the following Oracle modules:

Advanced Scheduler

Oracle Advanced Scheduler enables optimal scheduling of tasks and trips for field service business needs. While the Assignment Manager (in Oracle Common Application Components) searches for qualified resources to complete a field service task (based upon selection criteria set within the Assignment Manager), these qualified resources transfer to Oracle Advanced Scheduler to make the actual assignments based upon previously defined constraints. Oracle Advanced Scheduler uses the Assignment Manager to schedule Field Service tasks.

Assignment Manager

Oracle Depot Repair uses Assignment Manager to schedule technicians to all open and planned repair tasks. This module permits the planner to use the Assignment Manager in an assisted or unassisted mode. For more information, see the *Oracle Common Application Components User's Guide*.

Bills of Material

Oracle Bills of Material store lists of items that are associated with a parent item, and information about how each item relates to its parent. Oracle Depot Repair uses Oracle Bills of Material to create repair routers that the system uses for a submitted WIP Repair Job, and to create a bill of materials for an item that is linked to a repair router.

Contracts (Contracts Core and Service Contracts)

Oracle Depot Repair integrates with Oracle Service Contracts to manage service contracts associated with a customer's Installed Base item. Oracle Service Contracts holds all service contracts centrally--including warranties, extended warranties or complex service agreements--and provides the service provider visibility to all service entitlement information. It leverages functionality that Oracle Contracts Core provides to support common contract management activities, such as contract renewal, versioning, article management, and change management.

Counters

Note: Counters is now integrated into Oracle Installed Base.

Counter events and alerts provide a valuable tool to track critical service events that can affect a customer or items in the Installed Base. Oracle Depot Repair uses the Counters module to update item counters periodically, whenever a service depot technician performs work on the item, and saves it in the Installed Base record. The Oracle

Counters module also permits a service provider to set up logical or derived counters that use formulas that incorporate calendar dates, time, and cycle counts to trigger an event, such as a warranty or service contract expiration, or to alert the service provider when to schedule preventive maintenance on a customer's Installed Base item. The system can send alerts by the e-mail notification system to inform service personnel about warranty or service contract expiration, or about a preventive maintenance requirement that is due.

Field Service

When an organization sells an item to a customer, service contracts or warranties are often offered to the customer. Most companies offer on-site support for failures of the item. This is where field service is significant. After the customer reports the problem, the field service organization determines:

- Who and when a field service agent should visit the customer.
- What parts are needed to solve the problem.

If a field service agent cannot completed the repair on-site, the repair may need to be transferred to the service depot for completion. Furthermore, internal order refurbishments can be initiated in the Spares Management module within Oracle Field Service.

General Ledger

Oracle Depot Repair integrates with Oracle General Ledger to provide the functionality of recording and tracking all costs associated with every Oracle Depot Repair WIP mode repair, and of creating general ledger accounts.

HRMS (Human Resource Management System)

Oracle Depot Repair uses the Oracle HRMS module to define employees and locations where you ship, deliver internally, or bill the ordered goods and services.

Installed Base

Oracle Installed Base is a repository that tracks all installed customer items. Oracle Installed Base maintains and updates each item record to reflect the most current configuration. Service organizations must rely heavily on their installed base to provide accurate customer and item information. The installed base permits quick access to all item records and information. Oracle Depot Repair leverages this information to expedite the repair process when repairs involve incompatibility, configuration, revision, or counter history issues. Oracle Depot Repair integrates with Oracle Installed Base to assist accurate recording of all part and serial numbers that change during an item's life. It retrieves all service contracts and warranties associated with an Oracle Installed Base serialized item or component. Depending on the definition of Oracle Installed Base transaction sub-types, the TeleService Charges APIs update the location

and instance ownership information.

Inventory

Oracle Depot Repair uses the Oracle Inventory module to manage item and spare parts inventory.

iSupport

Self-Service Repair Order reporting is now supported in Oracle iSupport. Oracle Depot Repair customers can now search for their Repair Orders through an Oracle iSupport self-service user interface. Oracle iSupport will properly authenticate the user and display only Repair Orders for accounts which the user is authorized to view.

Knowledge Management

Oracle Knowledge Management is an Oracle Service Core module that provides an open architecture repository to store technical information or solution sets. Service agents and technicians can retrieve this information to find a quick resolution to service issues that customers are reporting, or provide assistance in an inspection or item diagnosis. Oracle Knowledge Management provides a security feature that permits only users with specific responsibility to contribute new information to the constantly enriched active database.

Oracle Depot Repair uses the Oracle Knowledge Management Search Engine to find the best possible solutions to resolve service issues. Agents can access the knowledge repository from the Service Request or the Repair Order. You can search for solutions by entering a Diagnostic Code or keyword string to query on statements that have links to a symptom, cause, action, or fact solution set. A solution set can also include a Task Template or set of objects that can automate or expedite the repair process.

Notes

A note records descriptive information, which users have created, about business transactions to provide referencing. Oracle Depot Repair uses the Notes module to access the comment log that relates to a specific transaction. The Notes module creates and passes information to all other Oracle applications. Upon transmission and receipt of a note, the system automatically sends an alert to the Oracle Depot Repair module to signal that a new note is present. Service employees can pass valuable information that can influence the repair process. The Notes module permits users to post both public or private notes, where public notes can be published to a Web site, and private notes are only accessible to employees that work inside the service organization. For more information, see the *Oracle Common Application Components User's Guide.*

Order Management

Oracle Depot Repair uses the Oracle Order Management module to create RMA and Sales Orders, validate customer accounts, and invoice customers for repairs.

Oracle Depot Repair integrates with Oracle Order Management Pricing to provide an advanced, highly flexible pricing engine that executes pricing and promotional calculations. It allows Oracle Depot Repair users to view and select a Price List while charging a repair, and while receiving or shipping an item.

Purchasing

For receiving, Oracle WIP uses Oracle Purchasing to perform outside processing of a repair from the WIP Router.

Receivables

The Oracle Receivables module integrates with Oracle Depot Repair integrates to track and maintain customer information such as customer name, account, customer contacts, and location.

Resource Manager

Oracle Depot Repair uses Resource Manager to manage employees. The Resource Manager permits a user to import employees and non-employees from HRMS into the resource module. You can set up and manage resources as individual resources, or as a team or group, and assign roles and skill sets to distinguish their qualifications. For more information, see the *Oracle Common Application Components User's Guide*.

Task Manager

Oracle Depot Repair uses the Task Manager to assist repair management. The Tasks model leverages the core functionality that Oracle Depot Repair provides by its integration with Resource Manager, Assignment Manager, and Oracle Calendar. The Task mode provides an alternate repair process that is intended to manage simple repair work that does not require extensive tracking or management processes. After task completion, the technician uses the Debrief Report in Oracle Depot Repair to log the material, labor, and expense transactions. For more information, see the *Oracle Common Application Components User's Guide*.

TeleService (Charges)

With the Charges module, a service organization can bill customers for provided services in response to support Service Requests, field Service Requests, and service depot repairs. Charges also creates a return material authorization (RMA) to return a defective item for repair, loan, or replacement. Returns from a customer occur for a variety of reasons including damage, shipment error, and repair. With the Charges capability of processing return material, you can manage customer expectations while controlling inventory receipts and processing customer credit. Oracle Depot Repair uses TeleService Charges APIs to automatically create the charge lines when the service depot has determined the Repair Type.

TeleService (Customer Care)

The Customer Profile summarizes customer information and indicates if a customer is critical. It can provide information such as the number of open Service Requests. A system administrator sets up the profile entries, which contain a set of defined verifications that you can configure. The Customer Profile engine displays these verification results. Oracle Depot Repair uses this functionality for customer management.

TeleService (Service Requests)

Service agents typically log a Service Request to record a service issue that a customer is reporting. Oracle Depot Repair invokes Oracle TeleService APIs to automatically create the Service Request after creation of the Repair Order header. The TeleService APIs populate the Service Request number into the Repair Order Header to permanently link the two source documents with an internal form identity. Service depot business flows always start with the creation of a Service Request.

Work in Process

Oracle Depot Repair uses Oracle Work in Process (WIP) to assist the repair of broken or damaged items. Oracle WIP permits assignment of resources, material, and outside processing. A WIP summary report tracks the associated costs with a completed WIP Repair Job. You can submit WIP mode Repair Jobs with or without an assigned routing.

Business Function Impacts

The following table presents the business functions in a depot that the Oracle Depot Repair integrating applications impact.

Integrating Oracle Module	Customer Interaction	Repair Management (WIP Mode)	Repair Management (Task Mode)	Logistics	Billing/ Invoicing
Advanced Scheduler	--	--	X	--	--
Assignment Manager	--	--	X	--	--
Bills of Material	--	X	--	--	X

Integrating Oracle Module	Customer Interaction	Repair Management (WIP Mode)	Repair Management (Task Mode)	Logistics	Billing/ Invoicing
Contracts (Contracts Core and Service Contracts)	X	--	--	X	X
Counters	X	X	X	X	--
Field Service	--	--	X	--	X
General Ledger	--	--	--	--	X
HRMS	--	X	X	--	--
Installed Base	X	X	X	X	--
Inventory	--	X	X	X	X
iSupport	X	--	--	--	--
Knowledge Management	X	X	X	--	--
Notes	X	X	X	--	--
Order Management	--	--	--	X	X
Purchasing	--	--	--	X	--
Receivables	--	--	--	X	X
Resource Manager	--	--	X	--	--
Task Manager	--	--	X	--	X

Integrating Oracle Module	Customer Interaction	Repair Management (WIP Mode)	Repair Management (Task Mode)	Logistics	Billing/ Invoicing
TeleService (Charges)	--	X	X	X	X
TeleService (Customer Care)	X	--	--	--	--
TeleService (Service Requests)	X	--	--	--	--
Work in Process	--	X	--	--	X

2

Overview of Setting Up

This chapter provides an overview of the steps required to set up Oracle Depot Repair.

This chapter covers the following topics:

- Setting Up Oracle Depot Repair
- Related Applications Setup
- Key Implementation Decisions
- Implementation Starting Point
- Implementation Checklist
- WIP and Task Mode Setup Considerations
- Considerations for Related Applications Setup
- Setting Up Inventory
- Setting Up Locations
- Defining Employees
- Setting Up Bills of Material
- Setting Up Work in Process
- Setting Up Purchasing
- Setting Up Order Management
- Setting Up Service Requests in Oracle TeleService
- Setting Up Charges in Oracle TeleService
- Setting Up Tasks
- Setting Up Knowledge Management

Setting Up Oracle Depot Repair

This section provides an overview of the setup steps required to implement Oracle Depot Repair.

Setting up Oracle Depot Repair includes setting up related Oracle applications, such as Oracle Inventory and Oracle Installed Base. In setting up these applications, you might only need to make Depot Repair specific modifications to existing data, like existing items. Check with your implementation team to determine which setup requirements have already been fulfilled.

Related Applications Setup

Oracle Depot Repair requires that the following Oracle modules are installed and set up:

- Oracle General Ledger
- Oracle Bills of Material
- Oracle Inventory
- Oracle HRMS
- Oracle Work in Process
- Oracle Order Management
- Oracle Purchasing
- Oracle Payables
- Oracle Receivables
- Oracle Common Application Components
- Oracle Installed Base
- Oracle Customer Support
- Oracle Customer Care
- Oracle TeleService
- Oracle Advanced Scheduler
- Oracle Contracts Core

- Oracle Service Contracts
- Oracle Field Service
- Oracle iSupport

This implementation guide, however, discusses only the Oracle Depot Repair-specific setup steps in detail. For setup of all related applications, please refer to the corresponding documentation as listed in the implementation checklist. Certain Oracle Depot Repair-specific setup steps that you need to perform in other Oracle applications setup windows are also explained in detail in the following chapter.

Key Implementation Decisions

The following sections detail the key decisions that are to be made before you begin implementation.

Loading Customer and Contact Information

Oracle Depot Repair requires that customer information be imported into the system from already available sources. However, Oracle Depot Repair allows you to capture customer contact data in real-time. There may be situations when contact data is already available from other systems. In such cases, you may want to import available customer information along with relationship data.

For example, a service organization already has extensive data on all the customers in its service area. In this scenario, it may serve the agency better if all such data is imported into the system.

Resource Creation

Determine the resources that have to be created in the system. All Call Center Agents, Service Administrators, Receipt Administrators, Service Technicians, Depot Managers, Field Service Agents, and other employees who will be using Oracle Depot Repair must be created as resources.

Calendar Definition

Determine the shifts, patterns, and time periods when resources are available to work.

Location Definition

Define the locations where you plan to ship, deliver internally, or bill the goods and services that you order. This is necessary if you plan to import purchase requisitions from the MRP Planner Workbench to Oracle Purchasing.

Knowledge Base Management

Determine the information that will go into the Knowledge Base. It is recommended that you identify and list the information sources (for example, the technical manuals, parts catalogs, policies, procedures and FAQs) at the outset.

Service Request Builder Setup

Define the Service Request Types, profiles, and the attributes associated with each of them. Also identify the owner for each Service Request Type. You would also need to define the criteria based on which duplicate Service Requests will be identified.

Repair Type Setup

While creating Repair Orders, Logistics transactions are generated based on the default transaction billing types defined in Repair Types. Also, the processing of transaction lines are determined by the definition of the Repair Types. For example, if the Repair Type has Auto RMA checked, then the RMA line is interfaced to Order Management and the Sales Order is also booked. You can also define your own Repair Types and link them to the seeded Repair Types.

The following are the seeded Repair Types for Oracle Depot Repair:

- Advance Exchange
- Exchange
- Loaner
- Loaner, Repair and Return
- Refurbishment
- Repair and Return
- Replacement
- Standard

These Repair Types determine the proper processing and management of Repair Orders by the application and the depot organization.

WIP and Task Modes

Determine the complexity of the repair management processes required by your organization. Either Oracle WIP or the Task Manager (in Oracle Common Application Components) can be used to manage the repair process. WIP mode is recommended for use when the Repair Jobs require series of sequential steps, and materials management. Task mode is recommended for use when the repairs require minimal steps that are not

necessarily completed in sequence. To the user, both of these processes are managed via separate tabs in the user interface.

The Oracle Depot Repair application supports the use of both WIP and Task modes for repair management. However, it is advisable to use only one mode to enhance the user experience.

> **Note:** Oracle Depot Repair provides E-records and E-signature (ERES) functionality in WIP mode via Oracle WIP. In Task mode, ERES functionality is available via the Debrief screen for each Task.

Implementation Starting Point

Before starting the implementation, identify all your implementation team members and the access privileges they require. Oracle Depot Repair provides Oracle Depot Repair Super User as the seeded implementation responsibility. In addition to this, implementation team members may have to use other responsibilities. You may have to create additional implementation responsibilities if you want to restrict access.

Create Oracle Applications users with appropriate responsibilities for performing implementation procedures. The user name you assign can be used to log on to Oracle Depot Repair. To create the user, use the System Administrator responsibility.

Defining an Oracle Applications User

Use the System Administrator responsibility to create the required Oracle Applications user(s). Implementation team members would need access to one or more of the following responsibilities:

- System Administrator
- Depot Repair Super User
- Foundation Administrator
- Support Administrator
- Knowledge Management Administrator

Use the Users window to define Oracle Applications users. Oracle Application user will need to be uniquely identified by an application user name. For detailed instructions on creating application users, please refer to *Oracle Applications System Administrator's Guide*.

Implementation Checklist

This checklist summarizes each of the steps you must follow to implement Oracle Depot

Repair. It includes setup steps for data that may be shared with other Oracle applications, but is required by Oracle Depot Repair. If you have already defined this information when setting up other Oracle Applications, you can skip these steps.

Since some implementation steps build upon information you define in other steps, you must perform the setup in the order listed.

Step No.	Setup Step	Reference
1	Define Key Flexfields	*Oracle Applications Flexfields Guide, Oracle General Ledger User Guide, Implementing Oracle HRMS*
2	Set Up Calendars, Currencies, and Set of Books	*Oracle General Ledger User Guide, Oracle Bills of Material User's Guide*
3	Set Up Payables	*Oracle Payables User Guide*
4	Set Up Receivables	*Oracle Receivables User Guide*
5	Set Up Organizations	*Implementing Oracle HRMS*
6	Define Locations	*Implementing Oracle HRMS, Oracle Purchasing User's Guide*
7	Set Up Employees	*Managing Your Workforce Using Oracle HRMS, Oracle Purchasing User's Guide*
8	Set Up Inventory	*Oracle Inventory User's Guide*
9	Set Up Cost Management	*Oracle Cost Management User's Guide*
10	Set Up Bills of Material	*Oracle Bills of Material User's Guide*
11	Set Up Work in Process	*Oracle Work in Process User's Guide*
12	Set Up Purchasing	*Oracle Purchasing User's Guide*
13	Set Up Order Management	*Oracle Order Management Suite Implementation Manual, Oracle Order Management User's Guide, Oracle Shipping Execution User's Guide*
14	Set Up Service Requests	*Oracle TeleService Implementation Guide*

Step No.	Setup Step	Reference
15	Set Up Customer Profile	*Oracle TeleService Implementation Guide*
16	Set Up Charges	*Oracle TeleService Implementation Guide*
17	Set Up Notes	*Oracle Common Application Components Implementation Guide*
18	Set Up Resource Manager	*Oracle Common Application Components Implementation Guide*
19	Set Up Task Manager	*Oracle Common Application Components Implementation Guide*
20	Set Up Assignment Manager	*Oracle Common Application Components Implementation Guide*
21	Set Up Advanced Scheduler	*Oracle Advanced Scheduler Concepts and Procedures Guide*
22	Set Up Knowledge Management	*Oracle Knowledge Management Implementation Guide*
23	Set Up Installed Base	*Oracle Installed Base Implementation Guide*
24	Set Up Counters and Counter Templates	*Oracle Installed Base User Guide*
25	Set Up Contracts Core	*Oracle Contracts Core Implementation Guide*
26	Set Up Service Contracts	*Oracle Service Contracts Concepts and Procedures Guide*
27	Set Up Field Service	*Oracle Field Service Implementation Manual*
28	Define Depot Repair Lookup Codes	Chapter 3, *Oracle Depot Repair Implementation Guide*
29	Define Depot Repair Profile Options	Chapter 3, *Oracle Depot Repair Implementation Guide*

Step No.	Setup Step	Reference
30	Define Depot Repair Users	Chapter 3, *Oracle Depot Repair Implementation Guide*
31	Set Up Repair Types	Chapter 3, *Oracle Depot Repair Implementation Guide*
32	Set Up Statuses, Status Transitions, and Repair Type Transitions	Chapter 3, *Oracle Depot Repair Implementation Guide*
33	Define Depot Repair Reason Codes	Chapter 3, *Oracle Depot Repair Implementation Guide*
34	Set Up Diagnostic Codes	Chapter 3, *Oracle Depot Repair Implementation Guide*
35	Set Up Service Codes	Chapter 3, *Oracle Depot Repair Implementation Guide*
36	Set Up Service Code Recommendations	Chapter 3, *Oracle Depot Repair Implementation Guide*
37	Set Up Depot Repair Update Programs	Chapter 3, *Oracle Depot Repair Implementation Guide*

Setup steps specific to Oracle Depot Repair are discussed in detail in the following chapter. For detailed instructions on other setup tasks, please refer to the corresponding guides.

WIP and Task Mode Setup Considerations

Oracle Depot Repair uses Work in Process (WIP) to process repairs where costing is relevant. Task mode is recommended for use when the repairs require minimal steps that are not necessarily completed in sequence.

To process repairs in Task mode, you must set up Task Manager, Assignment Manager, and Advanced Scheduler.

If you are processing repairs only in Tasks mode, you do not have to set up WIP.

Similarly, if you are processing repairs only in WIP mode, you need to set up WIP; but do not have to set up Task Manager, Assignment Manager, and Advanced Scheduler. For more information, see Repair Job Management, page 1-6.

Also, to use WIP for Repair Job management, you have to set up Resources within BOM

(see *Oracle Bills of Material User's Guide*), and to use Tasks, you must set up Resources within the Resource Manager, a module of Oracle Common Application Components (see *Oracle Common Application Components Implementation Guide*).

> **Note:** Oracle Depot Repair provides E-records and E-signature (ERES) functionality in WIP mode via Oracle WIP. In Task mode, ERES functionality is available via the Debrief screen for each Task.

Considerations for Related Applications Setup

The implementation team must take note of the following while setting up the respective related application or module.

Setting Up Inventory

When setting up items in the Master Items window, the fields that you must select to fulfill different features in Oracle Depot Repair appear in a variety of tabs. The main fields to set up are in the Inventory, Order Management, Invoicing, and Service tabs.

For example, in the Service tab:

- Ensure that you select the Billing Type. For material items, select Material for the Billing Type.

- For items to be tracked in Oracle Installed Base, select the check box Track in Installed Base.
- Select Enabled for the Service Request field.

Comments

1. You must set up items in the Inventory Organization specified by the value of the profile option Service: Inventory Validation Organization.
2. For items to be returned, set up the following Order Management and Inventory flags, as required: Returnable, Customer Ordered, Customer Order Enabled, Shippable, Transactable, and Invoiceable.
3. For items to be shipped, set up the following Order Management and Inventory flags, as required: Customer Ordered, Customer Order Enabled, Shippable, Transactable, and Invoiceable.
4. When you use bills or routings for your WIP mode Repair Jobs, the following must be set up as inventory items:
   - Each bill and each component of the bill.
   - Each routing.
5. When you use task parts for your Task mode Repair Jobs, the following must be set up as inventory items:
   - Each component item of the task part.

For more details, please refer to the following sources of information:

- *Oracle Inventory User's Guide.*
- *Oracle Purchasing User's Guide.*
- The section Setting Up Items in Oracle Inventory in the *Oracle TeleService Implementation Guide*.

Setting Up Locations

Define locations for where you ship, deliver internally, or bill the goods and services that you order. This is a necessary step if you plan on importing purchase requisitions from the MRP Planner Workbench into Oracle Purchasing.

Please refer to *Implementing Oracle HRMS* and the *Oracle Purchasing User's Guide*.

Defining Employees

You must have employees to fulfill certain features of Service Requests and Repair Orders. For example:

- The Default Owner of a Service Request must be an employee.
- When you set up resources, you typically associate one or more employees with a resource.

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

A resource can be an employee defined in HRMS, and imported into the Resource Manager of Oracle Common Application Components.

For more details, please refer to the following sources of information:

- *Managing Your Workforce Using Oracle HRMS.*
- *Oracle Purchasing User's Guide.*
- The section Setting Up Resource Manager in the *Oracle Common Application Components Implementation Guide*.

Setting Up Bills of Material

You can set up bills, resources, and routings in Oracle Bills of Material (BOM), to help process Repair Orders in Oracle Depot Repair.

Oracle Depot Repair uses bills and routings either through their association with Service Codes, or by allowing users to manually enter bills and routings while creating a job for a Repair Order.

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

Comments

1. For each bill, ensure also the following conditions:
   - The parent item is defined as an Inventory Item.
   - Each component of the bill is set up as an Inventory Item, with a Billing Type of

category Material.

- Each component of the bill has a list line with a value in the Price List to be used in the Repair Order.

To use Oracle WIP for Repair Job management, you must set up resources within Oracle BOM.

2. You need to define at least one department and also set up resources, and then you can create a routing.

3. For each routing, ensure also the following condition:
   - The item for which routing is being set up is defined as an Inventory Item.

4. The Billing Item for each resource has a list line with a value in the Price List to be used in the Repair Order.

For more details, please refer to the following sources of information:

- *Oracle Bills of Material User's Guide.*
- *Oracle Inventory User's Guide.*
- The Price Lists chapter in the *Oracle Order Management Suite Implementation Manual.*

Setting Up Work in Process

When reviewing the WIP setup for Depot Repair, remember that Repair Jobs use the non-standard WIP functionality.

Also confirm with the accounting team to ensure that the appropriate General Ledger accounts have been created to record activity for Rework, Repair, or however the client desires to capture the accounting information.

For more details, please refer to the WIP Accounting Classes section in the *Oracle Work in Process User's Guide*.

Setting Up Purchasing

The three Receipt Routing Options in Oracle Purchasing include the following values: Direct Delivery, Standard Receipt, and Inspection Required. You can inspect items if the Receipt Routing is Standard Receipt or Inspection Required.

For more information, please refer to the *Oracle Purchasing User's Guide* for more information.

Setting Up Order Management

Oracle WIP decrements inventory when a component is used in repair, but Oracle Order Management decrements inventory again when the repaired item is shipped to the customer. To prevent this, ensure that a "Bill Only" Line Type is set up for the Order Management Line Type mapped to the Service Activity Billing Type for repairs performed in WIP mode. This, however, applies only to component parts, and not to the whole repaired item.

This is specific only to Estimate or Actual charge lines that are interfaced to Oracle Order Management, for items that are not shipped. Do not set the "Bill Only" Line Type for repaired items.

For more details, please refer to Setting up Charges for Oracle Depot Repair, page 3-2.

For more information, please refer to the *Oracle Order Management User's Guide* and the *Oracle Shipping Execution User's Guide*.

Setting Up Service Requests in Oracle TeleService

When setting up the Customer Party addresses using the Contact Center form, only if both the site and the site use is set up as active, will the addresses be displayed in the Bill-To and Ship-To addresses List of Values in the Repair Header Information block of the Repair Orders form.

For more information, please refer to the *Oracle TeleService Implementation Guide* for more information.

Setting Up Charges in Oracle TeleService

Setting up Charges includes certain Depot Repair specific steps. These setup steps are detailed in the following chapter.

1. Oracle Order Management and the Charges module in Oracle TeleService must be set up correctly to ensure that items can be used in the Depot Repair process. See Setting Up Inventory, page 2-9.

2. All Repair Material, Labor, and Expense items must have a valid Billing Type associated as part of the Item definition setup in Inventory. This Billing Type along with the Repair Type and Service Activity and Billing Type setup determine what Service Activity Billing Type is to be used for the Estimate or Actuals lines being created.

3. The Service Activity Billing Type is linked to an Oracle Order Management Order Type and Line Type for each operating unit.

4. Also, use the Service Request Multi Org Set Up window to set the defaulting rules

for the charges operating unit. If the Oracle Applications installation is a multi-org installation, then Oracle Depot Repair derives the appropriate operating unit for the order interfaced to Order Management based on the sequence associated with these rules. If not, the operating unit is derived from the profile option MO: Operating Unit.

5. Use the Time & Material Labor Schedule window to set up a schedule for the Business Process being used for depot repair. This is needed to perform any labor transaction in the Debrief form accessed from the Repair Tasks tab in the Repair Orders form.

For more details, please refer to the following sources of information:

- *Oracle TeleService Implementation Guide*
- Setting up Charges for Oracle Depot Repair, page 3-2

Setting Up Tasks

To use the Task Manager for Repair Job management, you will need to set up Resources within the Resource Manager module of Oracle Common Application Components.

It is recommended that you set up task status transition rules. To define status transition rules for task status and map it to the Oracle Depot Repair responsibility being used, use the Task Status form.

Please refer to the *Oracle Common Application Components Implementation Guide* for more information.

Setting Up Knowledge Management

In order to allow Oracle Depot Repair to make use of solutions stored in Oracle Knowledge Management, you need to perform operations both in Oracle Knowledge Management and in other Oracle applications. You must perform the operations in the related Oracle applications first.

Operations in Related Oracle Applications

The operations in related Oracle applications can be performed in any sequence.

1. Set appropriate profile options in Oracle Depot Repair:
   - CSD: Enable Knowledge Management to Yes.
   - CSD: Use Tasks from Knowledge Base Solutions to Yes.
2. Set up Diagnostic Codes and Service Codes in Oracle Depot Repair.

For more information, see Setting Up Diagnostic Codes in Oracle Depot Repair, page 3-34 and Setting Up Service Codes in Oracle Depot Repair, page 3-34.

3. Set up Bills and Routings in Oracle Bills Of Material, if WIP mode is used.

4. Set up Task Templates and Task Parts in the Task Manager of Oracle Common Application Components and Oracle Spares Management respectively, if Task mode is used.

Operations in Oracle Knowledge Management

The main objective is to set up Solutions in Oracle Knowledge Management and to associate Diagnostic Codes and Service Codes to Solutions, as follows:

1. If an appropriate Solution does not exist to which you can add the associated objects, then create a Solution.

2. Include the Diagnostic Code (for example, DC100) in the title or body of the Oracle Knowledge Management Solution.

3. Specify one or more Depot Service Codes as External Objects in the Oracle Knowledge Management Solution.

4. Add one or more Related Items to the Oracle Knowledge Management Solution.

   In the standard Oracle Knowledge Management search initiated from Oracle Depot Repair, the Repair Order item is matched against the Related Items of a Solution.

5. If you want to be able to add in Task Template Groups directly from a Solution, then add one or more Task Template Groups to the Oracle Knowledge Management Solution.

6. Optionally, add one or more Related Categories to the Oracle Knowledge Management Solution.

   These categories are Solution categories, and are used to organize Solutions in Oracle Knowledge Management. They are not used by Oracle Depot Repair directly, but they provide you with more search options, if you want to modify the standard Oracle Knowledge Management search initiated from Oracle Depot Repair.

Please refer to the *Oracle Knowledge Management Implementation Guide* for more information.

3

Oracle Depot Repair-Specific Setup Steps

This chapter describes implementation tasks that are specific to Oracle Depot Repair.

This chapter covers the following topics:

- Completing the Prerequisite Setups
- Setting Up Charges for Oracle Depot Repair
- Defining Billing Type Codes
- Mapping Billing Type Codes to Billing Categories
- Defining Service Activities and Billing Types
- Defining Service Business Processes
- Defining Installed Base Transaction Sub Types
- Setting Up Time and Material Labor Schedules
- Setting Up Repair Types
- Setting Up Statuses, Status Transitions, and Repair Type Transitions
- Setting Up Service Request Types for Depot Repair
- Setting Up Depot Repair Reason Codes
- Setting Up Customer Profiles
- Setting Up Diagnostic Codes in Oracle Depot Repair
- Setting Up Service Codes in Oracle Depot Repair
- Setting Up Service Code Recommendations
- Defining Oracle Depot Repair Lookup Codes
- Setting Up Oracle Depot Repair Profile Options
- Setting Up Message Action Codes
- Managing Users
- Login Interfaces

- Roles, Responsibilities, and Permissions
- Creating Oracle Depot Repair Users
- Charges and Repair Types Setup Example

Completing the Prerequisite Setups

With reference to the Implementation Checklist, page 2-5, make sure that all the implementation steps prior to the Oracle Depot Repair specific tasks are completed and reviewed before proceeding with the tasks detailed here.

Setting Up Charges for Oracle Depot Repair

> **Note:** Every item to be processed using Charges must be set up in Inventory as a Material, Labor, or Expense (MLE) item. This means every item in Oracle Applications that may need repair must be set up as a Charges MLE item.

Charges is a module of Oracle TeleService. Setting up Charges for all service-related processing consists of steps that serves a variety of Oracle applications, including Oracle Depot Repair. This section describes the Charges setup steps, with a particular orientation to Oracle Depot Repair processes and operations.

For detailed information on setting up Charges, see the *Oracle TeleService Implementation Guide*.

Setting up Oracle Charges for Depot Repair processing includes the following setup steps:

- Defining Billing Type Codes, page 3-3
- Mapping Billing Type Codes to Billing Categories, page 3-3
- Defining Service Activities and Billing Types, page 3-4
- Defining Service Business Processes, page 3-6
- Defining Installed Base Transaction Sub Types, page 3-7
- Setting Up Time and Material Labor Schedules, page 3-10

Billing Categories classify Billing Types into Material, Labor, and Expense. Each serviceable item in Inventory is classified using Billing Type Codes associated to a Billing Category.

A Service Activity Code is a type of action to be performed, for example, replace, return, install, drain, fill. The combination of Billing Type and Service Activity defines the

Order Type for a given operating unit. It also provides the basis upon which discounts for a Service Contract can be applied.

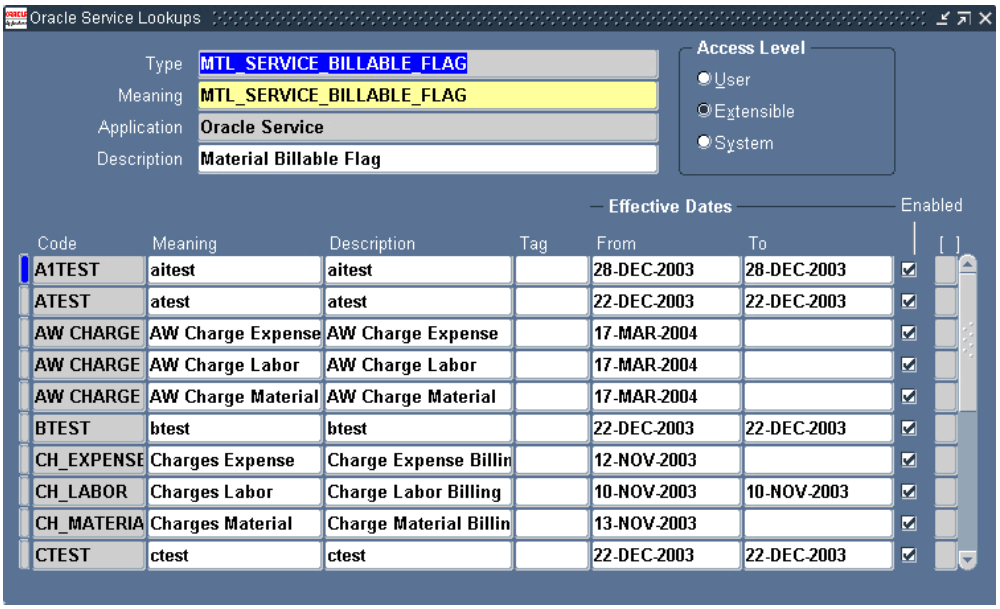
Defining Billing Type Codes

To define the Billing Type Codes, use the Oracle Service Lookups window.

To define Transaction Billing Type Codes:

1. From the Navigator, use the following path to open the Oracle Service Lookups window:

   Service Request > Setup > Customer Support Lookups.



2. Query up the Lookup Type MTL_SERVICE_BILLABLE_FLAG.

3. Add the new required Billing Type Codes. You can use the online help for more information.

   The seeded Billing Type Codes are M, L, and E.

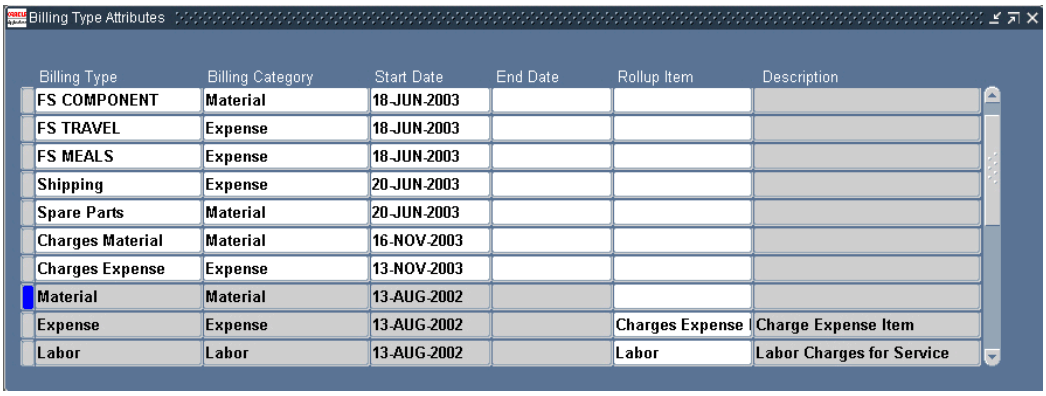
Mapping Billing Type Codes to Billing Categories

To associate Billing Type Codes to Billing Categories, use the Billing Type Attributes window. The seeded Billing Categories include Material, Labor, and Expense.

Use the following path to navigate to the Billing Type Attributes window:

Switch responsibilities to Customer Support, Vision Operations and navigate to Setup >

Charges > Billing Type Attributes.



Only the Billing Types associated with a Billing Category in this window appear in the Billing Type Name List of Values in the Service Activities and Billing Types form. Similarly only the Billing Type Names associated here appear in the List of Values for Billing Type: Material, Labor, and Expense in the Repair Types form.

> **Note:** You cannot associate the Billing Category Labor to a new Billing Type. The seeded Labor Billing Type is mapped to the Labor Billing Category.

Defining Service Activities and Billing Types

A Service Activity is a business operation, such as Replacement or Return for Repair. Each Service Activity is classified as either an Order or a Return - this is specified by its Line Category.

A Service Activity has a one to many relationship with Service Activity Billing Type. A Service Activity Billing Type, for example, Advanced Exchange: Material, is an intersection between Service Activity Advanced Exchange and Billing Type Material.

The Service Activity Billing Type is linked to an Oracle Order Management Order Type and Line Type for each operating unit.

Oracle Order Management Order and Line Types are associated with Service Activities that are assigned to Repair Types in Oracle Depot Repair. When a user chooses a Repair Type, these Order and Line Types determine the processing of charge lines (RMA, Ship, Estimate) for a Repair Order. Please refer to the *Oracle TeleService Implementation Guide* and the *Oracle Order Management User's Guide* for more details.

Oracle Order Management provides seeded Workflow process definitions for both orders and lines. It enables you to define both order header and order line Service Activities. The seeded Service Activities that Order Management provides are, however, not mapped by default.

A Service Activity is operating unit-specific. The Line Category is set at transaction level

to prevent the use of a single Service Activity as an order in one operating unit and a return in another.

Use the Service Activities and Billing Types window to confirm or define Service Activities and associated Billing Types, Order Management header types, and line types as detailed below.

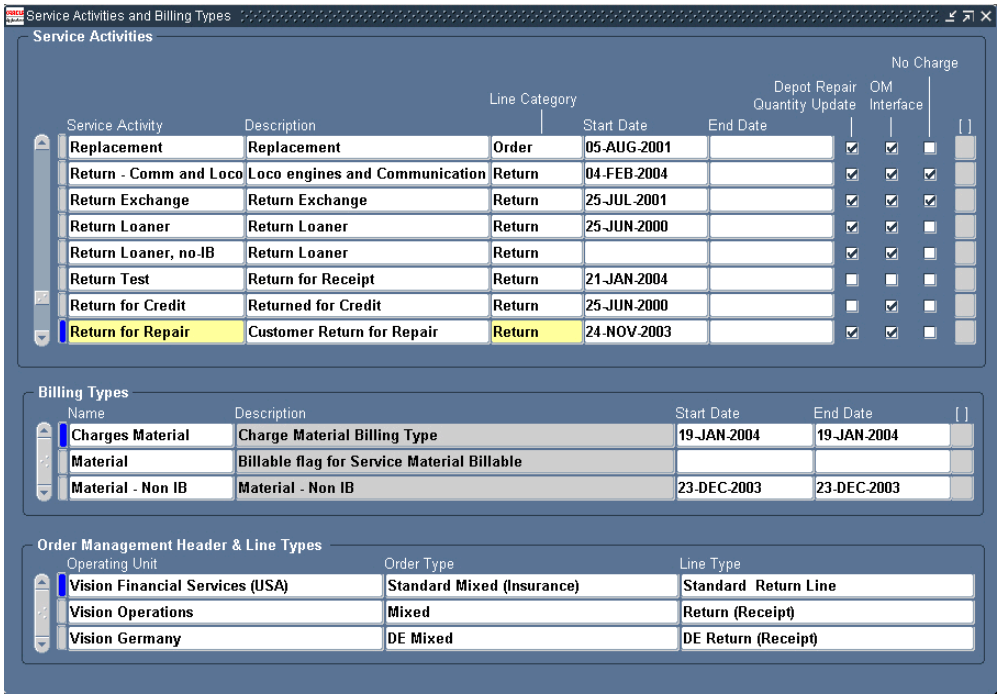
The Order Management Header & Line Types region is used to specify the organization, header type, and line type - in the Operating Unit, Order Type, and Line Type fields respectively - to be used when a charge line is submitted to Order Management. These values are used to retrieve an Order Management header type and line type from the setup while submitting the order.

Note: You can associate multiple Billing Types to a Service Activity.

To Define Service Activities and Billing Types:

1. Open the Service Activities and Billing Types window using the following navigation path:

   Service Request > Setup > Charges > Service Activities and Billing Types.



2. Select the New toolbar icon to create an empty row for your Service Activity Billing Type.

3. Enter the appropriate values in the Service Activity and Line Category Code fields.

4. In the Related Billing Types region, select the appropriate Billing Type to be associated with the Service Activity you are creating.

5. Select the Depot Repair Quantity Update checkbox to update the depot inventory.

   Only Service Activities with Depot Repair Quantity Update check box selected will be displayed in the Service Activity list of values in the Logistics tab in the Repair Types window.

6. Leave the OM Interface check box selected (the default value).

   This setting means the customer can be billed for charges for this activity.

7. Select the No Charge flag checkbox if you do not want to charge the customer for this Service Activity.

   Please note that an estimate or actuals line is discounted based on the contract associated with the Repair Order only if the Service Activity Billing Type of the estimate or actuals line is also set up for the contract. The Service Activity Billing Type of the estimate or actuals line is determined based on the Repair Type for the Repair Order, and the Billing Type for the estimate or actuals line item.

   For more information on the contract associated with a Repair Order, see Determine Contract and Price List Defaults at Repair Order Creation in the *Oracle Depot Repair User Guide*.

8. Save the Service Activity and exit the Service Activities and Billing Types window.

Defining Service Business Processes

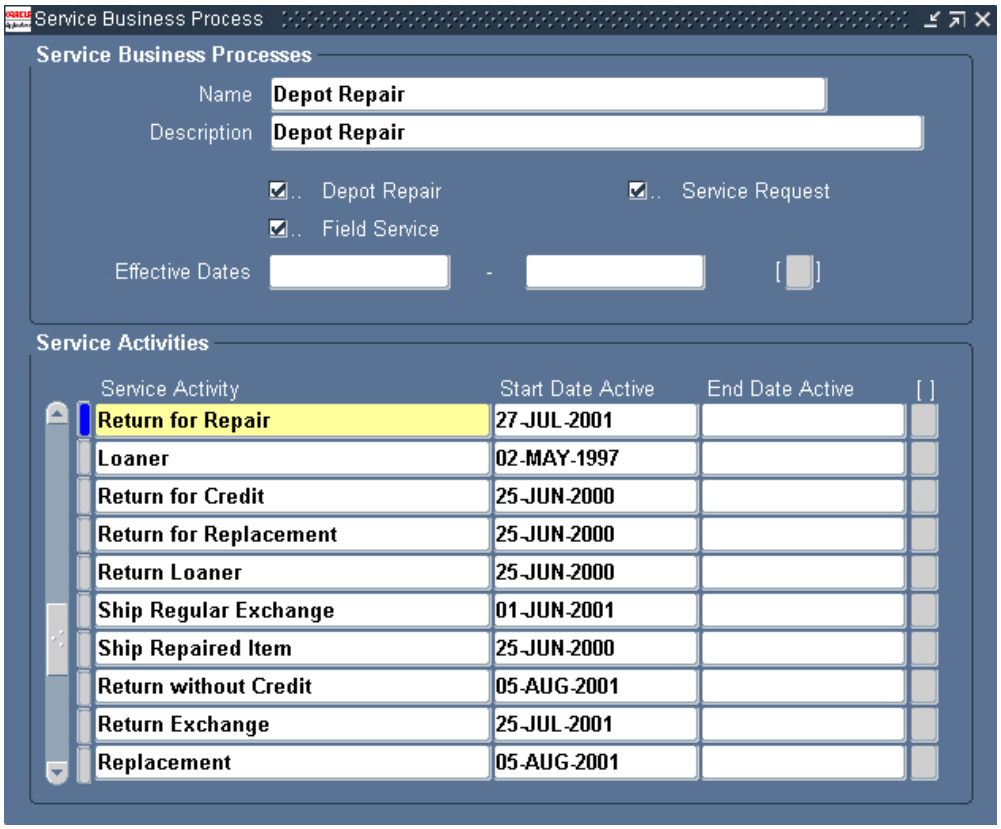
A Business Process is a group of Service Activities created with a view to restricting Service Activity availability. A Business Process supports the charge lines that the line of business in your organization can utilize, such as, Depot Repair.

Use the Service Business Process window to define your Business Process and associate Service Activities with it. Ensure that the Depot Repair check box is selected when setting up the Business Process. For a particular Business Process, the selected flag check boxes indicate the modules (Service Request, Field Service, Depot Repair) in which this Business Process can be used.

To Define Service Business Processes:

1. Open the Service Business Process window using the following navigation path:

   Service Request > Setup > Charges > Service Business Process.



2. Enter the appropriate value in the Name and Description fields.

3. Select the Depot Repair check box.

   You can also optionally select any of the other check boxes for the applications (Service Request, Field Service) where you want this Business Process to be visible.

4. Enter the Effective Dates for the Business Process if you want the Business Process to be used only for a limited time.

5. In the Service Activities region, select the Service Activity you want to associate with the Business Process.

6. Save your work, and exit the Service Business Process window.

Defining Installed Base Transaction Sub Types

Each Service Activity that is required to process an Installed Base trackable item must have an Installed Base Transaction Sub Type with the same name as the Service Activity. For example, for the Service Activity named Return for Repair, we define the corresponding Transaction Sub Type with the name Return for Repair.

Note: For items that are not Installed Base trackable, the Service Activities associated with the Repair Type should not have Installed Base Transaction Sub Types defined. Hence you need to have separate Repair Types and Service Activities defined for Installed Base trackable items and for non-trackable items.

Transaction Sub Types Window

Use the Transaction Sub Types window to specify the type of update that can be performed in an Installed Base instance by transactions originating from Depot Repair that are interfaced with Installed Base.

Transaction Sub Types Area

For Depot Repair, the Service Type checkbox should be selected. When the Service Type checkbox is selected, the Name field List of Values displays the Service Activities for which you can create an Installed Base Transaction subtype.

Source Info and Non Source Info Areas

You can define the transactions and the kind of actions they can perform on the Source, Non Source, and Parent instances.

- Source Info area: Specify details of the instance being transacted, such as in a sales order, as a shipped or a returned item.

  Note: Transaction sub types defined as shipments, that is, which have OM_SHIPMENT as their source transaction type, should not have Reference Reqd checked in the Source Info area. This is because Shipping does not understand and does not need Installed Base reference numbers.

  Also, for non-serialized Installed Base trackable items, when an item is shipped back to the customer, a new instance with a new Installed Base reference number is created in Installed Base for the shipped instance. For a serialized Installed Base trackable item, the shipped item instance is identified in Installed Base by the shipped item and the serial number.

- Non Source Info area: Specify information on a related instance, such as one that is being replaced by the source instance.

  Non Source information is required for the Service Activities associated with the Repair Types Exchange, Advance Exchange, and Replacement. In these cases, to transfer the warranty, the Non Source Info region should have Reference Reqd check box selected. This ensures that at the time of shipping the new item, the warranty information is transferred.

Note: For the Replacement Repair Type, the damaged item status is changed to EXPIRED by setting this value in the Status field in the Non Source Info area.

- Parent Info area: This area is reserved for future use.

The Change Owner check box and Change Owner To fields determine whether the instance ownership has to be changed.

In the case of Repair Type Return and Repair, for example, the Transaction Sub Type for Return and Ship in the Source Info area has neither the Change Owner check box selected nor the Change Owner To field populated.

But in the case of Repair Type Exchange, the item is changed, and hence the Source Info area for the Transaction Sub Types for Return and Ship has the Change Owner check box and Change Owner To field selected.

Source Transaction Types Area

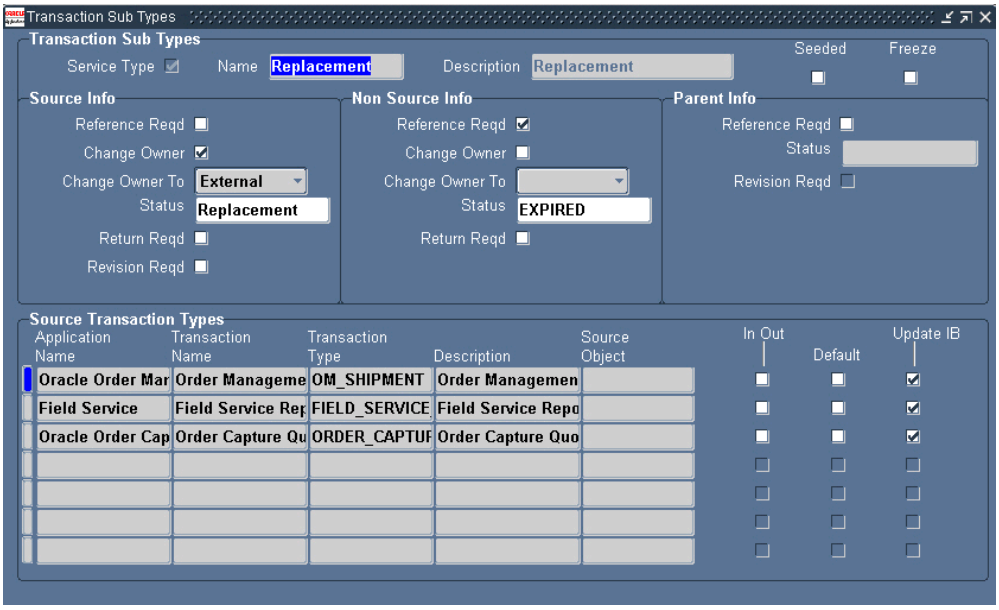
In the Source Transaction Types area, for Oracle Depot Repair, only Oracle Order Management needs to be set up as a source application. Ensure also that the Update IB check box is selected here.

Detailed information on Installed Base Transaction Sub Types is available in the *Oracle Installed Base Implementation Guide*.

To Define Installed Base Transaction Sub Types:

1. Open the Transaction Sub Types window using the following navigation path:

   Service Request > Setup > Charges > Install Base Transaction Types



2. Enter the appropriate values in the fields as explained above.

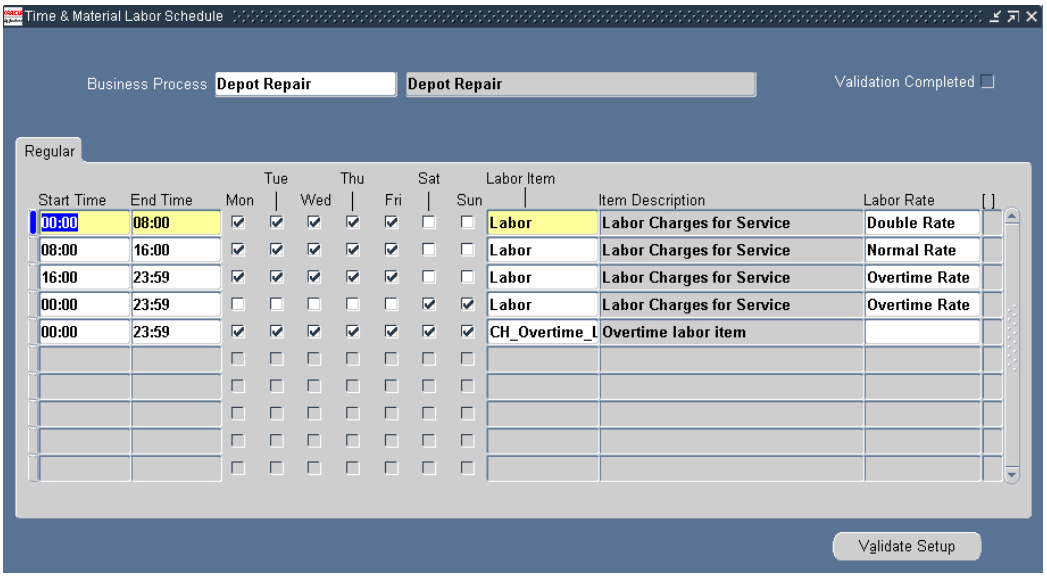
3. Save your work, and exit the Transaction Sub Types window.

Setting Up Time and Material Labor Schedules

Use the Time & Material Labor Schedule window to set up schedules for the Depot Repair Business Process. This is required to process any labor transaction in the Debrief form accessed from the Repair Tasks tab in the Repair Orders form.

From the Navigator, use the following path to access the Time & Material Labor Schedule window:

Service Request > Setup > Charges > T&M Labor Schedule.



For more information, please refer to the *Oracle TeleService Implementation Guide*.

Setting Up Repair Types

Oracle Depot Repair supports the following Repair Types:

- Advance Exchange

  The depot sends a replacement item to the customer before receiving the damaged item for core credit.

- Exchange

  The depot sends a replacement item to the customer after a broken item is received from the customer for core credit.

- Loaner

  The depot sends a loaner item to the customer.

- Loaner, Repair and Return

  This is the same as Repair and Return with an item loaned to the customer before receiving the broken item, so as to bridge the gap while the damaged item is being repaired.

- Repair and Return

  A broken item is repaired by the depot, and then returned to the customer.

- Replacement

The depot sends a new replacement item to the customer without having to receive a damaged item from the customer.

- Standard

  The depot agent is uncertain about a customer need, and is unable to take a decision before further inspection of the damaged item. RMAs and Sales Orders are created manually. The depot agent has the option to carry out all functions in a manual mode.

- Refurbishment

  A Repair Order and its associated Service Request is created in the Spares Management of Oracle Field Service as a result of a demand for refurbishment or replenishment. The Repair Order has a Repair Type of Refurbishment, and has two transaction lines, Move In and Move Out.

  The Move In line tracks the shipment of the defective item from Spares Management, and its reception into the depot. The Move Out line processes the shipment of the repaired item back to Spares Management.

The Repair Types Screen

Repair Types setup determines the proper processing and management of Repair Orders by the application and service organization. The Repair Types Setup screen determines which, and how each of the seeded Repair Types are used in the service organization, whether the Oracle WIP or the Task Manager module of Oracle Common Application Components is used in repairs management, and how charge lines are identified as they are passed to Oracle Order Management.

A service organization can also make a copy of the selected Repair Type, and customize as necessary. Though the value of the Repair Type Ref field drives application process automation, this capability enables service organizations to better distinguish their Repair Types if necessary.

Use the Repair Types Setup window to perform the following tasks:

- Customize the Repair Types.
- Select Repair Modes for Repair Types. A Repair Order is created with the repair mode defined for the chosen Repair Type.
- Select Repair Type Ref for custom Repair Types.
- Select Business Process for Repair Types.
- Select default Service Activity Codes for RMA order (Return) and Sales order (Ship) lines for the Repair Type. The default item transactions are created with the order and line types associated with the Service Activity Billing Type for the Repair Type

and repair item. This classifies the created RMA order and Sales order lines for respective Repair Types.

- Select a Pricelist for the Repair Type. This is optional.

  The default price list for a Repair Order is the Pricelist for the Repair Type if either of the following cases is true:

  - There is no default contract and the profile option CSD: Default Price List is not set.

  - There is a default contract, but the contract does not specify a price list, and the profile option CSD: Default Price List is not set.

- Select Billing Types and enter Service Activity Code for Material, Labor, and Expense charge lines. You can enter more than one Billing Type and Service Activity Code for Material and Expense charge lines. This classifies the Material, Labor, and Expense charge lines for Order Management processing. This is needed only if using Repair Estimates functionality.

- Select preferences to process Product Transaction lines for Repair Types by selecting Automatically Enter and Book RMA.

  Note: Only the Service Activities associated with the selected Business Process for the Repair Type will be displayed in the Service Activity Code List of Values in the Repair Types window. The same is true for the Service Activity Code List of Values in the Logistics tab in the Repair Orders window.

Repair Types Setup Fields

Control	Description	Editable	Seeded Values
General			
Repair Type	A short description of the Repair Type. This description appears in the application during Repair Type selection	Yes	Same name as Repair Type Ref, but editable
Description	A more detailed explanation of the Repair Type	Yes	--

Control	Description	Editable	Seeded Values
Active (check box)	This read-only field indicates if the Repair Type is active, based on the Start Date and End Date	No	--
Business Process	The combination of Repair Type Ref and Business Process identifies the applicable Transaction Billing Types	Yes	Depot Repair
Repair Mode	Determines whether Oracle WIP or the Task Manager module of Oracle Common Application Components is used for Repair Job management	No	Task WIP
Repair Type Ref	Identifies the type of application logic that applies to the Repair Type	No	Advanced Exchange Exchange Loaner Loaner, Repair and Return Refurbishment Repair and Return Replacement Standard
Pricelist	Identifies the default price list for the Repair Type.	Yes	--
Start Date	The effective start date of the Repair Type	Yes	--
End Date	The effective end date of the Repair Type	Yes	--
Internal Order (check box)	For Internal Order Refurbishments	Yes	--

Control	Description	Editable	Seeded Values
Service Activity Codes			
Pre-Repair RMA	Classifies the created RMA order (Return) line for respective Repair Type reference. If Repair Type reference does not require this RMA line, this entry is disregarded.	Yes	--
Pre-Repair Ship	Classifies the created Sales order (Ship) line for respective Repair Type reference. If Repair Type does not require this Sales order line, this entry is disregarded.	Yes	--
Post-Repair RMA	Classifies the created RMA order (Return) line for respective Repair Type reference. If Repair Type reference does not require this RMA line, this entry is disregarded.	Yes	--
Post-Repair Ship	Classifies the created Sales order (Ship) line for respective Repair Type reference. If Repair Type reference does not require this Sales order line, this entry is disregarded.	Yes	--
Repair Type Details: Check box			
Automatically enter and book RMA	Decides whether to default Auto RMA check box as checked or unchecked for Repair Orders. When a Repair Order is created with this check box selected, an RMA (Return) line is entered and booked automatically. You can still manually override the default for individual Repair Orders.	Yes	--

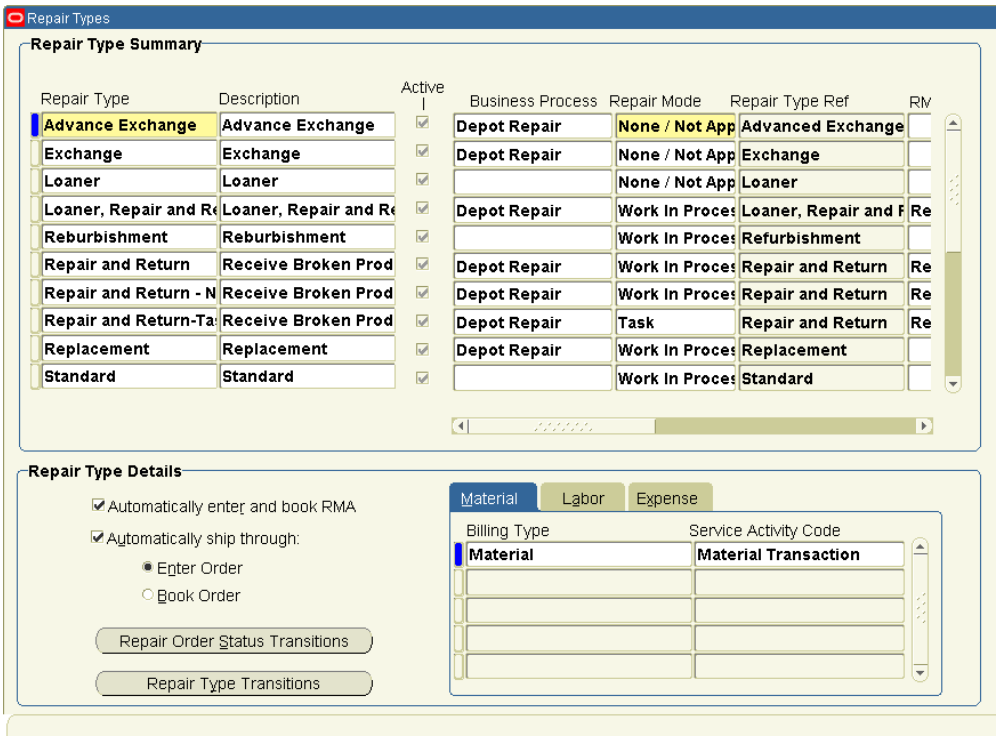
Control	Description	Editable	Seeded Values
Automatically ship through: *Radio buttons:* -- Enter Order -- Book Order	*This is available only for repair types whose Repair Type Ref is Advance Exchanged Exchange, Loaner, or Loaner, Repair and Return.* When a Repair Order is created with this check box and one of the radio button options selected, a Ship line is created and processed according to the option chosen: -- Enter Order results in ship line Status of Submitted. -- Book Order results in ship line Status of Booked.	Yes	--
Repair Type Details: Billing Type			
Material	Enables the classification of Material charge lines for Order Management processing	Yes	Material
Labor	Enables the classification of Labor charge lines for Order Management processing	Yes	Labor
Expense	Enables the classification of Expense charge lines for Order Management processing	Yes	Expense

For details on seeded Repair Types setup, see Charges and Repair Types Setup Example, page 3-56.

To Set Up Repair Types:

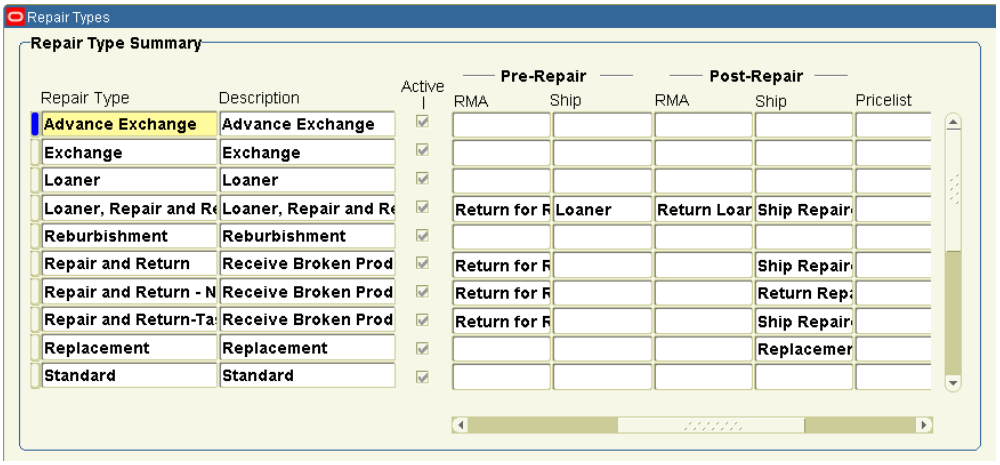
1. From the Depot Repair Navigator, use the following path to open the Repair Types window:

   Depot Repair > Setup > Repair Types



2. Define the necessary Repair Types.

3. Enter the fields in the Repair Types window making necessary selections for defining your Repair Types as explained above.



4. Save your work.

   After a Repair Type is set up, it should have default values for the following fields:

   - Repair Mode

- Repair Type Ref
- Business Process
- Default Service Activity Codes (Pre-Repair RMA, Pre-Repair Ship, Post-Repair RMA, Post-Repair Ship). Default values are required only for the applicable transaction for the Repair Type.

5. Billing Types and associated Service Activity Codes (Material, Labor, Expense). Default values are needed only if Repair Estimates functionality is used.

Setting Up Statuses, Status Transitions, and Repair Type Transitions

In Oracle Depot Repair, you can monitor and record the progress of a repair order through states and statuses. You associate statuses to repair types through record status transitions, where a transition is defined with a Current and a Next status. The status change of repair orders is then controlled by these status transitions.

Statuses in Earlier Releases of Oracle Depot Repair

In earlier releases of Oracle Depot Repair, only repair *statuses* existed to categorize repair order progress. There were four seeded repair statuses - Draft, Open, Hold, Closed - and they were not extensible.

This concept has been extended to allow statuses to be defined within *states*. The current *states* correspond to the earlier *statuses*. What you can now do is to define many lower-level statuses within the new states.

Terminology

State

A state describes the high level condition of a repair order. There are four seeded states in Oracle Depot Repair: Draft, Open, Hold, Closed, and they are not extensible.

Status

A status describes the more detailed mode or condition of a repair order. Each status is associated with one and only one state. Each state can be associated with many statuses.

Each status associated with a state inherits the limitations that are associated with that state. Statuses associated with Hold or Closed states restrict users as to what operations they can perform in Oracle Depot Repair. For more information, see Constraints on User Operations, page 3-19..

You can create as many statuses as you want.

Note: The Draft state is a special case, and has one status, Draft. Both the Draft status and the Draft state are used by the system only. For example, you cannot associate any of your own statuses to the Draft state.

Repair Order Status Transitions

A Repair Order Status Transition is the definition of two repair order statuses, the Current Status and the Next Status. For each repair type, you must define a start status and one or more repair status transitions: these transitions determine the only allowable status transitions for the given repair type.

You associate a repair status to a repair type only through the status transitions; that is, by specifying it either as a Start status, or a Current or Next status of a status transition pair.

Repair Type Transitions

The same status can be defined for several different repair types.

In this situation, when a repair order status has been defined as associated to other repair types, and your repair order has the appropriate common status, you can update the repair type of the repair order to any of the other repair types.

For example, you can define a status of In Repair for the repair type Repair and Return and also Loaner, Repair and Return. The repair type of a repair order, whose repair type is currently Repair and Return and whose status is In Repair, can be updated to Loaner, Repair and Return.

Note: Repair Type Transitions do not add, delete, nor default any logistic lines. After a repair type transition is performed on a repair order, you must perform manual adjustments to your logistic lines, if your organization processes require this.

Constraints on User Operations

If a status is associated with the Open state, setting that status for a repair order imposes no constraints for users performing Oracle Depot Repair operations.

If the status is associated with the Hold state, the following are the actions that you cannot perform for a repair order in that status:

- Update a Repair Order, other than change the Status
- Select or change the Default Contract field on the Coverage window launched through the menu path Tools > Coverage
- Create, update, submit, or book logistics lines

- Create a repair job
- Perform Material or Complete Job Transactions
- Create or update repair tasks
- Split a repair order
- Update counters

If the status is associated with the Closed state, the following are the only actions that you can perform for a repair order in that status:

- Update the Repair Order Status
- View and update Notes
- View Configuration, from the Details tab
- Send and view messages, from the Data menu option
- View Coverage and Contracts
- Enter Task Debrief
- View and Refresh Repair Jobs
- Print estimates
- View the current workflow

Overview of Status and Transition Setup Processes

This section consists of the following topics:

- Creating the Status Lookup, page 3-20
- Associating the Status to a State, page 3-21
- Adding a Status Transition to a Repair Type, page 3-22
- Creating a Repair Type Transition, page 3-24

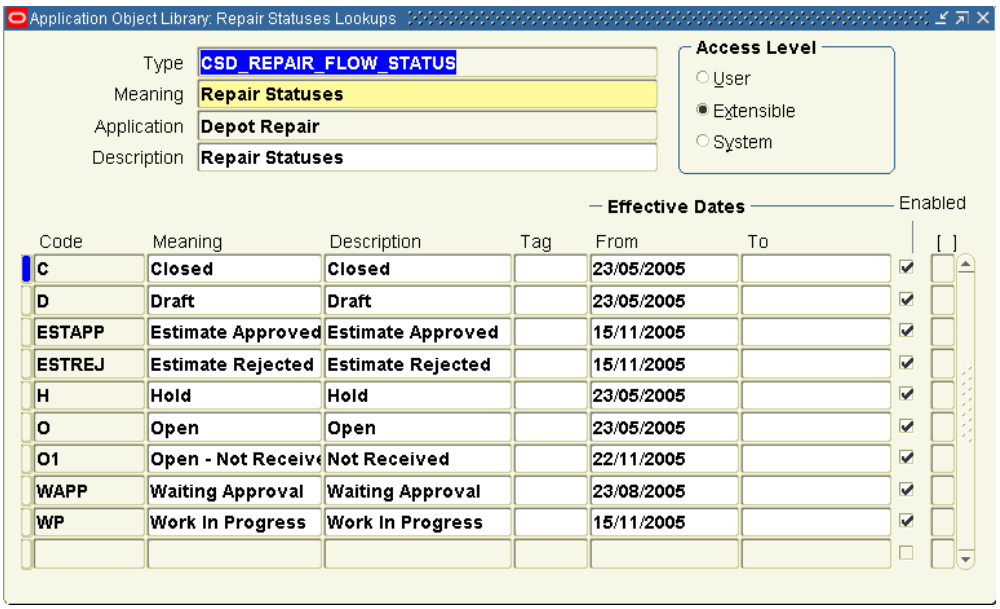
Creating the Status Lookup

You must first create a repair status lookup.

Steps

1. From the Depot Repair Navigator, use the following path to open the Repair Statuses Lookup window:

   Depot Repair > Setup > Repair Statuses



2. Add a new record, with values for Code and Meaning.

3. You can also add values for Description, Tag, and Effective From and To dates.

4. To allow activation of the status, ensure that the Enabled check box is set

5. Save your work.

Associating the Status to a State

You must associate each status that you create with a State of Open. Hold, or Closed..

There are limitations on the operations that can be performed on a repair order set to a Status associated with either the Hold or the Closed State. For details, see Constraints on User Operations, page 3-19.

Important: After you have associated a Status with a State, ***you cannot update that association***.

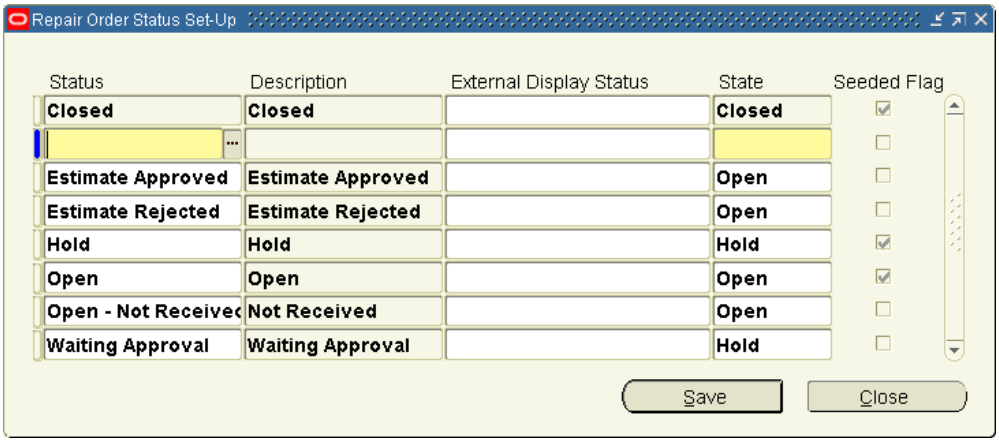
Important: You can delete non-seeded Status-State associations, but you

should do so with great care. Repair orders whose latest status resulted from a deleted Status-State association may be corrupted.

Steps

1. From the Depot Repair Navigator, use the following path to open the Repair Order Status Set-Up window:

   Depot Repair > Setup > Repair Order Status Set-Up



2. Select the Status and State.

3. Optionally enter a Description.

4. Save your work.

Adding a Status Transition to a Repair Type

In order to make use of statuses in repair orders, you must associate your statuses with at least one repair type - through a status transition. For each repair type, you must also specify a start status.

You can associate a repair status to several repair types, by including it in the status transitions of each repair type.

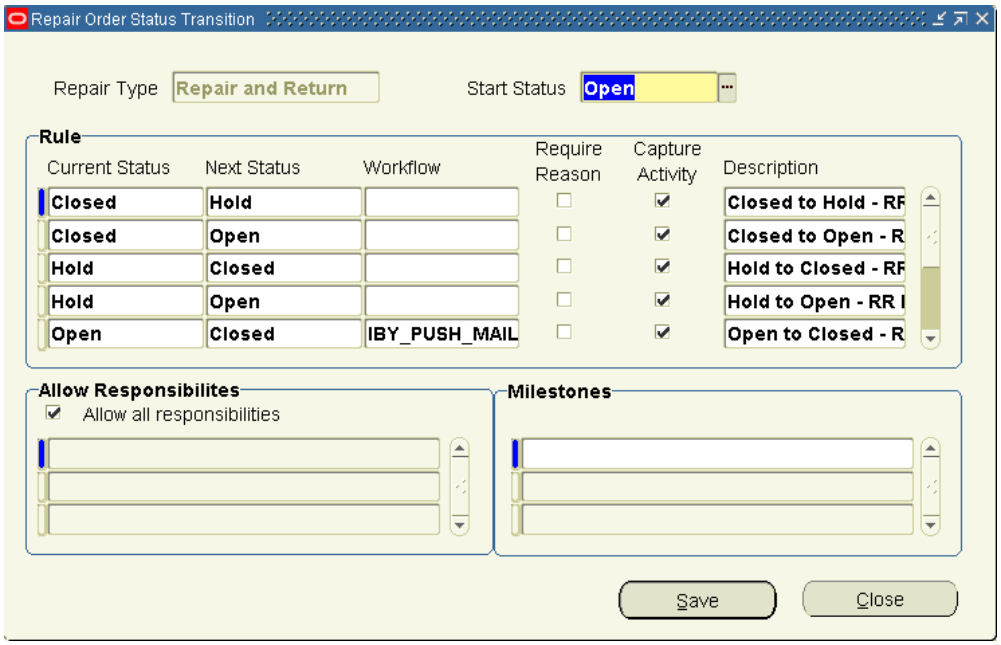
A status transition defines the Current and Next statuses that are to be allowed for the repair orders of a given repair type.

Steps

1. If you are not already in the Repair Types window, then, from the Depot Repair Navigator, use the following path:

Depot Repair > Setup > Repair Types

2. Select a Repair Type and click Repair Order Status Transitions.



3. Select a Start Status.

4. For each status transition, perform the following in the Rule area:

   - Select a Current Status and a Next Status.
   - Optionally select a Workflow that is to initiated when the repair order status changes fron the Current to the Next status.
   - Optionally check Require Reason, if you want to make it mandatory for a status changer to enter a reason at the time of status change.
   - Optionally check Capture Activity, if you want changing to the Next status to result in the creation of a viewable Activity.
   - Optionally enter a Description.

5. For each status transition, select the transition and, in the Allow Responsibilities area, either select the check box "Allow all responsibilities" or select individual responsibilities for which the status transitions are allowed.

6. For each status transition, select the transition and optionally select one or more milestones, to be used for DBI reporting metrics.

If you select Repair Start or Repair End or both as milestones for any transition, you will be able to see the metrics for a repair order in the Repair Order page, designed to process high-volume repairs. The earliest Repair Start time and the latest Repair End time, taken at the times of the status transitions, are recorded for the repair order, and appear as Key Performance Indicators in the Debrief Report tab of the Repair Order page.

7. Save your work.

Creating a Repair Type Transition

Repair type transitions are possible only when a repair order status is associated with more than one repair type. Defining a repair type transition allows users to switch the repair type of a repair order, when the repair order status is a status common to the repair types.

> **Important:** Repair type transitions do not add, delete, nor default any logistic lines. After a repair type transition is performed on a repair order, you must perform manual adjustments to your logistic lines, if your organization processes require this

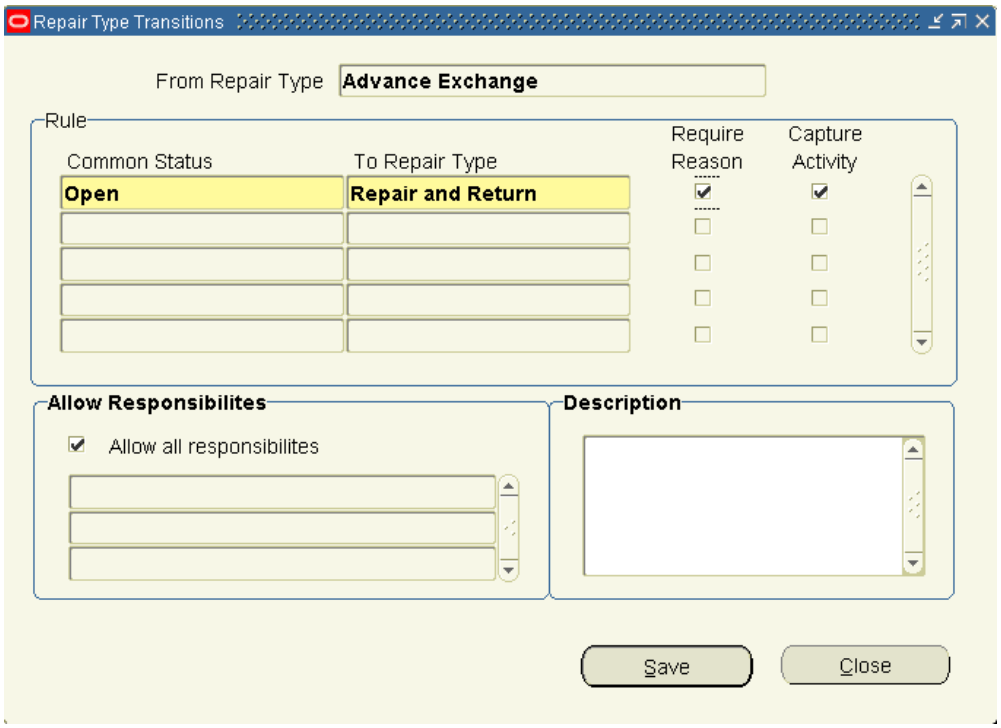
Steps

1. If you are not already in the Repair Types window, then, from the Depot Repair Navigator, use the following path:

   Depot Repair > Setup > Repair Types

2. Select a Repair Type and click Repair Type Transitions.

   The From Repair Type field shows the current repair type.



3. For each repair type transition, perform the following in the Rule area:
   - Select a Common Status and a To Repair Type.
   - Optionally check Require Reason, if you want to make it mandatory for a repair type changer to enter a reason at the time of repair type change.
   - Optionally check Capture Activity, if you want changing to the new repair type to result in the creation of a viewable Activity.
4. For each repair type transition, select the transition and, in the Allow Responsibilities area, either select the check box "Allow all responsibilities" or select individual responsibilities for which the repair type changes are allowed.
5. For each repair type transition, select the transition and optionally enter a Description.
6. Save your work.

Setting Up Service Request Types for Depot Repair

Service request types help categorize your service requests. For each service request type, you can set up service request statuses.

Each service request type can be linked to an existing Oracle Workflow process. The

workflow can be automatically launched when the service request is created (not when it is updated) or manually launched depending on the settings you enter while defining service request types.

You must define at least one service request type for Oracle Depot Repair use. Typically you define one service request type called Depot Repair. However, you can use any name for the service request type, so long as it is associated with a Business Process that can be used in Oracle Depot Repair. See Defining Business Processes, page 3-6.

The new service request types set up for Oracle Depot Repair use and their related statuses register as entries in the lists of values for their fields in the Repair Orders window. See the *Oracle TeleService Implementation Guide* for more information.

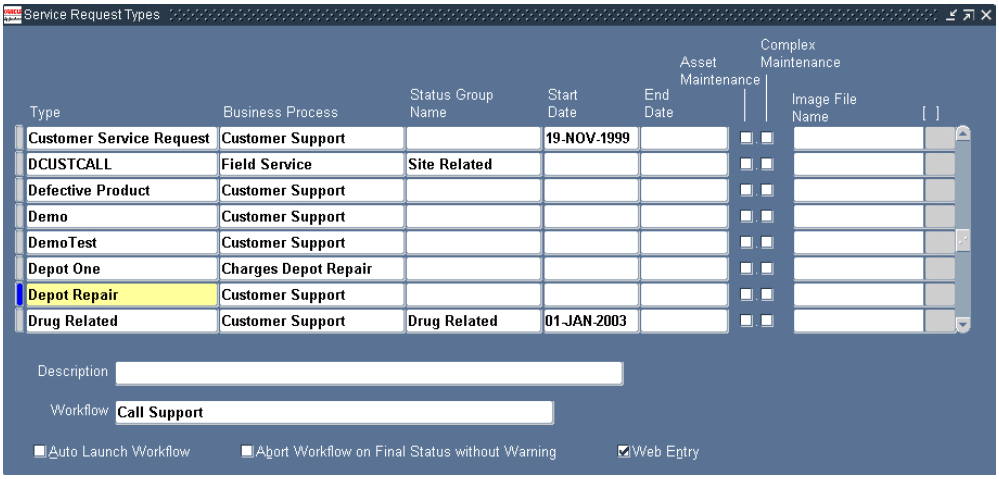
The Service Request Type window is used to link a Service Request Type to a Business Process. The Service Request Type Depot Repair needs to be associated with the applicable Business Process for your organization.

To Set Up Service Request Types:

1. Navigate to Service Request Types window using the following path:

   Service Request > Setup > Service Requests > Request Types

   The window lists all the existing service request types.



2. Click the New toolbar button to create a blank row for defining your service request type.

3. In the Type field, enter the name Depot Repair for the service request type.

   Typically, you have one service request type called Depot Repair, but it is not essential to have that exact name. You must have at least one service request type that is mapped to the Depot Repair Business Process.

4. In the Business Process field, select the Business Process for which this service

request type is being created. In this case, the Business Process is Depot Repair.

5. Enter the Status Group Name, which in this case is Depot Repair.

6. Enter the effective dates for the service request type in the Start Date and End Date fields.

7. Enter a brief description of the request type in the Description field.

8. In the Workflow field, select the Generic workflow. Do not select the Auto Launch Workflow check box, if this workflow is selected.

9. Optionally, select from the available check boxes. Refer to the following table for details of the actions initiated when the checkboxes are selected.

Checkbox	Action
Auto Launch Workflow	Launches workflow automatically when the service request is saved. Not to be used with Oracle Depot Repair Generic Workflow.
Abort Workflow on Close	Aborts workflow when service request status is set to closed
Web Entry	Makes this service request type accessible to web entry through *i*Support. Currently not used with Oracle Depot Repair.

10. Save your work.

Setting Up Depot Repair Reason Codes

Reason Codes are values defined for the different reasons that affect the return of an item for repair.

Oracle Depot Repair provides the following seeded Reason Codes:

Code	Description
ADV_EXCH	Advanced Exchange
APPRV	Customer Approves the RMA

Code	Description
EST	Estimate Approved
HOLD	Repair On-Hold
LOANER	Loaner
PRCD RPAIR	Proceed with Repair
REJECT_1	Product Unrepairable
REJECT_2	Declined Repair
REV_EST	Revised Estimate Approved
WAIT_1	Customer Contacted
WAIT_2	Awaiting Approval

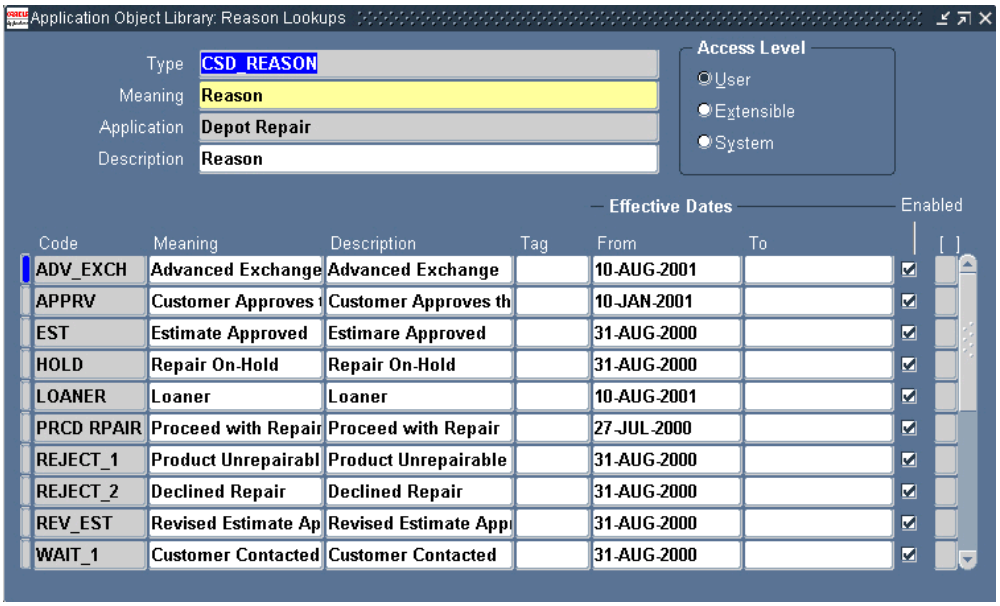
You can set up the reason codes for use in your organization using the Application Object Library: Reason Lookups window.

> **Note:** You can define additional reason Lookup Codes using the Lookups window. For detailed instructions, see Defining Oracle Depot Repair Lookup Codes, page 3-40.

To Set Up Depot Repair Reason Codes:

1. From the Depot Repair Navigator, use the following path to navigate to the Application Object Library: Reason Lookups window:

   Depot Repair > Setup > Reason



2. The Reason Lookups window consists of the following fields:

- Type: refers to the Lookup Type and is seeded value that the user cannot modify
- User Name: refers to a user definable value for this Lookup Type
- Application: refers to the application that owns the reason types being defined
- Description: refers to the description of the Lookup Type
- Code: is the unique code assigned to a reason type
- Meaning: represents the meaning of the Code
- Description: refers to the description for the Code
- Tag: refers to an optional additional category hard code, and is not used by Depot Repair
- Effective Date From: represents the first date that the Reason Code was available and valid
- Effective Date To: represents the last date the Reason Code was available and valid
- Enable checkbox: when selected, enables the use of the Reason Code while using Oracle Depot Repair

3. Enter, or modify the values in the fields as required for use in your depot.

4. Click the Save icon on the toolbar to save your setup.

Setting Up Customer Profiles

A Customer Profile displays summarized information about the customer that is appropriate for the service representative to know. It may contain information such as the number of open service requests. These profile checks are flagged by appropriate ratings and colors that provide instant visual clues to the service representative to assist in appropriate engagement with the customer. Customer Profiles also furnish the ability to drill down from a profile check to a detailed list, and then to the original transaction.

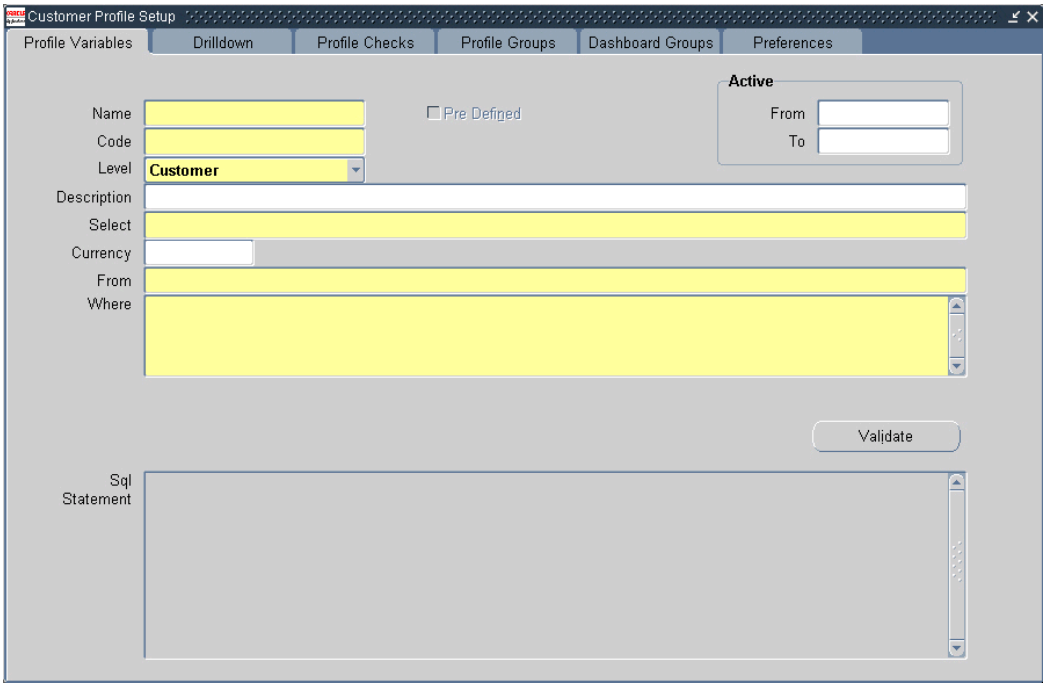
You can define profile checks, and combine multiple checks with complex criteria. It is also possible to define critical customer criteria by using profile checks.

The profile engine (a concurrent program) runs periodically to check and store changes to profile checks.

Use the Customer Profile Setup window to define the profiles based on critical customer information that needs to be readily accessible by the service representative. You may already have set up Customer Profile if other Oracle Service application modules are in use at your organization.

To navigate to the Customer Profile Setup window, use the following path:

Service Requests > Setup > Customer Management > Customer Profiles



Follow these steps to setup Customer Profiles:

- Define Profile Rating Lookup Codes
- Define Profile Variables
- Define Drilldowns
- Define Profile Checks
- Define Profile Groups
- Define Dashboard Groups
- Associate Profiles with Modules
- Define Preferences
- Define Rating Labels
- Define Categories
- Run the Customer Profile Engine

For detailed instructions, refer to the *Oracle TeleService Implementation Guide*.

Setting Up Diagnostic Codes in Oracle Depot Repair

Oracle Depot Repair provides the ability to associate repair problems with a Diagnostic Code, and to associate the potential resolutions with a Service Code. By utilizing Diagnostic Codes and Service Codes, users can quickly document repair efforts for customer charges and depot service history.

You make use of Diagnostic Codes and Service Codes when you process a Repair Order. If you have recorded one or more Solutions in Oracle Knowledge Management to previous problems similar to the one in the current Repair Order, then you can examine these previous cases, and if appropriate, apply one or more of the previous Solutions to the current Repair Order.

The full setup of Diagnostic Codes and Service Codes includes setup steps in both Oracle Depot Repair and Oracle Knowledge Management.

This section deals with the setting up of Diagnostic Codes in Oracle Depot Repair.

For details of setting up Service Codes in Oracle Depot Repair, see Setting Up Service Codes in Oracle Depot Repair, page 3-34.

For details of setting up Diagnostic Codes and Service Codes in Oracle Knowledge Management, see Setting Up Knowledge Management, page 2-14.

In Oracle Depot Repair, when you create a Diagnostic Code, you associate it with one or more domains. There are two domain types, Item and Category. Each associated domain is either an item or an item category, as defined in Oracle Inventory.

The list of values for the Category field will be a list of all item categories for the category set selected for the profile option CSD: Default Category Set for Diagnostic Codes and Service Codes.

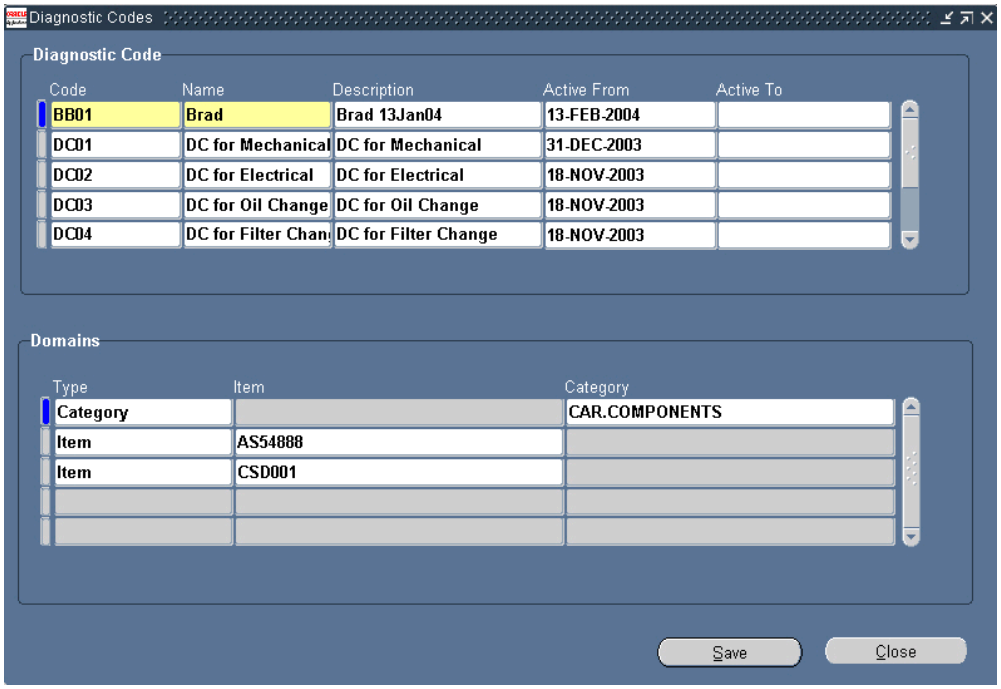
Use the Diagnostic Codes window to define the Diagnostic Codes, and their associated items or categories or both.

To Set Up Diagnostic Codes in Oracle Depot Repair:

1. Navigate to Diagnostic Codes window using the following path:

   Depot Repair > Setup > Diagnostic Codes

   The window lists all the existing Diagnostic Codes.



2. Click the New toolbar button to create a blank row for defining your Diagnostic Code.

3. Enter a Code and a Name for the Diagnostic Code.

4. Optionally, enter a Description for the Diagnostic Code.

5. In the Active From field, enter the date on which the Diagnostic Code is activated.

   The date defaults to the current date. You can change it to any later date, but not to a prior date.

6. Optionally, set the Active To date field.

7. Click any field in the Domains area, and if necessary, click the New toolbar button to create a blank row for defining a domain.

8. In the Type field, select either Item or Category. from the list of values.

9. Depending on the Type, select either an Item or a Category from the list of values in the Item or Category field respectively.

10. Repeat steps 7 to 9 for as many domains as you want to associate with the Diagnostic Code.

11. Click the Save icon on the toolbar to save your setup.

Setting Up Service Codes in Oracle Depot Repair

Oracle Depot Repair provides the ability to associate repair resolutions with a Service Code.

You make use of Service Codes when you process a Repair Order. If you have recorded one or more Solutions in Oracle Knowledge Management to previous problems similar to the one in the current Repair Order, then you can examine these previous cases, and if appropriate, apply one or more of the previous Solutions to the current Repair Order.

You can use Service Codes with or without Diagnostic Codes.

The full setup of Diagnostic Codes and Service Codes includes setup steps in both Oracle Depot Repair and Oracle Knowledge Management.

This section deals with the setting up of Service Codes in Oracle Depot Repair.

For details of setting up Diagnostic Codes in Oracle Depot Repair, see Setting Up Diagnostic Codes in Oracle Depot Repair, page 3-32.

For details of setting up Diagnostic Codes and Service Codes in Oracle Knowledge Management, see Setting Up Knowledge Management, page 2-14.

In Oracle Depot Repair, when you create a Service Code, you can associate it with the following:

- One or more items
- One or more item categories

  The item categories belong to the category set selected for the profile option CSD: Default Category Set for Diagnostic Codes and Service Codes.
- One or more reference bills
- One or more alternate bills
- One or more reference routings
- One or more alternate routings
- One or more task template groups

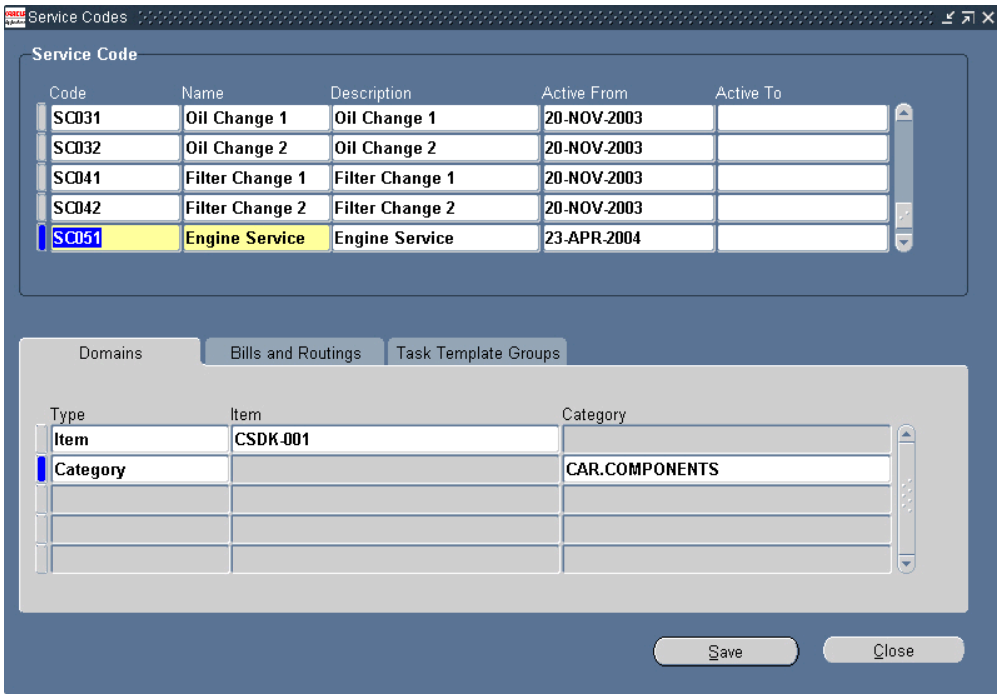
Use the Service Codes window to define the Service Codes, and their associated elements.

To Set Up Service Codes in Oracle Depot Repair:

1. Navigate to the Service Codes window using the following path:

   Depot Repair > Setup > Service Codes

The window lists all the existing Service Codes.



2. Click the New toolbar button to create a blank row for defining your Service Code.

3. Enter a Code and a Name for the Service Code.

4. Optionally, enter a Description for the Service Code.

5. In the Active From field, enter the date on which the Service Code is activated.

   The date defaults to the current date. You can change it to any later date, but not to a prior date.

6. Optionally, set the Active To date field.

7. If you want to associate the Service Code with a domain:

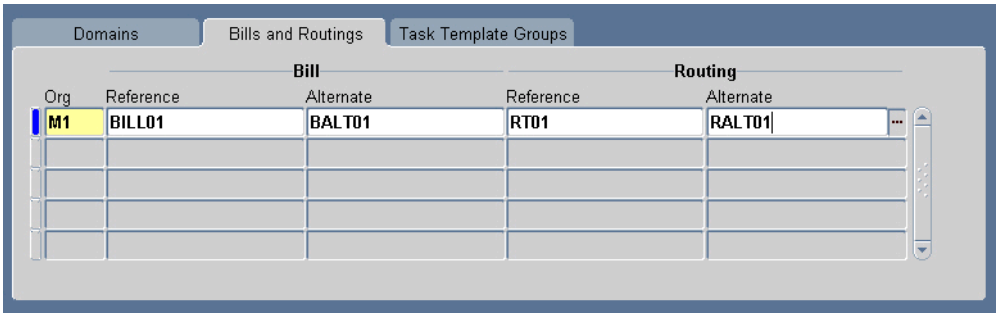
   - Click the Domain tab, if it is not visible
   - Select either Item or Category from the Type list of values
   - Depending on your choice of Type, select either an Item or a Category from the appropriate list of values.

   Repeat this step for as many domains as you want to associate with the Service Code.

8. If you want to associate a bill or routing or both to the Service Code:

   - Click the Bills and Routings tab.
   - Select the organization from the Org list of values.
   - To associate a bill, select from the Bill Reference list of values, and if you require an alternate bill, select also from the Bill Alternate list of values.
   - To associate a routing, select from the Routing Reference list of values, and if you require an alternate routing, select also from the Routing Alternate list of values.

   Repeat this step for as many bills and routings as you want to associate with the Service Code.

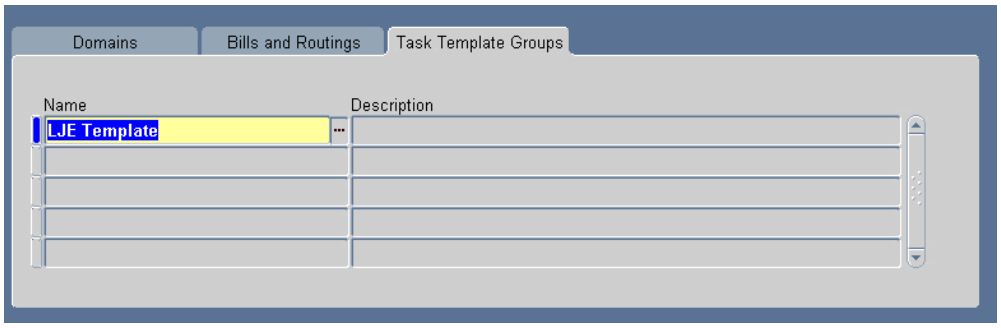


9. If you want to associate one or more task template groups to the Service Code:

   - Click the Task Template Groups tab.
   - Select the task template group from the Name list of values.

     This also populates the Description field.

   Repeat this step for as many task template groups as you want to associate with the Service Code.



10. Click the Save icon on the toolbar to save your setup.

Setting Up Service Code Recommendations

When you are processing high volume repairs, in the Evaluation tab of the Repair Order page, two of the screen areas are the Diagnostic Codes region and the Service Codes region.

Any diagnostic codes and service codes defined for the same item or item category as the repair item automatically appear in their respective screen areas.

You can also get service codes added to the page if you have set up service code recommendations in advance.

The main elements of a service code recommendation are the following:

- A name
- A service code and one of its domains
- A recommendation type of Sometimes or Always
- One or more requirements involving diagnostic codes and their domains; each requirement mandates either the existence or the absence of a diagnostic code and one of its domains

For example, if an examination of past repairs leads you to the conclusion that the service code S7 will always be useful when diagnostic code D1 is present and diagnostic code D99 is absent, you could set up a service code recommendation whose main elements are as follows *(assume that all domains are the same as the repair item)*:

- Recommendation Name: S7_D1Y_D99N
- Recommendation Type: Always
- Service Code: S7
- Diagnostic Requirement 1: Must Have D1

- Diagnostic Requirement 2: Must Not Have D99

Service code recommendations are used in the Repair Order page, as follows:

1. You click the Recommend Services button.
2. The system checks all the diagnostic codes in the Diagnostic Codes region against all the requirements of the service code recommendations.
3. If all the requirements of one or more recommendations are fulfilled, the corresponding service code or codes are added to the Service Codes region.

Any service code added from a recommendation whose Type is Always will be marked as Applicable and disabled, so that any jobs generated from the Service Codes region will include the bills and routings associated with that service code.

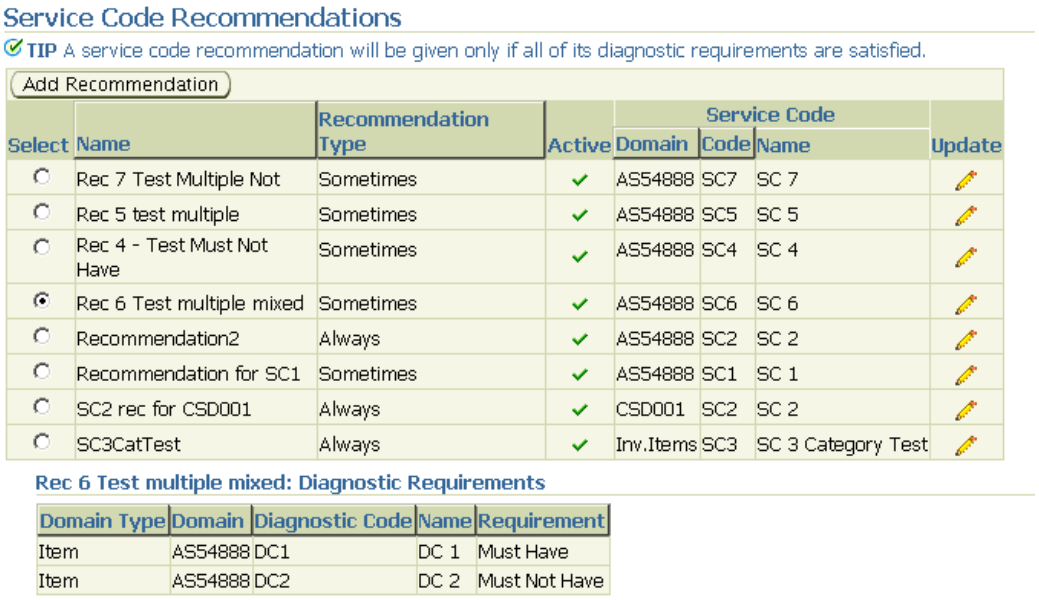
For details, select from the following:

1. Querying Service Code Recommendations, page 3-38
2. Adding Service Code Recommendations, page 3-39

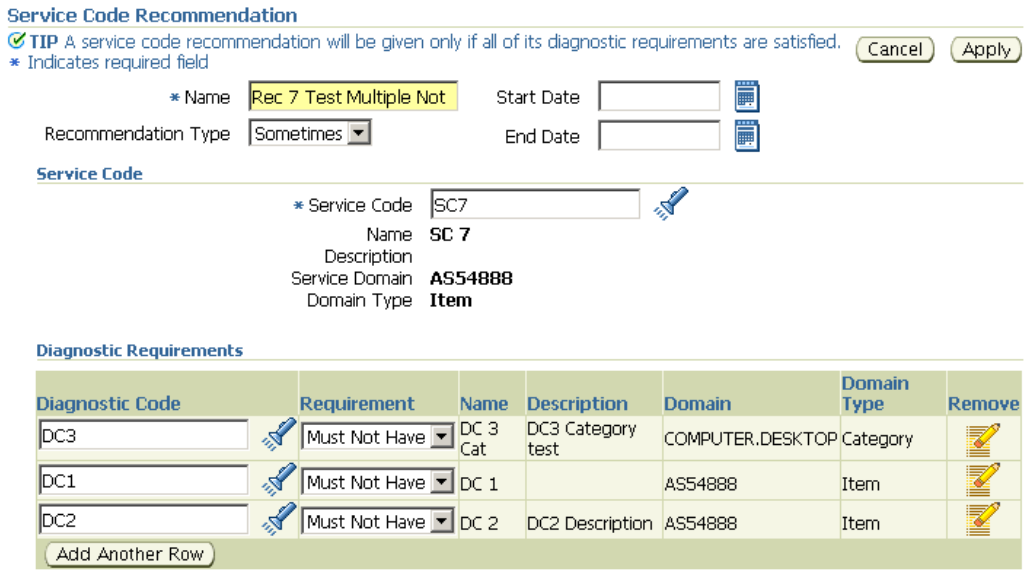
Querying Service Code Recommendations

1. Open the Service Code Recommendations window using the following navigation path: Depot Repair > Setup > Service Code Recommendations

   The window shows the existing service code recommendations.
2. Select a recommendation to see its diagnostic code requirements at the foot of the screen.:
3. Optionally, click the Update icon for a recommendation to update it.
4. For a new recommendation, click Add Recommendation, page 3-39..



Adding Service Code Recommendations



1. Enter a Name for the recommendation.
2. Select a Recommendation Type, of Sometimes or Always.
3. Optionally, select a Start and End Date.
4. Select a Service Code.

From the list of values, select the entry with the item or category domain that you want to associate with the recommendation. This is the domain that will be compared with the repair order item domain, to try to find a match when you click Recommend Services in the Repair Order page.

5. You can create one or more entries in the Diagnostic Requirements area.

   For each diagnostic requirement, select the following

   - Diagnostic Code

     Selecting from the list of values populates the Name, Description, Domain, and Domain Type fields.

     From the list of values, select the entry with the item or category domain that you want to associate with the recommendation. This is the domain that will be compared with the repair order item domain, to try to find a match when you click Recommend Services in the Repair Order page.

   - Requirement - either Must Have or Must Not Have

6. In the process of entering the requirements, you can Remove an entry.

7. Save your work.

Defining Oracle Depot Repair Lookup Codes

You can maintain existing Lookups as well as define additional Lookups for your shared Lookup Types.

Each Lookup has a Code, a Meaning, and a Description. Lookup Codes are not editable, but Meanings and Descriptions are. If you make changes to a Lookup, you must log out and then log back on before your changes take effect.

The following Lookup Types are pre-seeded in Oracle Depot Repair. For more information, refer to Appendix B.

Lookup Type	Description
CSD_APPROVAL_STATUS	Repair Approval Status (Approved, Rejected)
CSD_ESTIMATE_STATUS	Estimate Status (Accepted, Bid, Closed, Draft, Hold, Rejected)
CSD_EST_BILLING_TYPE	Estimate Billing Type (Expense, Labor, Material)

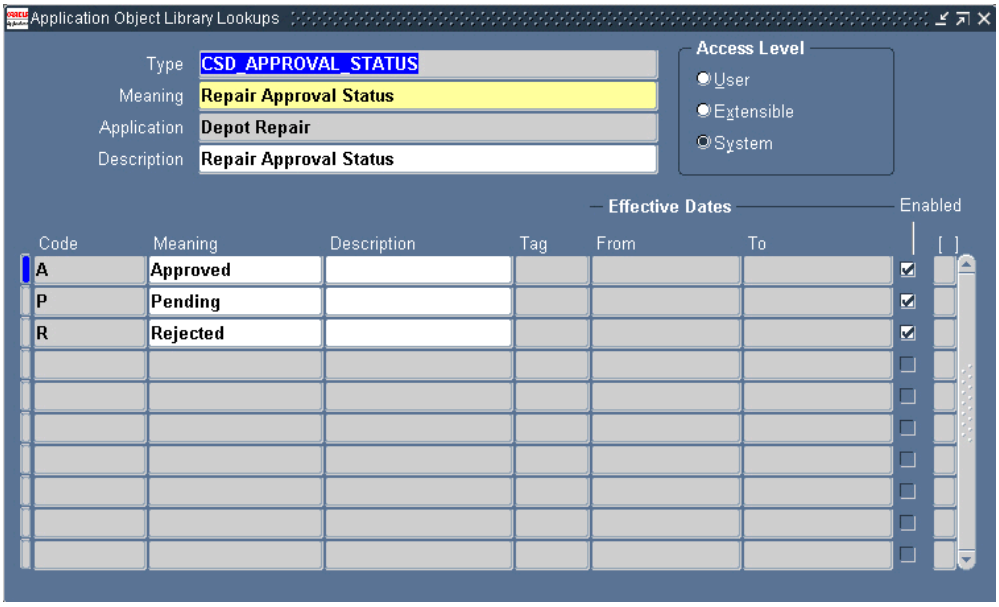
Lookup Type	Description
CSD_EVENT	Repair Event (Customer Approved, Charges Recorded, Repair Diagnosed, Repair Job Completed)
CSD_PRODUCT_ACTION_CODE	Product Transaction Action Code for Repair Orders (Customer Item, Exchange, Loaner, Replacement, Defective, Usable)
CSD_PROD_ACTION_TYPE	Depot Repair Order Product Transaction Action Types (Return, Ship, Move In, Move Out)
CSD_PRODUCT_TXN_STATUS	Product Transaction Status (Booked, Entered, Received etc.)
CSD_REASON	Reason for current status of repair process (Customer Approves the Estimate, Estimate Approved, Repair On Hold)
CSD_REJECT_REASON	Estimate Reject Reasons (Customer Reject, Machine Unavailable, Resource shortage)
CSD_REPAIR_MODE	Repair Mode for the depot repair processes (WIP, Tasks, None, All)
CSD_REPAIR_STATUS	Repair Status (Closed, Open, On Hold)
CSD_REPAIR_TYPES	Depot Repair Types (Advance Exchange, Walk-In with Return and Repair etc.)
CSD_RO_TXN_STATUS	Repair Order Transaction Status (OM Booked, OM Received, OM Released etc.)
CSD_UNIT_OF_MEASURE	Lead Time Unit of Measure (Hour, Week, Day)
CSD_WIP_JOB_STATUS	Repair Job Status (Released, Unreleased)

To Define Oracle Depot Repair Specific Lookup Codes:

Switch to the Application Developer responsibility.

1. From the Application Developer Navigator window, use the following path to navigate to the Applications Object Library Lookups window:

   Functions (tab) > Application > Lookups > Application Object Library



2. Run a query to display the details of the Lookup Type under which you want to define the lookup code. Several lookup types (listed above) are pre-seeded in Oracle Depot Repair.

3. Click anywhere in the spread table. Now click the New tool bar button to open a blank row.

4. Enter a name for the Lookup Code in the Code field. The code name is internal to the system.

5. Enter a User Name for the Lookup Code in the meaning field. This value is displayed in the LOV.

6. Optionally enter a description in the Description field.

7. If you want the Lookup Code to be effective only for a specific period, set the period by selecting the Effective Dates From and To fields.

8. Verify that the Enabled check box is selected. Only enabled Lookup Codes will appear in the List of Values.

9. Save your work.

Setting Up Oracle Depot Repair Profile Options

Profile options are changeable parameters that affect the way your application looks and behaves. As System Administrator, you control how Oracle Depot Repair operates by setting profile options to the values you want. You can set profile options at four different levels: site, application, responsibility, and user. For a detailed discussion of User Profile options, refer to the *Oracle Applications System Administrator's Guide*.

When a profile option may be set at more than one level, site has the lowest priority, superseded by application, then responsibility, with user having the highest priority. For example, a value entered at the site level may be overridden by values entered at any other level. A value entered at the user level has the highest priority, and overrides values entered at any other level.

Use the System Profile Values window to set up the profile values. The following profile options may be modified to customize Oracle Depot Repair to suit your specific requirements.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Add to Order Num Within Repair Order Default	No	Yes or No	When the new item transaction is created, the Add to Order Number is derived based on this profile and CSD: Add to Order Num Within Service Request Default.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Add to Order Num Within Service Request Default	No	Yes or No	When the new item transaction is created, the Add to Order Number is derived based on this profile and CSD: Add to Order Num Within Repair Order Default. This profile takes the precedence over CSD: Add to Order Num Within Repair Order Default. Setting this profile will cause it to use the order number of the Service Request.
CSD: Allow Charge Override for Actuals	No	Yes or No	Determines whether to allow overriding of the Charge field for Actuals lines.
CSD: Allow Charge Override for Estimates	No	Yes or No	Determines whether to allow overriding of the Estimated Charge field for Estimate lines.
CSD: Allow Creating WIP Job Without RMA	No	Yes or No	Determines whether the creation of a WIP Job without an RMA is allowed.
CSD: Allow Price Override for Logistics Lines	No	Yes or No	Determines whether to allow overriding of the Price field in the Logistics Tab. Cannot be updated by a User, only by Sysadmin. If not set, the value is taken as No.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Close SR When All Repair orders are Closed	None	Yes or No	When set to Yes, automatically closes the Service Request when the last Repair Order is closed.
CSD: Currency Conversion Type	None	Daily conversion types available in GL (gl_daily_conversion_types)	Conversion type to use when converting a cost to the currency of an estimate charge line.
CSD: Customer Approval Required	Yes	Yes or No	Determines whether customer approval of the estimate is required for creating a Repair Job.
CSD: Debug Level	0	1 to 10	Determines the Debug level for Depot Repair transactions.
CSD: Default Category Set for Diagnostic Codes and Service Codes	Inv.Items	<Category Set>	Determines the default Category Set for setting up Diagnostic Code and Service Code domains.
CSD: Default Country Code (Phone)	None	< free text >	Specifies the Default Country Code for phone number fields.
CSD: Default Job Name Prefix	No	<Any user entered value is allowed>	Specifies the Default Job Name Prefix used while submitting a Repair Job for creation. This profile is applicable only when the profile CSD: Use CSD as Job Name Prefix is set to No.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Default Labor Item for Estimate Line From Tasks	None	Eligible labor items from Inventory	Labor item to use when auto-creating estimate labor lines from tasks.
CSD: Default Pick Release Rule for Sales Orders	None	Standard, etc.	Determines default Pick Release Rule for Repair Order related sales orders.
CSD: Default Price List	None	< Price List >	Sets the default price list for the Depot Repair application.
CSD: Default Repair Job Status	None	Released or Unreleased	Determines the default Repair Job status.
CSD: Default Repair Order	Yes	Yes and No	Determines whether to default line values into the new line when you arrow down from last repair order line in the Depot Repair Workbench.
CSD: Default Repair Type	Standard	<Repair Types>	Determines default Repair Type for new Repair Orders.
CSD: Default Return Reason Code for RMAs	Damaged Product	Damaged Product, etc.	Determines default Return Reason Code for item transaction: RMAs.
CSD: Default Program Created Service Request Severity	None	<List of Incident Severities>	When creating Service Requests from RMA lines via concurrent manager, this severity will be used for the Service Request.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Default Program Created Service Request Status	None	<List of Incident Statuses>	1. When creating new Service Requests for internal order refurbishments, this status will be used for the Service Request. 2. When creating Service Requests from RMA lines via concurrent manager, this status will be used for the Service Request.
CSD: Default Program Created Service Request Type	None	<List of Service Request Types for Depot Repair>	When creating Service Requests from RMA lines via concurrent manager, this type will be used for the Service Request.
CSD: Default Program Created Service Request Urgency	None	<List of Incident Urgencies>	1. When creating new Service Requests for internal order refurbishments, this urgency will be used for the Service Request. 2. When creating Service Requests from RMA lines via concurrent manager, this urgency will be used for the Service Request.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Default Program Created Service Request Work Summary	None	< free text >	When creating Service Requests from RMA lines via concurrent manager, this work summary will be used for the Service Request.
CSD: Default SR Severity for Internal RO	None	<Service Request Severity>	When creating new Service Requests for internal order refurbishments, this severity will be used for the Service Request. List of values displays all active Service Request severities.
CSD: Default SR Type for Internal RO	None	<Service Request Types>	When creating new Service Requests for internal order refurbishments, this type will be used for the Service Request. List of values displays all active Service Request types.
CSD: Default WIP MRP Net Qty to Zero	None	Yes or No	Determines if the net quantity for a WIP job should be defaulted to zero.If it is set to null or No, then the net quantity will be set to job quantity.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Directory for Depot Repair Log Files	None	No predefined set of values. The value is specified at the time of implementation. For example, it can be set up as /sqlcom/log/SRVSTR9 .	Determines directory for Depot Repair log files. This is a mandatory profile option.
CSD: Enable Costing	Yes	Yes or No	Enables/disables cost fields and buttons for estimates.
CSD: Enable Estimates	Yes	Yes or No	This determines whether the Repair Estimate tab will be enabled or disabled.
CSD: Enable Knowledge Management	None	Yes or No	If the user sets this option to No, the applicable Knowledge Management area in the Diagnostics tab will be grayed out. If this profile option is not set, Knowledge Management will be enabled.
CSD: Number of Days to Rollback Currency Conversion	300	<Integer value>	Number of Days to rollback currency conversion when converting a cost from GL currency to currency of estimate charge line.
CSD: Printer Name	None	<Printer Name>	Determines printer for printing repair estimate report.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Printer Required	None	Yes or No	Determines whether a printer is required.
CSD: Repair Mode for Depot Repair Orders	Work In Process	Work In Process, Task, None/ Not Applicable, All	Determines Repair Mode for Depot Repair Processes - site level.
CSD: Repair Type Internal Repair Order	None	List of values displays all Repair Types where Repair Type Ref is Refurbishment and Internal Order flag is checked.	List of values will display at least one value, as Oracle Depot Repair seeds one Refurbishment Repair Type. Customer can add more Repair Types with Refurbishment set for the Repair Type Ref and Internal Order flag checked, for example, one each for Task and WIP mode. A value for this profile is required to create internal Repair Orders from Spares Management.
CSD: Require Item For Service Request	Yes	Yes or No	Makes the item and related fields required/not required in the Service Request header.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Show Service Request Descriptive Flexfield	No	Yes or No	If set to Yes, a descriptive flexfield appears in the Service Request block of the Depot Repair Workbench. **Note:** If you set up the application to have context sensitive service request descriptive flexfields, then this profile must be set to No.
CSD: Use CSD as Job Name Prefix	No	Yes or No	If set to Yes, CSD is used as the Job Name Prefix while submitting a Repair Job and the prefix value cannot be updated in the Submit Repair Jobs window. If set to No, the Job Name Prefix defaults to the value specified for the profile CSD: Default Job Name Prefix and the prefix value can be updated in the Submit Repair Jobs window.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Use Tasks from Knowledge Management Solutions	Yes	Yes or No	When set to Yes, auto-creates estimate lines from tasks that are linked to applicable solutions (even if they are not linked via a service code), when you click Add Lines from Diagnostics in the Repair Estimate tab.

The following profile options, though not owned by Oracle Depot Repair, provide certain application functionality:

Profile Name	Possible Values	Description
Service: Default Group Owner for Service Requests	Profile options Service: Default Group Owner for Service Requests and Service: Default Group Owner Type for Service Request both have to be either defined or NULL	Restricts the Service Request Owner List of Values depending on the selected profile value.
Service: Default Group Owner Type for Service Request	Profile options Service: Default Group Owner for Service Requests and Service: Default Group Owner Type for Service Request both have to be either defined or NULL	Restricts the Service Request Owner List of Values depending on the selected profile value.
Service: Default Service Request Owner	No predefined set of values. The value has to be specified during implementation.	This defaults the Service Request Owner in the Repair Order form.
Service: Default Service Request Owner Type	No predefined set of values. The value has to be specified during implementation.	This defaults the Service Request Owner Type. This field is not displayed in the Repair Orders form.

Profile Name	Possible Values	Description
Service: Inventory Validation Organization	No predefined set of values. The value has to be specified during implementation.	Items are validated against the Organization specified by this profile. This is mandatory and can usually be set to the Master Inventory Organization.
Service: Restrict Installed Base for location validation	Yes or No	If set to Yes, the Installed Base Reference Number List of Values will be restricted to HZ_PARTY_SITES or HZ_LOCATIONS.
Task Manager: Default Task Status	The value has to be specified during implementation.	If a status transition rule is defined, and is mapped to the Oracle Depot Repair responsibility being used, then this profile is mandatory. This profile specifies the default starting status for a Task in the Repair Tasks tab in the Repair Order form. If this profile is not set, then when creating a task, the status LOV will have no values. If no status transition rule is mapped to the Depot Repair Responsibility, then this profile is not mandatory, and the task status LOV in this case will list all the task statuses. It is recommended to setup status transition rules.
Task Manager: Default Task Owner	The value has to be specified during implementation.	Determines the default value for the Task Owner field on the Repair Tasks tab in the Repair Orders window
Task Manager: Default Priority	The value has to be specified during implementation.	Determines the default Task Priority value on the Repair Tasks tab.

Profile Name	Possible Values	Description
Task Manager: Default Task Type	The value has to be specified during implementation.	Determines the default Task Type on the Repair Tasks tab in the Repair Orders window
Task Manager: Owner Type for a Task	The value has to be specified during implementation.	Determines the default Owner Type for a task selected on the Repair Tasks tab in the Repair Orders window.
Server Timezone	The value has to be specified during implementation.	Determines the server time zone, and is mandatory. This is used in the Product Coverage tab in the Repair Orders window to sort the contracts by response resolution time.
Start Menu in Quickmenu	Depot Repair Quick Menu	Quick Menu under the Tools Menu in the Repair Orders window points to the menu specified by this profile. This profile has to be set at the responsibility level, and must be set to the seeded menu: Depot Repair Quick Menu.

Setting Up Message Action Codes

Please refer to *Oracle TeleService Implementation Guide* for instructions on setting up Message Action Codes. Message Action Codes are used to specify the type of action you want a message recipient to take.

Managing Users

This section discusses how to handle user management issues when setting up Oracle Depot Repair.

Login Interfaces

The menus that appear after login depend upon the roles and responsibilities assigned to the log in parameters assigned to a user. Users will not be able to access Oracle Depot Repair functionality until they have been assigned both roles and responsibilities.

Roles, Responsibilities, and Permissions

During the implementation process and throughout the life span of Oracle Depot Repair, it will be necessary for an administrator to assign roles, responsibilities, and permissions to users.

A role is a collection of page and function level permissions that are granted to maintain application security. A permission is the smallest unit making up a role.

There are two types of permissions: Functional and Data Access Control (DAC). Permissions dictate the actions that a user can perform.

Responsibilities control the presentation of menus, tabs, and screens. For example, the responsibility Depot Repair Super User gives users a different set of menus than the responsibility given to a technician.

Oracle Depot Repair provides Depot Repair Super User as the seeded responsibility.

Creating Oracle Depot Repair Users

A user refers to any person who needs access to Oracle Depot Repair. This includes employees ranging from call center agents to depot planners, technicians, accountants etc.

While you can create a number of user types, the basic procedures for defining them remain identical. The roles and responsibilities assigned to each user type may be different.

Creating users involves the following tasks:

- Defining responsibilities
- Defining users
- Assigning responsibilities to users

To perform these tasks, switch to the System Administrator Responsibility and navigate to Security > Responsibility, or Security > User as the case may be, then select Define to open the Responsibilities or Users window.

For detailed instructions on creating users, refer to the online help available from the two windows.

Charges and Repair Types Setup Example

The following examples illustrate Charges and Repair Types setup for Installed Base and Non-Installed Base trackable items. Separate Service Activities and Repair Types are required for Installed Base trackable items and non-Installed Base trackable items. Refer to the relevant sections within this document for navigation paths and other details.

Service Activities and Billing Types

Perform the following steps to set up Service Activities and Billing Types.

Service Activity: Return for Repair, Installed Base Trackable Item

Consider the Service Activity Return for Repair for an Installed Base trackable item. This Service Activity will be used for returns for repair, and requires a corresponding Installed Base Transaction Sub Type.

Perform the following set up.

Service Activity

- Service Activity: Return for Repair
- Line Category: Return
- Depot Repair Quantity Update check box: Selected

Billing Type

- Billing Type: Material

Order Management Header and Line Types

- Operating Unit: Vision Operations
- Order Type: Mixed
- Line Type: Return (Receipt)

Service Activity: Return for Repair, Non-Installed Base Trackable Item

Consider the Service Activity Return for Repair for a non-Installed Base item. This Service Activity will be used to process returns for repair, and does not have a corresponding Installed Base Transaction Sub Type set up.

Enter Service Activity value as Return for Repair, non-Installed Base. Set Billing Type and Order Management Header and Line Types as detailed above for the Installed Base item.

Service Activity: Replacement, Installed Base Trackable Item

Consider the Service Activity Replacement for an Installed Base item. This Service Activity will be used for shipping replacements, and requires a corresponding Installed Base Transaction Sub Type. Perform the following set up.

- Service Activity: Replacement
- Line Category: Order
- Depot Repair Quantity Update: Selected

Set up Billing Type and Order Management Header and Line Types as explained in the first example.

Service Activity: Replacement, Non-Installed Base Trackable Item

A separate Service Activity has to be set up for Replacement of non-Installed Base items. Set up the Replacement Service Activity for a non-Installed Base item as you did for the Return for Repair example. This Service Activity setup does not have a corresponding Installed Base Transaction Sub Type set up.

Service Business Processes

After defining required Service Activities and Billing Types as illustrated in the above example, define a Service Business Process and include the required Service Activities.

Installed Base Transaction Sub Types

After defining Service Activities and Billing Types and Service Business Processes, set up the Installed Base Transaction Sub Types as follows:

- Transaction Sub Type: Return for Repair. This Transaction Sub Type is seeded.
- Transaction Sub Type: Replacement. The Change Owner checkbox in the Source Info region of the Transaction Sub Types window is selected when the Service Activity is Replacement. Also select the Reference Reqd checkbox in the Non Source Info region. The Change Owner To Status and Status fields in the Source Info region must be populated with the values External and Replaced respectively. The Status field in the Non Source Info region has the value EXPIRED.

Other seeded Transaction Sub Types include Ship Loaner, Return Loaner, Material Transaction, and Ship Repaired Item. For Return for Repair, Ship Repaired Item, Ship Loaner, and Return Loaner, the Change Owner checkbox in the Source Info region is not selected. This is because, in these transactions, the owner does not change.

Repair Types Setup

After you set up all the required Installed Base Transaction Sub Types, set up the Repair Types as follows:

You have to set up separate Repair Types for Installed Base trackable items and non-Installed Base trackable items.

Repair Type: Repair and Return, Installed Base Trackable Product

Enter the following values:

- Repair Type: Repair and Return
- Business Process: Depot Repair
- Repair Mode: Work in Process
- Repair Type Reference: Repair and Return
- Pre-Repair RMA: Return for Repair
- Pre-Repair Ship: (Not Applicable)
- Post-Repair RMA: (Not Applicable)
- Post-Repair Ship: Ship Repaired Item
- Automatically Enter and Book RMA checkbox: Select

If you are using the Estimates functionality, you need to set up the Billing Type and Service Activity Codes for Material, Labor, and Expense.

- Material: Material Transaction
- Labor: Labor Transaction
- Expense: Expense Transaction

Repair Type: Repair and Return, Non-Installed Base Trackable Product

Enter the following values:

- Repair Type: Repair and Return, non-Installed Base
- Business Process: Depot Repair
- Repair Mode: Work in Process

- Repair Type Reference: Repair and Return
- Pre-Repair RMA: Return for Repair, non-Installed Base
- Pre-Repair Ship: (Not Applicable)
- Post-Repair RMA: (Not Applicable)
- Post-Repair Ship: Ship Repaired Item, non-Installed Base
- Automatically Enter and Book RMA checkbox: Select

If you are using Estimates functionality, you need to set up the Billing Type and Service Activity Codes for Material, Labor, and Expense.

> **Note:** Since estimate lines are created as Bill Only lines in Order Management, Transaction Sub Types for the associated Service Activity Codes are not relevant. This implies that even if a Transaction Sub Type exists for the Service Activity Code set up for the estimate line, it is ignored.

- Material: Material Transaction
- Labor: Labor Transaction
- Expense: Expense Transaction

Repair Type: Replacement, Installed Base Trackable Product

Enter the following values:

- Repair Type: Replacement
- Business Process: Depot Repair
- Repair Mode: None/Not Applicable
- Repair Type Reference: Replacement
- Pre-Repair RMA: (Not Applicable)
- Pre-Repair Ship: (Not Applicable)
- Post-Repair RMA: (Not Applicable)
- Post-Repair Ship: Replacement
- Automatically Enter and Book RMA checkbox: Do not select (leave unchecked)

Since Estimates may not be needed in case of Replacements, you do not have to set up the Billing Type and Service Activity Codes for Material, Labor and Expense.

Repair Type: Replacement, Non-Installed Base Trackable Product

You will need to set up a separate Repair Type for Replacement of non-Installed Base trackable items, just as you did for the Repair and Return example.

Seeded Repair Types Setup

This section describes the Repair Type setup summary for all the seeded Repair Types. The Repair Type details can be set up as explained in the examples in the section Repair Types Setup, page 3-58.

The following table, Seeded Repair Types Setup, applies to Installed Base trackable items.

> **Note:** For Non-Installed Base trackable items, you will need to define separate Repair Types, as illustrated in the above examples.

In the following Seeded Repair Types Setup table, the Service Activities Return Exchange, Ship Exchange, and Replacement need to be defined before they can be set up in the Repair Type form. The other Service Activities are available as seeded.

For Repair Types Exchange, Advance Exchange, and Replacement, the owner of the item is changed when the item is returned or shipped. This is specified in the Source Info region for Transaction Sub Types Return Exchange, Ship Exchange, and Replacement. For Transaction Sub Types Ship Exchange and Replacement, the Reference Reqd checkbox in the Non Source Info region should be selected, so that the warranty information is transferred to the shipped item.

Repair Type	Business Process	Repair Mode	Repair Type Reference	Pre Repair RMA	Pre Repair Ship	Post Repair RMA	Post Repair Ship
Repair and Return	Depot Repair	Work In Process	Repair and Return	Return for Repair	-	-	Ship Repaired Item
Replacement	Depot Repair	None/Not Applicable	Replacement	-	-	-	Replacement

Repair Type	Business Process	Repair Mode	Repair Type Reference	Pre Repair RMA	Pre Repair Ship	Post Repair RMA	Post Repair Ship
Advance Exchange	Depot Repair	None/Not Applicable	Advance Exchange	Return Exchange	-	-	Ship Exchange
Exchange	Depot Repair	None/Not Applicable	Exchange	Return Exchange	-	-	Ship Exchange
Loaner	Depot Repair	None/Not Applicable	Loaner	-	Ship Loaner	Return Loaner	-
Loaner, Repair and Return	Depot Repair	Work In Process	Loaner, Repair and Return	Return for Repair	Ship Loaner	Return Loaner	Ship Repaired Item
Refurbishment*	Depot Repair	Work In Process	Refurbishment	-	-	-	-
Standard	Depot Repair	Work In Process	Standard	-	-	-	-

Note: * - For the Refurbishment Repair Type, the Internal Order flag must be set. For all the other Repair Types, leave it unset.

A

Oracle Depot Repair Public APIs

This appendix presents information on the Oracle Depot Repair public API.

This appendix covers the following topics:

- Depot Repair Public Packages
- Create_Repair_Order
- Update_Repair_Order
- Parameter Descriptions
- Data Structure Specifications

Depot Repair Public Packages

Oracle Depot Repair provides the following public API.

- CSD_REPAIRS_PUB

This API includes the following two procedures:

Procedure Name	Description
Create_Repair_Order	This procedure is called to create a Repair Order.
Update_Repair_Order	This procedure is called to update a Repair Order.

Create_Repair_Order

This API will create a Repair Order. User can pass REPAIR_LINE_ID and REPAIR_NUMBER. If passed, the ID or NUMBER will be validated for uniqueness. If valid, the same ID or NUMBER will be returned.

Procedure Name

Create_Repair_Order

Prerequisites

None

Parameters

```
IN
p_api_version_number   IN   NUMBER     Required
p_init_msg_list        IN   VARCHAR2   Optional  Default =
FND_API.G_FALSE
p_commit               IN   VARCHAR2   Optional  Default =
FND_API.G_FALSE
p_validation_level     IN   NUMBER     Optional  Default =
FND_API.G_VALID_LEVEL_FULL
p_repair_line_id       IN   NUMBER     Optional  Default =
FND_API.G_MISS_NUM
P_REPLN_Rec            IN   CSD_REPAIRS_PUB.REPLN_Rec_Type Required

OUT
x_return_status        OUT  VARCHAR2
x_msg_count            OUT  NUMBER
x_msg_data             OUT  VARCHAR2
x_repair_line_id       OUT  NUMBER
x_repair_number        OUT  NUMBER
```

Current Version

1.0

Procedure Specification

```
Create_Repair_Order
(
P_Api_Version_Number     IN   NUMBER,
P_Init_Msg_List          IN   VARCHAR2     := FND_API.G_FALSE,
P_Commit                 IN   VARCHAR2     := FND_API.G_FALSE,
p_validation_level       IN   NUMBER       :=
FND_API.G_VALID_LEVEL_FULL,
p_repair_line_id         IN   NUMBER       := FND_API.G_MISS_NUM,
P_REPLN_Rec              IN   CSD_REPAIRS_PUB.REPLN_Rec_Type,
X_REPAIR_LINE_ID         OUT NOCOPY NUMBER,
X_REPAIR_NUMBER          OUT  NOCOPY VARCHAR2,
X_Return_Status          OUT  NOCOPY VARCHAR2,
X_Msg_Count              OUT  NOCOPY NUMBER,
X_Msg_Data               OUT  NOCOPY VARCHAR2
);
```

Update_Repair_Order

This procedure will update a Repair Order.

Procedure Name

Update_Repair_Order

Prerequisites

None

Parameters

```
IN
p_api_version_number      IN   NUMBER     Required
p_init_msg_list           IN   VARCHAR2   Optional  Default =
FND_API.G_FALSE
p_commit                  IN   VARCHAR2   Optional  Default =
FND_API.G_FALSE
p_validation_level        IN   NUMBER     Optional  Default =
FND_API.G_VALID_LEVEL_FULL
p_repair_line_id          IN   NUMBER     Required
P_REPLN_Rec               IN   CSD_REPAIRS_PUB.REPLN_Rec_Type Required

OUT
x_return_status           OUT  VARCHAR2
x_msg_count               OUT  NUMBER
x_msg_data                OUT  VARCHAR2
```

Current Version

1.0

Procedure Specification

```
Update_Repair_Order
(
P_Api_Version_Number         IN   NUMBER,
P_Init_Msg_List              IN   VARCHAR2     := FND_API.G_FALSE,
P_Commit                     IN   VARCHAR2     := FND_API.G_FALSE,
p_validation_level           IN   NUMBER       :=
FND_API.G_VALID_LEVEL_FULL,
p_repair_line_id             IN   NUMBER,
P_REPLN_Rec                  IN OUT NOCOPY
CSD_REPAIRS_PUB.REPLN_Rec_Type,
X_Return_Status             OUT NOCOPY  VARCHAR2,
X_Msg_Count                 OUT NOCOPY NUMBER,
X_Msg_Data                  OUT  NOCOPY VARCHAR2
);
```

Parameter Descriptions

The following table describes the IN parameters associated with this API.

Parameter	Data Type	Description
p_api_version	NUMBER	This must match the version number of the API. An unexpected error is returned if the calling program version number is incompatible with the current API version number (provided in the documentation).

Parameter	Data Type	Description
p_init_msg_list	VARCHAR2	Default = FND_API.G_FALSE. If set to true, then the API makes a call to fnd_msg_pub.initialize to initialize the message stack. If set to false then the calling program must initialize the message stack. This action is required to be performed only once, even in cases where more than one API is called.
p_commit	VARCHAR2	Default = FND_API.G_FALSE If set to true, then the API commits before returning to the calling program. If set to false, then it is the calling program's responsibility to commit the transaction.
p_validation_level	NUMBER	Default = FND_API.G_VALID_LEVEL_FULL If set to full, then the API validates all the IN parameter values. If set to none, then the API validates parameters that are a minimum requirement to create a Repair Order.
p_repair_line_id	NUMBER	If the repair line id is not passed, then the API uses sequence to generate the repair line id. If the repair line id is passed, then it validates to ensure that the repair line id does not exist in CSD_REPAIRS table.
P_REPLN_Rec	PL/SQL Record	It accepts the Repair Order record.

The following table describes the OUT parameters associated with this API.

Parameter	Data Type	Description
x_return_status	VARCHAR2(1)	If the API successfully creates a Repair Order, then it returns the status 'S', Else it returns the status as 'E' or 'U'.

Parameter	Data Type	Description
x_msg_count	NUMBER	Returns the number of messages logged in the message stack.
x_msg_data	VARCHAR2	It retrieves the message from the message stack and returns the message to the calling APIs.
x_repair_line_id	NUMBER	It returns the repair line id after the Repair Order is created successfully.
x_repair_number	NUMBER	It returns the repair number after the Repair Order is created successfully. The repair number can be different from the repair line id as different sequences are used.

Data Structure Specifications

Depot Repair API uses the following data structure.

REPLN_Rec_Type

The following table presents descriptions of data structures.

Name	Description
Repair_Number	If this value is passed during Repair Order creation, it will be validated for uniqueness and used for creation of Repair Order.
Incident_id	This is the Service Request id.
Inventory_item_id	Item information.
Customer_product_id	Instance ID of IB reference number.
Unit_of_measure	Unit of Measure Code.
Repair_type_id	Repair type information.
Resource_id	Resource to which the Repair Order is to be linked.
Project_id	Not used currently.

Name	Description
Task_id	Not used currently.
Contract_line_id	Used to store the contract information.
Auto_process_rma	Used to determine if the RMA has to be created automatically for the Repair Order.
Repair_mode	Used to determine if the Repair Order has to be created in WIP/Task/None mode.
Object_version_number	For Repair Order creation, the version number should be 1. For Repair Order update, the version number must be the same as that of the Repair Order in the database.
Item_revision	If the item is revision controlled, then pass the revision.
Instance_id	Same as customer product id.
Status	Repair Order transaction status.
Status_reason_code	Estimate approval reason code. It is required only if there is an estimate.
Date_closed	Repair order close date.
Approval_required_flag	This flag is used to check if the approval is required.
Approval_status	Estimate approval status.
Serial_number	Serial number if the serialized item is selected.
Promise_date	The promise date of repair completion.
Attribute_category	Context of the descriptive flexfield.
Attribute1	Attribute1
Attribute2	Attribute2
Attribute3	Attribute3

Name	Description
Attribute4	Attribute4
Attribute5	Attribute5
Attribute6	Attribute6
Attribute7	Attribute7
Attribute8	Attribute8
Attribute9	Attribute9
Attribute10	Attribute10
Attribute11	Attribute11
Attribute12	Attribute12
Attribute13	Attribute13
Attribute14	Attribute14
Attribute15	Attribute15
Quantity	Total Quantity for which the Repair Order has to be created.
Quantity_in_wip	To store quantity submitted for Work in Process (WIP) process.
Quantity_rcvd	To store the received quantity.
Quantity_shipped	To store the shipped quantity.
Currency_code	To store the currency code
RO_txn_status	Used internally to store the Repair Order Status.
Order_line_id	Not used currently.
Original_source_reference	Not used currently.

Name	Description
Original_source_header_id	Order header id of the source reference
Original_source_line_id	Order line id of the source reference
Price_list_header_id	Default Repair Order price list

B

Oracle Depot Repair Lookup Codes

This appendix presents the seeded Oracle Depot Repair lookup codes and values.

This appendix covers the following topics:

- Depot Repair Types (CSD_REPAIR_TYPES)
- Repair Type Reason (CSD_REASON)
- Repair Mode for the Depot Repair Processes (CSD_REPAIR_MODE)
- Repair Approval Status (CSD_APPROVAL_STATUS)
- Repair Status (CSD_REPAIR_STATUS)
- Repair Event (CSD_EVENT)
- Estimate Billing Type (CSD_EST_BILLING_TYPE)
- Estimate Status (CSD_ESTIMATE_STATUS)
- Estimate Reject Reasons (CSD_REJECT_REASON)
- Product Transaction Action Codes (CSD_PRODUCT_ACTION_CODE)
- Product Transaction Action Type (CSD_PROD_ACTION_TYPE)
- Product Transaction Status (CSD_PRODUCT_TXN_STATUS)
- Repair Order Transaction Status (CSD_RO_TXN_STATUS)
- Units of Measure (CSD_UNIT_OF_MEASURE)
- Repair Job Statuses (CSD_WIP_JOB_STATUS)

Depot Repair Types (CSD_REPAIR_TYPES)

The following lookup values are seeded for the Repair Type Refs in Oracle Depot Repair.

Code	Description	Editable?
AE	Advanced Exchange	No
AL	Loaner	No
ARR	Loaner, Repair and Return	No
E	Exchange	No
R	Replacement	No
RF	Refurbishment	No
RR	Repair and Return	No
SR	Standard Repair	No

Repair Type Reason (CSD_REASON)

Repair Type Reasons are values seeded for the different reasons that affect the return of an item for repair.

Code	Description	Editable?
APPRV	Customer approves the RMA	No
EST	Estimate approved	No
HOLD	Repair on hold	No
REJECT_1	Product unrepairable	No
REJECT_2	Declined repair	No
REV_EST	Revised estimate approved	No
WAIT_1	Customer contacted	No
WAIT_2	Awaiting approval	No

Repair Mode for the Depot Repair Processes (CSD_REPAIR_MODE)

The following seeded lookup values are used to define the repair mode used to process a repair using Oracle Depot Repair.

Code	Description	Editable?
ALL	Display all the values for repair modes	No
NONE	None of the modes are applicable	No
TASK	JTF Tasks	No
WIP	Discrete Jobs in Work in Process module	No

Repair Approval Status (CSD_APPROVAL_STATUS)

Repair Approval Status lookup values are defined (seeded) to represent the acceptance or rejection of an item's repair.

Code	Meaning	Editable?
A	Approved	No
P	Pending	No
R	Rejected	No

Repair Status (CSD_REPAIR_STATUS)

The Repair Status lookup values define whether a Repair Order is open, closed, or on hold. The following values are seeded.

Code	Meaning	Editable?
C	Closed	No
D	Draft (used in Mass RO)	No
H	Hold	No
O	Open	No

Repair Event (CSD_EVENT)

Repair Event lookups are defined to represent particular events that take place in a depot during repair processing. The following values are seeded.

Code	Meaning	Editable?
A	Customer Approved	No
CM	Charges Manually Updated for Repair Order	No
CONU	Default Contract Updated	No
CR	Charges Recorded	No
DIA	Diagnosed	No
DROC	Depot Repair Owner Changed	No
ESU	Estimate Status Updated	No
IP	Inspection Performed	No
JC	Job Completed	No
JCA	Job Completed Alert	No
JCN	Job Canceled	No

Code	Meaning	Editable?
JS	Job Created	No
JSA	Job Submitted	No
JSU	Job Submitted Alert	No
OA	Repair Order Alert	No
PDC	Promise Date Changed	No
PS	Shipment	No
PSI	Sales Order Completed	No
R	Customer Rejected	No
RC	Repair Order Opened	No
RE	RMA Created	No
RO	Replace Order Created	No
RR	RMA Received	No
RRI	Requisition Received	No
RSC	Receipt Serial Number is different	No
RSCI	Sales Order Alert	No
SC	Status Changed	No
SLT	Repair Order Split	No
SOC	Sales Order Created	No
SRU	Service Request Status Updated	No

Code	Meaning	Editable?
SSC	Shipped Serial Number is different	No
TAC	Task Assignee Changed	No
TBR	Ready to be Returned	No
TC	Task Created	No
TOC	Task Updated	No
TSC	Task Status Change	No

Estimate Billing Type (CSD_EST_BILLING_TYPE)

Estimate Billing Type lookup values are defined to represent the type of transaction being billed. Following are the seeded values.

Code	Description	Editable?
E	Expense	No
L	Labor	No
M	Material	No

Estimate Status (CSD_ESTIMATE_STATUS)

Estimate statuses are values defined for the different states of an estimate. Following are the seeded Estimate Status values.

Code	Description	Editable?
ACCEPTED	Estimate approved by customer	No

Code	Description	Editable?
BID	Estimate awaiting customer approval	No
CANCELLED	Estimate is cancelled	No
DRAFT	Estimate with information but not ready to reveal to customer	No
NEW	Estimate with no information entered	No
REJECTED	Estimate not approved by customer	No

Estimate Reject Reasons (CSD_REJECT_REASON)

The following lookup values are seeded to specify the reason for an estimate rejection.

Code	Description	Editable?
CUST_REJECT	Customer Rejects Estimate	No
MAC_SHORTAGE	Machine Not Available in Depot	No
MAT_SHORTAGE	Material Shortage in Depot	No
NOT_PROFITABLE	Unprofitable for depot to repair the item	No
NOT_REPAIRABLE	Product Beyond Repair in Depot	No
RES_SHORTAGE	Resource Shortage in Depot	No

Product Transaction Action Codes (CSD_PRODUCT_ACTION_CODE)

The following are the Product Transaction Action codes seeded for Depot Repair.

Code	Description	Editable?
CUST_PROD	Customer Item	No
DEFECTIVES	Defective Item	No
EXCHANGE	Item Exchange	No
LOANER	Loaned Item	No
REPLACEMENT	Replacement Item	No
USABLES	Usable Item	No

Product Transaction Action Type (CSD_PROD_ACTION_TYPE)

The following Product Transaction Action Type lookup values are seeded in Oracle Depot Repair.

Code	Description	Editable?
MOVE_IN	Move in defective products	No
MOVE_OUT	Move out usable products	No
RMA	Inbound transaction for returned product	No
SHIP	Outbound transaction for Repaired Product, Loaner etc.	No

Product Transaction Status (CSD_PRODUCT_TXN_STATUS)

Product Transaction Statuses are lookup values defined for representing the state of product transactions. The following values are seeded.

Code	Description	Editable?
BOOKED	Sales Order Booked	No
ENTERED	Created Product Txn	No
RECEIVED	Received against RMA	No
RELEASED	Sales Order Pick Released	No
SHIPPED	Sales Order Shipped	No
SUBMITTED	Charge Line Interfaced	No

Repair Order Transaction Status (CSD_RO_TXN_STATUS)

Repair Order Statuses are lookup values that define the different stages in Repair Order processing. The following Repair Order Transaction Status values are seeded in Oracle Depot Repair.

Code	Description	Editable?
CHARGE_ENTERED	Charge Entered	No
ESTIMATE_APPROVED	Estimate Approved	No
ESTIMATE_REJECTED	Estimate Rejected	No
NEW	New	No
OM_BOOKED	OM Booked	No
OM_RECEIVED	OM Received	No
OM_RELEASED	OM Released	No
OM_SHIPPED	OM Shipped	No
OM_SUBMITTED	OM Submitted	No

Code	Description	Editable?
WIP_COMPLETED	WIP Job Complete	No
WIP_SUBMITTED	WIP Job Submitted	No

Units of Measure (CSD_UNIT_OF_MEASURE)

The following are the seeded values for Unit of Measure for the estimated repair lead time.

Code	Description	Editable?
DAY	Day	No
HR	Hour	No
MONTH	Month	No
WEEK	Week	No
YEAR	Year	No

Repair Job Statuses (CSD_WIP_JOB_STATUS)

The following lookup values are seeded for Repair Job Statuses in Oracle Depot Repair.

Code	Description	Editable?
RELEASED	Released	No
UNRELEASED	UnReleased	No

C

Oracle Depot Repair Update Programs

This appendix presents the Oracle Depot Repair update programs.

This appendix covers the following topics:

- Overview
- Depot Repair Receipt Update
- Depot Repair Job (WIP) Update
- Depot Repair Shipment Update

Overview

The following update programs are available for Oracle Depot Repair users:

- Depot Repair Receipt Update, page C-1
- Depot Repair Job (WIP) Update, page C-2
- Depot Repair Shipment Update, page C-4

You can process one Repair Order, or a Repair Order group using these update programs.

Depot Repair Receipt Update

The Depot Repair Receipt Update program is used to update Repair Orders and create repair history records when returns are received.

Overview

Return Material Authorizations (RMA) to receive repair items are created using the Logistics tab of the Repair Orders window, or through internal requisitions and internal sales orders. RMAs are pushed into Order Management for standard processing, and subsequently into Inventory/Receiving for inspection and receiving. When an RMA

related to a repair line is received, the program updates the total quantity received for the repair line, and creates a repair history record.

Program Logic

The Depot Repair Receipt Update program is run when you click the Update Logistics button in the Logistics tab for an RMA (Return) line.

Alternatively, you can run this program by either starting from the Navigator, then following the path Depot Repair > Others > Run Requests > Single Request, or, from the top menu in the Repair Orders window, selecting the options View > Requests > Submit a New Request.

The program logic is as follows:

1. Check if the receiving transaction process is complete for the RMA received. If not, wait until the process is complete.

2. If the process is complete, start the Depot Repair Receipt Update program, as described previously in this Program Logic section. This will check the receiving record and update the Oracle Depot Repair tables.

   The Depot Repair Receipt Update program picks only the receiving lines that are actually delivered to a subinventory; for example, when inspection is stated as mandatory for items before being received, only the items that passed inspection and were not returned.

Dependencies

The Depot Repair Receipt Update program is dependent on the following application modules:

- Oracle Depot Repair, Release 11i
- Oracle Purchasing, Release 11i
- Oracle Order Management, Release 11i
- Oracle Inventory, Release 11i

Depot Repair Job (WIP) Update

The Depot Repair Job (WIP) Update program is used to update Repair Order information in the CSD_REPAIRS and CSD_REPAIR_JOB_XREF tables, and to create repair history records when WIP Repair Jobs related to Oracle Depot Repair are created or completed.

Overview

WIP Repair Jobs for repair lines are created using the Submit Repair Jobs window and

the Submit Repair Jobs for Repair Orders window. A given repair line can be represented by multiple Repair Jobs in WIP, or multiple repair lines can be grouped as a single Repair Job.

For new WIP Repair Jobs created, the Depot Repair Job (WIP) Update program updates the repair line in the CSD_REPAIRS table with the quantity processed, updates the repair line, job combination record in the CSD_REPAIR_JOB_XREF table with the wip_entity_id of the new job and creates a Repair Job history record for each updated repair line, job combination record.

For WIP Jobs completed, the Depot Repair Job (WIP) Update program updates the quantity completed in the CSD_REPAIR_JOB_XREF table. If the completed job is associated with multiple Repair Orders, the update program allocates the quantity completed, if needed.

Program Logic

The Depot Repair Job (WIP) Update program is run in the following cases:

- When you click the Submit Jobs button in either the Submit Repair Jobs window or in the Submit Repair Jobs for Repair Orders window, after the program WIP Mass Load completes successfully.
- When you click the Update Job button in the Repair Jobs tab.

The program logic is as follows:

1. Click the Submit Jobs button in either the Submit Repair Jobs window or in the Submit Repair Jobs for Repair Orders window.
2. Complete the WIP Repair Job by clicking the Complete Job button in the Repair Jobs tab in the Repair Orders window.
3. Click the Update Job button on the Repair Jobs tab.

Alternatively, you can run this program by either starting from the Navigator, then following the path Depot Repair > Others > Run Requests > Single Request, or, from the top menu in the Repair Orders window, selecting the options View > Requests > Submit a New Request. When submitting the request, you can specify using a parameter whether to run for a specific repair number and whether to update Job Completion information.

Dependencies

The Depot Repair Job (WIP) Update program is dependent on the following application modules:

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

Depot Repair Shipment Update

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

Overview

Sales orders for repair line shipments are created using the Logistics tab of the Repair Orders window. The sales orders are submitted to Oracle Order Management for processing, and are shipped by the Shipping module. The associated repair lines in Oracle Depot Repair need to be updated with the shipped quantity. A history record must be created to record the shipped quantity and shipped date against the repair line.

Program Logic

The Depot Repair Shipment Update program is run when you click the Update Logistics button in the Logistics tab for a Sales order (Ship) line.

Alternatively, you can run this program by either starting from the Navigator, then following the path Depot Repair > Others > Run Requests > Single Request, or, from the top menu in the Repair Orders window, selecting the options View > Requests > Submit a New Request.

The program logic is as follows:

1. Ensure that the Interface Trip Stop concurrent program completes successfully.

2. When the Interface Trip Stop concurrent program has successfully completed, start the Depot Repair Shipment Update program, as described previously in this Program Logic section. This program finds the shipment record, and updates the Oracle Depot Repair tables with the data.

Dependencies

The Depot Repair Shipment Update program is dependent on the following application modules:

- Oracle Depot Repair, Release 11i

- Oracle Order Management, Release 11i

- Oracle Shipping Execution, Release 11i

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