Oracle® Depot Repair

User Guide

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Oracle Depot Repair User Guide, Release 12.1

Part No. E13606-05

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Preface

Intended Audience

Welcome to Release 12.1 of the *Oracle Depot Repair User Guide.*

See Related Information Sources on page xii for more Oracle E-Business Suite product information.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

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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 Using Oracle Depot Repair

This chapter provides an overview of the user interface and the major tasks that you can perform using Oracle Depot Repair.

3 Oracle Depot Repair Business Scenarios

This chapter describes working with different service depot repair business scenarios.

4 Depot Workbench

This chapter describes task-based procedures for different processes that a user can perform to fulfill responsibilities.

5 Repair Manager Portal

This chapter outlines the broad set of capabilities that a repair manager performs in the course of normal repair center operations.

6 Recalls

7 Returns Dashboard

8 Receiving Returns using the Bulk Receiving Module

This chapter describes how to easily receive items into the depot that arrive with or without an RMA.

9 Executing Repairs using the Repair Technician Module

This chapter describes an enhanced set of operations to process repair items.

Related Information Sources

Oracle Depot Repair 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 Oracle 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 E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite 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 E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, 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 E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite 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
- Business Process Flows
- Setup Parameters
- Integration with Other Oracle Modules

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 1-2
- Repair Type Processing, page 1-2
- Repair Job Management, page 1-2
- Repair Resolution Management, page 1-2

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 of a similar problem, 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 1-2
- Loaner, Repair and Return, page 1-2

- Exchange, page 1-2
- Advance Exchange, page 1-2
- Loaner, page 1-2
- Replacement, page 1-2
- Standard, page 1-2
- Refurbishment, page 1-2

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 a requirement. 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 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 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 repair jobs:

- WIP (Work In Process): Recommended for use when the repair jobs 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 to enhance usability.

Repair Resolution Management

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

- Repair job search functionality.
- Process automation based on Repair Type, such as automatic creation of charge lines.
- Estimate creation and approval.
- Leveraging of the service depot knowledge base throughout repair processing.
- Repair job creation and release to shop floor.
- 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 1-6
- Logistics and Maintenance without Call Center Facility, page 1-6
- Internal Repairs, page 1-6

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 or repair an item that your organization took possession of through a field service agent instead of against an RMA. Oracle Depot Repair lets you process internal repairs in such cases. The customer is an internal party in the corresponding Service Request. RMAs and Sales Orders are not required to process internal repairs. This is under the assumption that items already exist in a subinventory within the organization letting you create repair jobs.

Setup Parameters

Depot Repair provides a setup screen that allows administrators to select application configuration options using simple Attribute-Operator-Value (A-O-V) rules. The new setup parameters allow administrators to default values and system behavior based on A-O-V rules and not relying on fixed profile values. Explanatory text is available on the page to make setup and maintenance easier. Dependencies between options are made explicit and clear to understand.

As the Depot Repair application relies on integrations with many other CRM and ERP applications, the setup parameters allow the administrator to setup profiles from other applications that are required for successful depot business flows.

Depot Repair provides the ability to automate the disposition of products and the assignment of repairs to specific resources based on the following two customer defined rules:

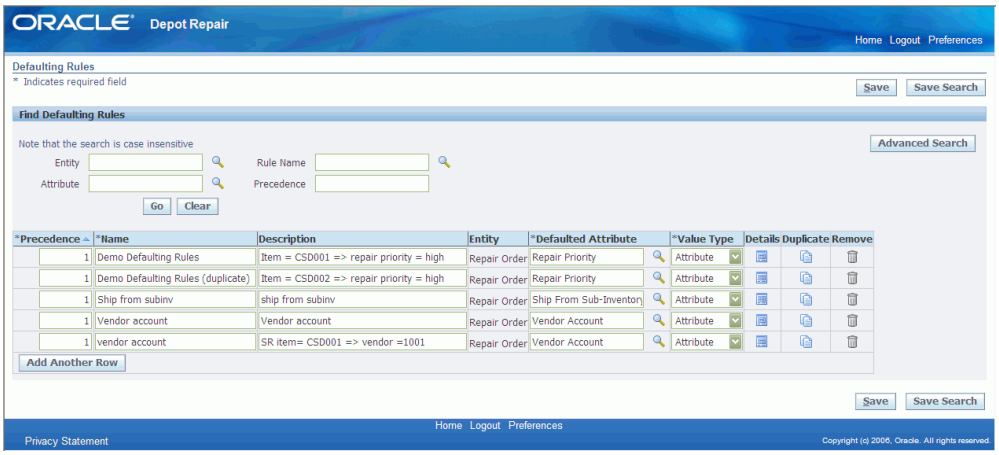
Defaulting Rules Engine

Repair queue, repair owner, priority and other repair order values default at the time of repair order creation based on customer defined rules. The fields that default are: Inventory Organization, RMA Receiving Organization, RMA Receiving, Subinventory, Repair organization, Repair Owner, Repair Priority, Repair Type, Ship from Organization, Ship from Subinventory, and Vendor Account. Rules are based on repair item, repair location, customer, contract, and the like.

Setting up Defaulting Rules

To set up defaulting rules

1. Navigate to the Defaulting Rules page. This page displays the summary of existing defaulting rules.



2. To set up a new defaulting rule, click Add Another Row button.

3. Enter the values in the following fields:

   - Precedence: Each rule is assigned a Precedence. Rules are evaluated in the order of precedence - the smaller the number, the higher is the precedence. The Precedence field accepts both positive and negative values.

   - Name: Name of the defaulting rule

   - Description: Description of the defaulting rule

   - Entity: Defaults from the system

- Defaulted Attribute: The value of this field defaults when a defaulting rule is applied to a repair order.

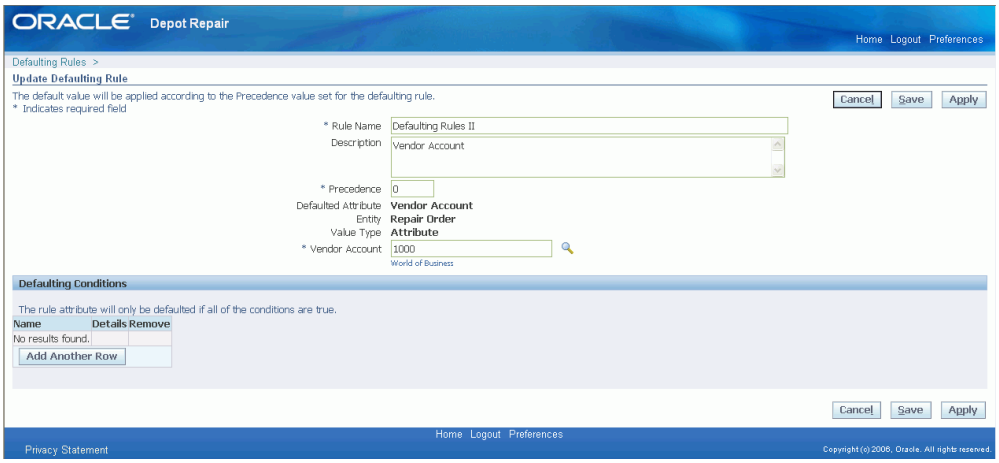
  The list of values for Defaulted Attribute are:

  - Inventory Organization
  - RMA Receiving Organization
  - RMA Receiving Sub-Inventory
  - Repair Organization
  - Repair Owner
  - Repair Priority
  - Repair Type
  - Ship From Organization
  - Ship From Sub-Inventory
  - Vendor Account

- Value Type: It lists attributes whose values default using Defaulting Rules. Valid list of values for Value Type are:

  - Attribute: This enables the user to specify a value from a dynamically generated list of values for the Defaulted Attribute. This list of values is generated based on the selection in the Defaulted Attribute.
  - PL/SQL API: This defaults the value returned from a call to the specified PL/SQL API to the Depot Workbench when this rule is evaluated to be true.
  - Profile: When you select profile as the value type and there are multiple levels of profile setting (for example, profile values set at the User level and at the Responsibility level), the system behaves the way it does for other profile option selections. This means it defaults from the most specific level that has been set (in this example, giving the User level setting precedence over the Responsibility level setting).

4. Click the Details icon to navigate to the Update Defaulting Rule page.



This page displays the details of the defaulting rule you entered. Use this page to specify a value for the defaulted attribute and the conditions to trigger the rule.

5. In the Defaulting Conditions region, click Add Another Row to enter a self-explanatory name for the condition.

   Defaulting Conditions region enable you to define one or more conditions for a defaulting rule. All the conditions must evaluate to true to execute the defaulting rule.

6. Click Apply to save your work and navigate back to the Defaulting Rules page.

7. Click Save to save the Defaulting Rule.

8. Duplicate icon duplicates the condition.

9. To delete a defaulting rule, click the corresponding Remove icon in the Defaulting Rules page.

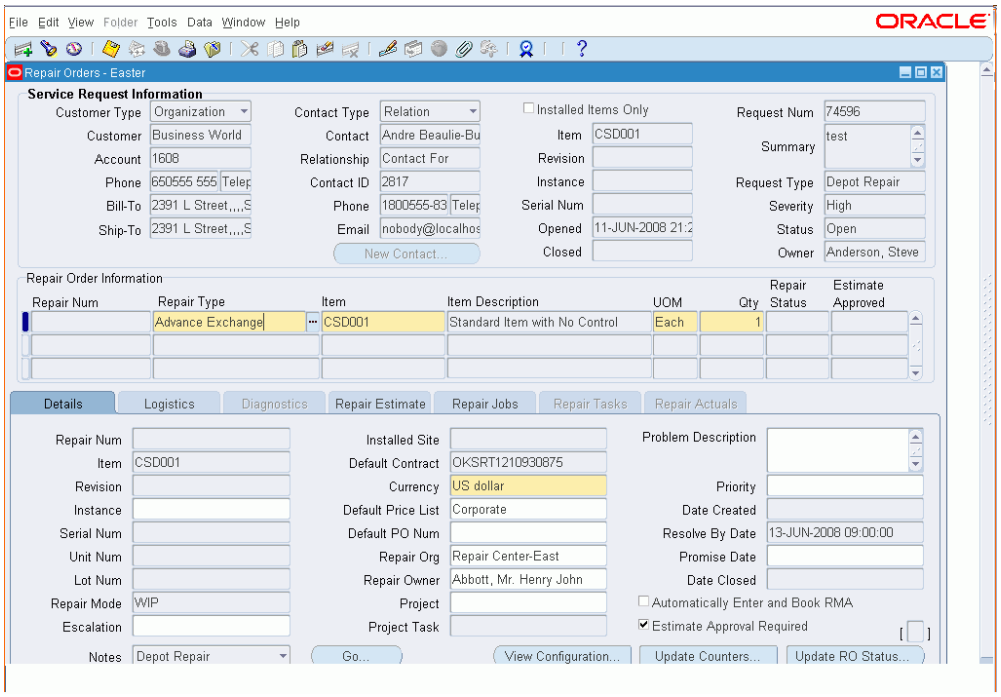
Using Defaulting Rules

To use defaulting rules

1. Navigate to the Depot Repair Workbench and click the New button to navigate to the Repair Orders page.

2. Create a new Service Request and click Save. See: Create a Service Request, page 4-12.

3. Create a new repair order for the item for which you have set the defaulting rule. See: Create a Repair Order in the Depot Repair Workbench, to create a repair order.



4. Click in the Repair Type field, in the Repair Order Information region. Any field for which rules have been created which evaluate to true defaults. You can overwrite the default values till the repair order is saved.

Disposition Rules Engine

Repair type, repair location, repair organization, third party repair vendor, exchange from location and other values default at the time of repair order creation based on customer defined rules. Rules are based on repair item, repair location, customer, contract, and the like.

Disposition implies a specific set of attributes related to where a product goes and what is done to it, for example the shipping and receiving inventory organization, subinventories, the repair type, and the like.

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:** The Counters module is now incorporated in 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 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*.

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.

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*.

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

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.

> **Note:** Oracle Depot Repair provides E-records and E-signature (ERES) functionality in WIP mode via Oracle WIP.

2

Overview of Using Oracle Depot Repair

This chapter provides an overview of the user interface and the major tasks that you can perform using Oracle Depot Repair.

This chapter covers the following topics:

- Accessing Oracle Depot Repair
- The Depot Repair Workbench
- The Service Request Information Area
- The Repair Order Information Area
- Details Tab
- Logistics Tab
- Diagnostics Tab
- Repair Estimate Tab
- Repair Jobs Tab
- Repair Tasks Tab
- Repair Actuals Tab
- Drill into Order Management
- Depot Repair Workbench Tools Menu
- Depot Repair Workbench Data Menu
- Find Repair Orders for Job Submission Window
- Submit Repair Jobs for Repair Orders Window
- Define Triggers for Service Bulletins
- Receive Unplanned Returns
- Execute Repair

Accessing Oracle Depot Repair

At the core of Oracle Depot Repair is the Depot Repair Workbench that provides service agents with instant access to customer and Repair Order information. You can access a number of tabs from the Depot Repair Workbench. Some tabs show information about the customer, the Service Request, and the service history of the item. Other tabs let you process transactions, such as:

- Receipt or shipment.
- Creation and processing of Repair Jobs and tasks.

The Depot Repair Workbench also provide access to a knowledge base through Oracle Knowledge Management.

The following procedures describe how to access the Depot Repair Workbench.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You need the navigation to Oracle Applications, and a registered and approved login to Oracle Depot Repair from your system administrator.

Navigation

Depot Repair > Repair Orders

Steps

1. In the Find Repair Orders window, if you click New, the Repair Orders window opens and serves as the Depot Repair Workbench.
2. Alternatively, in the Find Repair Orders window, you can retrieve a specific Repair Order by entering search criteria, and clicking the Find button.

   Note: You can also open the Depot Repair Workbench from the Service Request Quick Menu.

The Depot Repair Workbench

The title of the main window in Oracle Depot Repair is Repair Orders. As most of the Oracle Depot Repair user operations start in this window, it is generally referred to as the Depot Repair Workbench.

In the Depot Repair Workbench you can perform all service depot repair functions, including Repair Order creation, status monitoring, receiving, and shipping. From the Depot Repair Workbench, you can create Repair Orders to track the activities on customer or vendor items returned to service depot repair, for repair, upgrade, or overhaul.

Using the Depot Workbench, you can capture a value for a Project, Task and/or Model Unit Number on a Repair Order. The list of values for Project is restricted to those Projects defined in Oracle Project Manufacturing. The list of values for Task is restricted to the valid Tasks for the selected Project. When a Project, Task or Model Unit Number is selected on the Depot Repair Workbench, the values are passed to Order Management when an RMA or Ship line is created from Depot. Also, the values are passed to any WIP jobs created from the Depot Workbench.

You can use the Depot Workbench to cancel an order line in Order Management to the point of booking the order from the Depot Workbench. Select an RMA or Ship line in the Logistics tab, and select Cancel Order from the Tools menu.

The Depot Repair Workbench provides integration with Oracle E-Business Application Suite modules and components, such as Notes, Charges, Knowledge Management, Install Base, Work in Process (WIP), Bills of Material (BOM), General Ledger, Inventory, Shipping, and Receiving.

For more information, see Integration with Other Oracle Modules, page 1-11.

Service organizations can start their service depot business process from the Depot Repair Workbench. When a service agent enters the customer and item information, the Depot Repair Workbench automatically validates the customer and item in the Install Base.

From the Depot Repair Workbench, you can:

- Create new customers.
- Review your customer profiles.
- Automatically create Service Request and charge lines based on the selected Repair Type selected.
- Access shipping and receiving areas.
- Access WIP or Tasks for repair management.

For more information on the Depot Repair Workbench, see:

- The Service Request Information Area, page 2-5
- The Repair Order Information Area, page 2-8
- Details Tab, page 2-9
- Logistics Tab, page 2-12
- Diagnostics Tab, page 2-21
- Repair Estimate Tab, page 2-24
- Repair Jobs Tab, page 2-30
- Repair Tasks Tab, page 2-35

- Repair Actuals Tab, page 2-38
- Depot Repair Workbench Tools Menu, page 2-41
- Depot Repair Workbench Data Menu, page 2-46

The following features, that in previous versions were available through tabs in the Depot Repair Workbench, are now accessible through menu options:

- Coverage Window, page 2-41
- Activity Window, page 2-48
- Service History Window, page 2-47

For more details about these features, see Depot Repair Workbench Tools Menu, page 2-41 and Depot Repair Workbench Data Menu, page 2-46.

The Service Request Information Area

You can enter and view customer information in the Service Request Information area. The fields in the Service Request Information area include:

- Customer Information Fields, page 2-5
- Contact Information Fields, page 2-5
- Item Information Fields, page 2-5
- Request Information Fields, page 2-8

Customer Information Fields

Fields in the Customer Information area include:

- Customer Type: Caller types.
- Customer: Customer names. The customer can also be the internal party. Validation of items occurs against the party ID to assist the repair of internally owned items.
- Account: Customer Account Number.
- Phone: Customer's contact telephone number.
- Bill-To: Bill-to address of customer or a related party.
- Ship-To: Ship-to address of customer or a related party.

Note: The Bill-To and Ship-To addresses always default to the primary bill-to and ship-to addresses of the customer party, even if you select a primary address for the Installed Base instance.

Note: Also, the list of values for the Bill-to and Ship-to fields contains only the bill-to and ship-to addresses of the customer party. The Bill-to and Ship-to fields do not contain the addresses of the contact even if you have selected one.

Contact Information Fields

Fields in the Contact Information area include:

- Contact Type: Choose this value from the list of values.

  Note: This field does not automatically default to a null value. If you do not want to enter any contact information, then select the blank value from the Contact Type list of values; the remaining contact information fields that follow are disabled.

- Contact: Contact's name (customer account validation is required). Select from the contacts that your organization defined during Oracle Depot Repair setup.
- Relationship: Specifies the contact's relationship with the customer, such as Associate of, Child of, and Benefactor of. Select from the Relationship list of values.
- Contact ID: Contact's Identification Number.
- Phone: Contact's telephone number.

Contact Information Area Buttons

The button in the Contact Information area is:

- New Contact: To create a new customer contact, click the New Contact button.

Item Information Fields

Fields in the Item Information area include:

- Installed Items Only check box: Validates the item against the Installed Base.

  When the Installed Items Only check box is not set, the list of values for the Item field displays both the Installed Base trackable items and the non-Installed Base

trackable items.

When the Installed Items Only check box is set, the list of values for the Item field displays Installed Base trackable items only, that is, those that have an Instance value.

- Item: Specifies the Item Number for which there is a Service Request.
- Revision: Displays the item revision, if the item is revision controlled.
- Instance: Shows the Instance value of the item, and applies only to items that have an Installed Base instance. If you choose to enter the Instance field for an item first, the Item field becomes automatically populated when you select the Instance value from the list of values.
- Serial Num: For serialized items, displays the Serial Number of the item.

  If you have not already entered or selected the Item, and when both of the following conditions occur:

  - Installed Items Only is not checked
  - You choose to select or manually enter an already-existing Serial Number

  then the Item field and the other item-related fields are automatically populated.

  If you have already entered or selected the item:

  - For serialized, Installed Base trackable items, you must enter or select a valid Serial Number.
  - For serialized, non-Installed Base trackable items, if you select a Serial Number from the list of values, then other item-related fields are automatically populated.
  - For serialized, non-Installed Base trackable items, if you manually enter a Serial Number, then, whether or not it already exists, no further item-related fields are populated.
- Opened: Displays the date when the request was opened.
- Closed: Displays the date when the request was closed.

Request Information Fields

Fields in the Request Information area include:

- Request Num: Displays the system-generated Service Request Number.

- Summary: Enter or view a brief description for the request in the Summary field. The Summary field is a text string field and is classified as a Note.
- Request Type: Choose from the list of values that your organization defined. The default value for this field comes from the profile option Service: Default Service Request Type.
- Severity: Choose from the list of values to assign a severity to the request. The default value for this field comes from the profile option Service: Default Service Request Severity.
- Status: This defaults to Open when you create a Service Request, as specified by the default value of the profile option Service: Default Service Request Status.
- Owner: Assign a Service Request owner by selecting from the default the Price List from the profile option CSD: Default Price List, and derive the currency. Definition of the owners occur in Resource Manager. The default value for this field comes from the profile option Service: Default Service Request Owner.

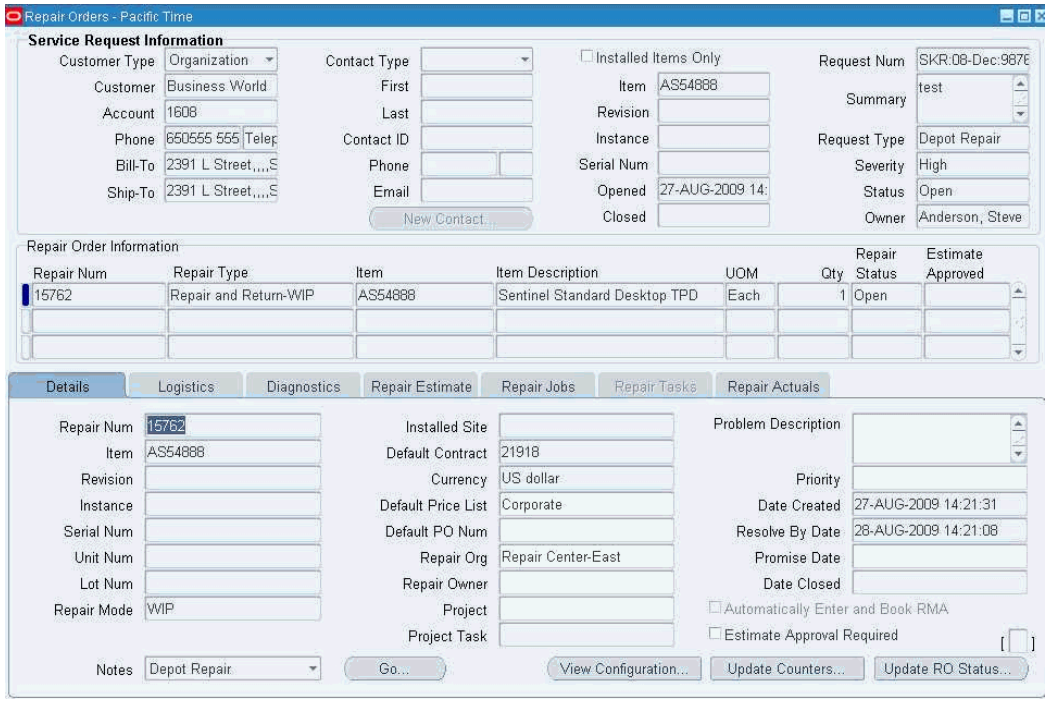
The Repair Order Information Area

The Repair Order Information area displays:

- Repair Num: Read-only field that displays the system-generated Repair Order Number.
- Repair Type: A mandatory field that is part of the Repair Order line, that contains a list of values of the user-defined Repair Types. A workflow supports each Repair Type to automate the service depot business process. For more information, see Repair Type Processing, page 1-2.
- Item: An automatically populated field that shows the item that you specified in the Service Request Information area. This field can be changed.
- Item Description: An automatically populated field that shows the description of the item that appears after you specify the item.
- UOM (Unit of Measure): An automatically populated field that shows the unit of measure after you specify the item. This field can be changed.
- Qty (Quantity): Automatically defaults to 1, except for internal order refurbishment repairs.
- Repair Status: Status of the Repair Order.
- Estimate Approved: Displays the associated estimate approval status value. Values include Approved, Pending, Rejected, and null.

Note: This is not the same as the Estimate Status which appears in the Repair Estimate tab. For more information, see Obtain Customer Approval for a Repair Estimate, page 4-63.

Details Tab



The Details tab contains:

- Repair Num: A read-only field that displays the system-generated Repair Order Number.
- Item: An automatically populated field that shows the item that you specified in the Service Request Information area. If multiple Repair Orders have already been created that are associated with a single Service Request, this field displays the item in the Repair Order line that you selected in the Repair Order Information area.
- Revision: Displays the item revision residing in the Installed Base record, if the item is revision controlled.
- Instance: Shows the Installed Base Instance value of the item, if the item is Installed Base trackable.
- Serial Num: Displays the Serial Number of the item for which repair is requested, if the item is serialized.

- Unit Num: Displays a list of values that includes Module Unit Numbers defined in the Inventory Organization to which you are assigned.

- Lot Num: Displays the item Lot Number residing in the Installed Base record, if the item is lot controlled.

- Warranty Status: The list of values are part of an extensible lookup. The seeded values are: In Warranty, Out Of Warranty, and Warranty Violated. These values are editable. This attribute is used for businesses that have standard warranties but do not want to use Oracle Service Contracts. You can use Personalization to default the warranty status based on rules such as, 1 year from Sold On Date, 90 days since Last Repaired Date and the like. This field is useful for companies which query warranty status from a third party database.

- Installed Site: Displays the (current) location identifier for the Installed Base item.

- Promise Date: Specifies the date within which completion of the item repair should occur. This date is a prediction only, and is derived after the service depot owner has reviewed the activities and commitments of the service depot.

- Date Created: A read-only field that displays the system-generated date and the creation date the Repair Order.

- Date Closed: A read-only field that displays the system-generated date and time stamp when the Repair Order status is set to closed.

- Repair Owner: Service depot resource that is responsible for execution and completion of the repair.

- Currency: Displays the functional currency of the repair organization, for example, US dollar.

  Note: Each Repair Order can have one currency only.

- Price List: Displays the Price List for the default contract of the Repair Order.

  - For more information, see Contract and Price List Defaulting at Repair Order Creation, page 4-8.

- Default PO Num: A free form text field to capture the Purchase Order Number. This value, if entered, becomes the default value for the PO Num fields in the Estimate Charge Line Details form, and the Logistics and Repair Actuals tabs.

- Resolve By Date: If a Service Contract exists, the Resolve By Date value defaults from the contract. In the absence of a Service Contract leave the date as null.

The Depot Workbench supports integration with Project Manufacturing by enabling

you to capture a Project ID, Task ID, and Unit Number on the repair order. While repair orders are not recognized on a Project, you can track the RMA lines, ship lines, and WIP jobs created as part of the repair on a Project. The following fields enable this functionality in the Details tab:

- Project: Displays list of values that show only the active Projects defined in the Inventory Organization to which you are assigned.
- Project Task: Displays only the active Tasks linked to the selected Project.

> **Note:** Once you select values for Project, Task, and Unit Number any RMA lines, ship lines, or WIP jobs created using the Depot Workbench are stamped with the Project, Task, and Unit Number IDs. If these IDs are changed on the Details tab, the values on the already created RMA lines, ship lines or WIP jobs are not updated. Any lines or jobs created after the updated Project and Task are stamped with the updated values.

Details Tab Check Boxes

- Estimate Approval Required: Forces an approval step after a repair estimate or diagnosis is performed, requiring the customer to approve the Repair Order before the service depot can proceed with the repair.
- Automatically Enter and Book RMA: Appears selected or cleared by default based on setup of the Repair Type corresponding to the Repair Order. When you create a Repair Order with this check box selected, the system automatically enters and books an RMA line. You can manually override the default selection for individual Repair Orders.

Details Tab DFF

- Descriptive Flex Field: Enter flexfield information associated with the Repair Order. You cannot edit the DFF field after the Repair Order status is changed to Closed.

Details Tab Buttons

- View Configuration: Displays item details for items that are Installed Base trackable. Item details include the most recent item configuration and revision status. The service depot can use this information when attempting to troubleshoot, upgrade, or repair the item.
- Update Counters: Displays the Counters Update window. In the Counters Update window, repair technicians can update the present counters that are associated to a

item.

- Update RO Status: Displays the Update Repair Order Status window where you can change the status of a Repair Order.

- Notes: Displays the Notes window. On the Notes window, you can record and share relevant information about customers and repair processes.

  The Service Request option provides a filter that only permits a user to view notes that someone created in the Service Request window. The Depot Repair option provides a filter that only permits the user to view notes that someone created in the Repair Order window.

Logistics Tab

On the Logistics tab, you process receiving or shipping transactions, for all types of repair.

For general repairs, that is, repairs that are not internal order refurbishments, the main operations that you can perform in the Logistics tab are as follows:

- Create and view RMA/Sales Order charge lines that are linked to a selected Depot Repair Order.

- Edit or save an existing charge line.

- Book an RMA or Sales Order.

- Pick release a Sales Order.

- Receive a returned item and move it to a subinventory.

- Ship or issue a repaired, loaner, or exchange item.

- Default Logistics Lines for OSP Operations: This enables a technician to automatically create a third party ship and RMA line on the Logistics tab whenever an OSP operation is completed. Set the profile option, CSD: Create Logistics Lines for OSP, to Yes to enable this functionality.

For internal order refurbishments, the main operations that you can perform in the Logistics tab are as follows:

- Create and view the Move In and Move Out charge lines.

- Pick release the internal Sales Order.

- Receive the item for refurbishment and move it to a subinventory.

- Ship the refurbished item.

The main fields on the Logistics tab appear automatically in one of two different multi-record layouts, depending on the Repair Type of the Repair Order:

1. A general layout for most of the Repair Types, page 2-12
2. A special layout for internal order refurbishment Repair Types, page 2-12, that is, where the Repair Type has been set up as follows:
   - The Repair Type has Repair Type Ref = Refurbishment.
   - The Repair Type has the Internal Order flag set on.

     For details of setting up Repair Types, see the *Oracle Depot Repair Implementation Guide*.

Under the multi-record area of the Logistics tab are the elements common to all Repair Types:

- Logistics Tab Check Box and Radio Buttons, page 2-12
- Logistics Tab Buttons, page 2-12

Logistics Tab General Multi-Record Area

The general multi-record area of the Logistics tab contains the following fields:

- Process Trans (check box): Selects the charge line for processing. When you select a line, you can select the "Automate order processing steps through" check box and one of its associated process stage options to set the parameters for processing the charge line (see Logistics Tab Check Box and Radio Buttons, page 2-12.)
- Action Type:

  In the Action Type field, select one of the following:
  - Return option to receive customer or vendor items.
  - Ship option to ship items to customers or vendors.
- Action Code: When the Action Code field is enabled, either leave the default value or select one of the following:
  - Customer Item option if the item belongs to the customer.
  - Loaner option if the item is on loan to the customer.
  - Exchange option if the item is an exchange.

    - Replacement option if the item is a replacement.

- Service Activity: Select the relevant Service Activity in this field, for example: Return for Repair.
- Order Num: Displays the RMA/Sales Order Number that Oracle Order Management returns.
- Line Num: Displays the Line Number in the Oracle Order Management order that is specified in the Order Num field.
- Status: Displays the status of the active Order Management Order Number. The status can be Entered, Submitted, Booked, Released, Received, or Shipped.
- Item: Choose the Item Number from the list of values.
- Price List: Specifies an Order Management Price List to price the Charge line.
- Qty: Specify the item quantity.

  If the value of Action Code is Customer Item, then the Qty in the Logistics tab must not exceed the Repair Order Qty, that is, the Qty in the Repair Order Information area.
- UOM: An item's unit of measure.
- Price: Specifies a price from the Price List for the charge line.
- Rev: Displays the item revision, if the item is revision controlled.

  > **Note:** The Source fields that follow are based on item inventory attributes. For more information, see the *Oracle Inventory User's Guide* and the *Oracle Depot Repair Implementation Guide*

- (Source) Serial Num: If the Source Item (the Item that is currently being shipped or received) is serialized, this field displays the Serial Number for the Source Item.
- (Source) Instance: If the Source Item (the Item that is currently being shipped or received) is Installed Base trackable, this field displays the Instance value for the Source Item.

  For a ship exchange line, the Source fields are optional and the fields are blank by default. You have two action items for the Source fields:

  - You can leave the Source fields empty if you do not know which instance is being shipped out and let them get populated during shipping.

- You can select the instance/serial being shipped out if you know exactly which serial number is being shipped out.

If the list of values in the Source field is empty, then check the following:

- You have internally owned items.
- A value is specified for Service: Inventory Validation Organization.

> **Note:** The Non Source fields that follow are based on attributes set up in Installed Base transaction subtypes. For more information, see the *Oracle Depot Repair Implementation Guide*.

- (Non Source) Serial Num: If the Non Source Item (the Item that is currently being replaced or exchanged) is serialized, this field displays the Serial Number for the Non Source Item. This applies only for Ship lines.
- (Non Source) Instance: If the Non Source Item (the Item that is currently being replaced or exchanged) is Installed Base trackable, this field displays the Instance value for the Non Source Item. This applies only for Ship lines.

  For a ship exchange line, the Non Source fields are mandatory and the repair order item information defaults. To enable entering the serial number in the Non Source field, execute the following steps:

  - You need Non Source information for the Service Activities associated with the Repair Types Exchange, Advance Exchange, and Replacement.
  - The list of value for the Non Source fields is activated only when the Action Type is SHIP or WALK_IN_ISSUE and Action code is EXCHANGE for product transaction line.
- Lot Num: Displays the item Lot Number, for lot controlled items.
- Subinv:
  - Displays the subinventory into which the item is received for Return lines.
  - Displays the subinventory from which the item is shipped for Ship lines.
- Locator: If the item is Locator controlled, displays the Locator information.
- Return Reason: Specify a reason for returning the item from the list of values.
- Return by Date: Specifies the date within which the item you need to return the item.

- Contract: Specifies the default Contract Number that applies to the charge lines.

  For more information, see Contract and Price List Defaulting at Repair Order Creation, page 4-8 and Coverage Window, page 2-41.

- PO Number: Specifies the Purchase Order Number corresponding to the order line in this field. This field value is not mandatory.

- (Addresses) Bill-To: Specifies the customer's Bill-To address.

- (Addresses) Ship-To: Specifies the customer's Ship-To address.

- Item Description: The description of the item.

- Picking Rule: The Picking rule for the ship line. This can be changed until the ship line is released.

- Add to Order: Displays the Order Management Order Number to which you want to add the Return/Ship line.

  If set, the two profile options:

  - CSD: Add to Order Num Within Repair Order Default

  - CSD: Add to Order Num Within Service Request Default

    provide default values for this field.

    If both are set, the default value comes from CSD: Add to Order Num Within Repair Order Default.

- No Charge (check box): You specify the default selection of this check box during implementation setup of the Service Activities and Billing Types. Selection of No Charge implies that you are not charging the customer for that transaction.

  After the charge line has been interfaced to Oracle Order Management, and an Order Number appears in the charge line, you cannot update the No Charge check box.

  > **Note:** It is recommended that you do not use the Logistics tab to charge items for logistics-related transactions. Instead, enter charges on the Repair Estimate tab.

Logistics Tab Multi-Record Area for Internal Order Refurbishments

The multi-record area of the Logistics tab that is specific to internal order (not internal party) refurbishments contains the following fields:

- Process Trans (check box): Selects the charge line for processing. When you select a

line, you can select the "Automate order processing steps through" check box and one of its associated process stage options to set the parameters for processing the charge line (see Logistics Tab Check Box and Radio Buttons, page 2-12.)

- Action Type:

  In the Action Type field, select one of the following:

  - Move In option to receive items from a source organization, such as a Spares Management site, and move them into a depot.
  - Move Out option to ship items back to the source organization, such as a Spares Management site.

- Action Code: The Action Code field displays one of the following values:
  - Defective, for the Move In line.
  - Usable, for the Move Out line.

- Order Num: Displays the internal Sales Order Number that Oracle Order Management returns.
- Line Num: Displays the Line Number and the Shipment Line Number in the Oracle Order Management order that is specified in the Order Num field.
- Status: Displays the status of the active Order Management Order Number. The status can be Created, Entered, Booked, Released, Received, Shipped, or Issued.
- Item: Choose the Item Number from the list of values.
- (Allocation Qty) Line: Displays the number of units specified on the internal refurbishment Repair Order. For serialized items, the value is always 1.
- (Allocation Qty) Shipped: Displays the number of units shipped
  - From the source organization for Move In lines.
  - From the depot for Move Out lines.

- (Allocation Qty) Received: Displays the number of units received
  - Into the depot for Move In lines.
  - The field is disabled for Move Out lines.

- Requisition Num: Displays the Requisition Number from Oracle Purchasing.

- Item Desc: Displays the description of the item.
- UOM: Displays the unit of measure of the item.
- Serial Num: Displays the Serial Number of the item for which repair is requested, if the item is serialized.
- Lot Num: Displays the item Lot Number, for lot controlled items
- Locator: If the item is Locator controlled, displays the Locator information.
- Ship-To Address: Displays the address of the destination organization.
- Source Org: Displays the organization from which the item is moved.
- Source Subinv: Displays the subinventory from which the item is moved.
- Destination Org: Displays the organization to which the item is moved.
- Destination Subinv: Displays the subinventory to which the item is moved.
- Order Type: Type of order from Oracle Order Management.

Logistics Tab Check Box and Radio Buttons

The fields under the multi-record area of the Logistics tab are as follows:

- Automate order processing steps through (check box)

  Automates order processing steps through selected options for Repair Order lines.

  If this check box is selected, you must also select one of the radio button options below this check box, to determine the default processing option for the Repair Order line.

- Enter Order (radio button)
- Book Order (radio button)
- Pick Release (radio button)
- Ship Confirm (radio button)

  Some of these radio buttons are disabled depending on a variety of factors, including the Action Type of the line, the Status, whether the repair item is serialized, and the type of serialization.

Comments

The following provides a list of the main conditions that affect the visibility and usage of the radio button options on the Logistics tab:

1. For Return lines, you can select only the Enter Order or the Book Order radio button.
2. For Ship lines, you can select any of the four radio button options.
3. For Move In and Move Out lines, the Enter Order and Book Order radio buttons are disabled.
4. For Move In and Move Out lines, the Pick Release radio button is always enabled if the Status is Booked.
5. For Move In and Move Out lines, the Ship Confirm radio button is disabled in either of the following cases:
   - When the serialized item is serialized at Sales Order Issue.
   - For partial shipments.

Logistics Tab Buttons and Actions Field

The buttons on the Logistics tab include the following:

- Refresh Logistics: Used to update the shipping or receiving information in the Depot Repair application. This only updates the information for the current line.
- Process: Submits the transaction lines, whose Process Trans check box is selected, to Order Management and returns a system-generated Order Number to the Order Num field.

The Actions field, accompanied by a Go button, contains a list of the operations available for processing logistics lines. Select an action and click Go to perform the corresponding operation. Depending on the Action Type and Status of the current logistics line, some options may be disabled, and you may not be allowed to perform some operations.

The list includes the following values:

- Edit Transaction Details: Displays the Transaction Details window. Service depot managers can edit the transaction details of the charges created for the customer item.

  This option is not available for Move In and Move Out lines.
- View Line Status Details : Displays the view-only Logistics Line Status Details

window, that relates the Status for the current logistics line to the statuses in the corresponding Order Management, Shipping, and Receiving lines as maintained by the other, integrated Oracle applications.

- Inspect/Move: Used to perform inspection and moving of items to inventory during the receiving process.

  This option is only available for Return lines with a Status of Booked, and for Move In lines with a Status of Shipped.

- Receive: Displays the Oracle Receiving window to receive the item and place it in a subinventory.

  This option is only available for Return lines with a Status of Booked, and for Move In lines with a Status of Shipped.

- Ship: Displays the Order Management Shipping Transactions window to ship the item to the customer.

  This option is only available for Ship, Move In, and Move Out lines, when their Status is Released.

- Transact Move Order: Enables you to set up a serial number for an item about to be shipped or moved.

  This option is only available for Ship, Move In, and Move Out lines, when their Status is Booked.

- Cancel Order Line: Allows you to cancel an order line, if the line processing has not gone beyond the booking stage.

  This option is available for Return lines before the Status becomes Received, and for Ship lines before the Status becomes Released. It is also available for Move In and for Move Out lines.

  To cancel an order line:

  1. Navigate to the Depot Repair Workbench.
  2. Create a Repair Order. Alternatively, you can search and retrieve an existing repair order. The Repair Orders page opens.
  3. Click the Logistics tab.
  4. Select the line you want to cancel and select Cancel Order Line from the Actions list of values.
  5. Click Go. The required order line is cancelled.

- Project Details: Displays the Project Details window. It enables you to select a different Project, Task ID, and Unit Number for a specific RMA line or ship line and

override the value that defaults from the Details tab. The Project, Task, and Unit Number LOVs under Project Details have the same values and constraints as the LOVs on the Details tab.

Once an RMA line, ship line or WIP job is created, the Project, Task, and Unit Number information cannot be changed from the Depot Workbench. However, it can be changed from the Order Management or WIP application screens. Project, Task, and Unit Number information are not passed to Estimate or Actuals lines.

Diagnostics Tab

The Diagnostics tab has the following layout:

- Diagnostic Codes Area, page 2-21

  In the Diagnostic Codes area, you enter Diagnostic Codes and perform searches for solutions in Oracle Knowledge Management based on the selected Diagnostic Codes. You can also search for solutions without specifying any Diagnostic Codes.

- Solutions Area, page 2-21

  In the Solutions area, you view matching potential solutions in Oracle Knowledge Management, determine which ones that you want to add as charge lines to the estimate or as Bills and Routings to the WIP Repair Job or both, and indicate the usefulness of the solutions.

- Service Codes Area, page 2-21

  In the Service Codes area, after you perform a solution search in Oracle Knowledge Management, linked solutions will be returned with associated Service Codes (if any exist). These associated Service Codes will be populated automatically in the Service Codes area, if the linked solution Status is Useful. When your implementor sets up Service Codes, your implementor associates material or labor costs or both to each Service Code. For more information on setting up Service Codes, see the *Oracle Depot Repair Implementation Guide*.

  > **Note:** If Oracle Knowledge Management is not installed or if the profile option CSD: Enable Knowledge Management is set to No, then Oracle Knowledge Management related elements will be disabled in the Diagnostics tab.

- Diagnostics Tab Button, page 2-21

  The Search Solutions button enables you to search for solutions in Oracle Knowledge Management.

Diagnostic Codes Area

The Diagnostic Codes area contains the following elements:

- Select (check box): Selects the Diagnostic Code to be included as a parameter in the Oracle Knowledge Management search.
- Code: Choose the Diagnostic Code from the list of values. This list includes only those Diagnostic Codes whose domains include either the Item or the Item Category of the Repair Order Item, as set up in Oracle Inventory.

  For more information on setting up Diagnostic Codes, see the *Oracle Depot Repair Implementation Guide*.
- Name: This read-only field specfies the name of the chosen Diagnostic Code.

Diagnostics Codes Area Buttons

- Select All: Selects all the Diagnostic Codes in the Diagnostic Codes area.
- Deselect All: Deselects all the Diagnostic Codes in the Diagnostic Codes area.

Solutions Area

The Solutions area displays the solutions that have been given feedback in Oracle Knowledge Management and have been linked to a Repair Order in Oracle Depot Repair.

The Solutions area contains the following elements:

- Number: The Oracle Knowledge Management Solution Number.
- Title: The Oracle Knowledge Management solution title.
- Status: The status indicates the usefulness of the solution. The values for Status correspond to the question posed in Oracle Knowledge Management: Is this solution useful in resolving your question or problem?
  - If the answer was Yes, the Status is Useful.
  - If the answer was Maybe, the Status is Possibly useful.
  - If the answer was No, and the value of the profile option Knowledge: Action for Negative Feedback Solution is Linked Solution as Not Solved, the Status is Not useful. If the profile option does not have the value Linked Solution as Not Solved, then the solution does not appear in the Solutions area.

You may change the Status value by clicking the Status field, selecting a different value

from the list of values, and then clicking Update Status.

Solutions Area Buttons

- Details: Launches the window in Oracle Knowledge Management that displays the solution details.

- Update Status: In order to update the status of the solution, you must click the Status field that you want to change, select a new value from the list of values, then click Update Status.

  Note: After you have brought back a solution from Oracle Knowledge Management, you can only change the status of the solution in Oracle Depot Repair. You cannot delete a solution from the Solutions area; however you can change the status of a solution to "Not useful".

Service Codes Area

The Service Codes area contains the following elements:

- Applicable (check box): Enables the Service Code and its associated elements to be included in the subsequent creation of estimate lines and WIP Repair Jobs.

- Code: The Service Code that is associated to WIP and Task elements, such as Bills, Routings, and Task Templates, to assist in the creation of estimate lines and WIP Repair Jobs.

  This field is filled in either automatically or manually.

  After performing a solution search in Oracle Knowledge Management, linked solutions which have associated Service Codes will populate automatically in the Service Codes area, if the linked solution Status is Useful.

  You may choose Service Codes manually, whether you have any automatic entries or not.

  For manual selection, select from the Code list of values. This list displays those Service Codes whose domain includes either the Item or the Item Category of the Repair Order Item, as set up in Oracle Inventory.

  For more information on setting up Service Codes, see the *Oracle Depot Repair Implementation Guide*.

- Name: This read-only field specifies the name of the selected Service Code.

- Solution Number: This read-only field specifies the identifying number of the Oracle Knowledge Management Solution associated with the chosen Service Code,

if any.

Diagnostics Tab Button

The Diagnostics tab contains the following button that lies outside the three main tab areas:

- Search Solutions

  When you click the Search Solutions button, you initiate a search for solutions in Oracle Knowledge Management.

Repair Estimate Tab

The Repair Estimate tab provides a summarized view of the repair estimate transactions needed to complete the repair. You can launch an estimate "worksheet" window that allows changes to charge lines that you entered on the Repair Estimate tab.

> **Note:** The CSD: Enable Estimates profile option, set up during implementation, lets your organization specify whether to enable or disable the Repair Estimate tab in the Depot Repair Workbench.

The Repair Estimate tab performs the following functions:

- It uses Order Management Price Lists to determine the selling price for each item selected in the charge line.
- It obtains the Item Cost from the inventory Item Master list.
- It copies in charge lines associated with the applicable Service Codes selected in the Diagnostics tab.
- It calculates the profit margin for each of the charge lines as a percentage and actual dollar amount.
- It provides a summary of estimated charges, with subtotals for Material, Labor, and Expenses charges.
- It provides an estimate cost analysis, which lets you compare your estimated margins and profitability based on estimated costs and estimated charges.

Repair Estimate Tab Header Fields

The Repair Estimate tab header fields and functionality include:

- Status: Select a status from the list of values. Estimate statuses in Oracle Depot

Repair include:

- Accepted: An estimate that the customer has approved.
- Bid: An estimate that is awaiting customer approval.
- Cancelled: A cancelled estimate.
- Drafted: An estimate with information, but not ready to be revealed to the customer.
- New: An estimate with no entered information.
- Rejected: An estimate that the customer did not approve.

- Date: Select a date from the Calendar to enter the creation date of the Repair Estimate.
- Reason: Select a Reason Code from the list of values that best describes the reason for performing the repair estimate process. This field is enabled when the Status is Accepted or Rejected.
- Summary: Enter a free text work summary or problem description that best describes the repair diagnosis or symptom of the broken or damaged item.
- Lead Time: Enter the number of units required to complete the item repair.
- UOM: Select a unit of measure to describe the lead time units required.
- Descriptive Flex Field: Enter flexfield information associated with the repair estimate header. You cannot edit the DFF field after the Repair Order status is changed to Closed.

Repair Estimate Tab Multi-Record Fields

Fields and functionality in the Repair Estimate multi-record area include:

- Source Type: Displays the source of the estimate charge line. Possible values are Manual, Service Code and Solution.
- Billing Category: Displays the categories of Material, Labor, or Expense.
- Item: Displays the selected Item Number from inventory

  Note: Items for estimates must be defined in the organization specified by the profile option Service: Inventory Validation

Organization.

- Contract Number: Displays the Contract Number that is applicable to the estimate charge line.
- Price List: Displays the selected Order Management Price List.
- Pricing Attributes: Enter the appropriate Pricing Attribute flexfield information for the Price List.
- Qty: Displays the quantity if items for which service is being requested.
- UOM: Displays the unit of measure.
- Unit Price: Displays the item's selling price from the selected Price List.
- Estimated Charge: Displays the charge after the contract entitlement has been applied.
- Override Charge (check box): Select this if you want to change the Estimated Charge field.

  Note: This field is only enabled if the profile option CSD: Allow Charge Override for Estimates is set to Yes.

  Note: When you change the Estimated Charge, any discount associated with the contract is ignored.

- No Charge (check box): Discounts the charge line amount to zero or no charge.

Summary of Estimated Charges Fields

The Summary of Estimated Charges area displays:

- Material: Displays the subtotal of the estimated material required.
- Labor: Displays the subtotal of the estimated labor required.
- Expenses: Displays the subtotal of the estimated expenses required.
- Total: Displays the combined subtotal of the material, labor, and expenses.
- Currency: Displays the currency for the Repair Order, for example: US dollar.

Note: A Repair Order supports only a single currency. The system supports different currencies for different Repair Orders within a Service Request.

Repair Estimate Tab Buttons

Buttons on the Repair Estimate tab include:

- Estimate Notes: Enter justification notes that describe the estimated transaction line.
- Costs: Launches the Estimated Costs versus Estimated Charges window.
- Line Details: Displays the detailed estimate worksheet.
- Add Lines from Diagnostics: Copies charge lines into the Repair Estimates tab from the Service Codes marked as applicable in the Diagnostics tab, and their associated Oracle Knowledge Management solutions, if not added already.
- Save Estimate: Records estimate header and charge line details.

About Estimate Charge Line Details Window

On the Estimate Charge Line Details window, you can edit details of charge lines that you had entered on the Repair Estimate tab.

Note: You cannot add new charge lines or delete existing charge lines using the Estimate Charge Line Details window. To add a new charge line or delete an existing charge line, return to the Repair Estimate tab.

In the multi-record area, the Estimate Charge Line Details window displays, as read-only fields, most of the charge line fields that appear in the Repair Estimate Multi-Record Fields area of the Repair Estimate tab, namely:

- Source Type
- Billing Category
- Item
- Contract Number
- Price List
- Qty

- UOM
- Unit Price
- Estimated Charge
- Override Charge (check box)
- No Charge (check box)

When you select one of the charge lines in the multi-record area, the Estimate Line Details region shows more details of the selected charge line.

Of all the fields that appear in the Estimate Line Details region, you can edit or enter the following field values.

- Billing Category
- Item
- Resource: Displays the resource type that was selected from the item master. This field is enabled when Billing Category = Labor.
- PO Num: Enter the customer or vendor Purchase Order Number to validate the acceptance of the repair estimate or customer's approval to proceed with the pending repair. This field value is not mandatory.
- Price List
- Pricing Attributes
- Quantity
- UOM
- Quantity
- (Contract Information) Number
- Estimated Charge: You can edit this field if you set the check box Override Charge.
- Override Charge (check box): To be able to change this field, the profile option CSD: Allow Charge Override for Estimates must be set to Yes.

  Note: When you change the Estimated Charge, any discount associated with the contract is ignored.

- No Charge (check box): If No Charge is checked, then Override Charge is disabled.

When you update these field values, the application automatically updates any associated fields.

The Number field in the Contract Information area of the Estimate Line Details region displays the default Repair Order contract. This contract could be the best contract, the contract associated at the Service Request level, or the contract selected manually from the Coverage window that you can access using the menu option path Tools > Coverage.

For more information, see Contract and Price List Defaulting at Repair Order Creation, page 4-8 and Coverage Window, page 2-41.

The default Repair Order contract populates the Number field in the Contract Information area for each estimate charge line. You can override this default value at the estimate line level by entering a different contract by selecting from the list of values.

Other fields include:

- Revision: Displays the item Revision Number if the item is revision-controlled.
- Unit Price: Displays the unit price of the item.
- Extended Price: Multiplies Quantity by Unit Price to display the extended price.
- Item Cost: Displays the inventory cost for the selected item.
- Extended Cost: Multiplies Quantity by Item Cost to display the extended cost.
- (Contract Information) Description: Displays the Contract name for the selected Contract Number.
- Discount: Displays the discounted charges by applying the selected contract.
- Profit Margin: Displays the profit margin as a dollar value, for example, Profit Margin = $128.45.
- Profit Margin%: Displays the profit margin as a percentage, for example, Profit Margin% = 30%.
- Descriptive Flex Field: Displays the flexfield information associated with the repair estimate line. You cannot edit the DFF field after the Repair Order status is changed to Closed.

Estimate Charge Line Details Check Boxes

Check boxes in the Estimate Line Details region include:

- Override Charge: Select this if you want to edit the charges in the Estimated Charge field.

Note: To be able to change this field, you must set the value of the profile option CSD: Allow Charge Override for Estimates to Yes.

- No Charge: Discounts the charge line amount to zero or no charge.

Estimate Charge Line Details Buttons

Buttons on the Estimate Charge Line Details window include:

- Save: Saves the repair estimate charge lines.
- Close: Closes the Estimate Charge Lines Details window.

Repair Jobs Tab

Note: Oracle Depot Repair provides E-records and E-signature (ERES) functionality in WIP mode via Oracle WIP.

Access the Repair Jobs tab from the Depot Repair Workbench. The Repair Jobs tab displays details of WIP Repair Jobs pertinent to the Repair Order.

The Repair Jobs tab displays:

- Job Name: The system shows the Repair Job name after you have created the Repair Job.
- Item: Displays the item for which the Repair Job has been created.
- Organization: Displays the name of the repair organization.
- Created: Displays the job quantity created.
- Completed: Displays the job quantity completed.
- (Allocated) Created: If the Repair Job is created for more than one Repair Order, displays the quantity created for this Repair Order.
- (Allocated) Completed: If the Repair Job is created for more than one Repair Order, displays the quantity completed for this Repair Order.
- Job Status: Displays the current status of the WIP Repair Job.
- (Routing) Reference: Refers to the routing used for the Repair Job.

  You create Routings in BOM. WIP uses Routings to assist the repair process. Each

routing contains the operations and resource requirements for the Repair Job.

- (Routing) Alternate: Refers to the alternate if an alternate routing was used for the Repair Job.
- Source Type: Displays Service Code or Manual, depending on how the Repair Job was created
- Source Name: If Source Type is Service Code, the Source Name is the name of the Service Code. If Source Type is Manual, the Source Name has no value.

Buttons and Actions field

Buttons on the Repair Jobs tab include:

- Refresh Job: Updates the Repair Job information in Oracle Depot Repair.
- Create Job: Launches the Submit Repair Jobs window.

  For more information, see Submit Repair Jobs Window, page 2-30.

  The Create Job button is disabled in the following situations:

  - The profile option CSD: Allow Creating WIP Job Without RMA is set to No and nothing has yet been received against the Repair Order.
  - Estimate approval is required, and the estimate has not yet been approved.

The layout of the rest of the foot of the Repair Jobs tab depends on the value of the profile option CSD: Repair Execution Mode.

If the value is WIP, the Repair Jobs tab contains an Actions field and a Go button. The Actions list of values contains the following entries, which trigger the corresponding operation when you click the Go button:

- View Job: Displays the WIP View Discrete Jobs window in a read-only mode to show details of the Repair Job.
- Execute Move: Displays the WIP Move Transactions window, which enables you to move the repair item through the operations.
- Transact Materials: Displays the Oracle Inventory Material Transactions window, which enables you to issue the broken or damaged items and needed material for the WIP Repair Job.
- Transact Resources: Displays the Resources window, which enables you to transact resources to the WIP Repair Job.
- Complete Job: Displays the Oracle WIP Completion Transactions window, which

enables you to complete the WIP Repair Job.

If the value is Depot Repair, the Repair Jobs tab contains the following button:

- Execute Job: Launches the Repair Order page, in the Repair Execution tab. For more information, see Using the Repair Execution tab.

Submit Repair Jobs Window

On the Submit Repair Jobs window, you can submit one or more WIP Repair Jobs for a given Repair Order.

The Submit Repair Jobs window includes:

- Repair Job Parameters Area Fields, page 2-30
- Repair Order Area Fields, page 2-30
- Service Codes, Bills and Routings Area Fields, page 2-30
- Buttons, page 2-30

Repair Job Parameters Area Fields

The Repair Job Parameters area of the Submit Repair Jobs window includes the following fields:

- Item: Defaults to the Repair Order Item, but you can change the item.
- Description
- Job Name Prefix

  If the value of the profile option CSD: Use CSD as Job Name Prefix is set to Yes, the value in this field appears as CSD, and cannot be updated.

  If the value of the profile option CSD: Use CSD as Job Name Prefix is set to No, the value in this field defaults to the value of the profile option CSD: Default Job Name Prefix, and can be updated.
- (Quantity) Repair Order: Displays the number of item units on the Repair Order.
- (Quantity) Received: Displays the number of item units received on the Repair Order.

The other fields in the Repair Job Parameters area include:

- (Quantity) Submit: Enter the number of item units that you want to submit for the Repair Job. This field is mandatory.

(Quantity) Submit must be greater than 0.

The default for the (Quantity) Submit depends on the value of the profile option CSD: Allow Creating WIP Job Without RMA, as follows:

- If the value is Yes, (Quantity) Submit defaults to the Repair Order quantity.
- If the value is No, (Quantity) Submit defaults to the received quantity.

  If the Repair Job Item is the same as the Repair Order Item, (Quantity) Submit cannot exceed the default value.

  If the Repair Job Item is different from the Repair Order Item, (Quantity) Submit can exceed the default value.

- Job Status: The job status with which you submit a Repair Job to WIP. Possible values are Released and Unreleased. This field is mandatory.

  This defaults to the value of the profile option CSD: Default Repair Job Status.

  > **Note:** For a WIP Repair Job to begin or for materials to be issued against the job, the Job Status must be Released.

- Accounting Class: The valuation and variance accounts associated with the accounting classes determine which accounts are charged and when. You can select any active asset non-standard or non-standard expense class. This field is mandatory.
- Start Date: The system date defaults as Start Date.
- Complete Date: Select the completion date and time for the WIP Repair Job. Defaults to the start date. This field is mandatory.

For more information on WIP-related fields, such as Accounting Class, see the *Oracle WIP User's Guide*.

Repair Order Area Fields

The Repair Order area contains the following read-only fields, related to the Repair Order:

- Customer
- Number: The Repair Order Number.
- Type: The Repair Type of the Repair Order.
- Status: The status of the Repair Order.

- Promise Date

Service Codes, Bills and Routings Area Fields

The Service Codes, Bills and Routings area is the region where you select which method you want to use to create the Repair Job, as indicated by the radio buttons at the top of the area:

- Use Service Codes
- Select Bills and Routings
- Do not Specify Bills and Routings

Below the radio buttons, there are two multi-record areas. The availability and use of these multi-record areas depends on which radio button option you select.

> **Note:** You cannot select the Use Service Codes button unless there are Service Codes associated in the Diagnostics tab.

If there are any Service Codes associated to the Repair Order, the Use Service Codes radio button option will be selected by default in the Submit Repair Jobs window.

In the Submit Repair Jobs window, you must perform the following sequence of steps:

1. Select one of the radio buttons.
2. Enter information in one of the multi-record areas, if the area is enabled.
3. Click Submit Jobs.

Use Service Codes

If you select the Use Service Codes radio button, then the associated Service Codes and Bills and Routings will be displayed in the multi-record areas, and cannot be updated.

If you deselect the Use Service Codes radio button, the Service Code and Bill and Routing information is cleared.

For details of selecting Service Codes, see Use the Diagnostics Tab and the Knowledge Base, page 4-39.

For details of setting up Service Codes, see the *Oracle Depot Repair Implementation Guide*.

Select Bills and Routings

If you select the Select Bills and Routings radio button, the first multi-record area is not applicable, but the second multi-record area is available for you to fill in manually, and you must enter at least one bill or routing.

The fields in the second multi-record area are as follows:

- Bills (Reference)
- Bills (Description)
- Bills (Alternate)
- Routing (Reference)
- Routing (Description)
- Routing (Alternate)

These fields refer to Bills and Routings that are set up in Oracle Inventory and Oracle Bills of Material. For more information, refer to the User's Guides for these applications.

Do not Specify Bills and Routings

If you select the Do not Specify Bills and Routings radio button, neither of the multi-record areas is applicable. With this option selected, when you submit a Repair Job, it is submitted without any Bill or Routing information for creation in WIP.

Buttons

The Submit Repair Jobs buttons include:

- Submit Jobs: Submits the Repair Job to WIP for creation.
- Close: Closes the Submit Repair Jobs window.

> **Note:** If there are any errors during the process of submitting a WIP Repair Job, such as an inactive Service Code, they will appear in an Errors window.

Repair Tasks Tab

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

You can access the Repair Tasks tab from the Depot Repair Workbench. On the Repair Tasks tab, you can create the tasks needed to assist an item repair. This tab is enabled only if the Repair Type chosen has been defined during implementation to use the repair mode of Task.

The tasks appear in the Repair Tasks table. The fields on the Repair Tasks tab

dashboard area include:

- Number: Displays the system-assigned Task Number.
- Name: Displays the task name.
- Description: Displays the task description.
- Status: Displays the current task status.
- Priority: Displays the task priority, for example: Critical, High, Medium, or Low.
- Actual Start: Displays the task start date.
- Actual End: Displays the task end or completion date.
- Owner: Displays the task owner's name.
- Applicable Qa Plans: Indicates whether any quality collection plans are associated with the task.

The fields on the Repair Tasks tab include:

- Number: Displays the system-assigned Task Number.
- Type: Displays the service depot task type, for example: Callback, Diagnostic, General, Repair, or Upgrade.
- Name: Displays the task name.
- Status: Displays the current task status selected from the list of values.
- Priority: Displays the task priority selected from the list of values, for example: Critical, High, Medium, or Low.
- Description: A free text field to enter a detailed description of the displayed task.
- Publish (check box): If you wish to display the task for the customer to see on their Oracle iSupport Web portal, then select the Publish check box.
- Private (check box): Select the Private check box if this is a personal task and you do not want other employees to view it. Any resource associated with the task, for example an assignee, will have access to the task whether it is marked as private or not.
- Owner Type: Displays the owner type selected from the list of values, for example: Employee, Group, or Team Resource.
- Owner: Displays the task owner's name selected from the list of values.

- Assignee Type: Displays the assignee type selected from Assignment Manager.
- Assignee: Displays the assignee selected from Assignment Manager.

The fields in the Dates section of the Repair Tasks tab include:

- Planned Start: Displays planned start date.
- Planned End: Displays planned end date.
- Scheduled Start: Displays scheduled start date.
- Scheduled End: Displays scheduled end date.
- Actual Start: Displays actual start date.
- Actual End: Displays actual end date.

The fields that appear in the Effort section of the Repair Tasks tab include:

- Estimate Qty: Displays estimated number of units to complete the task.
- Estimate UOM: Displays unit of measure used to describe the estimated effort.
- Actual Qty: Displays actual number of units used to complete the task.
- Actual UOM: Displays unit of measure used to describe the actual effort.

Repair Tasks Tab Buttons

Buttons on the Repair Tasks tab include:

- Assignment Manager icon (next to the Assignee field): Displays the Assignment Manager window.
- Add Tasks from Diagnostics: Adds tasks associated with Task Template Groups associated with the Service Codes marked as applicable in the Diagnostics tab.
- Use Template: Displays the Create Tasks from Template Group window to permit creation of new tasks from previously defined templates.
- Launch Workflow: Starts the task workflow to reserve the designated resources and notify the task owner of task creation.
- Debrief: Displays the Debrief Report window to capture the Material, Labor, and Expense billing transactions used to complete the task.
- More: Displays the windows to display and capture additional task details including:

- Resources: Defines and displays resource requirements, assignments, and scheduling information.
- Dependencies: Specifies ordering and prioritization of multiple tasks.
- References: Permits linking of task to different documents or to other pertinent background information.
- Dates: Identifies more dates in addition to the planned dates.
- Contacts: Enables creation and management of multiple contacts who are assigned to a task. The system obtains contact information from customer information.
- Recurrences: Enables the scheduling of tasks to occur automatically.
- Others: Identifies additional information about the task.
- Audit: Displays an audit history log with the changed dates and the user responsibility that initiated the changes.

Repair Actuals Tab

The Repair Actuals tab provides the data fields required for billing your customer for charges incurred during the processing of items in Oracle Depot Repair.

The Repair Actuals tab contains the following elements:

- The Summary of Actual Charges area
- A multi-record area consisting of the charge line fields
- Buttons to allow you to perform the following operations:
  - Specify from where to add lines to the Repair Actuals tab
  - View further details of the charge lines
  - Select and deselect all charge lines
  - Book selected charge lines

Depending on how you choose to add lines to the multi-record area, certain fields and buttons may be enabled or disabled. See the Comments at the end of this section, page 2-38.

Summary of Actual Charges Area

The Summary of Actual Charges area displays a summary of the information which appears in greater detail in the multi-record area.

The Summary of Actual Charges area consists of the following read-only fields:

- Material: Total charge of all the charge lines with the Material billing category.
- Labor: Total charge of all the charge lines with the Labor billing category.
- Expenses: Total charge of all the charge lines with the Expenses billing category.
- Total: Total charge of all the charge lines.
- Currency: Currency of all the charges.

Repair Actuals Tab Multi-Record Area

The multi-record area in the Repair Actuals tab is populated either with data copied from other Depot Repair Workbench tabs, or manually.

The multi-record area of the Repair Actuals tab includes the following fields:

- Select (check box): Selects the charge line for booking.
- Source Type: Describes the source of the actual charge line.

  The available values are:

  - WIP, Estimate, and Task, for lines copied from other Oracle Depot Repair tabs.
  - Manual, if you enter the actual charge line manually in this window. This value appears when you start to enter a new charge line.

    Note: The fields marked with an asterisk (*) below are available for you to enter data if the Source Type field is Estimate or Manual.

- Order Number: Displays the Order Number returned from Oracle Order Management, after you click Book Selected.
- Billing Category*
- Item*
- Serial Num*: This field is enabled for items that are serialized at receipt.

- PO Number*
- Contract Number*
- Price List*
- Pricing Attributes*
- Qty*
- UOM*
- Unit Price
- Charge*: You can enter a Charge if you first set the check box Override Charge and if the value of the profile option CSD: Allow Charge Override for Actuals is set to Yes. See the Comments at the end of this section, page 2-38.
- Override Charge* (check box)
- No Charge* (check box)

Repair Actuals Tab Button Area

The button area contains mainly buttons, and one data field, as follows:

Select All button: Selects all the eligible charge lines in the multi-record area.

Deselect All button: Deselects all the eligible charge lines in the multi-record area.

Book Selected button: Books the selected charge lines in the multi-record area. *This button is visible only if you have the User Function Name Repair Orders: Submit Charges associated with your responsibility.*

Line Details button: Shows details of the actual charge line.

Source field: Source of charge lines to copy into the Repair Actuals window.

- For WIP mode repairs, the options are WIP and Estimate.
- For Task mode repairs, the options are Task and Estimate.

Add button: Click this to copy the charge lines into the Repair Actuals tab from the source you selected in the Source field.

Comments

1. The Book Selected button and the Select check box are enabled for all sources.
2. For lines whose Source Type is WIP, all the fields in the multi-record area except

Override Charge (if CSD: Allow Charge Override for Actuals is set to Yes) and No Charge are disabled. If you check Override Charge, you can enter a new Charge.

3. For lines whose Source Type is Task, the Select check box is checked, by default, and cannot be deselected. All the other fields in the multi-record area are disabled.

4. For lines whose Source Type is Task, only Book Selected and Line Details are available to you, as task lines have already been flagged for interfacing to Oracle Order Management.

Drill into Order Management

The Sales Order Number can optionally be hyperlinked to allow you to click on it to launch the Sales Order window in editable mode and in context of the clicked Order Number. You can enter information such as credit card number, ship method and payment details, save the order, close the Sales Order screen and return to the Depot Workbench without ever leaving.

You can navigate to the Sales Order window from the Logistics tab and the Repair Actuals tab.

- From the Logistics tab: Select a Return Line, and book the order. A number appears in the Order Number field. Click the Actions list and select the Update Sales Orders option. This launches the Sales Order window. You can also launch the Sales Order window by clicking on the hyperlinked Sales Order number.

- From Repair Actuals tab: Select the individual charge lines or click Select All to book all the charge lines and click the Book Selected button. A number appears in the Order Number field. Click the Order Number to launch the Sales Order window. You can also launch the Sales Order window by clicking on the hyperlinked Sales Order number.

  Note: Set the profile option, CSD: Enable Sales Orders Hyperlink, to Yes. This profile enables the Sales order hyperlink on the Logistics tab and Repair Actuals tab.

Depot Repair Workbench Tools Menu

The Tools Menu of the Depot Repair Workbench provides the following facilities:

- Quick Menu: Launches the Quick Menu.

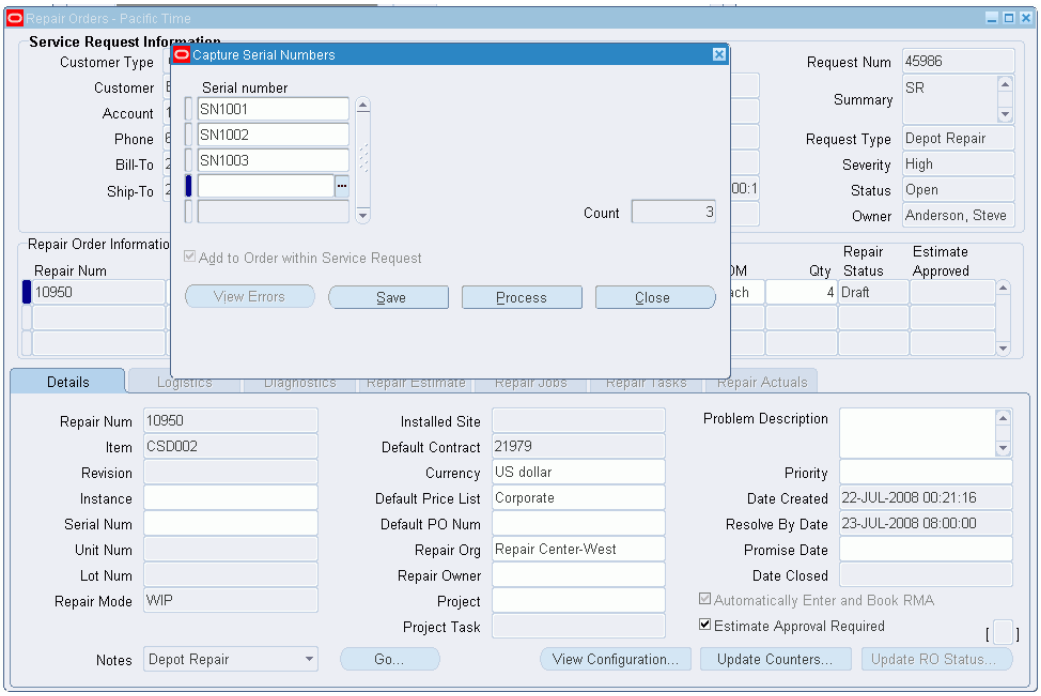
- Print Estimate: Submits the repair estimate for printing.

- Freeze Estimate: Freezes the repair estimate and prevents updates.

- Capture Serial Numbers: For details, see Capture Serial Numbers.
- Find Customer: For details, see Find Customer Window
- Split Repair Order: Allows the user to split a Repair Order. For more information, see Split a Repair Order, page 4-76.
- Profile: To view an existingcustomer profile, select Profile from the Tools menu. For proper setup of the Profile window with customizable options, see the *Oracle TeleService Implementation Guide*.
- Send Message: Choose Send Message from the Tools menu to send a workflow notification message, and have that message link to the Repair Order selected in the Depot Repair Workbench at the time the message was sent. For more information, see the *Oracle TeleService User Guide*.
- View Message History: Choose View Message History from the Tools menu to display the Message History window. For more information, see the *Oracle Support User Guide*.
- Coverage: For details, see Coverage Window, page 2-41.

Capture Serial Numbers

Capture Serial Numbers window enables you to quickly create repair orders for multiple quantity of the same serialized item. You can create a single Draft repair order for the serialized item with a quantity greater than one, rather than creating a repair order for each item individually. When you create a repair order for a serialized item with quantity greater than one, it is automatically saved with a repair order status of Draft. Once that repair order is saved, the Capture Serial Numbers menu item is enabled. Select the Capture Serial Numbers menu item to launch the Capture Serial Numbers window. Use this window to capture the serial numbers for each item.



Click the Process button to create a new repair order for each serial number entered. The quantity of items on the Draft repair order decrements for each new repair order created. If you capture the entire quantity of serial numbers, the Draft repair order disappears. However, you can enter a partial quantity of serial numbers and only process those which have been entered, leaving the remaining quantity of serialized items to be processed later.

Serial number region

The fields enable you to enter the desired serial numbers for creating the repair orders. Count field displays the total number of serial numbers you enter. If the serial number is not currently in the installed base, then the system adds the item to the installed base for you.

Button

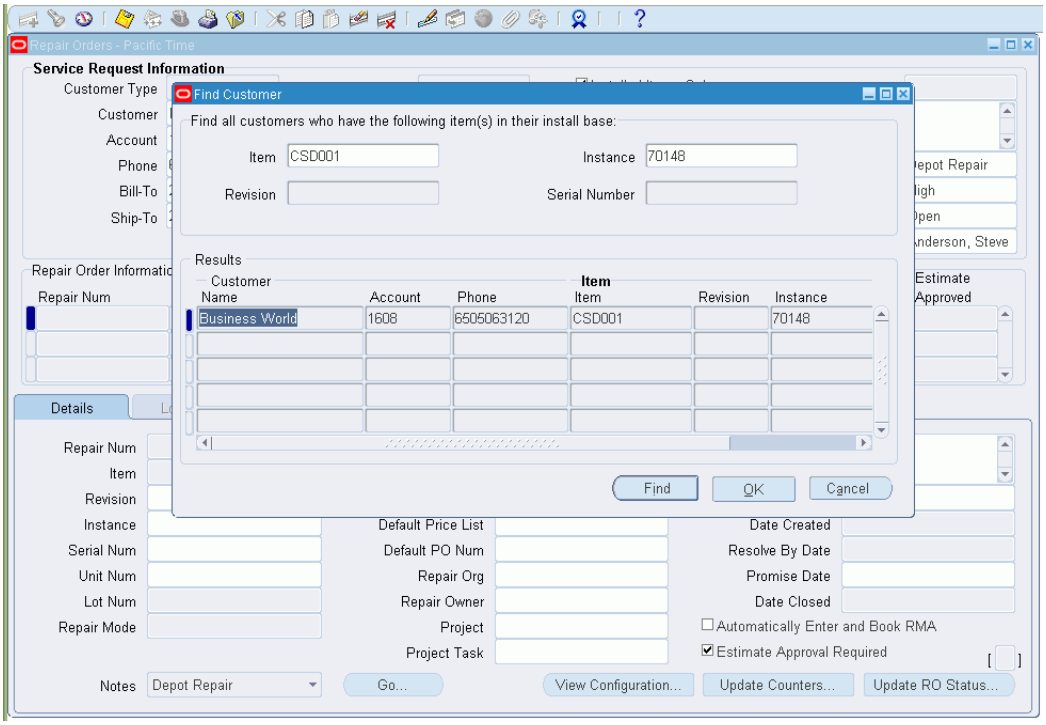
Buttons in the Capture Serial Numbers window include:

- View Errors: Button is disabled. This button enables if any processing errors occur, and allows you to determine the reasons of failure.
- Save: Saves the serial numbers you enter
- Process: Creates a new repair order for each serial number entered and the quantity of items on the Draft repair order decrements for each new repair order created. It also adds any new serial numbers to the installed base for the customer on the SR.

- Close: Closes the Capture Serial Numbers window

Find Customer Window

The Find Customer Window enables you to find customers based on an item in Oracle Install Base. This feature is available when you create the Service Request for the Repair Order.



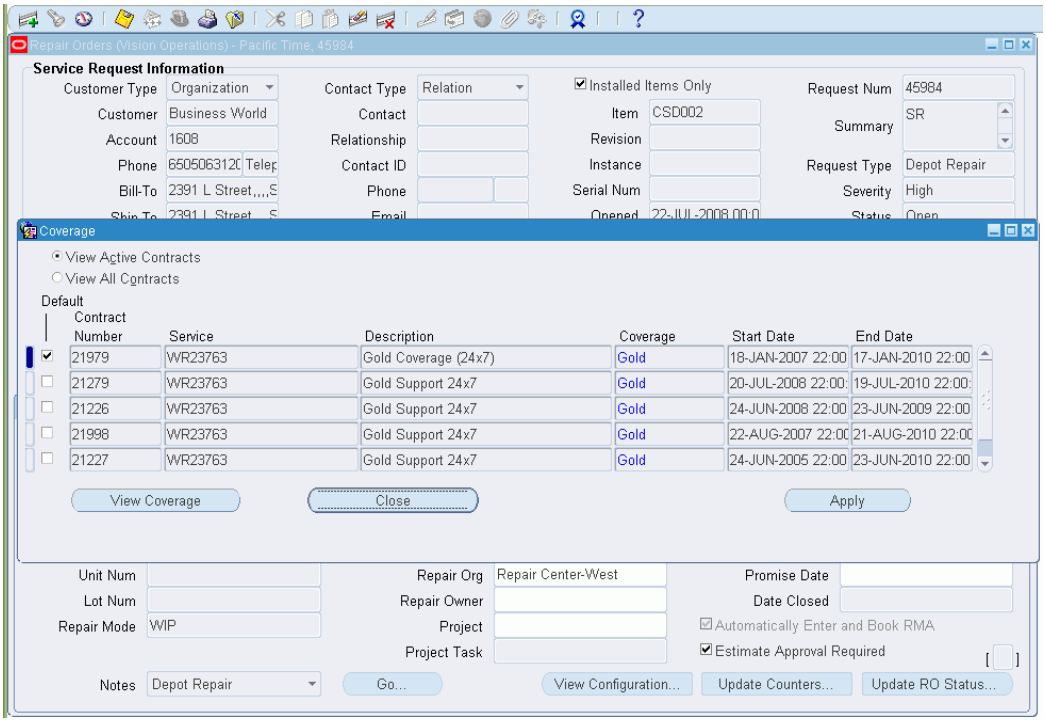
The header of the Find Customer Window enables you to find customers. Enter the relevant search criteria in the following fields:

- Item: Select the item from the list of values.
- Instance: Select the appropriate instance from the list of values.
- Revision: This field is updatable only for items that are revision controlled. If the item is revision controlled, you can select one of the defined revisions in the list of values.
- Serial Number: This field is enabled when the item is defined as serial controlled in the Inventory Item Master.

The Results region displays the names of the customers based on the search criteria provided in the header.

Coverage Window

The Coverage window displays detailed information about the Installed Base item and Contract entitlements. When you select the Coverage option from the Tools menu in the Depot Repair Workbench, active entitlements or all entitlements (based on option button selection) applicable to the selected Repair Order appear.



Option Buttons

Option buttons in the Coverage window include:

- View Active Contracts: Displays the active entitlements that are applicable to the selected Repair Order.

- View All Contracts: Displays all the entitlements that are applicable to the selected Repair Order, including expired ones. This is a useful tool for service agents to inform customers about contract coverage expiration and service contract renewal opportunities to reinstate item coverage.

Multi-Record Area Region

The fields that appear in the multi-record area region include:

- Default (check box): Permits the service agent to select a contract coverage to override the coverage selected at the Service Request level. Select the Default check

box corresponding to the relevant contract coverage, and click Apply to cause this change. The system defaults this coverage to all charge lines associated with the selected Repair Order. However, you cannot apply this selected default contract to the Task Debrief charge lines. The selected contract at the Service Request level applies by default to these charge lines.

- Contract Num: The item warranty or Service Contract Number.
- Service: The contract name, Warranty, PM, Support Only, and Full Service.
- Description: High-level description of the contract offering.
- Coverage: The service provider's contract coverage window in days and hours.
- Start Date: The warranty or contract's effective start date.
- End Date: The warranty or contract's effective end date.

Buttons

Buttons in the Coverage window include:

- View Coverage: Displays the Service Contracts Coverage window that shows details of the selected coverage. You can access this window also by double-clicking the Coverage (field) value of an entitlement. For more information, refer to the online help available from the Service Contracts Coverage window.
- Close: Closes the Coverage window.
- Apply: Select the contract entitlement that you want to use as default by using the Default check box, and click Apply. This selection overrides the existing default contract. This selected contract becomes the default contract for the Repair Order. However, note that this contract cannot be applied to the Task Debrief charge lines. Instead, the contract selected at the Service Request level applies by default to the Debrief charge lines.

Depot Repair Workbench Data Menu

The Data Menu of the Depot Repair Workbench provides the following facilities:

- Service History Window, page 2-47
- Activity Window, page 2-48
- Reserve/Unreserve Serial Number, page 2-48

Service History Window

The Service History window displays all the Service Requests and service depot Repair Orders that have been logged against an Installed Base item.

> **Note:** An item must be Installed Base trackable in order for this functionality to work.

A service agent can view a document by clicking the Repair Order or Service Request Number links to display the historical document. This functionality permits the service provider to review the service history and repair records spread over the lifetime of the Installed Base item.

The Service History window displays the following information in the multi-record areas:

Service Requests Fields

Service Requests fields include:

- Number: Service Request Number.
- Date Opened: Displays the creation date of the Service Request document.
- Date Closed: Displays the closed date of the Service Request document.
- Type: Displays the Service Request type.
- Status: Displays the current Service Request status.
- Severity: Displays the severity of the Service Request or Repair Order that the owner set.
- Urgency: Displays the customer's urgency being weighted on the Service Request.

Repair Orders Fields

Repair Orders fields include:

- Number: Repair Order Number.
- Date Opened: Displays the creation date of the Repair Order document.
- Date Closed: Displays the closed date of the Repair Order document.
- Type: Displays the Service Request type.
- Status: Displays the current Repair Order status.

- Service Request: Displays the Service Request Number that is linked to the Repair Order.

Buttons

Buttons in the Service History window include:

- Close: Closes the Service History window.

Activity Window

The Activity window provides the service depot agent with information about the major events and activities that occurred for a Repair Order. The agent can view the latest status with each event date and time stamped at the completion of a process step.

The fields that appear in the upper section of the Activity window include:

- Qty Received: RMA quantity that the service depot received.
- Qty Submitted to WIP: Repair Order quantity submitted to the Repair Job.
- Qty Completed in WIP: Repair Job quantity completed in WIP.

  Note: The Qty Submitted to WIP and Qty Completed in WIP fields appear only for repairs being processed in WIP repair mode.

- Qty Shipped: Repair Order quantity shipped against the Sales Order.

The fields that appear in the lower multi-record area include:

- Event: The Repair Order event that the service depot completed.
- Date: The completion date or time stamp of the activity.
- Details: Specific information about a particular activity.

Buttons

Buttons in the Activity window include:

- Close: Closes the Activity window.

Reserve/Unreserve Serial Number

Reserve Serial Number feature enables you to place a reservation for the serial number of the repaired item and perform pick release using the serial number reserved. Also group API is used from shipping team to pick release the item.

Navigate to the Reserve Serial Number option from the Data menu to perform serial number reservation manually. To un-reserve serial number manually, navigate to the Unreserve Serial Number option from the Data menu.

> **Note:** The subinventory on the ship line is required for reserve serial number and un-reserve serial number.

Find Repair Orders for Job Submission Window

The Find Repair Orders for Job Submission window permits you to search for Repair Orders against which you want to submit Repair Jobs. Access the Find Repair Orders for Job Submission window by double-clicking Submit Repair Jobs under Depot Repair in the Navigator window. Double-clicking Submit Repair Jobs displays the Organizations window, where you choose the organization that is repairing the item or where the item is being repaired.

In the Find Repair Orders for Job Submission window, use the following fields to specify your search criteria or view the search results:

- Service Request Area Fields, page 2-49
- Repair Order Area Fields, page 2-49
- Search Buttons, page 2-49
- Results Area Fields, page 2-49
- General Buttons, page 2-49

Service Request Area Fields

You can enter one or more Service Request search parameters in the following fields:

- Request Num: Service Request Number.
- Customer: Name of the person or organization.
- Account: Customer account.
- Severity: Service Request severity.
- Urgency: Service Request urgency.

Repair Order Area Fields

You can enter one or more Repair Order search parameters in the following fields:

- Repair Num: Repair Order Number.
- Item: The Repair Order Item.
- Description: The description of the Repair Order Item.
- Serial Num: The Serial Number of the Repair Order Item.
- RMA/Sales Order Num: The RMA/Sales Order Number.
- Repair Type: The Repair Type of the Repair Order.
- Supercession Item: The Item that has been upgraded or changed and used to replace another Item.

  For more information about supercessions, see the *Oracle Field Service User Guide*.
- Description: The description of the supersession item.
- Internal Order Num: The internal Order Number for a refurbishment generated from Spares Management.
- Internal Requisition Num: The internal Requisition Number for a requisition generated from Oracle Purchasing.
- Create Date: Creation date of the Repair Order. Optionally, start and end dates for a range of creation dates.
- Promise Date: The Promise date of the Repair Order. Optionally start and end dates for a range of promise dates.
- Create Date: Creation date of the Repair Order. You can enter a creation date range if you want to perform a search based on this attribute.

Search Buttons

The Search buttons, below the Repair Order area, include:

- Find: Searches and returns results based on your entered search criteria.
- Clear: Clears the fields in which you have entered values to specify your search criteria. You can enter new values to perform a new search.

Results Area Fields

The fields in results area are almost completely the same as the search parameter fields in the Service Request and Repair Order areas. The main result fields, that appear in the non-scrolling area, are:

- Request Num: The Service Request Number for the Repair Order.
- Repair Number: The Repair Order Number.
- Item: The Repair Order Item.

General Buttons

The General buttons, in and below the Results area, include:

- Select All: Selects all the Repair Orders in the Results area.
- Deselect All: Deselects all the Repair Orders in the Results area.

  Note: To select multiple, non-contiguous rows from among the Search Results, press and hold the Control key, and click each row.

  Note: To select a range of rows from among the Search Results, click the first row of the range, then press and hold the Shift key, and click the final row of the range.

- OK: Displays the Submit Repair Jobs for Repair Orders window for the selected Repair Orders.
- Cancel: Closes the Find Repair Orders for Job Submission window.

Submit Repair Jobs for Repair Orders Window

On the Submit Repair Jobs for Repair Orders window, you can submit a single WIP Repair Job for single or multiple Repair Orders to WIP.

The Submit Repair Jobs for Repair Orders window includes:

- Repair Job Parameters Area Fields, page 2-52
- Repair Order Details Tab, page 2-52
- Bills and Routings Tab, page 2-52
- Buttons, page 2-52

Repair Jobs Parameters Area Fields

The fields in the Repair Jobs Parameters area include:

- Item: The item Number of the Repair Job. This field is mandatory.
- Description: The item description.
- Job Name Prefix: The job name prefix for the Repair Job.

  If the value of the profile option CSD: Use CSD as Job Name Prefix is set to Yes, the value in this field appears as CSD, and cannot be updated.

  If the value of CSD: Use CSD as Job Name Prefix is set to No, the value in this field defaults to the value of the profile option CSD: Default Job Name Prefix, and can be updated.
- Job Status: The job status with which you want to submit a Repair Job to WIP.

Possible values are Released and Unreleased. This field is mandatory.

This defaults to the value of the profile option CSD: Default Repair Job Status.

> **Note:** For a WIP Repair Job to begin or for materials to be issued against the job, the Job Status must be Released.

- Accounting Class: The valuation and variance accounts associated with the accounting classes determine which accounts are charged and when. You can select any active asset non-standard or non-standard expense class. This field is mandatory.
- Start Date: The system date defaults as Start Date.
- Complete Date: Select the completion date and time for the WIP Repair Job. Defaults to the start date. This field is mandatory.
- Total Submit Qty (read-only): Shows the total of the (Quantity) Submit values in the lines of the Repair Order Details tab. This is the number of items that you want to submit to WIP.

  This is the same as the Released quantity for a Repair Order line when you selected only one Repair Order for submission to WIP. When you are creating a Repair Job for multiple Repair Orders, this field value is the sum of the quantities for all the Repair Orders that you are submitting.

For more information on WIP-related fields, such as Accounting Class, see the *Oracle WIP User's Guide*.

Repair Order Details Tab

The Repair Order line or lines that you selected from among the search results in the Find Repair Orders for Job Submission window populate the Repair Order Details tab. The fields on the Repair Order Details tab include:

- (Quantity) Repair Order (read-only): Shows the item quantity in a Repair Order.
- (Quantity) Received (read-only): Shows the quantity of items that you received against a Repair Order.
- (Quantity) Submit: Quantity of items in a Repair Order that you want to submit to WIP for repair.

Bills and Routings Tab

You can optionally specify Bills and Routings to be used on the Repair Job.

The fields on the Bills and Routings tab include two radio buttons:

- Select Bills and Routings
- Do not Specify Bills and Routings

The multi-record area, which is enabled only if you select the Select Bills and Routings radio button, consists of the following fields:

- (Bill) Reference
- (Bill) Description
- (Bill) Alternate
- (Routing) Reference
- (Routing) Description
- (Routing) Alternate

Buttons

The buttons include:

- Submit Jobs: Submits the Repair Job or jobs to WIP for creation.
- Close: Closes the Submit Repair Jobs for Repair Orders window.

Define Triggers for Service Bulletins

Depot Repair provides an interface to the repair manager enabling him to trigger notifications, escalations, and/or workflows based on key business events in the repair shop. The repair manager can drill down to the details of critical activities to speed up the resolution of issues, thereby increasing customer satisfaction.

Key business events include:

- Past Due Repairs
- Overdue Customer Returns or Loaners
- Product Returned Multiple Times
- Products Under Recall
- Products Requiring WEEE, RoHS, or other Regulatory Compliance
- Repair Order item has an Expiring contract

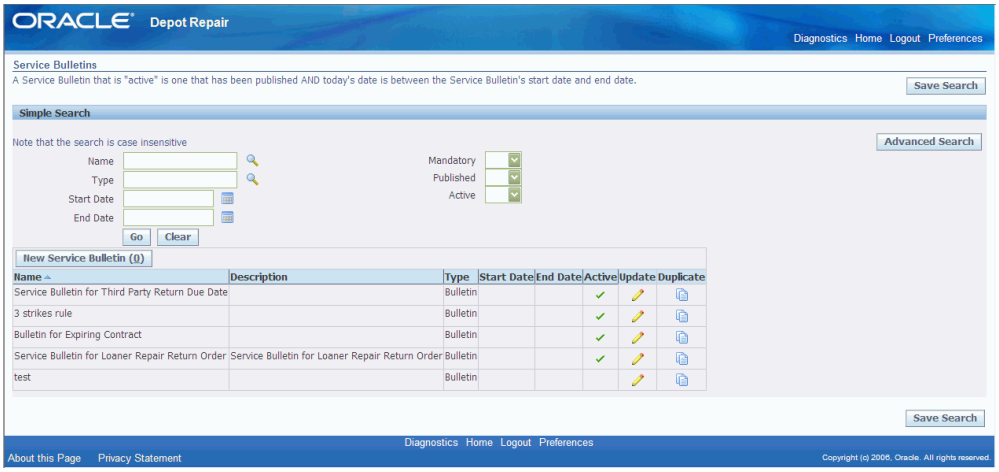
- Third party return due date

Setting up Service Bulletins

To set up service bulletins

1. Navigate to the Service Bulletins page.

   This page displays the existing service bulletins in a summary table. The Simple and Advanced Search options enable you to look for a particular service bulletin.



2. Click the Duplicate icon to duplicate a service bulletin. This reduces the overhead of bulletin creation.

3. Click the New Service Bulletin button to navigate to the Create Service Bulletins page.

4. Enter the information in the following fields. The fields marked with an asterisk (*) are mandatory:

   - Name: Name of the service bulletin.

   - Description: Description of the service bulletin.

   - Type: Select the type of the service bulletin.

   - Workflow Process: Associate a workflow process to the service bulletin.

   - Frequency: Select how frequently the service bulletin is applied.

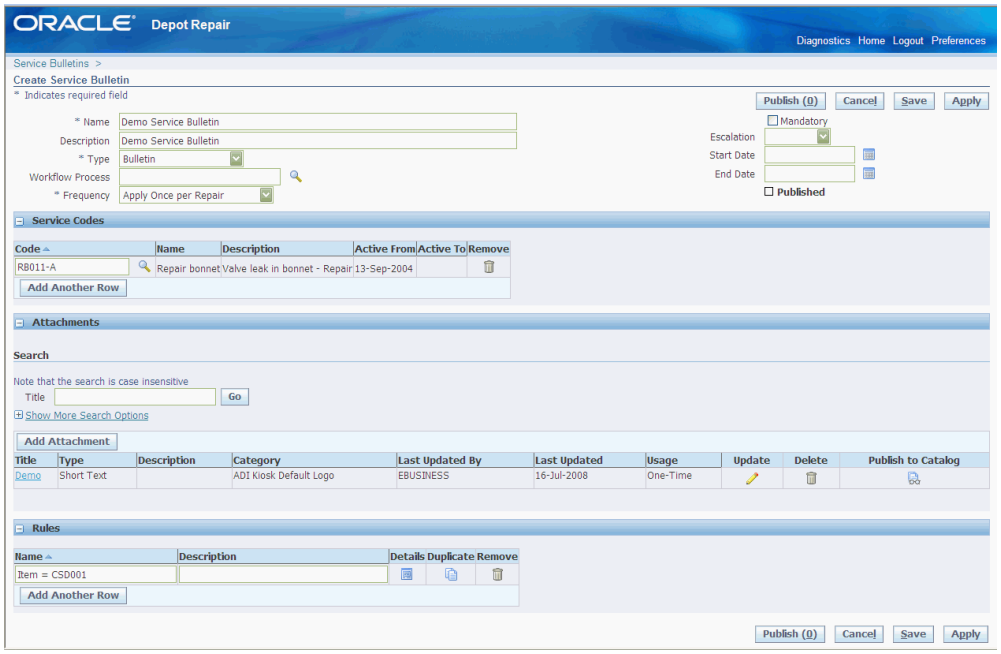
     Apply Once per Item Instance implies that the service bulletin is applied only once for a particular instance. For example, you can set this frequency when an engineering change order is applied only once and for which the same bulletin does not need to be applied repeatedly. A bulletin with this frequency never

gets attached to Repair Orders with Non-Installed Base items.

Apply Once Per Repair implies that the service bulletin is applied every time there is a new repair order.

- Mandatory: Select this checkbox to mark the service bulletin as mandatory on the repair order.
- Escalation: You can define your own statuses.
- Start Date: The activation date of the service bulletin.
- End Date: The expiration date of the service bulletin.

Note: If the dates' field is left blank, it implies that the service bulletin is always active.



5. In the Service Codes region, click Add Another Row to define the service codes for the service bulletin.

6. You can add one or more attachments to a service bulletin using the Attachments region. Click Add Attachment to navigate to the Add Attachment page.

Note: You can add a File, URL, or Text as an attachment.

7. The Rules region enables you to define multiple rules to associate to the service bulletin. Click Add Another Row to define rules.

8. Click the Details link in the Rules region to navigate to the Update Service Bulletin Rule page.

9. Use the Conditions region to define conditions for the rule. Click Add Another Row to enter the condition.

   A rule can have multiple conditions and all the conditions are evaluated to hold true for the rule to apply.

10. Click the Details link to navigate to the Update Rule Condition page.

11. Enter the required rule conditions and click Apply.

12. Navigate back to the Create Service Bulletin page and click Publish.

    Note: Once you publish the service bulletins, it becomes read only. You can only modify the start and end dates.

Receive Unplanned Returns

Bulk receiving module facilitates you to receive unplanned returns. The general principle behind receiving unplanned returns is to enable you to record easily the information required to process repair order items arriving in the depot without an return materials authorization (RMA).

You use the bulk receiving function to create a batch of items per customer per shipment. The items can have the attributes, serialized or non serialized, trackable or non trackable, and the like. All combinations of these attributes are allowed.

See: Receiving Returns using the Bulk Receiving Module, page 8-1.

Execute Repair

The Repair Technician module automates and facilitates the creation of work orders, issuing materials, and assigning resources, helping the repair technicians to take good decisions. Based on a finite number of possible symptoms and a finite number of responses to those symptoms, the system can recommend or dictate work to be done, materials demanded, and resources needed for complex repairs based on symptoms captured by a technician.

See: Executing Repairs using the Repair Technician Module, page 9-1.

3

Oracle Depot Repair Business Scenarios

This chapter describes working with different service depot repair business scenarios.

This chapter covers the following topics:

- Process a Repair and Return
- Process a Loaner, Repair and Return
- Process an Exchange
- Process an Advance Exchange
- Process a Replacement
- Process an Internal Order Refurbishment
- Process a Third Party Repair
- Process a Return Only Repair

Process a Repair and Return

The following steps describe in the recommended order how to process a Repair and Return scenario.

For more information, see Repair and Return, page 1-2.

Steps:

1. If you have not already created a Service Request, then Create a Service Request in the Depot Repair Workbench, page 4-12.

2. Create a Repair Order, selecting Repair and Return as the Repair Type.

   If the create process is successful, the application automatically creates two charge lines, one with Action Type Return, the other with Action Type Ship.

3. If you have not created and booked the Return line automatically as part of the

process of creating the Repair Order, then book the Return line.

See Create and Book a Return Line Manually, page 4-26.

4. If you want to diagnose the problem by searching Oracle Knowledge Management for solutions to related problems, or if you want to apply Service Codes to help in creating estimates and WIP Repair Jobs for the current Repair Order, see Use the Diagnostics Tab and Knowledge Base, page 4-39.

5. Receive the item, with or without inspection, page 4-65.

6. The ability to create an estimate is controlled by a profile option. If this is enabled, and you want to create an estimate, then estimate the repair charges, page 4-54 and, if required, obtain the customer's approval.

   - If the customer accepts the repair estimate, then proceed to step 7.
   - If the customer rejects the repair estimate, then close the Repair Order, page 4-121 and the Service Request, page 4-122, if appropriate, to end this scenario.

7. Manage the repair process using either WIP or Task repair mode.

   The definition of the Repair Type that occurred during setup determines the repair mode. Based on this definition, the Repair Jobs tab or Repair Tasks tab is available.

   > **Note:** The repair mode associated with the seeded Repair Type Repair and Return is WIP.

   For more information, see the following topics:

   - Manage the Repair Process, page 4-79
   - Create and Process WIP Jobs, page 4-79
   - Create and Process Repair Tasks, page 4-90

8. If you have not created the Ship line automatically as part of the process of creating the Repair Order, then create the Ship line manually.

   See Create a Ship Line Manually, page 4-103.

9. Ship the repaired item, and process the Ship line accordingly.

   See Ship a General Item, page 4-105.

10. If required, create actual charges for the Repair Order.

    See Record Billing Data in Repair Actuals, page 4-112.

11. If required, book the actual charges for the Repair Order.

See Book Repair Actuals, page 4-119.

12. If required, invoice the customer.

    See Invoice a Customer, page 4-120.

13. Close the Repair Order, page 4-121.

14. If appropriate, close the Service Request, page 4-122.

Process a Loaner, Repair and Return

The following steps describe in the recommended order how to process a loaner, repair and return.

For more information, see Loaner, Repair and Return, page 1-2.

Steps:

1. If you have not already created a Service Request, then Create a Service Request in the Depot Repair Workbench, page 4-12.

2. Create a Repair Order, selecting Loaner, Repair and Return as the Repair Type.

3. If the create process is successful, the application automatically creates these charge lines:

    - Ship line for loaner
    - Return line for defective item return
    - Ship line for repair of defective item
    - Return line to track the loaner item return

4. If you have not created the Ship line for the loaner automatically as part of the process of creating the Repair Order, then create the Ship line manually.

    See Create a Ship Line Manually, page 4-103.

5. Ship the loaner item, and process the Ship line accordingly.

    See Ship a General Item, page 4-105.

6. If you have not created and booked the Return line for the defective item automatically as part of the process of creating the Repair Order, then book the Return line.

    See Create and Book a Return Line Manually, page 4-26.

7. If you want to diagnose the problem by searching Oracle Knowledge Management for solutions to related problems, or if you want to apply Service Codes to help in creating estimates and WIP Repair Jobs for the current Repair Order, see Use the Diagnostics Tab and Knowledge Base, page 4-39.

8. Receive the defective item, with or without inspection, page 4-65.

9. The ability to create an estimate is controlled by a profile option. If this is enabled, and you want to create an estimate, then estimate the repair charges, page 4-54 and, if required, obtain the customer's approval.

   - If the customer accepts the repair estimate, then proceed to step 10.
   - If the customer rejects the repair estimate, then close the Repair Order, page 4-121 and the Service Request, page 4-122, if appropriate, to end this scenario.

10. Manage the repair process using either WIP or Task repair mode.

    The definition of the Repair Type that occurred during setup determines the repair mode. Based on this definition, the Repair Jobs tab or Repair Tasks tab is available.

    > **Note:** The repair mode associated with the seeded Repair Type Loaner, Repair and Return is WIP.

    For more information, see the following topics:

    - Manage the Repair Process, page 4-79
    - Create and Process WIP Jobs, page 4-79
    - Create and Process Repair Tasks, page 4-90

11. If you have not created the Ship line for the repaired item automatically as part of the process of creating the Repair Order, then create the Ship line manually.

    See Create a Ship Line Manually, page 4-103.

12. Ship the repaired item, and process the Ship line accordingly.

    See Ship a General Item, page 4-105.

13. If required, create actual charges for the Repair Order.

    See Record Billing Data in Repair Actuals, page 4-112.

14. If required, book the actual charges for the Repair Order.

    See Book Repair Actuals, page 4-119.

15. If required, invoice the customer.

See Invoice a Customer, page 4-120.

16. When the loaner item is returned, book the Return line for the loaner item.

    See Create and Book a Return Line Manually, page 4-26.

17. Receive the returned loaner item, with or without inspection, page 4-65.

18. If additional charges, such as rental charges, are required for the loaner item, create actual charges for the Repair Order.

    See Record Billing Data in Repair Actuals, page 4-112.

19. If required, book the actual charges for the Repair Order.

    See Book Repair Actuals, page 4-119.

20. If required, invoice the customer.

    See Invoice a Customer, page 4-120.

21. Close the Repair Order, page 4-121.

22. If appropriate, close the Service Request, page 4-122.

Process an Exchange

The following steps describe how to process an exchange in which an item is sent to the customer after the service depot has received the defective item.

> **Note:** Processing for the Exchange Repair Type typically does not include a repair stage.

For more information, see Exchange, page 1-2.

Steps:

1. If you have not already created a Service Request, then Create a Service Request in the Depot Repair Workbench, page 4-12.

2. Create a Repair Order, selecting Exchange as the Repair Type.

   If the create process is successful, the application automatically creates two charge lines, one with Action Type Return, the other with Action Type Ship.

3. If you have not created and booked the Return line automatically as part of the process of creating the Repair Order, then book the Return line.

   See Create and Book a Return Line Manually, page 4-26.

4. Receive the item, with or without inspection, page 4-65.

5. If you have not created the Ship line automatically as part of the process of creating the Repair Order, then create the Ship line manually.

   See Create a Ship Line Manually, page 4-103.

6. Ship the exchange item, and process the Ship line accordingly.

   See Ship a General Item, page 4-105.

7. If required, create actual charges for the Repair Order.

   See Record Billing Data in Repair Actuals, page 4-112.

8. If required, book the actual charges for the Repair Order.

   See Book Repair Actuals, page 4-119.

9. If required, invoice the customer.

   See Invoice a Customer, page 4-120.

10. Close the Repair Order, page 4-121.

11. If appropriate, close the Service Request, page 4-122.

Process an Advance Exchange

The following steps describe how to process an advance exchange in which an exchange item is sent to a customer before the defective item has been received back from the customer for a credit.

> **Note:** Processing for the Advance Exchange Repair Type typically does not include a repair stage.

For more information, see Advance Exchange, page 1-2.

Steps:

1. If you have not already created a Service Request, then Create a Service Request in the Depot Repair Workbench, page 4-12.

2. Create a Repair Order, selecting Advance Exchange as the Repair Type.

   If the create process is successful, the application automatically creates two transaction lines, one with Action Type Ship, the other with Action Type Return.

3. If you have not created the Ship line automatically as part of the process of creating

the Repair Order, then create the Ship line manually.

See Create a Ship Line Manually, page 4-103.

4. Ship the exchange item, and process the Ship line accordingly.

   See Ship a General Item, page 4-105.

5. If you have not created and booked the Return line automatically as part of the process of creating the Repair Order, then book the Return line.

   See Create and Book a Return Line Manually, page 4-26.

6. Receive the item, with or without inspection, page 4-65.

7. If required, create actual charges for the Repair Order.

   See Record Billing Data in Repair Actuals, page 4-112.

8. If required, book the actual charges for the Repair Order.

   See Book Repair Actuals, page 4-119.

9. If required, invoice the customer.

   See Invoice a Customer, page 4-120.

10. Close the Repair Order, page 4-121.

11. If appropriate, close the Service Request, page 4-122.

Process a Replacement

The following steps describe how to process a replacement in which the service depot sends a replacement item to the customer.

> **Note:** Processing for the Replacement Repair Type typically does not include a repair stage.

For more information, see Replacement, page 1-2.

Steps:

1. If you have not already created a Service Request, then Create a Service Request in the Depot Repair Workbench, page 4-12.

2. Create a Repair Order, selecting Replacement as the Repair Type.

   If the create process is successful, the application automatically creates one transaction line with action type Ship.

3. If you have not created the Ship line automatically as part of the process of creating the Repair Order, then create the Ship line manually.

   See Create a Ship Line Manually, page 4-103.

4. Ship the exchange item, and process the Ship line accordingly.

   See Ship a General Item, page 4-105.

5. If required, create actual charges for the Repair Order.

   See Record Billing Data in Repair Actuals, page 4-112.

6. If required, book the actual charges for the Repair Order.

   See Book Repair Actuals, page 4-119.

7. If required, invoice the customer.

   See Invoice a Customer, page 4-120.

8. Close the Repair Order, page 4-121.

9. If appropriate, close the Service Request, page 4-122.

Process an Internal Order Refurbishment

Defective items in a Spares Management warehouse can be sent for repair to a Oracle Depot Repair depot, and returned to Spares Management after repair.

> **Note:** Spares Management is a module of Oracle Field Service.

From Spares Management, you identify how many units of each defective item you wish to repair. Then you create a Service Request and one or more Repair Orders, also within Spares Management, as follows:

- For serialized items, there is one Repair Order for each item instance.
- For non-serialized items, there is one Repair Order for each item.

The type of repair carried out in this situation is called a refurbishment.

From the depot's perspective, defective items are received via an Internal Requisition, and usable or repaired items are shipped via an Internal Order.

The following steps describe how to process a refurbishment for an item or item instance, for which a Repair Order has been created in the Spares Management module of Oracle Field Service.

Steps:

The steps below describe the processing for an individual refurbishment Repair Order.

1. In the Find Repair Orders window, search for the Repair Order created in Spares Management.

   When the Repair Order appears in the Depot Repair Workbench, certain fields are filled in, as follows:

   - In the Service Request Information area, the Summary contains a standard description, such as "Internal Refurbish repair".

   - In the Repair Order Information area, the Repair Type indicates that the item is to be refurbished; the value of the Repair Type is provided by the profile option CSD: Repair Type Internal Repair Order.

     The Repair Type must have been set up with a Repair Type Ref of Refurbishment, and its Internal Order check box must have been set.

     For more information on setting up Repair Types, see the *Oracle Depot Repair Implementation Guide*.

     > **Note:** Because refurbishment Repair Orders are processed as internal orders, the Repair Estimate tab, the Repair Actuals tab, and the Tools > Coverage option are disabled.

2. Click the Logistics tab.

   The Repair Order has two transaction lines, one with Action Type Move In, the other with Action Type Move Out.

   The Move In transaction processes the transfer of the defective item from the Spares Management location into a depot for repair.

   The Move In transaction is a two-stage process:

   1. First, the item is shipped from Spares Management.

   2. Then, the item is received into a depot subinventory.

      The Move Out transaction is a single-stage process - the item is shipped from the depot after it has been repaired.

      > **Note:** The Move In and Move Out transactions make use of existing Internal Order and Internal Requisition functionality. From the depot's perspective, defective items are shipped via the Internal Requisition, and usable or repaired items are shipped via the Internal Order.

3. Process the two-stage transfer of the item into a depot, page 4-70.
4. Perform any required repairs on the item, page 4-79.
5. Process the shipping of the item back to the Spares Management location after repair, page 4-109.
6. If appropriate, close the Repair Order, page 4-121.
7. If appropriate, close the Service Request, page 4-122.

Process a Third Party Repair

The repair centres require the ability to interface with third parties to fulfill a customer's service requirements. Repair centres track the movement of products, work, and financial obligation between all the parties involved in executing a repair.

For a third party repair execution, an Outside Processing (OSP) operation is created in the Repair Technician Portal. OSP operations are not specific to Depot Repair, they are standard in Work in Process (WIP). Essentially, completing the OSP operation triggers the creation of a purchase order with a request to procure service from a third party.

For more information, see Third Party Flows, page 4-124.

Process a Return Only Repair

The return only repair functionality is used when a repair type is setup to have an RMA line. In this case, there is no corresponding ship line. When an item is returned, you have the following options:

- Items are returned for credit
- Items are returned to stock
- Items are returned for salvage

For example, when an item is returned, all the parts are first salvaged, the parts are recycled, and the remaining parts are scrapped.

4

Depot Workbench

This chapter describes task-based procedures for different processes that a user can perform to fulfill responsibilities.

This chapter covers the following topics:

- Overview of Managing Business Processes
- View Customer Profile
- View Coverage Information
- View Service History
- Determine Contract and Price List Defaults at Repair Order Creation
- Create a Customer Contact
- Create a Service Request
- Find a Customer for an Installed Base Item
- Create a Repair Order in the Depot Repair Workbench
- Create a Repair Order Starting From Oracle TeleService
- Create a Repair Order Starting From Oracle Order Management
- Update the Repair Order Status
- Update the Repair Type of a Repair Order
- Create and Book a Return Line Manually
- Move Items Internally
- Find Service Requests and Repair Orders
- Transfer Install Base Ownership
- Create and Maintain Notes
- Use the Diagnostics Tab and Oracle Knowledge Management
- Manage Diagnostic Codes in the Diagnostics Tab

- Search Oracle Knowledge Management
- Manage Solutions in the Diagnostics Tab
- Manage Service Codes in the Diagnostics Tab
- Select Service Codes Manually in the Service Codes Area
- Activate and Deactivate Service Codes in the Service Codes Area
- Delete Service Codes in the Service Codes Area
- Estimate Repair Charges
- Create a Repair Estimate
- Revise a Repair Estimate
- Obtain Customer Approval for a Repair Estimate
- Receive a General Item
- Ship Additional Items
- Auto-Receive an Item
- Receive an Item for an Internal Order Refurbishment
- Split a Repair Order
- Manage the Repair Process
- Create and Process WIP Repair Jobs
- Create a WIP Repair Job for a Single Repair Order
- Process a WIP Repair Job for a Single Repair Order
- Create a WIP Repair Job Across Multiple Repair Orders
- Process a WIP Repair Job Across Multiple Repair Orders
- Create and Process Repair Tasks
- Create a Repair Task Manually
- Create a Repair Task Using a Task Template
- Enter and Update Task Details
- Prepare the Repair Tasks Debrief
- View Activities Related to a Repair Order
- Update Repair Orders Concurrently
- Send and View Workflow-Based Messages
- Create a Ship Line Manually
- Ship a General Item
- Ship a Refurbished Item

- Record Billing Data in Repair Actuals
- Add WIP Summary to Repair Actuals
- Add Task Debrief to Repair Actuals
- Add Estimate to Repair Actuals
- Create Manual Charges in Repair Actuals
- Book Repair Actuals
- Invoice a Customer
- Close a Repair Order
- Close a Service Request
- Create and Process an Internal Party Refurbishment
- View Repair Orders in Oracle iSupport
- Third Party Flows
- Execute Outside Processing
- Select Repair Parts from Dynamic Repair BOM Window
- Print Traveler Document
- View Service Bulletins using Depot Repair Workbench
- View Read Only Workbench

Overview of Managing Business Processes

Oracle Depot Repair improves the efficiency of the service depot repair process.

Many different users can be involved in the overall service depot process. These users and roles include the call center agent, service technician, shop floor technician, shop floor accountant, shop floor production manager, warehouse administrator, shipping administrator, receiving administrator, service administrator, accounts receivable manager, purchasing manager, HR manager, and depot manager.

For example, the call center agent logs the Service Request, the service technician diagnoses the broken part, the shop floor technician fixes the item, the shop floor accountant keeps track of the repair costs, the shop floor production manager schedules the repair jobs, and the depot manager has the overall repair process responsibility. Depending on the service organization, a user can have multiple roles. For example, the service technician can log the Service Request, and diagnose the broken part.

For key concepts and features of Oracle Depot Repair, see the Introduction to Depot Repair.

To explore the Oracle Depot Repair user interface, see Overview of Using Oracle Depot Repair.

For an overview of the processes behind different depot repair business scenarios, see Oracle Depot Repair Business Scenarios.

> **Note:** To discover how to easily receive many items as they arrive in the depot without an RMA, see Performing Bulk Receiving.
>
> To use an enhanced set of operations to process your repairs, see Performing High Volume Repair.

View Customer Profile

The customer profile summarizes customer information. A system administrator usually sets up the profile entries that appear in the customer profile, which contain a set of previously defined verifications. You can configure these verifications, as well as the actual range values and value definitions. The verification results appear by using the Customer Profile Engine, which is a concurrent program.

The customer profile information appears in the Profile window when you select Profile from the Tools menu in the Depot Repair Workbench. Click Refresh in the Profile region to view the latest profile information for the customer. This Oracle Depot Repair functionality lets service agents verify a customer's profile information, including Open Orders, Booked Orders, Cancelled Orders, Open Service Requests, Escalated Service Requests, Active Contracts, Expired Contracts, Cancelled Contracts, Open Repair Orders.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

Repair Order records associated with the customer must exist in the database.

Navigation

Depot Repair > Repair Orders > (Find Repair Orders window) New

Steps:

1. In the Depot Repair Workbench, select the customer whose profile you want to view.

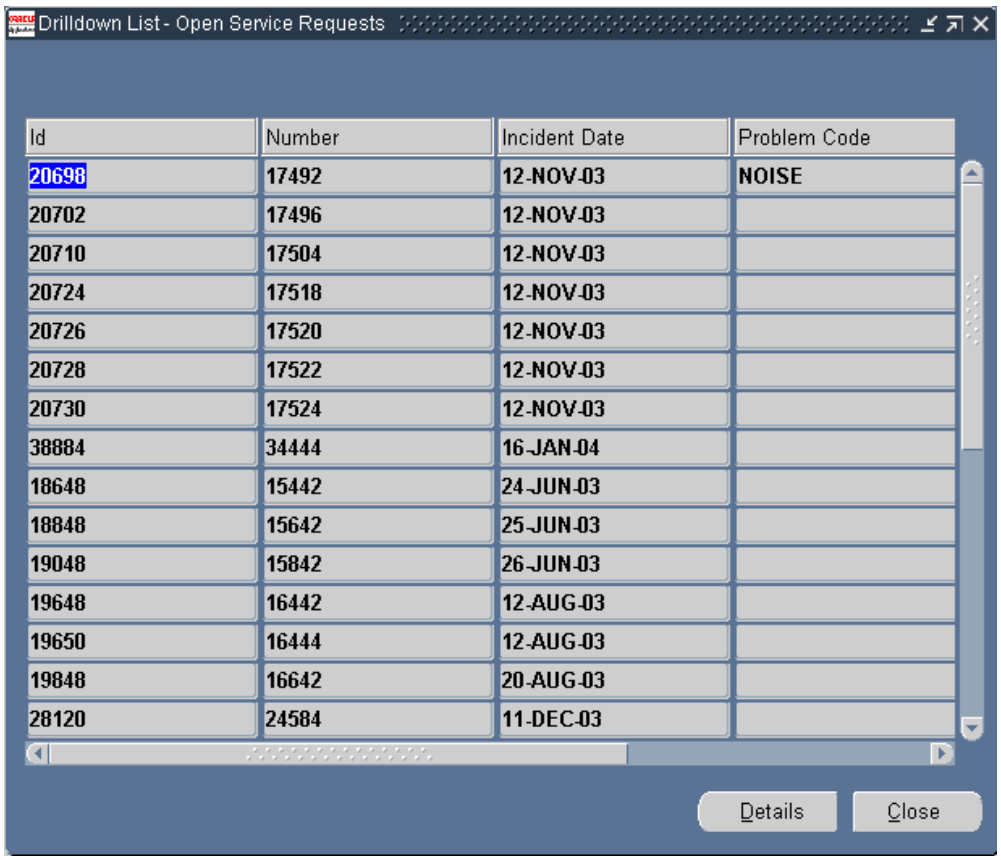
2. Select Profile from the Tools menu.

The Profile window opens.

3. Double-click a key indicator in the profile window.

   Oracle Depot Repair shows a summary list of that profile verification. For example, double-clicking Open Service Request (a key indicator) displays the list showing all open Service Requests for the selected customer type.

   This list displays information such as the Service Request Number, incident date, problem code and resolution code.



Id	Number	Incident Date	Problem Code
20698	17492	12-NOV-03	NOISE
20702	17496	12-NOV-03	
20710	17504	12-NOV-03	
20724	17518	12-NOV-03	
20726	17520	12-NOV-03	
20728	17522	12-NOV-03	
20730	17524	12-NOV-03	
38884	34444	16-JAN-04	
18648	15442	24-JUN-03	
18848	15642	25-JUN-03	
19048	15842	26-JUN-03	
19648	16442	12-AUG-03	
19650	16444	12-AUG-03	
19848	16642	20-AUG-03	
28120	24584	11-DEC-03	

4. Double-click any line in the summary list.

   Oracle Depot Repair displays the appropriate window containing details of the selected line.

View Coverage Information

Items that a warranty or service contract covers and that link to Oracle Installed Base, populate the coverage fields with a list of all entitlements or all active entitlements (based on option selection) that apply to the selected Repair Order.

Oracle Depot Repair permits the service agent to select a contract coverage that can be

applied to the Sales Order charge lines that Charges created. The selected Contract Number automatically defaults on each charge line that is generated from the WIP Summary Report only. This option excludes those charge lines that relate to any new item upgrades and enhancements. The agent can verify active warranties existing for the item. Also, the contract selected as default in the Coverage window cannot be applied to charge lines in the Debrief Report. Instead, the contract selected at the Service Request level applies by default to the Debrief charge lines.

Oracle Depot Repair also permits the agent to find all contracts including those that have already expired. This is a handy tool for service agents to advise customers on contract coverage expiry, and service contract renewal offers to reinstate their coverage.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You can view coverage information only for an Installed Base item referenced on a Repair Order.

Navigation

Depot Repair > Repair Orders

Steps

1. Retrieve the Repair Order referencing the item for which you want to view coverage information.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. Select the relevant result from the Results area of the Find Repair Orders window, and click OK.

   The Depot Repair Workbench shows the selected Service Request and Repair Order details.

3. From the top menu, select Tools > Coverage.

The Coverage window displays the configuration and entitlements for the Installed Base item referenced on the Repair Order.

Based on option selection, you can automatically query all contracts or all active contracts applicable to the Repair Order. By selecting the Default check box beside a contract, you apply this as the default contract to the Repair Order. For detailed field descriptions, see Coverage Window, page 2-41.

If you select a contract that does not specify a Price List, the application defaults the Price List that is set for the default Price List profile option. This happens if the Price List currency is the same as the Repair Order currency. If the Price List currency is not the same as that of the Repair Order, or if the profile option is not set, you can select any Price List from the list.

View Service History

Service agents can view all the Service Requests and Repair Orders that were logged against a service item. The item must be serialized and linked to an Installed Base Instance value in order for this functionality to work. This valuable functionality permits the service provider to review the service history and repair records that were recorded over the lifetime of the Installed Base item, and is especially useful when attempting to troubleshoot and diagnose repair patterns and service trends that affect the item.

The following procedures describe how to view an item's service history.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You can view the service history of only an Installed Base item. Repair Order records must exist for the item.

Navigation

Depot Repair > Repair Orders

Steps:

1. Retrieve the Repair Order corresponding to the item, the service history of which you want to view.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

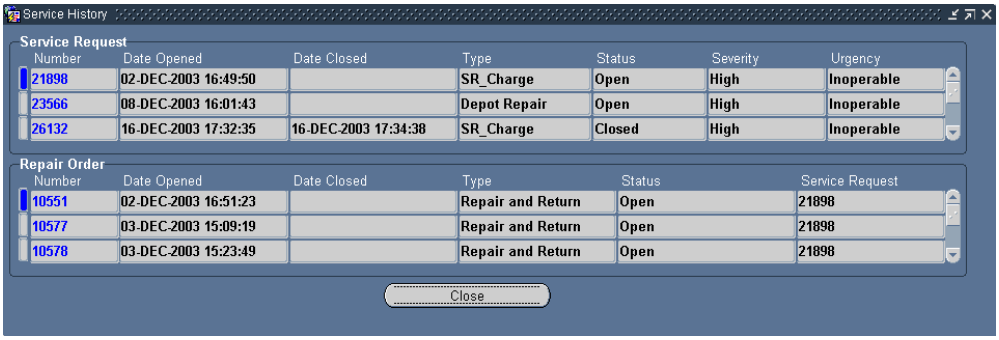
2. Select the relevant result from the Results area of the Find Repair Orders window, and click OK.

   The Depot Repair Workbench shows the selected Service Request and Repair Order details.

3. From the top menu, select Data > Service History.

   The Service History window lists all the Service Requests and Repair Orders previously opened against the Installed Base item on a Repair Order.

   For detailed field descriptions, see Service History Tab, page 2-47.



Determine Contract and Price List Defaults at Repair Order Creation

A service contract has entitlements, for example, discounts, and response time. Entitlements are specified for each business process setup for the contract. There are cases where a contract can have entitlements that are specified for the Business Process of the Service Request, but not for the Depot Repair Business Process. If that is the case, Oracle Depot Repair cannot use that contract.

The rest of this section describes how the default contract and Price List are evaluated

when you create a new Repair Order.

Default Contract

- If there is a contract in the Service Request, it becomes the default contract only if the contract is valid for the Business Process associated with the Oracle Depot Repair Repair Type in the Repair Order.
- If the contract in the Service Request is not valid for the Business Process associated with the Oracle Depot Repair Repair Type or if there is no contract in the Service Request, the "best" contract calculated by response time becomes the default contract.

Default Price List

1. With Contract

- If there is a contract, get the Business Process Price List of the contract for the Repair Type in the Repair Order and derive the currency.
- If the contract does not have a Business Process Price List for the Repair Type, get the contract (selling) Price List and derive the currency. If there is no Price List, then get the default from the profile option CSD: Default Price List.
- If the profile option CSD: Default Price List is not set, get the Repair Type Price List and derive the currency.
- If Repair Type Price List is not set, neither the currency nor the Price List is set.

2. Without Contract

- If no contract is set, get the default Price List from the profile option CSD: Default Price List and derive the currency.
- If the profile option CSD: Default Price List is not set, get the Price List from the Repair Type setup and derive the currency.
- If the Repair Type Price List is not set, neither the currency nor the Price List is set.

Create a Customer Contact

You can create a new contact for a customer in the Depot Repair Workbench, and use this contact while creating your new Service Request.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

The customer whose new contact is being created must have an existing record in the database.

Navigation

Depot Repair > Repair Orders

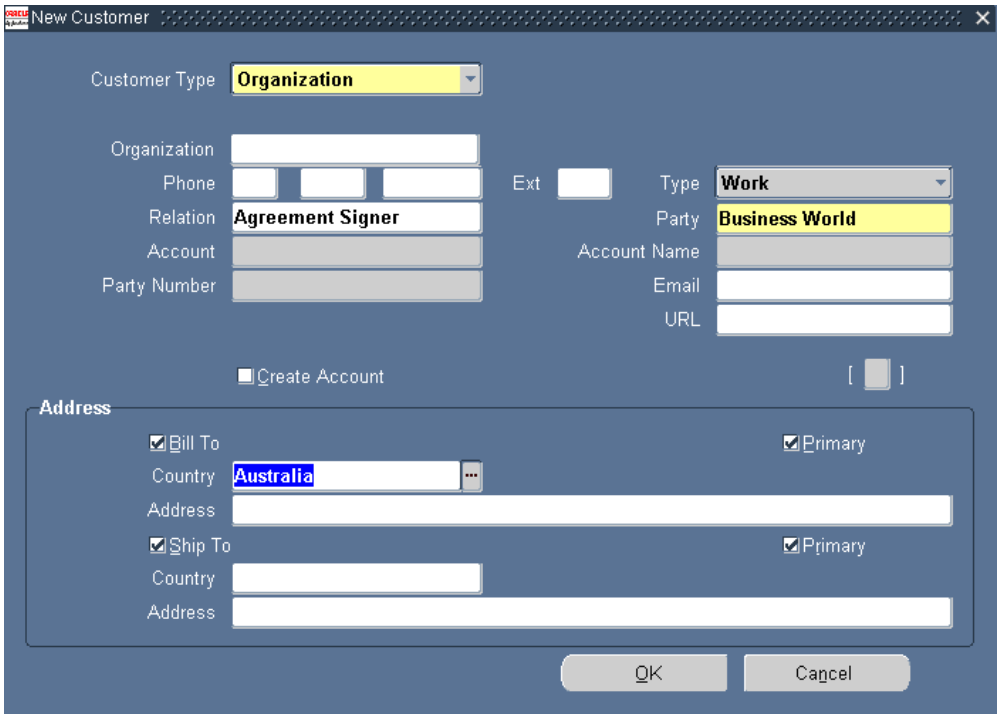
Steps:

1. In the Find Repair Orders window, click New to display the Repair Orders window.

   The Repair Orders window serves as the Depot Repair Workbench. From the Depot Repair Workbench, you can perform all depot processes, end-to-end.

2. In the Depot Repair Workbench, in the Service Request Information area, click New Contact.

   The New Customer window opens.



3. In the New Customer window, select the Customer Type: Person or Organization.

   Customer Type refers to the type of the contact, and indicates whether or not the contact is a person or an organization.

   When you select the Person Customer Type, the following fields appear:

   - Title: Indicates the contact's title, such as Miss, Mr., Mrs., and Dr.
   - First, Last, Middle, Suffix: Indicate the First, Last and Middle names of the contact, and Suffixes in the name.
   - Phone: Indicates the contact's phone number. You can look up area codes in the list of values.
   - Type: Refers to the phone type, such as Work, Home, Cell, or General. Select from the list of values.
   - Relation: Specifies the contact's relationship with the customer, such as Associate of, Child of, and Benefactor of. Select from the list of values.
   - Party: Refers to the name of the customer. Select from the list of values.
   - Email: Enter the contact's e-mail address.
   - Create Account: Check box, when selected, creates an account for the new

contact in your database.

- Bill-to: Refers to the address to which you should send the contact's bill.

  When you have entered the Country in the Address field, the Address window appears where you can select the Context Value to choose the contact's Address style, such as North European, Japanese, or South American. After you select the Context Value, the Address window provides you with fields appropriate to the address style you have chosen. Enter the address, and click OK.

- Ship-to: Refers to the address to which you should ship an item for the contact.

- Primary: Check boxes that indicate whether the Bill-to and Ship-to addresses are the contact's primary addresses.

  If you select the Customer Type Organization, the Title, First, Last, Middle, and Suffix fields are replaced with the Organization name field. All the other fields remain the same with the exception of an additional field for the organization's URL or Web address.

4. In the New Customer window, click OK.

   A note appears informing you that a Party Number and an Account Number (if you selected the Create Account check box) have been created and saved for the new contact.

5. In the note, click OK.

   The application returns you to the Depot Repair Workbench.

Create a Service Request

Service Requests initiate the actions required to solve a customer problem. A Service Request is mandatory for any repair process, and needs to be created before any Repair Order can be created in the Oracle Depot Repair module.

> **Note:** You do not have to create the Service Request explicitly before creating the Repair Order. You can enter details for both the Service Request and the Repair Order, and create both at the same time.

On the Depot Repair Workbench, you can log a customer request for assistance. The application lets you create Service Requests without having to leave the Depot Repair Workbench.

Generally, as you create a Service Request, you know which customer to associate with the Service Request. There may be situations where you are only provided with identifiers for Installed Base items, and the customer information is not provided. In this case, you can use an Oracle Depot Repair feature to find and select the customer

associated with the item.

> **Note:** You cannot create a Service Request without a value in the Item field if the profile CSD: Require Item For Service Request has been set to Yes during implementation. Setting this profile option to No lets you create a Service Request without entering a value in the Item field. Also, when the profile option is set to No, you can specify an Installed Base item without specifying an Instance value in the Service Request.

You can search for existing Service Requests and Repair Orders from the Find Repair Orders window.

For more information, see Find Service Requests and Repair Orders, page 4-32.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

The customer and contact records must exist in the database.Service Requests can be logged only for items recorded in inventory.

Navigation

Depot Repair > Repair Orders

Steps:

1. In the Find Repair Orders window, click New.

   The Depot Repair Workbench opens.

   In the Service Request Information area in the Depot Repair Workbench, the Contact Type, Customer Type, and Opened Date fields default to Relation, Organization, and the Current Date respectively.

   The Severity and Status fields default to the value of the profile options Service: Default Service Request Severity and Service: Default Service Request Status respectively.

   If you need to discover the customer for the Installed Base item that will be the subject of the Service Request, perform the operations in Find a Customer for an Installed Base Item, page 4-15.

2. If you select a customer using these operations, the customer-related and the

item-related fields in the Service Request Information area are automatically filled in. The fields can be changed before you save the Service Request.

3. Choose the Contact Type and Customer Type from the lists of values, and use lists of values to select the Contact, Customer, Request Type (such as Customer Call, Depot Repair, Field Service), Severity, and Status fields.

   You can also enter the date and time in the Opened field.

   > **Note:** Contact information is not mandatory for creating a Service Request. Selecting a blank contact type in the Contact Type field disables all Contact information fields.
   >
   > The Bill-To and Ship-To address fields are populated automatically when the Customer and Contact Names are entered. The addresses always default to the primary Bill-To and Ship-To addresses of the customer. Even if you select a primary address for the Installed Base instance, the Bill-To and Ship-To address fields default only to the primary address of the customer party. Also, the list of values for both fields contains addresses for related parties, which can be for either persons or for organizations.
   >
   > For more information, see The Service Request Information Area, page 2-5.

4. To validate the item against the Installed Base, select the Installed Items Only check box.

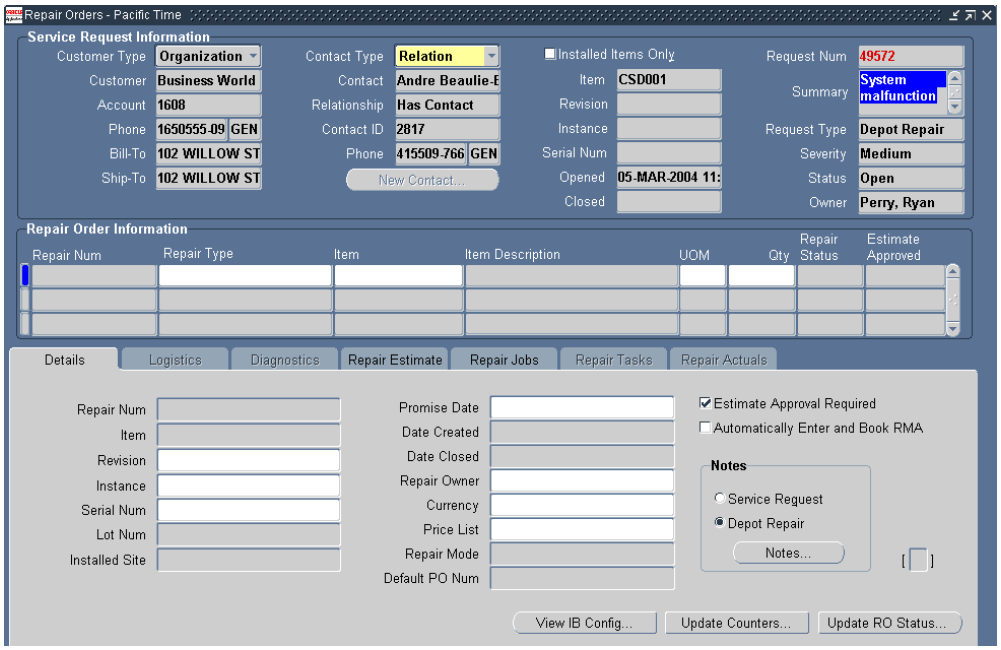
5. Select the Item that the customer is reporting as defective from the Item list of values.

   If the item is serialized, the Serial Number appears. After validation, the Instance field is automatically populated. For a given customer, the call center agent can view all the items in the customer Installed Base.

   For more information about entering the Item, Instance and Serial Number fields, see Item Information Fields, page 2-5.

6. Select the name of the person responsible for overseeing the Service Request in the Owner field from the list of values.

7. Enter a brief summary of the repair issue in the Summary text field.



8. Click the Save icon on the toolbar to create the Service Request record.

   The application populates the Request field in the Service Request Information area with the Service Request Number. When you click any of the fields in the Repair Order Information area, the application populates the Item, Item Description, UOM, and Quantity fields from the Service Request Information area.

9. Authorized users can launch the Service Request HTML page by clicking the hyperlinked Request Number from both the Depot Workbench and the Repair Technician Portal. This renders the Service Request HTML page in editable mode where you can update and save data. This enables you to update service request values such as Customer Bill-to and Ship-to addresses, SR Status and SR Resolution Type.

   You can enable the hyperlink through profile option, CSD: Enable Service Request Drill-down (Yes/No).

Find a Customer for an Installed Base Item

Sometimes, when you are creating a Service Request, you may know the Item Name, or its Serial Number, or its Installed Base Instance Number, but the customer name is unknown or simply not provided.

In these circumstances, you can provide the item information, and search for the customers that have the item in their Installed Base.

After you select one of the customers for the item, all the customer-related and item-related fields appear in the Service Request Information area of the Depot Repair

Workbench.

This procedure is only available when you are creating a new Service Request in the Depot Repair Workbench.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must be in the process of creating a Service Request.

The items provided as search parameters must be Installed Base trackable or serialized items.

Navigation

Depot Repair > Repair Orders > New

Steps:

1. In the Depot Repair Workbench, from the top menu, select Tools > Find Customer.

   The Find Customer window opens.

2. Select one or more of the following fields as search parameters:

   - Item
   - Instance
   - Serial Num
   - Revision

3. Click Find.

   The Results area shows the customers that have the item in their Installed Base.

4. Highlight the customer whose data you want to have on the Service Request, and click OK.

5. The Find Customer window closes, and the fields related to the customer and the item appear in the Service Request Information area of the Depot Repair Workbench.

Create a Repair Order in the Depot Repair Workbench

The depot business process starts with a Repair Order. Creation of Repair Orders occurs only against Service Requests for serviceable items.

You can create a Repair Order and its associated Service Request directly in the Depot Repair Workbench, which automates part of the process. Alternatively, you can start the process of creating a Repair Order in another Oracle application. For more information, see Alternative Ways of Creating Repair Orders, page 4-17.

For repair items that are under revision control, a correct Revision Number is mandatory. If your Repair Order Item is serialized, and the quantity to repair is greater than 1, you will have specify each of the Serial Numbers of the item to be repaired, for Installed Base trackable items.

Oracle Depot Repair also lets you add items to a customer's Installed Base from the Depot Repair Workbench. This enables the depot to process (Installed Base trackable) repair items that the customer purchased from outside the service organization. If you try to create a Repair Order line without specifying an Instance value for an Installed Base trackable item, the application will prompt you to add a new item instance to the Installed Base. This lets you process the repair.

Each Repair Order must have a Repair Type. When you create a Repair Order in Oracle Depot Repair, then, depending on the Repair Type, the application automatically creates one or more RMA and Sales Order lines. The RMA and Sales Order lines appear in the Logistics tab, with action types of Repair and Ship respectively. If you choose the Standard Repair Type, no charge lines are created automatically; you must create them manually.

You can also choose to create RMA charge lines manually. If you want to create the RMA charge line manually, first you must clear the check box Automatically Enter and Book RMA, during the creation of the Repair Order. Afterwards, you can create the RMA charge line, as described in Create an RMA Manually, page 4-26.

The following procedures describe how to create a Repair Order in the Depot Repair Workbench.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

A Service Request record must exist for the broken item in order to create a Repair

Order for its repair.

Navigation

Depot Repair > Repair Orders

> **Note:** You can also proceed to creating a Repair Order immediately after creating a Service Request record, without having to navigate to the Find Repair Orders window. In this case, start at step 3.

Steps:

1. From the Find Repair Orders window, retrieve the pertinent Service Request.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. Select the relevant Service Request, and click OK.

   The Depot Repair Workbench shows the Service Request information.

3. In the Repair Order Information area in the Depot Repair Workbench, confirm the information appearing in the table, or enter the appropriate information for the defective item.

4. Select the Repair Type from the list of values.

   For more information on Repair Types, see Repair Type Processing, page 1-2. For field descriptions, see Details Tab, page 2-9.

   > **Note:** A Repair Order supports a single currency. Different currencies are supported for different Repair Orders within a Service Request. The default currency is based on the default contract. If no default contract is selected, the default Price List determines the currency. If neither defaults are set, the currency selection is based on the manually selected Price List in the Details tab.
   >
   > After a charge line is created, you cannot change the currency of the Repair Order in the Details tab or select another default contract that has a Price List with a different currency. To change the currency of a Repair Order, all the charge lines have to be deleted.

5. Optionally, enter the quantity of items to be repaired in the Qty field.

   The default quantity is 1. If you specify a Qty that is greater than 1 for a serialized item, then you will need to capture the Serial Numbers separately, after the Repair Order is created. For details, see step 13.

6. In the Details tab, optionally enter the Promise Date (date and time) for repair

completion after negotiation with the customer.

7. Optionally, select the name of the person responsible for overseeing the repair in the Repair Owner field from the list of values.

8. If you require estimates to be approved before you can proceed with the repair of an item, then select the check box Estimate Approval Required, else uncheck this check box.

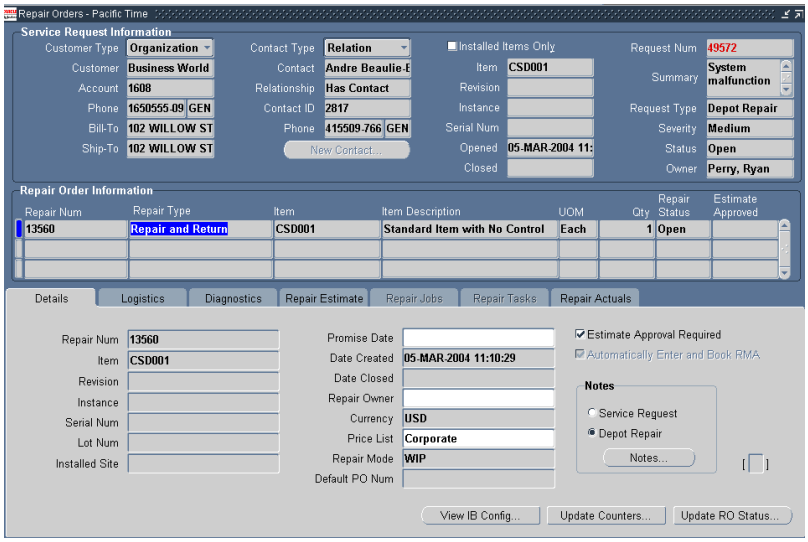
9. If you want the RMA line to be automatically entered and booked when you create the Repair Order, then select the check box Automatically Enter and Book RMA, else uncheck this check box.

10. Click Save to create the Repair Order.

11. If you have tried to create a Repair Order line without specifying an Instance value for an Installed Base trackable item, or without specifying a Serial Number for a serialized item with a Qty of 1, a message window appears.

    In the message window, you can either click Add to IB to add an item instance to the Installed Base, or you can click Save As Is to create the Repair Order without adding to the Installed Base. *You can only Add to IB if the User Function Name Repair Orders: Add to IB is associated with your responsibility*

    > **Note:** If you select Save As Is, the Repair Order is created, but no charge lines are created automatically. You will have to create all the required charge lines for your Repair Type manually in the Logistics tab.
    >
    > After the Repair Order is created, the application populates the Repair Number fields both in the Details tab, and in the Repair Order Information area, with the Repair Order Number.



12. For the case where the Repair Order Item is serialized, and the quantity of the item Repair Order Item is greater than 1, continue at step 13.

    For all other cases, continue at step 18.

    Capture Serial Numbers

13. If your Repair Order contains a serialized item, and the quantity is greater than 1, when you click Save, a message window appears, which instructs you as follows:

    - The Repair Order created will be a draft Repair Order, that is, its Repair Status will be Draft.
    - You must enter the Serial Numbers using the Capture Serial Numbers option from the Tools Menu.

14. To complete the processing for repairing many individual serialized items, click OK in the message window, then, from the top menu, select the options Tools > Capture Serial Numbers.

    In the Serial Numbers window that appears, your main functions are to select a Serial Number for each individual item instance, and to process the Serial Numbers. Processing the Serial Numbers creates a separate Repair Order for each item instance.

15. Select a Serial Number from the Serial Number list of values for the customer account.

    You can specify a Serial Number that does not exist yet. In this case, a message appears asking if you wish to create the new Serial Number.

16. You can optionally select the check box Add to Order within Service Request.

    If you select this option, then, when the Serial Numbers are processed, each RMA line will be added to the same Order Number.

17. After you have specified the Serial Numbers, click one of the following buttons:

    - Save: This saves the Serial Numbers, but does not process the values into separate Repair Orders for each Serial Number.

    - Process: This creates a separate Repair Order for each Serial Number, each with a status of Open.

    - Close: This closes the window without saving or processing the Serial Numbers.

      Note: For serialized, non-Installed Base trackable items, if you enter fewer Serial Numbers than the Qty on the Repair Order, Oracle Depot Repair creates as many Repair Orders as the Qty number of units. For example, if Qty is 10, and you enter 8 Serial Numbers, you get 8 Repair Orders with Serial Numbers provided, and 2 without Serial Numbers. You will need to provide the 2 missing Serial Numbers at time of receipt.

      Note: For serialized, Installed Base trackable items, if you enter fewer Serial Numbers than the Qty on the Repair Order, Oracle Depot Repair creates only as many Repair Orders as the number of Serial Numbers you entered. For example, if Qty is 10, and you enter 8 Serial Numbers, you get 8 Repair Orders with Serial Numbers provided.

Checking the Logistics Tab

18. Click the Logistics tab.

    While not technically part of the creation process, after you have created the Repair Order, you should check the Logistics tab to determine the next process to perform.

    Depending on your choice of Repair Type and whether you set the check box Automatically Enter and Book RMA, the Logistics tab generally contains one or more Return and Ship lines, each of which has a Status.

19. In certain cases, there are no charge lines in the Logistics tab, such as when one of the following has occurred:

    - The Repair Type is Standard.

- For a serialized repair item, you selected Save As Is in the Create IB Instance window (see step 11).

You must create and book the required charge lines manually.

See Create and Book a Return Line Manually, page 4-26 and Create a Ship Line Manually, page 4-103.

20. If your Repair Type involves the return of a defective item, then, in order to receive the defective item into inventory, the following conditions must apply:

    - There must be a Return line in the Logistics tab.
    - The Status of the Return line must be Booked.

    To fulfill these conditions, except for the special case where you created the Repair Order after creating an order in Oracle Order Management, proceed to create and book the Return line, as required.

    See Create and Book a Return Line Manually, page 4-26.

Comments:

1. If you are creating more than one repair order line, and the value of the profile option CSD: Default Repair Order is set to Yes, then, as you arrow down from the last repair order line, the values are defaulted from the last repair order line into the new line.

2. After creating the Repair Order record, you can attach additional information to the Service Request or Repair Order by clicking the Notes button in the Details tab

   For more information, see Create and Maintain Notes, page 4-37.

   After creating the Repair Order record, you can attach additional information to the Service Request or Repair Order by clicking the Notes button in the Details tab.

3. After creating the Repair Order record, you can also search from the Diagnostics tab for possible solutions to the problem affecting the repair item.

   In the Diagnostics tab, by selecting Service Codes, either manually or as a result of a search performed in Oracle Knowledge Management, you can get the information ready to automatically create estimate lines and default Bills and Routings for WIP Repair Jobs.

   For more information, see Use the Diagnostics Tab and Oracle Knowledge Management, page 4-39.

Alternative Ways of Creating Repair Orders

In addition to the method of creating a Repair Order and its associated Service Request in the Depot Repair Workbench, which enables you to automatically create charge lines associated with the Repair Type, there are two other ways by which you can create a

Repair Order, as follows:

- Create a Repair Order Starting From Oracle TeleService, page 4-23
- Create a Repair Order Starting From Oracle Order Management, page 4-24

Create a Repair Order Starting From Oracle TeleService

The depot agent can view activities performed against a Service Request that was initiated in the call center and transferred to the depot for resolution. You can link RMAs and Sales Orders generated through the call center to Repair Orders created within the Depot Repair Workbench.

This procedure shows an example of creating a Repair Order, where an existing Service Request already has RMA and Sales Order lines.

1. Create a Service Request in Oracle TeleService, with a Service Request Type of Depot Repair.
2. In the Charges tab of the Service Request, create one or more charge lines with typical Depot Repair activities for the items that require repair processing.

   A RMA charge line, for example, could include the following values:

   - Charge Line Type = Actual
   - Business Process = Depot Repair
   - Service Activity = Return for Repair

   A Sales order line, for example, could include the following values:

   - Charge Line Type = Actual
   - Business Process = Depot Repair
   - Service Activity = Ship Returned Item
3. Submit the lines for processing.
4. In the Navigator, using the Depot Repair Super User responsibility, navigate the path Depot Repair > Repair Orders.
5. In the Find Repair Orders window, enter the Service Request Number you created in step 1, and click Find.
6. When the record appears in the Results area, click OK.

   A message window informs you that RMA/Sales Order lines not linked to a Repair

Order were found, and asks if you want to create a Repair Order or associate the RMA/sales lines.

7. When you click OK, the Create Repair Order window appears, containing the not-yet-linked RMA lines.

8. Select the lines that you want to become Return (RMA) lines in the Repair Order, and click OK.

   If there are submitted Sales Order lines in the Service Request, the Link Sales Order window appears, containing the not-yet-linked Sales Order lines.

9. Select the lines that you want to become Ship lines in the Repair Order, and click OK.

   The Repair Order appears in the Depot Repair Workbench, with a Standard Repair Type. The Return and Ship lines appear in the Logistics tab, each with the Status of Submitted.

Create a Repair Order Starting From Oracle Order Management

This procedure shows an example of creating a Repair Order, which starts with the creation of an order in Oracle Order Management, and includes the operation of receiving the repair item into inventory.

1. In Oracle Order Management (if you use the Depot Repair Super User responsibility, navigate the path: Order Management > Orders, Returns > Sales Orders), create a Sales Order, with the following values:

   Order Information tab:

   - Set Order Type = Mixed

   Line Items tab, Main sub-tab:

   - Specify the item to be repaired in Ordered Item, and set Qty = -1

   Line Items tab, Returns sub-tab:

   - Specify the Return Reason

   Line Items tab, Shipping sub-tab:

   - Specify the Warehouse

2. When the order status is Booked, note the Order Number.

3. In Oracle Purchasing (if you use the Depot Repair Super User responsibility, navigate the path: Purchasing > Receiving > Receipts), in the Find Expected Receipts window, click the Customer tab, and search for the receipt whose RMA Number

you noted in step 2.

4. In the Receipts window, select Inventory for the Destination Type, select the Subinventory.

5. If required, specify the Serial Number or Serial Number range of the item to be received.

6. Submit a request to run the program Create SR/RO from OM RMA Lines; specify the Organization and Subinventory parameters.

7. When this program finishes, the Repair Order has been created, with a Standard Repair Type.

   Because the item to be repaired has already been received, the Logistics tab contains neither Return nor Ship lines.

8. From the top menu, select Data > Activity, to find summary information in the Activity window about the receiving of the item.

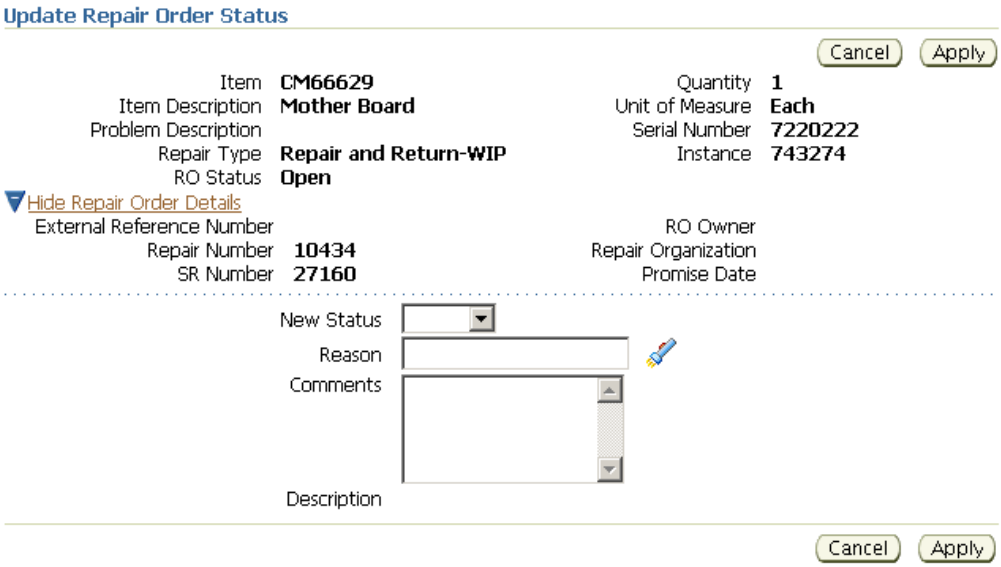
Update the Repair Order Status

You can update the Status of a Repair Order either by selecting a Repair Order and then clicking the Update RO Status button from the Depot Repair Workbench or by clicking the Update Status button from the Repair Order page.

When you update the Status of a Repair Order, you can only change to a Status defined as acceptable for the current Repair Type in your setup of Repair Order Status Transitions. The list of values for New Status shows only the allowable statuses from which you can select.

For more details, see Repair Order Status Transitions in the Oracle Depot Repair Implementation Guide.

If the transition has been set up to require you to enter a reason at the time of status change, enter the Reason, else it is optional for you to do this. You may also add or edit Comments.



Update the Repair Type of a Repair Order

Start the process of updating the Repair Type of a Repair Order by selecting Tools > Update Repair Type from the main menu.

You can update the Repair Type of a Repair Order only if the Status of the Repair Order has previously been defined as a Status of both the current Repair Type and your intended target Repair Type.

For more details, see Repair Type Transitions in the *Oracle Depot Repair Implementation Guide*.

Enter the New Repair Type. The Description associated with the repair type transition appears.

If the transition has been set up to require you to enter a reason at the time of repair type change, enter the Reason, else it is optional for you to do this.

> **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.

Create and Book a Return Line Manually

> **Important:** In this section, the terms *RMA*, *RMA line*, and *Return line* are used interchangeably.

When creating a Repair Order, then, for Repair Types that require RMA creation, the application automatically generates the Return line based on Repair Type setup. If you choose or have to create an RMA manually, then, in the Details tab, clear the Automatically Enter and Book RMA check box, before saving the Repair Order.

The main objective of creating and booking an RMA is to create an order in Oracle Order Management. When the RMA is fully interfaced with Oracle Order Management, an Order Number is associated with the RMA, and appears in the Return line.

The following procedures explain how you can create and book an RMA manually, after you have created the Repair Order. If the RMA has already been created, you can just book the RMA.

For background information about RMA creation, see Create a Repair Order in the Depot Repair Workbench.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must have created a Repair Order.

Navigation

Depot Repair > Repair Orders

Steps:

1. Retrieve the Repair Order for which you want to create or book the RMA.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. Select the relevant result from the Results area of the Find Repair Orders window, and click OK.

   The Depot Repair Workbench shows the selected Service Request and Repair Order details.

3. Select the Logistics tab in the Depot Repair Workbench.

   If a Return line already exists for the defective item to be returned, but the Status is not Booked, then continue at step 10.

   Creating a Return Line

4. If you need to create a Return line, click the Action Type field in the next blank line, and select Return.

5. Select the fields for the Return line.

   The main fields that you must select are Action Code, Service Activity, Price List, and Return Reason. For serialized items, you must select the Source Serial Number.

   Item-related fields default to the Repair Order Item. You may edit these as required.

   Note also the Add to Order field. Oracle Depot Repair lets you place all Return (RMA) and Ship lines on the same order.

   By default, all Return (RMA) and Ship lines appear on the next-highest Order Number created when the lines are transferred to Order Management.

   You can also select the specific order for the Return (RMA) or Ship line by selecting the Order Number in the Add to Order field before interfacing the specified line to Oracle Order Management.

   For field descriptions, see Logistics Tab, page 2-12.

   If you want to process the Return line directly to the Booked stage, continue at step 10.

6. Select the Process Trans check box for the Return line.

7. Select the Automate order processing steps through check box.

8. Select the Enter Order button option.

9. Click Process.

   Acknowledge the message in any message window that appears.

   The Status of the Return line changes to Entered or Submitted.

   Booking a Return Line

10. Select the Process Trans check box for the Return line.

11. Select the Automate order processing steps through check box.

12. Select Book Order radio button option.

13. Click Process.

    Acknowledge the message in any message window that appears.

    The Status of the Return line changes to Booked.

The Sales Order Number can optionally be hyperlinked to allow you to click on it to launch the Sales Order window in editable mode and in context of the clicked Order Number. You can enter information such as credit card number, ship method and

payment details, save the order, close the Sales Order screen and return to the Depot Workbench without ever leaving.

Comments:

1. During the processing of the Return line, when the Return line is fully interfaced with Oracle Order Management, the Order Num field is populated with the system-generated RMA Order Number.

   If you have not selected the No Charge check box, the application returns the item price to the Price field based on Price List selected.

2. To delete a Return or Ship line, select the Return or Ship line on the Logistics tab, and click the Delete icon on the toolbar.

   > **Note:** The Delete icon on the toolbar remains enabled as long as the Return or Ship line has not been fully interfaced with Order Management. After the order is fully interfaced to Order Management, the application disables the Delete icon, and you cannot delete the order line.

Move Items Internally

The Internal Move capability allows you to move items or parts from one location to another from a single window. The Internal Move window wraps the capabilities provided by the Internal Requisition and Internal Sales Order modules provided by Purchasing and Order Management. This new capability enables a single repair order to track both internal and external logistical operations. You can perform logistical transactions without leaving the Depot Repair interface.

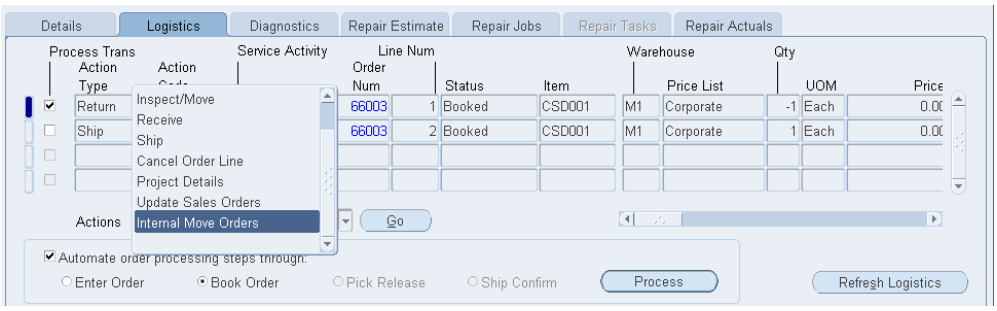
Additionally, it provides the ability to create Internal Requisitions and Internal Sales Orders in one step, ship and receive Internal Sales Orders and link Internal Moves to a repair order along with RMAs and Sales Orders. The business value of this functionality is that it prevents losing track of items as they move from one location to another, enables ad-hoc routing of material to the best processing location and reduces click count to create Internal Requisitions and Sales Orders.

To move items internally:

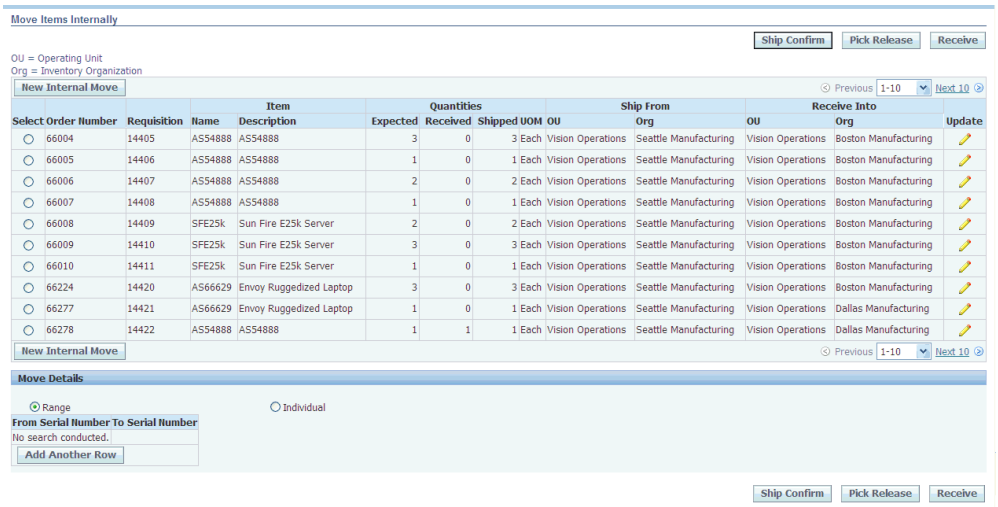
1. Navigate to the Find Service Requests window and select a Repair Order to open the Repair Orders window.

2. Select the Logistics tab.

3. Choose the Internal Move Orders option from the Actions drop down list and click Go.



The Move Items Internally page appears. The page displays the existing internal move orders linked to this repair order. The Move Details region provides the ability to enter one or more serial numbers or a serial number range.

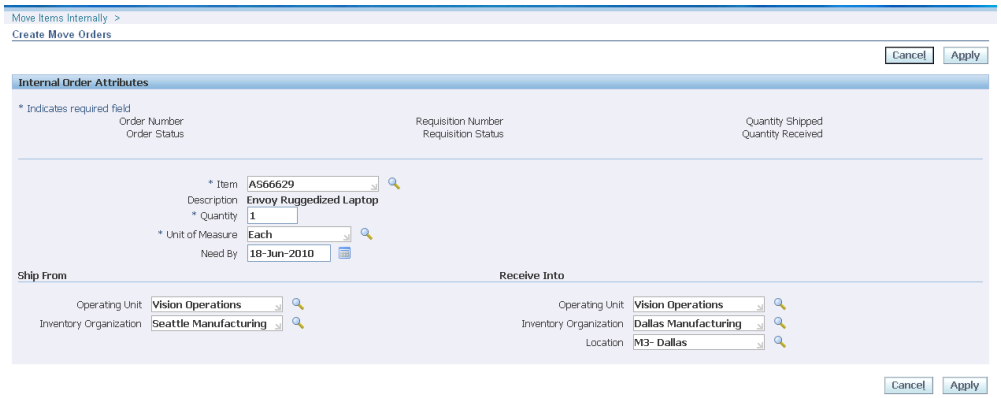


4. To create a new internal move order, click the New Internal Move button. The Create Move Orders page appears.

5. Enter the fields in the Internal Order Attributes region:
   - Item
   - Description
   - Quantity
   - Unit of Measure
   - Need By

6. Enter the Operating Unit and Inventory Organization in the Ship From region.

7. Enter the Operating Unit, Inventory Organization, and Location in the Receive Into region.

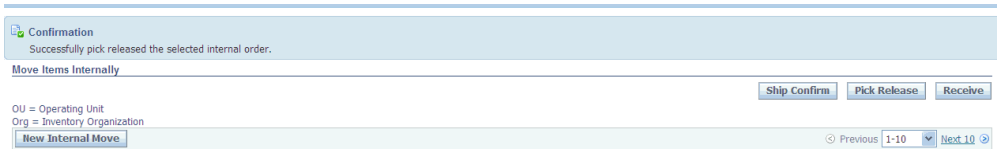


8. Click Apply to create a new internal move order. A confirmation page appears. You cannot edit any fields once an Internal Sales order is created.

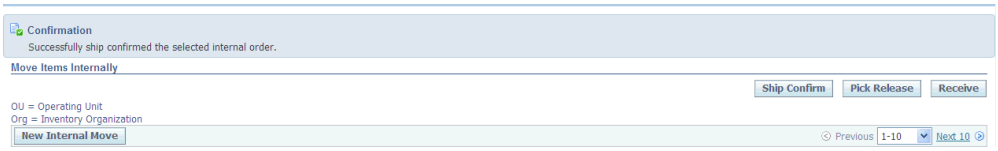
   The header of the Create Move Orders page populates with the following:

   - Order Number
   - Order Status
   - Requisition Number
   - Requisition Status
   - Quantity Shipped
   - Quantity Received

9. To Pick Release the internal sales order line, select the move order on the Move Items Internally page and click the Pick Release button. A confirmation message appears validating the pick release.



10. To Ship Confirm the internal sales order line, select the relevant move order and click the Ship Confirm button. A confirmation message appears validating the ship confirm.



11. You can receive the internal requisition associated with Internal sales order in the destination organization. If the shipping network between source and destination organization are set up as direct then the receipt automatically happens as part of ship confirm action in the source organization. Though the internal requisition is automatically received as part of ship confirm action, you must click the Receive button to refresh the receipt information in the depot schema. A confirmation message appears validating the receipt.

Additionally, you can perform partial shipments and partial receipts. For example, for an Internal Order with quantity of 5, the shipping clerk ships out only 3. In this case the destination organization receives these 3 into their inventory. Later when the remaining quantity of 2 is shipped out, the destination organization receives the remaining quantity.

Find Service Requests and Repair Orders

On the Find Repair Orders window, you can retrieve Service Requests or Repair Orders from the database.

A search in Oracle Depot Repair enables you to retrieve Service Requests and Repair Orders based on parameters related to a Service Request or Repair Order (Number, Customer, Item, or Date Opened). You can use a combination of these parameters to restrict your search so as to retrieve only the Service Requests or Repair Orders that you want.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

The Service Request or Repair Order record that you want to retrieve must exist in the database.

Navigation

Depot Repair > Repair Orders

Steps:

1. In the Find Repair Orders window, specify the parameters based on whether you want to search for the Service Request or Repair Order.

2. The search parameters in the Service Request area include:

   - Request Number
   - Status
   - Customer Name
   - Customer Account
   - Date Opened
   - Item
   - Serial Number
   - Owner

   The search parameters in the Repair Order area include:

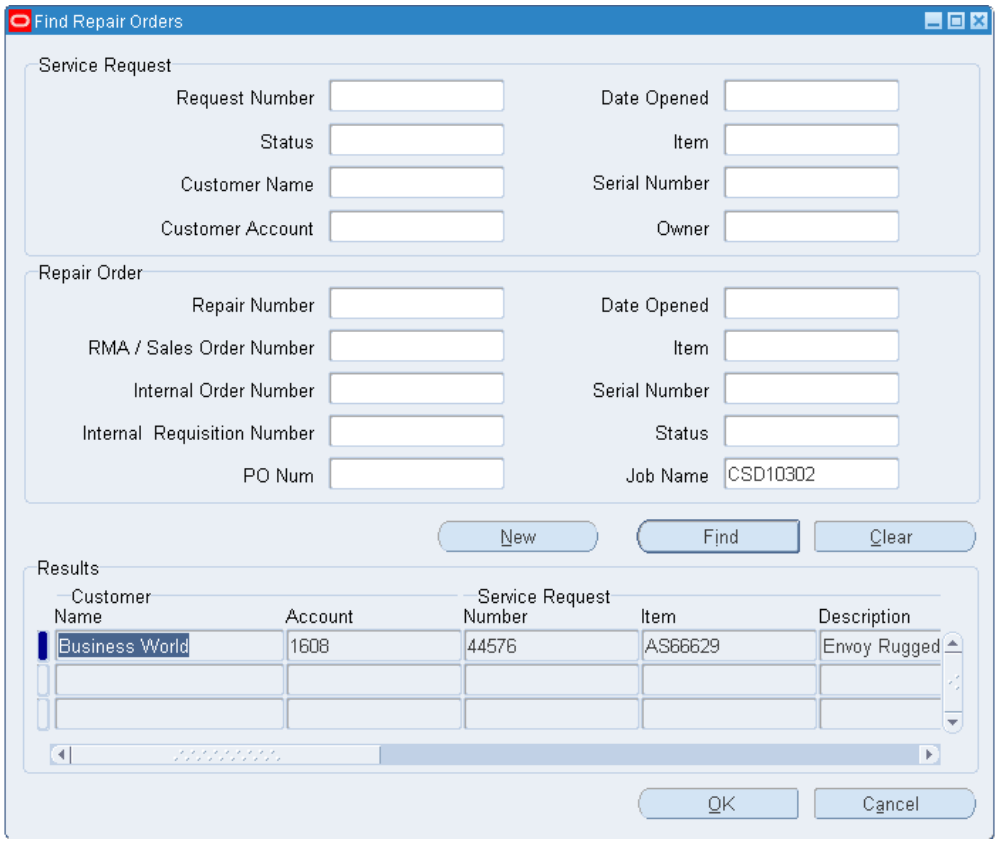
   - Repair Number
   - RMA / Sales Order Number
   - Internal Order Number
   - Internal Requisition Number
   - PO Num
   - Project
   - Date Opened
   - Item

- Serial Number
- Status
- Job Name
- Project Task

> **Note:** Performing a search based on these values searches for Project or Task values saved on the Repair Order Details tab, and not the values stored on linked Sales Orders or WIP jobs.

3. Click Find to find matching Service Requests or Repair Orders based on the parameters you have specified.
4. The Results region in the Find Repair Orders window displays the search results.

   You can select any of the retrieved Service Requests or Repair Orders, and click OK to view its details in the Repair Orders window, generally known as the Depot Repair Workbench.



Transfer Install Base Ownership

Transfer Install Base Ownership function is performed in two ways:

- Changing ownership based on the service request
- Changing ownership on a repair order

Changing ownership based on the service request

You can change the ownership based on the service request.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must set up Transfer Ownership from System Administrator Responsibility.

Navigation

Depot Repair > Repair Orders

Steps

1. Navigate to the Service Request region.
2. Enter an SR with Install Base item instance owned by a party other than the SR party.
3. Save the SR.
4. Click OK when the system prompts you to change the ownership of instance.
5. Select Change Ownership option from the Tools menu.
6. Click Yes to commit the change in the decision window.
7. Save the SR.

From Install Base query the instance number; you will find item's owner name is changed to new one.

Changing ownership on a repair order

You can change the ownership based on a repair order.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must set up Transfer Ownership from System Administrator Responsibility.

Navigation

Depot Repair > Repair Orders

Steps

1. Navigate to the Service Request region.

2. Enter an SR without item details.
3. Enter RO details with item instance belonging to another customer other than the SR Party.
4. Save the RO.
5. Click OK when the system prompts you to change the ownership of instance.
6. Select Change Ownership option from the Tools menu.
7. Click Yes to commit the change in the decision window.
8. Save the RO.

From Install Base query the instance number; you will find item's owner name is changed to new one.

Create and Maintain Notes

Notes are used to record and manage the comments that the depot agents and technicians generated against various services. Notes in a Service Request help in recording the descriptive information about customer repair issues, any progress that the agent had done in resolving this issue, and so on. You can enter either Service Request or Repair Order notes from the Details tab in the Depot Repair Workbench.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

A Repair Order record must exist for an item before you can attach notes to the relevant Service Request or Repair Order.

Navigation

Depot Repair > Repair Orders

Steps:

1. Retrieve the Service Request or Repair Order to which you want to attach a note.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. In the Results area of the Find Repair Orders window, select the relevant result, and click OK.

   The Depot Repair Workbench shows the selected Service Request and Repair Order details.

3. On the Details tab of the Repair Order window, select Service Request or Depot Repair in the Notes area.

4. To open the Notes window, click Notes.

5. In the Type field, select a note type.

6. In the Status field, select a note status.

   The choices are: Personal, Internal, and Publish. If you use the Personal status, this note would not be viewable to any customer in a customer facing application. Employees at the depot can view Internal notes. All employees and customers can view Publish notes. You can create additional Status codes. For more information, see the *Oracle Common Application Components Implementation Guide*.

7. In the Note field, enter a brief description of the note.

8. To enter more notes, click the More button.

   The Detailed Note window opens and holds textual notes up to 32K characters.

9. After entering notes, click OK.

10. In the main Notes window, to specify more details for the note, specify the Related To and Value fields.

11. Save the note.

    The note appears in the table under the Notes tab on the left. The Summary tab displays the notes as text in a chronological or reverse chronological manner. You can change the chronological view by clicking the Latest First check box.

12. To search for existing notes, use the Find Notes functionality.

    1. Open the Notes main window.

    2. Click the flashlight icon on the toolbar to open the Find Notes window.

    3. Enter the fields such as Source, Entered By, and so on.

    4. Click Search to display the results.

Use the Diagnostics Tab and Oracle Knowledge Management

The main purpose of the Diagnostics tab is to enable you to make use of solutions to previous problems stored in Oracle Knowledge Management. Oracle Knowledge Management is a repository of solution sets that have already been contributed. Solutions to previous incidents can guide users to resolve current problems at hand.

However, even if you have not installed Oracle Knowledge Management, you can still use the Diagnostics tab to select Service Codes, which enable you to automatically create estimate lines and default Bills and Routings for WIP Repair Jobs.

This section consists of the following topics:

- Diagnostic Codes and Service Codes, page 4-39
- Using Diagnostic Codes and Service Codes with Oracle Knowledge Management, page 4-39
- Using Service Codes in the Repair Order, page 4-39
- Diagnostics Tab Usage Overview, page 4-39

Diagnostic Codes and Service Codes

Depot repairs are generally repetitive in nature and the number of problems and resolutions is finite. As such, Oracle Depot Repair provides the ability to associate the potential 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.

An example Diagnostic Code is DC100, whose descriptive Name is Engine Oil Light On, and a corresponding example Service Code is SC100, with descriptive Name Engine Oil Change.

For details of setting up Diagnostic Codes and Service Codes, see the *Oracle Depot Repair Implementation Guide*.

Using Diagnostic Codes and Service Codes with Oracle Knowledge Management

The association of Diagnostic Codes to Service Codes is done in Oracle Knowledge Management via Solutions. First, during implementation, Service Codes are linked to Oracle Knowledge Management Solutions as external objects. Then, during the authoring of Solutions in Oracle Knowledge Management, Diagnostic Codes (for example, DC100) are included in the title or body of the Solution.

Once a Diagnostic Code is associated to a Service Code and that Service Code is linked to an Oracle Knowledge Management Solution, then the repair work to be performed has been defined.

For details of associating Diagnostic Codes and Service Codes with Oracle Knowledge Management, see the *Oracle Depot Repair Implementation Guide*.

Using Service Codes in the Repair Order

Oracle Depot Repair enables you to automate Repair Order processing as follows:

- In WIP repair mode, Oracle Depot Repair provides the ability to predefine work using Bills and Routings and any associated material, labor and expense charges. The user can retrieve the defined work using Service Codes. The Service Code association with Bills and Routings can be used to create material, labor and expense estimate lines as well as default routes to WIP Repair Jobs.

- In Task repair mode, Oracle Depot Repair provides the ability to predefine work using Task Templates and Task Parts and any associated material, labor and expense charges. The user can retrieve the defined work using Service Codes. The Service Code association with Task Templates and Task Parts can be used to create material, labor and expense estimate lines, and to create tasks.

For details of how Service Codes are used in the Repair Order, see the following:

- Create a Repair Estimate, page 4-57

- Create a WIP Repair Job for a Single Repair Order, page 4-80

Diagnostics Tab Usage Overview

The interface from Oracle Depot Repair to Oracle Knowledge Management is the Diagnostics tab, which is divided into three areas:

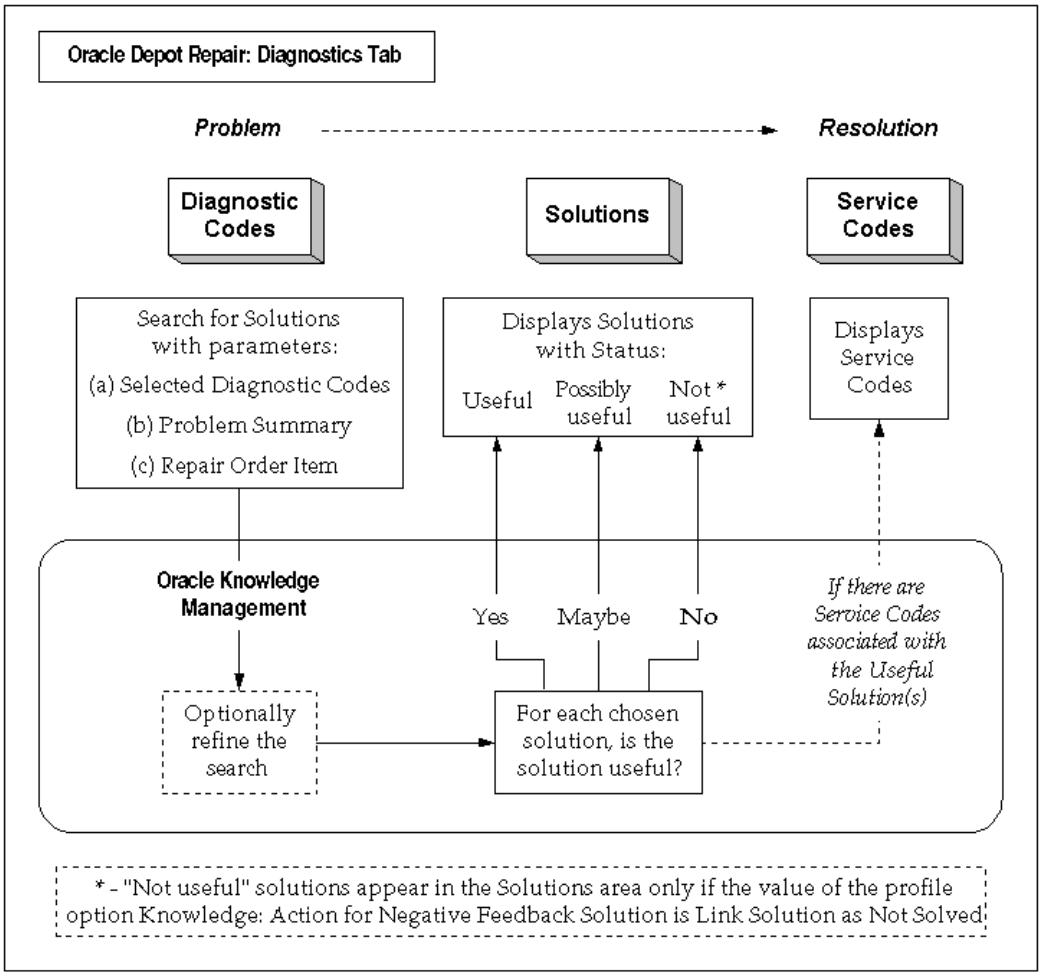
- Diagnostic Codes

- Solutions

- Service Codes

The following figure shows an overview of the standard use of the different areas of the Diagnostics tab.

Overview of Standard Diagnostics Tab Usage



See Also

- Manage Diagnostic Codes in the Diagnostics Tab, page 4-42
- Search Oracle Knowledge Management, page 4-43
- Manage Solutions in the Diagnostics Tab, page 4-48
- Manage Service Codes in the Diagnostics Tab, page 4-50

Manage Diagnostic Codes in the Diagnostics Tab

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must have set up Diagnostic codes and Service Codes in Oracle Depot Repair.

You must have associated the Diagnostic Codes and Service Codes to Solutions in Oracle Knowledge Management.

For details of setting up and associating Diagnostic Codes and Service Codes, see the *Oracle Depot Repair Implementation Guide*.

Navigation

Depot Repair > Repair Orders

Steps

1. Retrieve the Repair Order that you want to process.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. If you are not already in the Diagnostics tab, click the Diagnostics tab.

3. If you do not want to provide any Diagnostic Codes as parameters to the search in Oracle Knowledge Management, continue at step 7.

4. Enter a Diagnostic Code manually or select a Diagnostic Code from the list of values.

   The list shows all Diagnostic Codes that have been associated with either the Item or the Item Category of the Repair Order Item.

   For more information on setting up Diagnostic Codes, see the *Oracle Depot Repair Implementation Guide*.

   > **Note:** If you enter an invalid Diagnostic Code, the list of values appears, which contains all the valid Diagnostic Codes for your Repair Order.

5. Click the Select check box.

6. Repeat steps 4 to 5 for as many Diagnostic Codes as you want to display.

   Note: You may click the Select All or Deselect All as appropriate any time before you click Search Solutions.

   Note: Only the Diagnostic Codes that are explicitly selected are forwarded as search parameters to the Oracle Knowledge Management search.

7. Click Search Solutions.

   This launches two windows:

   - A Refresh linked Solutions box, with the message: Please press OK after searching for Solutions.

   - An Oracle Knowledge Management window.

     The window that is launched in Oracle Knowledge Management depends on the value of the profile option Knowledge: Search to display for integrating applications.

     If the value of this profile option is Unified Search, then the window that is launched is a Simple Search window; if the value of the profile option is Advanced Search, then the window that is launched is the Advanced Solution Search Results window.

     Continue the search process at the section Search Oracle Knowledge Management, page 4-43.

Search Oracle Knowledge Management

The search in Oracle Knowledge Management is the second stage of the completely integrated process which starts in the Diagnostics tab. This section concentrates on the Oracle Knowledge Management search itself, and how it provides feedback back into the Diagnostics tab.

This procedure follows immediately after you have clicked the Search Solutions button in the Diagnostics tab.

Use of the Search Parameters in Oracle Knowledge Management

The parameters passed to Oracle Knowledge Management to search for solutions are the following:

- All selected Diagnostic Codes
- Problem Summary
- Repair Order Item

The search for solutions is performed as follows:

- The Diagnostic Codes and Problem Summary are used as search keywords in the title and body of the Solutions.
- The Repair Order Item are used to match the specified item with the Related Items as set up in the Solutions.

By utilizing the profile option Knowledge: Search results include weighting from Product, Platform and Category filters, you can narrow or widen your search results.

When the profile option is set to No, the search results contain only Solutions matching the specified Product/Platform/Category.

When the profile option is set to Yes, the results can also contain Solutions that do not match the Product/Platform/Category specified -- the Solutions that do match the Product/Platform/Category are given a boost in the scoring algorithm.

> **Note:** Oracle Depot Repair does not make use of platform and category filters in Oracle Knowledge Management.

For additional information on how to use Oracle Knowledge Management, please refer to the *Oracle Knowledge Management User Guide*.

Search Result Examples

Consider the following search parameters:

- Selected Diagnostic Codes = DC01, DC02.
- Problem Summary = Mouse Malfunction.
- Repair Order Item = ITM342.

With the profile option Knowledge: Search results include weighting from Product, Platform and category filters set to No, you get the following results:

- All Solutions whose title or body contains DC01, DC02, Mouse, or Malfunction, and whose Related Items include ITM342.

With the profile option Knowledge: Search results include weighting from Product, Platform and category filters set to Yes, you get both of the following sets of results, with the first set having a higher score:

- All Solutions whose title or body contains DC01, DC02, Mouse, or Malfunction, and

whose Related Items include ITM342.

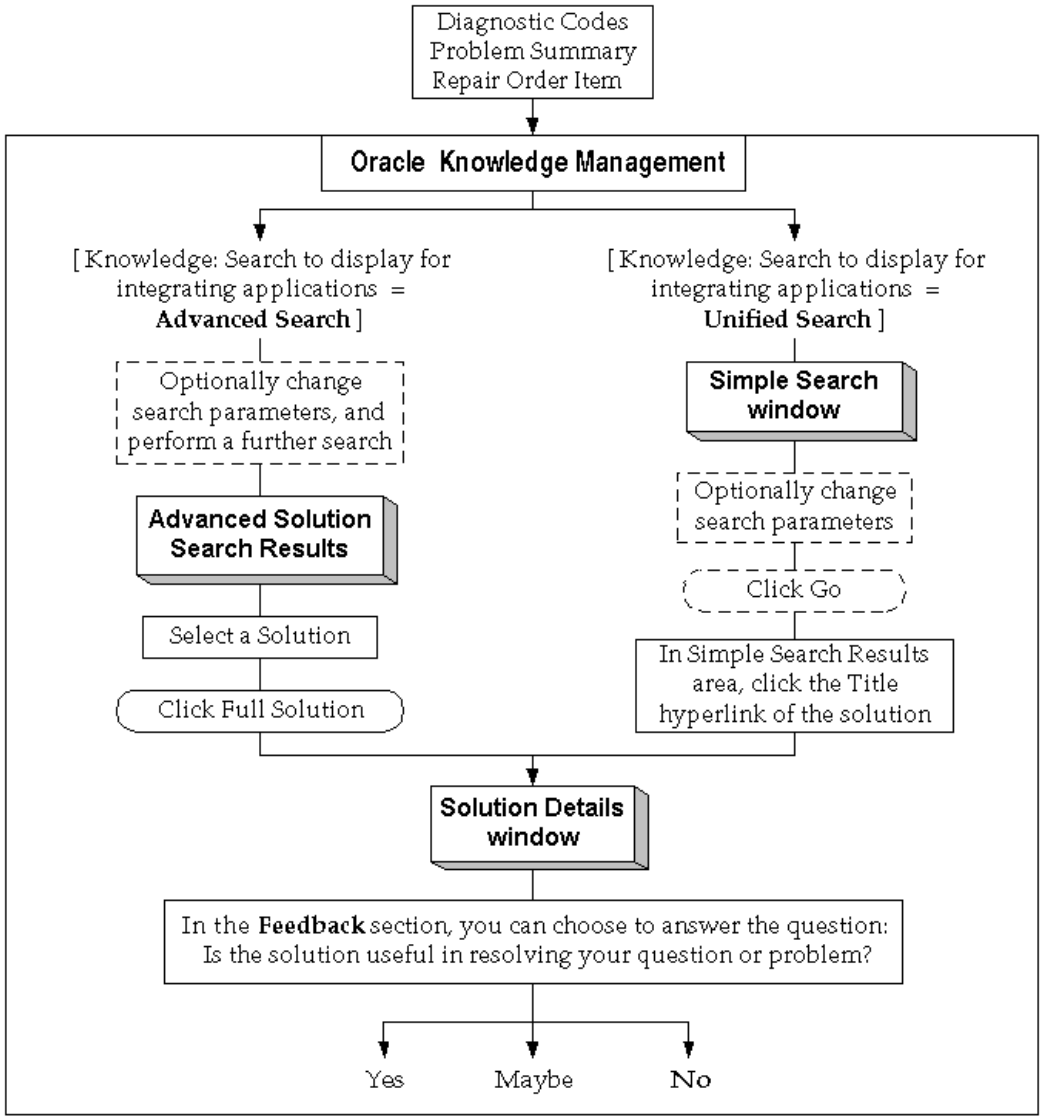
- All Solutions whose title or body contains DC01, DC02, Mouse, or Malfunction.

Prerequisites

You must have started the search process by clicking the Search Solutions button in the Diagnostics tab.

For details, see Manage Diagnostic Codes in the Diagnostics Tab, page 4-42.

Overview of Main Oracle Knowledge Management Search Procedure



Steps

1. You can optionally add and edit search parameters in the Oracle Knowledge Management search window, and then perform an explicit search.

   The net objective of the Oracle Knowledge Management search is to specify whether a solution is useful or potentially useful for the current repair problem. To do this, you must first select a solution in a "search results" window, then access the solution details for that solution.

2. If you are in the Simple Search window, click the Title hyperlink of the potentially

useful solution in the Simple Search Result area. If you are in the Solution Advanced Search Results window, click the radio button beside the potentially useful solution, and click Full Solution.

In the Solution Details window, there is a section available for you to decide the usefulness of the solution. This section is the Feedback section, whose main constituent is the question "Is the solution useful in resolving your question or problem?"

> **Note:** The Feedback section only appears if the solution has not already been linked to the current Repair Order. However, after a user explicitly selects an answer to the usefulness question, then the next time the Solution Details window appears for that solution, the Feedback section does not appear.

3. In the Solution details window, scroll down to, and just beyond, the External Objects area.

4. If the Feedback section appears, then, you can optionally respond to the question "Is the solution useful in resolving your question or problem?", by clicking Yes, Maybe, or No.

   If you choose one of these options, a confirmation message appears, indicating that your feedback was recorded.

5. You may optionally continue in Oracle Knowledge Management, and select more Solutions for feedback to Oracle Depot Repair.

6. When you have finished in Oracle Knowledge Management, close the Oracle Knowledge Management window.

7. Click OK in the Refresh linked Solutions box.

   If you have linked any Solutions from Oracle Knowledge Management to a Repair Order, they appear in the Solutions area of the Diagnostics tab. Additionally, Service Codes appear in the Service Codes area of the Diagnostics tab (if any exist).

Providing Feedback into the Solutions Area of the Diagnostics Tab

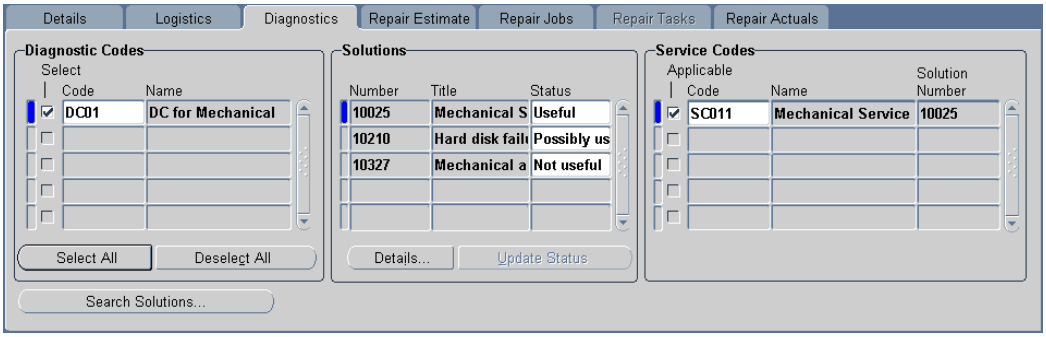
In step 4, your response to the question "Is the solution useful in resolving your question or problem?" causes the following to occur in the Solutions area of the Diagnostics tab:

- If you answered Yes, then the solution appears with a Status of Useful.
- If you answered Maybe, the solution appears with a Status of Possibly useful.

- If you answered No, and if the value of the profile option Knowledge: Action for Negative Feedback Solution is Link Solution as Not Solved, the solution appears with a Status of Not useful.

Providing Feedback into the Service Codes Area of the Diagnostics Tab

If the Useful Solutions returned to the Solutions area have any Service Codes associated with them, then those Service Codes will appear in the Service Codes area, together with their associated Solution Number and with their Applicable check box set.



Manage Solutions in the Diagnostics Tab

The main use of the Solutions area is to change the status of Solutions returned from Oracle Knowledge Management searches, in order to influence the Service Code information in the Service Codes area.

When you change the Status of a Solution in the Solutions area to Useful, any Service Codes associated with that Solution in Oracle Knowledge Management appear in the Service Codes area, and are initially marked as Applicable.

Under the following conditions:

- The profile option CSD: Use Tasks from Knowledge Base Solutions is set to Yes
- The Solution in the Solutions area is marked as Useful
- The corresponding Solution in Oracle Knowledge Management has one or more Task Templates among its Related Objects

you can retrieve the associated Task Template charge lines into the Repair Estimate tab by clicking Add Lines from Diagnostics.

For more details, see Create a Repair Estimate, page 4-57.

> **Note:** From the Solutions area, you may also return to Oracle Knowledge Management to view the solution details, by clicking the

Details button.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must have previously performed an Oracle Knowledge Management search for the Repair Order, and returned one or more Solutions into the Solutions area (see Search Oracle Knowledge Management, page 4-43)

Navigation

Depot Repair > Repair Orders

Steps

1. If you have not already accessed the Repair Order, retrieve the Repair Order that you want to process.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. If you are not already in the Diagnostics tab, click the Diagnostics tab.

3. Click the right-hand side of the Status field of a solution whose status you want to change.

4. Select a different status from the list of values.

   This enables the Update Status button.

5. Click Update Status.

   If, in steps 3 and 4, you changed the Status to Useful, existing Service Codes associated with the solution will appear in the Service Code area with the Applicable check box set on.

   Continue at step 6.

6. If, in steps 3 and 4, you "downgraded" the Status from Useful to Possibly useful or Not useful, then an Update Solution Status message box appears, presenting the following information:

- Service Codes associated with the solution in the Service Codes area will be marked as not applicable.
- You may delete the Service Code in the Service Codes area manually.

Click OK in the Update Solution Status message box.

This unsets the Applicable check box for the associated Service Code in the Service Codes area.

For details of deleting Service Codes in the Service Codes area, see Delete Service Codes Manually in the Service Codes Area, page 4-53.

7. Optionally, repeat steps 3 through 6 for each solution whose status you want to change.

> **Note:** You cannot delete any Solutions from the Solutions area, you can only change the status values of the Solutions.

Manage Service Codes in the Diagnostics Tab

The topics in this section include the following:

- Select Service Codes Manually in the Service Codes Area, page 4-50
- Activate and Deactivate Service Codes Manually in the Service Codes Area, page 4-52
- Delete Service Codes Manually in the Service Codes Area, page 4-53

Select Service Codes Manually in the Service Codes Area

As part of Oracle Depot Repair implementation, when Service Codes are set up, they are associated with Items, Categories, a combination of Bills and Routings, and Task Template Groups.

The main usage of the Service Codes area in the Diagnostics tab is to enable the associated elements of the Service Codes to be added to the estimate lines and WIP Repair Jobs of the current Repair Order.

The Service Codes area is populated with Service Codes in one or more of the following ways:

- Automatically by Useful Solutions (see Search Oracle Knowledge Management, page 4-43).
- Manually, by selecting Service Codes from the lists of values in the Service Codes

area - in this case, there is no associated Solution Number.

This section deals with the manual selection of Service Codes in the Service Codes area.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must have set up Service Codes in Oracle Depot Repair.

To make use of prior repair knowledge, you must have associated Service Codes to Solutions in Oracle Knowledge Management.

For details of setting up and associating Diagnostic Codes and Service Codes, see the *Oracle Depot Repair Implementation Guide*.

Navigation

Depot Repair > Repair Orders

Steps

1. If you have not already accessed the Repair Order, retrieve the Repair Order that you want to process.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. If you are not already in the Diagnostics tab, click the Diagnostics tab.

3. Select a Service Code from the Service Code list of values in the Service Codes area.

   This list of values that appears shows all the Service Codes that have been associated with either the repair Item or the Inventory Category of the repair item.

   For more information on setting up Service Codes, see the *Oracle Depot Repair Implementation Guide*.

4. In the Code field, either enter a Service Code, or select a Service Code from the list of values.

   > **Note:** If you enter an invalid Service Code, the list of values appears, which contains all the valid Service Codes for your Repair Order.

By default, as each valid Service Code is entered or selected, its Applicable check box is set.

Manually entered Service Codes do not have a Solution Number.

5. Repeat steps 3 to 4 for as many Service Codes as you want to display.

6. Save your changes.

Activate and Deactivate Service Codes in the Service Codes Area

You activate Service Codes in the Service Codes area by marking them as applicable.

Activating Service Codes in the Service Codes area enables the following subsequent processing options:

- In the Repair Estimate tab, after you have created a repair estimate header, you can add lines from the Diagnostics tab associated with the activated Service Codes in the Service Codes area.

  Charge lines can be added in for WIP mode repairs (if Bills and Routings are associated with the Service Codes) and for Task mode repairs (if Task Template Groups are associated with the Service Codes).

- In the Repair Jobs tab, you can create a WIP Repair Job with the Bills and Routings associated with the activated Service Codes in the Service Codes area.

For more information on setting up Service Codes, see the *Oracle Depot Repair Implementation Guide*.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must have previously performed one or more of the following operations for the Repair Order:

- Searched Oracle Knowledge Management, and returned one or more Service Codes into the Service Codes area (see Search Oracle Knowledge Management, page 4-43 and Manage Solutions in the Diagnostics Tab, page 4-48).

- Selected one or more Service Codes manually (see Select Service Codes Manually in the Service Codes Area, page 4-50).

Navigation

Depot Repair > Repair Orders

Steps

1. If you have not already accessed the Repair Order, retrieve the Repair Order that you want to process.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. If you are not already in the Diagnostics tab, click the Diagnostics tab.

3. In the Service Codes area, check the Applicable check box for each Service Code that you want to activate.

4. In the Service Codes area, uncheck the Applicable check box for each Service Code that you want to deactivate.

5. Save your changes.

Delete Service Codes in the Service Codes Area

You may delete Service Codes from the Service Codes area, whether they are marked as applicable or not.

> **Note:** After the first time that you use Service Codes in a Repair Order in either the creation of a repair estimate or the creation of a WIP Repair Job, then the selected Service Codes are protected against deletion in that Repair Order.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must have previously performed one or more of the following operations for the Repair Order:

- Searched Oracle Knowledge Management, and returned one or more Service Codes into the Service Codes area (see Search Oracle Knowledge Management, page 4-43

and Manage Solutions in the Diagnostics Tab, page 4-48).

- Selected one or more Service Codes manually (see Select Service Codes Manually in the Service Codes Area, page 4-50).

Navigation

Depot Repair > Repair Orders

Steps

1. If you have not already accessed the Repair Order, retrieve the Repair Order that you want to process.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. If you are not already in the Diagnostics tab, click the Diagnostics tab.

3. In the Service Codes area, click the marker field to the left of the Service Code that you want to delete.

4. From the top menu, select Edit > Delete.

5. Optionally, repeat steps 2 through 3 for each Service Code that you want to delete.

6. Save your changes.

Comments

If you wish to reinstate Service Codes that you have deleted, then perform one of the following operations:

- Change the status of any associated solution in the Solutions area to Useful, as described in Managing Solutions in the Diagnostics Tab, page 4-48.

- Select and activate Service Codes manually, as described in Selecting Service Codes Manually in the Service Codes Area.)

Estimate Repair Charges

Depots can require a repair diagnosis of the customer's returned item in order to accurately determine the cost involved in the actual repair, upgrade, or overhaul. The depot technician typically performs this by inspecting or performing a teardown of the item to determine the required parts and labor for the repair. After completing this process, the depot provides a formal quotation to the customer for approval before any work is scheduled. During the teardown, the technician can identify individual parts, and diagnose for further service requirements using typical repair manuals and

technical notes for aid.

> **Note:** If you have set up the application to not use the Estimate functionality, by setting the profile option CSD: Enable Estimates to No, the Repair Estimate tab in the Depot Repair Workbench is not available and you cannot create a repair estimate. For more information, see the note in the topic Repair Estimate Tab, page 2-24.

Items for Estimates

Items for estimates must be defined in the organization specified by the profile option Service: Inventory Validation Organization.

Pricing and Currency

To charge for repair services, a service provider can use standard pricing method using Price Lists to determine the fixed repair price. Variable pricing method can also be used, which permits the depot to charge the customer for the actual material, labor, and other expenses incurred during the repair. When exchanging or replacing items, a service provider typically calculates the price of the exchange as 60% of the new item price, and possession of the customer's broken item.

In Oracle Depot Repair, a Repair Order supports a single currency. The default currency is based on the default contract. If no default contract is selected, the default Price List determines the currency. If neither defaults are set, the currency selection is based on the Price List manually selected in the Details tab. After a charge line is created, you cannot change the currency of the Repair Order in the Details tab, or select another default contract that has a Price List of a different currency. To change the currency of a Repair Order, all the charge lines, including the Logistics lines, have to be deleted.

The Repair Order currency drives the list of Price Lists that you can use for estimate charge lines. You cannot select a Price List with a currency that is different from the Repair Order currency.

Estimate Lines from Diagnostics

If you have Service Codes marked as applicable in the Diagnostics tab, and these Service Codes are associated with Bills, Routings, and Task Template Groups, then you can copy the following into the Repair Estimate tab:

- Charge lines associated with the Bills and Routings for WIP mode repairs.
- Charge lines associated with Task Template Groups for Task mode repairs.

When you add in lines for WIP mode repairs through Service Codes, then, typically:

- Bill of Material items are added as Material lines.

- Resources associated to the Operations for BOM Routing are added as Labor lines.

When you add in lines for Task mode repairs through Service Codes, then, typically:

- Items specified in Task Parts in Spares Management are added as Material lines.
- Planned Effort elements for a Task Template are added as Labor lines.

Estimate Cost Analysis

While preparing an estimate, you can also perform estimate cost analysis. Estimate cost analysis lets you compare your estimated margins and profitability based on estimated costs and estimated charges. The only supported costing method is standard costing. The estimate cost analysis is always an aggregate of all estimated costs and charges for the Repair Order.

Materials, labor, and expenses comprise the totals for charges or costs. Taxes and other fees are not included in cost analysis.

Costing of items differs in WIP and Task mode.

- In WIP mode, Item Cost is used for material, labor, and expense charges; however, if a Resource Cost exists, it is used for the Labor charge.
- In Task mode, Item Cost is used for material, labor, and expense charges; Resource Cost is not used.

To enable estimate cost analysis, the following conditions must apply:

- The profile option CSD: Enable Costing must be set to Yes.
- Each material, labor, and expense item must have an item cost defined in Oracle Inventory.

Estimate Approval

On the Details tab for a Repair Order, you can check or uncheck the Estimate Approval Required field. If the check box is set, you must get customer approval for the estimate, and record this as a status change in the repair estimate.

The topics in this section include the following:

- Create a Repair Estimate, page 4-57
- Revise a Repair Estimate, page 4-62
- Obtain Customer Approval for a Repair Estimate, page 4-63

Create a Repair Estimate

The following procedures describe how to prepare a repair charges estimate for the customer.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must complete all steps in the relevant business scenario prior to creating the estimate. For more information, see Oracle Depot Repair Business Scenarios..

Navigation

Depot Repair > Repair Orders

Steps

1. Retrieve the Repair Order for which you want to estimate charges.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. Select the relevant record from the Results area of the Find Repair Orders window, and click OK.

   The Depot Repair Workbench shows the selected Service Request and Repair Order details.

3. Select the Repair Estimate tab in the Depot Repair Workbench.

4. Optionally enter the Status, Date, Lead Time, and UOM field values.

   For field descriptions, see the topic Repair Estimate Tab, page 2-24.

5. Click Save Estimate to save the estimate header record.

6. You can enter estimate details in one or more of the following ways:

   - Manually, by entering individual charge line details in the multi-record table area.

     For field descriptions, see the topic Repair Estimate Tab, page 2-24.

- If you have previously selected and activated Service Codes in the Diagnostics tab, then you can click **Add Lines from Diagnostics**.

  This adds the charge lines associated with the active Service Codes in the Diagnostics tab, that is, the Service Codes marked as applicable.

  You can also add Task Template charge lines associated with Solutions if the following conditions are true:

  1. The profile option CSD: Use Tasks from Knowledge Base Solutions is set to Yes.

  2. At least one Solution in the Solutions area of the Diagnostics tab is marked as Useful, and the corresponding Solution in Oracle Knowledge Management has one or more Task Templates among its Related Objects.

  When these conditions are true and you click Add Lines from Diagnostics, you retrieve the associated Task Template charge lines into the Repair Estimate tab.

  After you have clicked Add Lines from Diagnostics, the added lines appear in the Repair Estimate tab, and an information window appears which records any errors and information about the lines added.

  If the lines that you expect to be added do not appear, you should check a variety of factors associated with your Repair Order and the data that you are trying to add in. See Checks for Adding Estimate Lines from Diagnostics, page 4-60.

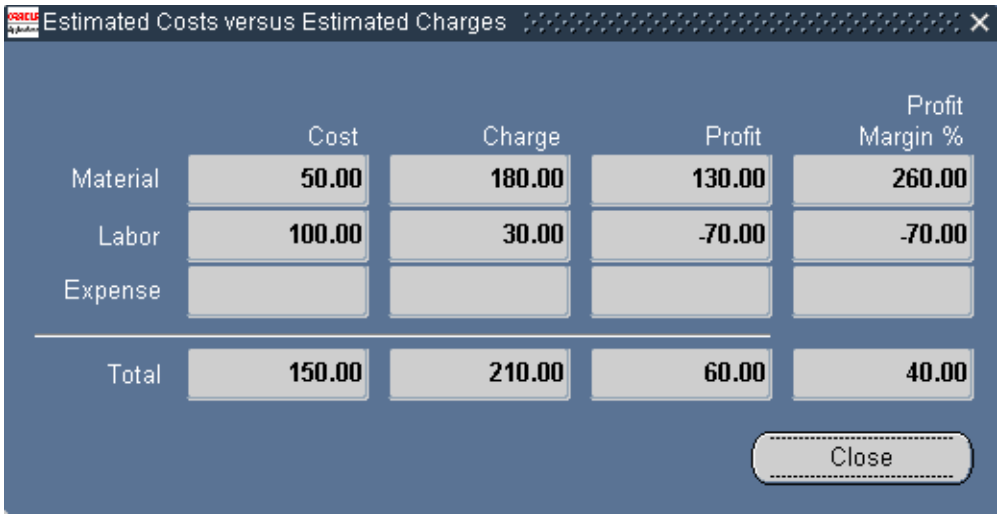
  For more information, see the topic Activate and Deactivate Service Codes in the Service Codes Area, page 4-52.

  > **Note:** After you have added the lines associated with the active Service Codes, the Service Code rows from which you derived the estimate lines are disabled in the Service Codes area of the Diagnostics tab.

7. After entering a charge line, click Save Estimate to record the charge line.

   The application populates the Unit Price and Est Charge fields in the table. The Summary of Estimated Charges region is also populated. This region is updated as you add (or delete) charge lines.

8. Optionally, click Costs to see an estimate cost analysis.



9. The Estimated Costs versus Estimated Charges window opens and shows the estimated Cost, the estimated Charge, the estimated Profit (Charge less Cost), and the estimated Profit Margin% by separate Material, Labor, Expense, and Total lines.

   Click Close to exit the Estimated Costs versus Estimated Charges window.

10. Click Line Details to display the Estimate Charge Details window.

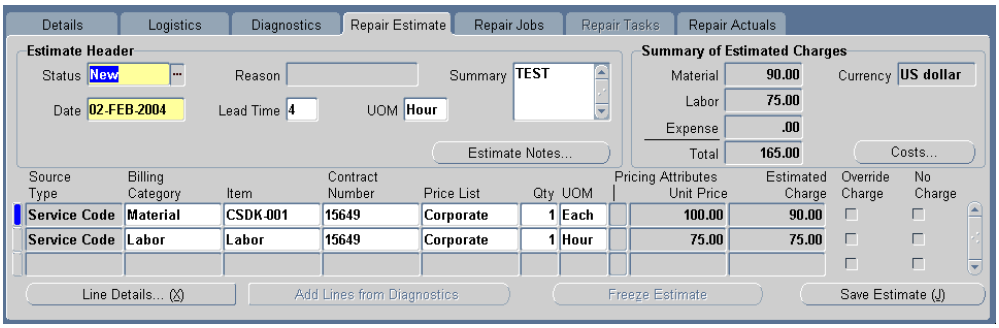
    Enter the detailed charge line values in the table fields.

    For field descriptions, see the topic About Estimate Charge Line Details Window, page 2-24.

11. To allow provisioning for overriding the entered charges later, select the Override Charges check box.

    This is enabled if the profile option CSD: Allow Charge Override for Estimates is set to Yes.

    The Override Charges check box lets you override repair charges, in the Estimated Charge field, after you have saved it. Discounts associated with the contract are not applied if you manually change the Estimated Charge.



12. Click Save to record the changes.

13. Click Close to close the Estimate Charge Details window, and return to the Repair Estimate tab.

    The Totals fields in the lower part of the Repair Estimate tab show charge line totals.

14. To delete a charge line, select the relevant charge line on the Repair Estimate tab, and click the Delete icon on the toolbar.

Comments

1. You cannot add or delete charge lines in the Estimate Charge Details worksheet. You can add or delete charge lines only in the Repair Estimate tab.

2. If you have added estimate lines derived from a Service Code, using Add Lines from Diagnostics, then you cannot add the lines again from the same Service Code.

Checks for Adding Estimate Lines from Diagnostics

You should ensure that the following conditions are true before you add lines from the Diagnostics tab. Failure to satisfy all the conditions results in rows not being imported as estimate lines.

(A) General Checks

The following checks apply to all lines:

- You must have at least one active Service Code, that is, a Service Code marked as applicable, associated to the Repair Order.

- The default Price List must be defined and active.

- The Billing Type for the item must be defined.

Note: You cannot add an estimate line from the same Service Code entry on the Diagnostics tab twice.

(B) WIP-Specific Checks

The following checks apply to WIP lines:

- The Service Code must be associated with at least one work entity (bill or routing), and each associated work entity must be defined for the organization specified by the profile option Service: Inventory Validation Organization.
- Each work entity must have a Bill of Material.
- Each operation sequence must have a Resource.
- Each Resource must have a billing Item.

(C) Task-Specific Checks

The following checks apply to task lines derived through Service Codes and, under profile control, directly from Task Templates related to Oracle Knowledge Management Solutions.

- Each work entity must have a Task Template Group.
- Each Task Template Group must have a Task Template.
- You must have a product part defined for the Task Templates and the Repair Order Item.
- For a task parts definition, you should have a manual or a rollup quantity or both.
- If there is a substitute defined for a task part, the task part is not added as an estimate line.
- For labor lines only, for Planned Effort, you must have provided a value for the profile option CSD: Default Labor Item for Estimate Line from Tasks.
- For labor lines, the Planned Effort Interval and UOM for the Task Template must not be null.

(D) Tasks-from-Solutions Checks

In addition to the Task-Specific checks, the following additional checks apply to task lines derived directly from Oracle Knowledge Management Solutions:

- The profile option CSD: Use Tasks from Knowledge Base Solutions must be set to

Yes.

- The Solution in the Solutions area of the Diagnostics tab must have a Status of Useful.
- The corresponding Solution in Oracle Knowledge Management must have an active Task Template among its Related Objects.

Revise a Repair Estimate

Certain repairs can require service providers to revise repair estimates many times. The service agent should verify existing warranties or contracts while quoting and revising estimates.

> **Note:** If you manually override the Estimated Charge, which you are allowed to do if the profile option CSD: Allow Charge Override for Estimates is set to Yes, then discounts associated with the contract are not applied.

> **Note:** Net Discount will always be the Extended Price minus the Estimated Charge, not the contract discount.

The following procedures describe how to revise the estimated charges for an item under repair.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

A repair charges estimate must exist for the broken item.

Navigation

Depot Repair > Repair Orders

Steps

1. Retrieve the Repair Order for which you want to revise the estimate.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. Select the relevant record from the Results area of the Find Repair Orders window, and click OK.

   The Depot Repair Workbench shows the selected Service Request and Repair Order details.

3. Select the Repair Estimate tab in the Depot Repair Workbench.

   The existing charge lines appear in the multi-record area.

4. Click Line Details.

   The Estimate Charge Line Details window opens.

5. Make the necessary changes to the charge line field values.

   For more information, see Estimate Repair Charges, page 4-54.

6. Click Save to record the revised charges.

7. Click Close to close the Estimate Charge Line Details window and return to the Repair Estimate tab.

   The charge lines and totals on the Repair Estimate tab reflect the revision made to the estimate.

8. To change the repair estimate status, choose an appropriate value from the list of values in the Status field.

9. Click Save Estimate to record the changes.

Obtain Customer Approval for a Repair Estimate

If estimate approval is required for a repair estimate, then, after creating the repair charges estimate, the service agent seeks the customer's approval of the estimate.

Upon customer's approval, the depot receives the defective parts in repair subinventory. If the customer rejects the estimate, the Repair Order can be closed, or put on hold as appropriate.

Repair Order estimates can be New, Drafted, Bid, Accepted, Rejected, or Cancelled. These statuses indicate whether to start a repair process. Typically, a repair estimate must be approved prior to the start of the WIP Repair Job.

The following procedures describe how to record customer approval for a repair estimate.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

A Repair Order record with an approved estimate must exist. Also, you must have revised the original estimate as appropriate.

Navigation

Depot Repair > Repair Orders

Steps

1. Retrieve the Repair Order that you want to revise.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. Select the relevant record from the Results area of the Find Repair Orders window, and click OK.

   The Depot Repair Workbench shows the selected Service Request and Repair Order details.

   The Details tab of the Depot Repair Workbench displays the total charges for the repair in the Charges area.

3. Make changes to the original estimate charge lines as required.

   For detailed instructions, see Revise a Repair Estimate, page 4-62.

4. Discuss the revised charges with the customer.

5. In the Repair Estimate tab, update the estimate Status to Estimate Accepted or Estimate Rejected.

6. Click the Save icon on the toolbar to save the updated status.

   The Repair Order is revised with the new charges and customer approval information.

7. On the Details tab, create or consult notes as required.

   For detailed instructions, see Create and Maintain Notes, page 4-37.

8. Click Update RO Status.

   In the Update Repair Order Status window, you can update the Repair Order status.

   For details, see Update the Repair Order Status, page 4-25.

9. Optionally, from the top menu, click Tools > Freeze Estimate to freeze the estimate.

   After the estimate is frozen, you cannot change the estimate.

Receive a General Item

The term "general item" indicates an item that is not being refurbished.

Depot technicians can receive hand carried (walk-in) items for repair, or receive serviceable items against RMAs. Oracle Depot Repair provides flexible options when receiving and shipping items from and to customers and vendors.

Before receiving an item the system allows you to receive a serial number different from the one originally entered in the repair order. In case of a mismatch or discrepancy the system allows the receipt of the discrepant serial number and logs an activity to track the discrepancy.

Inspection

You can also inspect items during the receiving process, which allows for more accurate repair estimates as a result of inspection. Inspection of items is possible only if the routing on the RMA order is either Standard Receipt or Inspection Required.

The procedure for receiving an item with inspection is more extensive than the procedure for receiving an item without inspection

The following is an overview of the procedure for receiving an item without inspection:

- Receive the item on the RMA order into a subinventory.

The following is an overview of the procedure for receiving an item with inspection:

- Receive the item on the RMA order into a receiving location.
- Inspect the item, then accept or reject it.
- Move the item into a subinventory.

The following procedures describe how to receive a general item (except for internal order refurbishment items - for details of those procedures, see Receive an Item for Refurbishment, page 4-70).

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must complete all steps in the relevant business scenario prior to receiving the general item. For more information, see Oracle Depot Repair Business Scenarios..

Navigation

Depot Repair > Repair Orders

Steps:

1. Retrieve the Repair Order for which you want to receive the general item.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. Select the relevant result from the Results area of the Find Repair Orders window, and click OK.

   The Depot Repair Workbench shows the selected Service Request and Repair Order details.

3. Select the Logistics tab in the Depot Repair Workbench.

   If the RMA (Return) line was not created and booked automatically for the Repair Order, then create an RMA order manually.

   For detailed instructions, see Create and Book a Return Line Manually, page 4-26.

4. Click Receive to open the Find Expected Receipts window.

5. In the Customer tab in the Find Expected Receipts window, enter the RMA Number, and click Find.

   If the RMA is found, the application displays the Receipt Header and Receipts windows.

6. Confirm the Received By field of the Receipt Header window, that is, the person receiving the RMA.

7. Confirm the Receipt Date, and click the Save icon on the toolbar to obtain the system-generated Receipt Number.

8. Close the Receipt Header window.

   If you want to receive an item without inspection, continue at step 9.

   If you want to receive an item with inspection, continue at step 16.

   Receiving an Item Without Inspection

> **Note:** For Direct Delivery Routings, you must receive an item without inspection. Inspection is optional if your routing is Standard Delivery or Inspection Required.
>
> However, for Inspection Required Routings, Oracle recommends that you perform the steps starting at step 16.

9. In the Receipts window, in the Lines tab, select the check box located beside the Qty field to confirm quantity.

10. For the Destination Type, select Inventory.

11. Scroll the horizontal bar to reveal the Subinventory field, and select a Subinventory location in this field from the list of values.

    If the general item is a serialized item, the Lot-Serial button on the Receipts window is enabled.

    1. Click Lot-Serial to display the Serial Number window.

    2. Enter the received Serial Number, and click OK.

       You can manually enter a Serial Number even if the number does not appear in the list of values

12. Click the Save icon on the toolbar.

13. Close the Receipts window to return to the Depot Repair Workbench.

14. In the Logistics tab, click Refresh Logistics.

    The status of the RMA (Return) line changes to Received.

15. Optionally, you can see item reception details in the Activity window. From the top menu, select Data > Activity to open up the Activity window.

    This completes the procedures for receiving an item without inspection.

    Receiving an Item With Inspection

    > **Note:** Note: For Inspection Required Routings, Oracle recommends that you perform the inspection steps that follow.

16. In the Receipts window, in the Lines tab, select the check box located beside the Qty field to confirm quantity.

17. For the Destination Type, select Receiving.

18. Select a Location.

19. Click the Save icon on the toolbar.

20. Close the Receipts window.

21. Back in the Logistics tab of the Depot Repair Workbench, click Inspect/Move.

22. In the Customer tab in the Find Receiving Transactions window, enter the RMA Number, and click Find.

    The Receiving Transactions window appears.

23. If there is more than one line, select the lien you want to inspect.

24. Click Inspect.

25. In the Inspection Details window, select the Status (values are either Accept or Reject).

26. Click OK.

    This closes the Inspection Details window.

    The Destination Type of the item shows as Inspect.

27. Click the Save icon on the toolbar.

28. Close the Receipt Transactions window.

29. Back in the Logistics tab of the Depot Repair Workbench, click Inspect/Move.

30. In the Customer tab in the Find Receiving Transactions window, enter the RMA Number, and click Find.

    The Receiving Transactions window appears, with the Destination Type of the item showing as Inventory.

31. Scroll the horizontal bar to reveal the Subinventory field, and select a Subinventory location in this field from the list of values.

32. If the general item is a serialized item, the Lot-Serial button on the Receiving Transactions window is enabled.

    1. Click Lot-Serial to display the Serial Number window.

    2. Enter the received Serial Number, and click OK.

       You can manually enter a Serial Number even if the number does not appear in the list of values.

33. Click the Save icon on the toolbar.

34. Close the Receiving Transactions window to return to the Depot Repair Workbench.

35. In the Logistics tab, click Refresh Logistics.

    The status of the RMA (Return) line changes to Received.

36. Optionally, you can see item reception details in the Activity window. From the top menu, select Data > Activity to open up the Activity window.

    This completes the procedures for receiving an item with inspection.

> **Note:** You can enable the functionality of updating the Repair Status automatically once an item is received successfully. This is done by setting the profile option, CSD: Enable Auto Update of Repair Order Status upon Receiving, to Yes, and the profile option, CSD: Default Repair Order Status After Receiving, will hold the value for the new status.
>
> Use caution in setting the profile option, CSD: Default Repair Order Status After Receiving, to Yes as only one status can be chosen irrespective of the item or repair type used.

Ship Additional Items

On the Logistics tab, Oracle Depot Repair verifies that the item quantity on the Repair Order matches the RMA quantity on Logistics tab. This implies that it is not possible to ship additional items or quantities of items against the same Repair Order. To ship additional items or quantities of items, you must create a new Repair Order with the additional item or quantity.

Auto-Receive an Item

When you receive an item into a subinventory, you generally have to perform a number of operations in several different windows (for example, find a receipt, edit one or more receipt fields).

Under certain conditions, you can receive an item directly from the Logistics tab, without having to navigate through extra windows. The operation of receiving an item directly from the Logistics tab is called *auto-receive.*

The conditions under which you can auto-receive an item are as follows:

- The item must be serialized.

- The item must be locator controlled.
- The quantity on the RMA (Return) line is 1.
- The Receipt Routing must not be Inspection Required.
- You must enter the Source Serial Num and Subinv fields on the RMA (Return) line.

When all these conditions apply, and you click the Receive button on the Logistics tab, an alert message appears that informs you that the item is eligible for auto-receive.

If you accept the option to auto-receive the item, the auto-receive operation is performed.

> **Note:** After the successful completion of the auto-receive operation, the Status of the RMA (Return) line is Booked. After you click Refresh Logistics, the Status changes to Received.

Receive an Item for an Internal Order Refurbishment

When a Repair Order has been created in the Planner's Desktop of Spares Management, or an equivalent external agency, and the item or items are to be sent to an Oracle Depot Repair depot for processing, this type of repair is called an internal order refurbishment.

> **Note:** This is not the same as an internal party refurbishment, where the items to be refurbished belong to an internal party. For more information, see Create and Process an Internal Party Refurbishment, page 4-123.

If you do not select a subinventory for the item, the subinventory is derived from the picking rule defined in the profile option CSD: Default Pick Release Rule for Sales Orders.

In Oracle Depot Repair, the Repair Order for each item or item instance to be refurbished contains two transactions, with action types Move In and Move Out. This section describes the Move In transaction.

The Move In transaction has two components:

1. First, the shipment stage, where the item is shipped from a source organization, such as Spares Management.
2. Then, the receiving stage, where the item is received into a depot subinventory.

In the shipment stage, if you do not select a subinventory for the item, the subinventory is derived from the picking rule defined in the profile option CSD: Default Pick Release Rule for Sales Orders.

The shipment stage includes a Pick Release process, and then either a manual Ship process or an automatic Ship Confirm process. When both Pick Release and Ship Confirm processes can be performed automatically, that is, without any manual Serial Number entry required, you can select whether to perform both processes separately one after the other, or in sequence automatically.

Inspection

During the receiving stage, you can also inspect the items to be refurbished, which allows for more accurate repair estimates as a result of inspection. Inspection of items is possible only if the routing on the requisition order is either Standard Receipt or Inspection Required.

The procedure for receiving an item with inspection is more extensive than the procedure for receiving an item without inspection.

The following is an overview of the procedure for receiving an item without inspection:

- Receive the item on the requisition order into a subinventory.

The following is an overview of the procedure for receiving an item with inspection:

- Receive the item on the requisition order into a receiving location.
- Inspect the item, then accept or reject it.
- Move the item into a subinventory.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

The Service Request and the associated refurbishment Repair Order or orders must have been created in the Planner's Desktop of the Spares Management module of Oracle Field Service.

> **Note:** It is possible to create demand for refurbishment using a module other than Oracle Field Service and to pass this demand to Oracle Depot Repair.

Note: The module must be able to create Internal Requisitions and associate them to Internal Sales Orders. However, Oracle recommends using the out-of-the-box integration to Oracle Field Service.

Navigation

Depot Repair > Repair Orders

Steps:

1. Retrieve the Repair Order for which you want to receive the item for refurbishment.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. Select the relevant result from the Results area of the Find Repair Orders window, and click OK.

3. Click the Logistics tab.

4. Click any field of the Move In line to make that line current.

   The Status of the Move In line should be Booked.

   Shipping the Item to be Refurbished from Spares Management

   Note: The following description assumes that you select the automatic Pick Release option when processing the Move In line.

   Note: Even if you select Ship Confirm as your first choice for processing the Move In line, the application automatically processes the Pick Release stage first, then the Ship Confirm stage.

   Pick Release

5. Click the Process Trans check box for the Move In line.

6. Click the Automate order processing steps through check box.

7. Select the Pick Release radio button.

8. Click Process.

   The Status of the Move In line generally changes to Released.

   However, for a serialized item that has Serial Control which is either Predefined or At Receipt, the resulting Status depends on whether you are performing the Pick Release processing for the first time or the second time.

1. The first time, you must enter a Serial Number, navigating through the Find Move Order Lines window that appears automatically, to the Transact Move Orders window.

   For details of the Find Move Order Lines window and the Transact Move Orders window, see the *Oracle Inventory User's Guide*.

   When you return from the Transact Move Orders window, the Status of the Move In line remains as Booked.

2. The second time you perform the Pick Release process (steps 5 through 8), you do not have to enter any further data, and the Status changes to Released.

   To see the Serial Number that you entered during the first-time Pick Release processing in the (Source) Serial Num field on the Logistics tab, click Refresh Logistics, after you complete the second-time Pick Release processing.

9. Optionally, from the top menu, select Data > Activity to see the details of the item shipment in the Activity window.

   If there has been a mismatch between the Serial Number in the Move In line and the Serial Number you entered in the Transact Move Orders window, an alert message line appears in the Activity window, recording the two Serial Numbers. You must explicitly select Data > Activity to display the alert message.

   This completes the Pick Release processing.

   Manual Ship or Ship Confirm

10. For the case of a serialized refurbished item, whose Serial Control is At Sales Order Issue, the Ship Confirm button is disabled. In this situation, click Ship and enter the item's Serial Number in Oracle Shipping Execution windows. For details of these windows, see the *Oracle Shipping Execution User's Guide.*

    When you return to the Logistics tab, click Refresh Logistics. The Status changes to Shipped.

    This completes the manual ship processing for these special Move In lines.

    Continue at step 16.

11. For all other cases, click the Process Trans check box for the Move In line.

12. Click the Automate order processing steps through check box.

13. Select the Ship Confirm radio button.

14. Click Process.

    When processing the Ship Confirm stage, you should wait until the concurrent program Interface Trip Stop has completed successfully before you click Refresh Logistics, to see the changed value of the Status.

You can monitor the progress of the program by selecting Requests from the View menu on the toolbar, and selecting appropriate search criteria.

15. Click Refresh Logistics.

    The purpose of this is to update the Status on the Move In line, so that it reflects in Oracle Depot Repair the results of the procedures executed in other Oracle applications when you clicked Process.

    After the background concurrent process Interface Trip Stop has completed successfully, the Status changes to Shipped.

    Starting the Process of Receiving the Item to be Refurbished

16. Click any field of the Move In line to make that line current.

17. Click Receive to open the Find Expected Receipts window.

18. In the Supplier and Internal tab in the Find Expected Receipts window, enter the Requisition from the Requisition Num of the Move In line, and click Find.

    If the requisition is found, the application displays the Receipt Header and Receipts windows.

19. Confirm the Received By field of the Receipt Header window, that is, the person receiving the requisition.

20. Confirm the Receipt Date, and click the Save icon on the toolbar to obtain the system-generated Receipt Number.

21. Close the Receipt Header window.

    If you want to receive an item without inspection, continue at step 22.

    If you want to receive an item with inspection, continue at step 29.

    Receiving the Item to be Refurbished Without Inspection

22. In the Receipts window, in the Lines tab, select the check box located beside the Qty field to confirm quantity.

23. In the Destination Type field, select Inventory.

24. Scroll the horizontal bar to reveal the Subinventory field, and select a Subinventory location in this field from the list of values.

    If the item is a serialized item, the Lot-Serial button on the Receipts window is enabled.

    1. Click Lot-Serial to display the Serial Number window.

    2. Enter the received Serial Number, and click OK.

You can manually enter a serial number even if the number does not appear in the list of values.

25. Click the Save icon on the toolbar to save the receipt record.

26. Close the Receipts window to return to the Depot Repair Workbench.

27. Click Refresh Logistics.

    The Status of the Move In line changes to Received.

28. Optionally, from the top menu, select Data > Activity to see the details of the reception of the item in the Activity window.

    This completes the process of receiving an item without inspection.

    Receiving the Item to be Refurbished With Inspection

29. In the Receipts window, in the Lines tab, select the check box located beside the Qty field to confirm quantity.

30. For the Destination Type, select Receiving.

31. Select a Location.

32. Click the Save icon on the toolbar.

33. Close the Receipts window.

34. Back in the Logistics tab of the Depot Repair Workbench, click Inspect/Move.

35. In the Supplier and Internal tab in the Find Expected Receipts window, enter the Requisition from the Requisition Num of the Move In line, and click Find.

    The Receiving Transactions window appears.

36. Click Inspect.

37. In the Inspection Details window, select the Status (values are either Accept or Reject).

38. Click OK.

    This closes the Inspection Details window.

    The Destination Type of the item shows as Inspect.

39. Click the Save icon on the toolbar.

40. Close the Receipt Transactions window.

41. Back in the Logistics tab of the Depot Repair Workbench, click Inspect/Move.

42. In the Supplier and Internal tab in the Find Expected Receipts window, enter the Requisition from the Requisition Num of the Move In line, and click Find.

    The Receiving Transactions window appears, with the Destination Type of the item showing as Inventory.

43. Scroll the horizontal bar to reveal the Subinventory field, and select a Subinventory location in this field from the list of values.

44. If the item is a serialized item, the Lot-Serial button on the Receiving Transactions window is enabled.

    1. Click Lot-Serial to display the Serial Number window.

    2. Enter the received Serial Number, and click OK.

       You can manually enter a Serial Number even if the number does not appear in the list of values.

45. Click the Save icon on the toolbar.

46. Close the Receiving Transactions window to return to the Depot Repair Workbench.

47. In the Logistics tab, click Refresh Logistics.

    The status of the Move In line changes to Received.

48. Optionally, from the top menu, select Data > Activity to see the details of the reception of the item in the Activity window.

    This completes the procedures for receiving an item with inspection.

Split a Repair Order

Often as a result of an inspection carried out during the receiving of an item, you may decide to repair some but not all of the defective units.

Under certain conditions (see the Prerequisites that follow in this section, page 4-77), Oracle Depot Repair allows you to split a Repair Order, but not necessarily just because of an inspection.

Repair Type Change Options

One of the prerequisite conditions is that the original Repair Type must have a Repair Type Ref value of either Standard or Repair and Return. You can change the Repair Type on the new Repair Order, so long as the final Repair Type also has a Repair Type

Ref value of either Standard or Repair and Return.

> **Note:** The explicit condition specifies the Repair Type Ref attribute of the allowable Repair Types. The seeded Repair Types Standard and Return and Repair have the same Repair Type Ref values as their Repair Type names.

For details of setting up Repair Types, see the *Oracle Depot Repair Implementation Guide*.

Splitting Options

When you choose to split a Repair Order, you have the following options:

- You can split into two separate Repair Orders, as for example when splitting 10 units into two lines of 8 and 2 units.
- You can split into multiple Repair Orders, each with a quantity of 1.

When you choose to split the Repair Order into two separate Repair Orders, you can also decide whether to copy attachments from the original Repair Order to the new Repair Order.

When you split into multiple lines, each with a quantity of 1, all attachments on the original Repair Order, if any exist, are automatically copied to each new Repair Order.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

The Repair Order Item must be serialized.

The item must not be Installed Base trackable.

All quantities must be received.

For WIP mode, all jobs must be completed, that is, no partial completions are allowed.

The Repair Order status must be Open.

The Repair Type Ref of the Repair Type must be Standard or Repair and Return.

No Ship lines have been interfaced to Oracle Order Management.

Navigation

Depot Repair > Repair Orders

Steps:

1. Retrieve the Repair Order that you want to split.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. Select the relevant result from the Results area of the Find Repair Orders window, and click OK.

3. From the top menu, select Tools > Split Repair Order.

   The Split Repair Order window appears.

   Your splitting options are indicated by the two radio buttons:

   - Split into 2 lines
   - Split into lines with quantity of 1

   Split into 2 Lines

   Under the Split into 2 lines option, there is a table showing the following fields:

   - Original Repair Order Quantity (enabled)
   - Original Repair Order Repair Type
   - New Repair Order Quantity
   - New Repair Order Repair Type (enabled)

   There is also a check box under the Split into 2 lines option, enabling you to copy attachments from the original Repair Order to the new Repair Order.

   If there are no attachments to the original Repair Order, the check box is disabled.

   Split into Lines with a Quantity of 1

   Under the Split into lines with a quantity of 1 option, a message indicates that any attachments to the original order will be automatically copied to the new order.

4. Select one of the radio buttons.

5. If you selected Split into lines with a quantity of 1, you have no further choices. Continue at step 7.

6. If you selected Split into 2 lines:

1. Enter the Original Repair Order Quantity, that is, the new quantity that you wish to have on the original Repair Order after splitting.

   The New Repair Order Quantity is automatically calculated after you enter the Original Repair Order Quantity.

2. Select the New Repair Order Repair Type.

   You can only select a Repair Type whose Repair Type Ref was set up as Standard or Repair and Return.

3. Optionally, select the check box Copy attachments from original Repair Order to new Repair Order.

7. Click OK.

Manage the Repair Process

Oracle Depot Repair lets service organizations manage repair by using either Oracle WIP or Task Manager, a module in Oracle Common Application Components.

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.

The WIP or Task modes are associated to the Repair Types during implementation. 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 to enhance usability.

The topics in this section include the following:

- Create and Process WIP Jobs, page 4-79
- Create and Process Repair Tasks, page 4-90

Create and Process WIP Repair Jobs

Note: Oracle Depot Repair provides E-records and E-signature (ERES) functionality in WIP mode via Oracle WIP.

The topics in this section include the following:

- Create a WIP Repair Job for a Single Repair Order, page 4-80
- Process a WIP Repair Job for a Single Repair Order, page 4-83

- Create a WIP Repair Job Across Multiple Repair Orders, page 4-85
- Process a WIP Repair Job Across Multiple Repair Orders, page 4-88

Create a WIP Repair Job for a Single Repair Order

The Shop Floor Technician can create a non-standard WIP Repair Job from the Depot Repair Workbench. You select the organization for the WIP Repair Job, and the items for the WIP Repair Job must be defined in that organization.

Multiple jobs can be created for each Repair Order. You can release WIP Repair Jobs on to the shop floor. You must provide the WIP Accounting Class through which costs are posted to Oracle General Ledger.

Depot agents can view WIP Discrete Jobs window in a read-only mode to verify the status and additional details of the WIP Repair Job.

The following procedures describe how to create a WIP Repair Job for a single Repair Order.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must complete all steps in the relevant business scenario prior to creating the WIP Repair Job for the Repair Orders. For more information, see Oracle Depot Repair Business Scenarios.

> **Note:** You may need to create a Repair Job without an RMA in case of remanufacture or refurbishment on items that your organization already owns, or if your organization took ownership or possession of an item through a field service agent rather than against an RMA.

> **Note:** Oracle Depot Repair provides you with a profile option, CSD: Allow Creating WIP Job Without RMA, which enables you to create a WIP Repair Job without an RMA. Refer to *Oracle Depot Repair Implementation Guide* for details.

Navigation

Depot Repair > Repair Orders

Steps

1. Retrieve the Repair Order for which you want to create a WIP Repair Job.

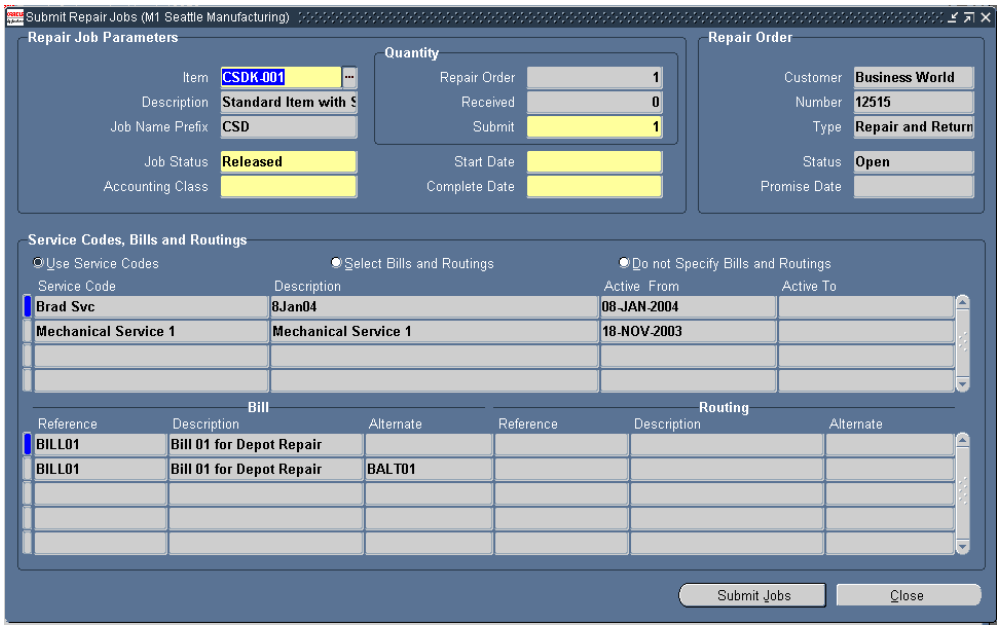
   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. Select the relevant record from the Results area of the Find Repair Orders window, and click OK.

   The Depot Repair Workbench shows the selected Service Request and Repair Order details.

3. In the Depot Repair Workbench, select the Repair Jobs tab, and click Create Job.

   The Submit Repair Jobs window opens. The job you create will be in the organization set up when you perform the Change Organization operation. If you have not performed the Change Organization operation, the organization is taken from the profile option CSD: Default Repair Inventory Org.



4. If the WIP Repair Job item is different from the Repair Order Item, select the relevant WIP item from the list of values in the Item field.

5. Select the Released Job Status from the list of values.

Note: The default value for this field is taken from the profile option CSD: Default Repair Job Status.

Note: You may submit a WIP Repair Job with a Job Status of Unreleased. You will be able to change the status later using Oracle Work In Process transactions.

6. Select an Accounting Class from the list of values, for example, Rework.
7. Enter the number of items that you want to submit in the (Quantity) Submit field.
8. The system date defaults as Start Date. Select the Complete Date for the WIP Repair Job.
9. In the Service Codes, Bills and Routings area, select one of the three radio buttons:
   - Use Service Codes
   - Select Bills and Routings
   - Do not Specify Bills and Routings

   If you select Use Service Codes, the following occurs:
   - Bills and Routings associated with the active Service Codes, that is, the Service Codes marked as applicable, in the Diagnostics tab are attached to the WIP Repair Job.
   - Read-only summary information about the Service Codes, Bills, and Routings is displayed in the Service Codes, Bills and Routings area.
   - After you have added the Bills and Routings associated with the active Service Codes, the Service Code rows from which you derived the Bills and Routings are disabled in the Service Codes area of the Diagnostics tab.

     Note: After you have added the Bills and Routings associated with the active Service Codes, the Service Code rows from which you derived the Bills and Routings are disabled in the Service Codes area of the Diagnostics tab.

   If you select Select Bills and Routings, enter appropriate Bill and Routing data in the Bill and Routing sections.

   If you select Do not Specify Bills and Routings, you are choosing not to provide any Bill and Routing information for the WIP Repair Job.

10. Click Submit Job to submit the job in a released status to WIP.

11. To make sure that the program completes successfully, monitor the requests by choosing View > Requests.

12. Close Repair Jobs window to return to the Depot Repair Workbench.

13. Click Refresh Job.

    The new job appears on the Repair Jobs tab.

14. To view the job, select the job record on the Repair Jobs tab, and click View Job.

    To process the WIP Repair Job, see Process a WIP Repair Job for a Single Repair Order, page 4-83.

See Also

Create a WIP Repair Job Across Multiple Repair Orders, page 4-85.

Multiple WIP Repair Jobs and Partial Quantities for a Single Repair Order

Oracle Depot Repair lets you create multiple WIP Repair Jobs for a single Repair Order and supports the creation of multiple WIP Repair Jobs with partial quantities per RMA.

WIP Repair Job Item Same As Repair Order Item

If the item selected for the WIP Repair Job is the same as the one in the Repair Order, then for each WIP Repair Job submission, the *submit* quantity cannot be greater than the quantity received. A submit quantity less than the quantity received implies that you can create multiple WIP Repair Jobs against a single Repair Order, with each WIP Repair Job handling part of the RMA quantity.

For example, consider that the item on the Repair Order is A, and the quantity of item A is 5. When you submit WIP Repair Jobs for item A, the maximum number of units of A that can be submitted in a WIP Repair Job is 5, and the minimum is 1.

WIP Repair Job Item Different From Repair Order Item

If the item selected for a WIP Repair Job is different from the one on the Repair Order, the submit quantity restriction does not apply, and you can submit the WIP Repair Job for any quantity. The application validates this quantity with the quantity received in the Repair Order line. In this case, the quantity to be submitted to WIP must be at least 1.

Process a WIP Repair Job for a Single Repair Order

The following procedures describe how to process a repair WIP Repair Job that contains a single Repair Order.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must complete all steps in the relevant business scenario prior to processing the WIP Repair Job for the Repair Order. For more information, see Oracle Depot Repair Business Scenarios.

Navigation

Depot Repair > Repair Orders

Steps

1. Retrieve the Repair Order for which you want to process the WIP Repair Job.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. Select the relevant record from the Results area of the Find Repair Orders window, and click OK.

   The Depot Repair Workbench shows the selected Service Request and Repair Order details.

3. In the Depot Repair Workbench, select the Repair Jobs tab.

4. Click **Material Txn** to display the Material Transaction window.

5. Issue the item and the material required to process the WIP Repair Job.

   For details, see Issuing and Returning Specific Components in the *Oracle Work In Process User's Guide*.

6. Complete the item repair using a recommended repair procedure.

7. When the repair is complete, click **Complete Job** in the Repair Jobs tab.

   The Completion Transaction Find window opens.

   Enter the completion details, such as quantity completed and completion subinventory, for the WIP Repair Job.

   For details, see Completing and Returning Assemblies in the *Oracle Work In Process User's Guide*.

8. In the Repair Jobs tab of the Depot Repair Workbench, click Refresh Job to update the Repair Order activity information.

Post-Processing

1. To see information about the WIP Repair Job activity, from the top menu, select Data > Activity.

   For more information, see View Activities Related to a Repair Order, page 4-100.

2. After you have processed a WIP Repair Job, if invoicing is required, you must move the data to Repair Actuals.

   For more information, see Record Billing Data in Repair Actuals, page 4-112.

Create a WIP Repair Job Across Multiple Repair Orders

Oracle Depot Repair lets service organizations automatically create a single WIP Repair Job against multiple Repair Orders for identical items.

You search for WIP Repair Jobs issued for items that have already been received into the repair organization. You can perform the search against the Item Code, or attributes that pertain to the linked Service Request.

You perform this operation in two stages:

1. First, you search for the Repair Orders, in the Find Repair Orders for Job Submission window.

2. Then, you determine how many units to submit for repair for each Repair Order, and submit the WIP Repair Job, in the Submit Repair Jobs for Repair Orders window.

The Find Repair Orders for Job Submission window incorporates a multi-select feature to let you select any or all Repair Order lines that appear in the search results.

In the Submit Repair Jobs for Repair Orders window, you can specify the quantity of the item to submit for each Repair Order, and optionally, select Bills and Routings.

The following procedures describe how to create a WIP Repair Job for multiple Repair Orders relating to the same item.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must complete all steps in the relevant business scenario prior to creating the WIP Repair Job for the Repair Orders. For more information, see Oracle Depot Repair Business Scenarios.

Navigation

Depot Repair > Submit Repair Jobs...Organizations window

Steps

1. Select the relevant Repair Organization from the list of values.

   Find Repair Orders for Job Submission Window

   The Find Repair Orders for Job Submission window opens.

   For field descriptions, see Find Repair Orders for Job Submission Window, page 2-49.

2. Enter one or more search criteria by using one or more of the following fields:

   - (Service Request) Request Num
   - (Service Request) Customer
   - (Service Request) Account
   - (Service Request) Severity or Urgency
   - (Repair Order) Item
   - (Repair Order) Promise Date or Date Range
   - (Repair Order) Create Date or Date Range

     This is a sample list of the search parameters.

     For descriptions of all the fields, see Find Repair Orders for Job Submission Window, page 2-49.

3. Click Find to start the query.

   The search results appear in the Results area of the Find Repair Orders for Job Submission window.

4. Select the relevant Repair Order or combination of Repair Orders.

   - To select all the rows, click Select All.

- To select multiple, non-contiguous rows from among the search results, press and hold the Control key, and click each row.
- To select a complete range of rows from among the search results, click the first row of the range, then press and hold the Shift key, and click the final row of the range.
- To deselect all rows, click Deselect All.

5. After you select the relevant rows, click OK.

   Submit Repair Jobs for Repair Orders Window

   The Submit Repair Jobs for Repair Orders window opens.

   The selected rows populate the Repair Order Information area in the window, and the Total Quantity Submitted for repair automatically appears.

   For field descriptions, see Submit Repair Jobs Window, page 2-52.

6. In the Job Status field, select Released from the list of values.

   You may submit a WIP Repair Job with a Job Status of Unreleased. You will be able to change the status later using Oracle Work In Process transactions.

7. Select an Accounting Class from the list of values, for example, Rework.

   Your organization determined these values during implementation of Oracle Depot Repair.

8. The system date defaults as Start Date. Select the WIP Complete Date.

9. In any line of the Repair Order Details tab, you can optionally change the number of units to submit in the (Quantity) Submit field.

10. You can optionally click the Bills and Routings tab, and select one of the radio buttons:

    - Select Bills and Routings
    - Do not Specify Bills and Routings

    If you choose Select Bills and Routings, then you must select at least one Bill or Routing.

11. Click Submit Jobs to submit the job in a released status to WIP.

12. To verify that the program completes successfully, monitor the requests by choosing View > Requests from the toolbar.

13. Close the Submit Repair Jobs for Repair Orders window and return to the

Navigator.

Refresh Job for Each Repair Order

14. Retrieve these Repair Orders by using the Find Repair Orders window.

15. In the Depot Repair Workbench, select each Repair Order, and click Refresh Job. The new job appears on the Repair Jobs tab.

    For more information, see Update Repair Orders Concurrently, page 4-102.

Comments

After you have created and submitted a WIP Repair Job for identical items across multiple Repair Orders, you can process the WIP Repair Job.

For more information, see Process a WIP Repair Job Across Multiple Repair Orders, page 4-88.

See Also

Create a WIP Repair Job for a Single Repair Order, page 4-80

Process a WIP Repair Job Across Multiple Repair Orders

The following procedures describe how to process a WIP Repair Job containing multiple Repair Orders. Processing a WIP Repair Job across multiple Repair Orders involves the following areas:

- Find Discrete Jobs Window, page 4-89
- Material Transactions Window, page 4-89
- Completion Transactions Window, page 4-90
- WIP Jobs and Schedules Window, page 4-90

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must complete all steps in the relevant business scenario prior to processing the WIP Repair Job for the Repair Orders. For more information, see Oracle Depot Repair

Business Scenarios.

Navigation

WIP > Discrete > Discrete Jobs...Find Discrete Jobs window

Steps

Find Discrete Jobs Window

1. Enter the WIP Repair Job Number, and click the Find button.

   The Discrete Jobs window opens.

2. Confirm that the Repair Job is in Released status.

3. Click the Routing Tab and select the Completion Subinventory from the list of values.

4. If the item is under Locator control, enter the Locator value.

5. Save your work.

6. Close the Discrete Jobs window to return to the navigator.

Material Transactions Window

1. Navigate to WIP > Material Transactions > WIP Material Transactions.

   The Material Transactions window opens.

2. Select the Specific Component option if the material to be issued is not defined as a material requirement for the job.

3. Enter the WIP Job Number, and click the Continue button.

   The WIP Component Issue window opens.

4. In the Components Issue window, enter the Items to be repaired.

   If you did not select the Specific Component option, and the material you want to issue is not defined as a material requirement for the job, you might not be able to issue the item.

5. Select the present Subinventory location of the items.

6. If the items are Locator controlled, enter Locator information.

7. Enter the Quantity to be repaired.

8. If the items are under Serial or Lot control, enter Serial or Lot information.

9. Enter the material needed to assist the repair.

10. Click Done.

    This issues the material and closes the window.

11. Close the Material Transactions window to return to the Navigator.

Completion Transactions Window

1. After completing the repair, navigate to WIP > Material Transactions > Completion Transactions.

   The Completion Transactions window opens.

2. Enter the WIP Repair Job Number, and click the Continue button.

3. Enter the completed quantity and the completion subinventory if you did not enter this information previously.

4. If the items are Locator, Serial, or Lot controlled, and you entered such information previously, enter these values.

5. Click Done to perform the completion transaction and return to the Depot Repair Navigator window.

WIP Jobs and Schedules Window

1. Navigate to WIP > Discrete > WIP Value Summary.

   The WIP Jobs and Schedules window opens.

2. Enter the WIP Repair Job Number, and click Find.

   The WIP Jobs and Schedules window opens.

3. Enter the From Period and To Period information.

4. Click Value Summary.

   The WIP Value Summary window opens.

Create and Process Repair Tasks

Note: In Task mode, Oracle Depot Repair provides E-records and

E-signature (ERES) functionality via the Debrief screen for each Task.

Tasks consist of work assignments that detail the actions required of company personnel.

The Repair Tasks tab in the Depot Repair Workbench provides a solution for repair establishments that use simple, standard business processes without requirements for WIP-based processes. The Tasks module is accessed (Repair Tasks tab is enabled or disabled) depending on the Repair Type selected in the Depot Repair Workbench Details tab.

In the Repair Tasks tab, you can create, update, assign, and view previous tasks assigned to a Repair Order. Tasks assigned previously appear in the table in the upper part of the tab, while details of the selected task appear in the fields below it. You can create a task directly from the Repair Tasks tab by entering all the relevant information, or by using a template.

Using Quality Collection Plans with Tasks

You can assign Oracle Quality collection plans to tasks, through setups to be performed in Oracle Quality.

For general information about collection plans, see the Oracle Quality User's Guide.

> **Tip:** When creating the collection plan, copy the elements from the Template Depot Repair Task Plan as a starting point.

To link a collection plan with a task, you must select Depot Repair Task Transaction as a Quality Collection Transaction. You may choose to make this transaction mandatory: this will require Oracle Depot Repair users to enter quality results before they close the task.

You can also set up one or more collection triggers to specify conditions under which the collection plan is to be assigned to tasks.

In Oracle Depot Repair, you must enter the quality results for mandatory plans. For details, see Enter and Update Task Details, page 4-96.

Repair Task Debrief

On the Repair Tasks tab, you can click the Debrief button to display Material, Labor, and Expense forms. You can debrief a job with actual Material, Labor, and Expense repair charges.

For repair jobs that you have managed using Tasks, the Debrief provides the actual charges incurred during the repair that would be invoiced to a customer. If both estimate and debrief exists for a repair that you have managed using Tasks, the customer is invoiced based on charges that appear in the debrief.

The topics in this section include the following:

- Create a Repair Task Manually, page 4-92
- Create a Repair Task Using the Task Template, page 4-94
- Enter and Update Task Details, page 4-96
- Prepare the Repair Tasks Debrief, page 4-98

Create a Repair Task Manually

The following procedures describe how to create a repair task manually.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must complete all steps in the relevant business scenario prior to creating the repair tasks for the Repair Order. For more information, see Oracle Depot Repair Business Scenarios.

Navigation

Depot Repair > Repair Orders

Steps

1. Retrieve the Repair Order for which you want to create repair tasks.

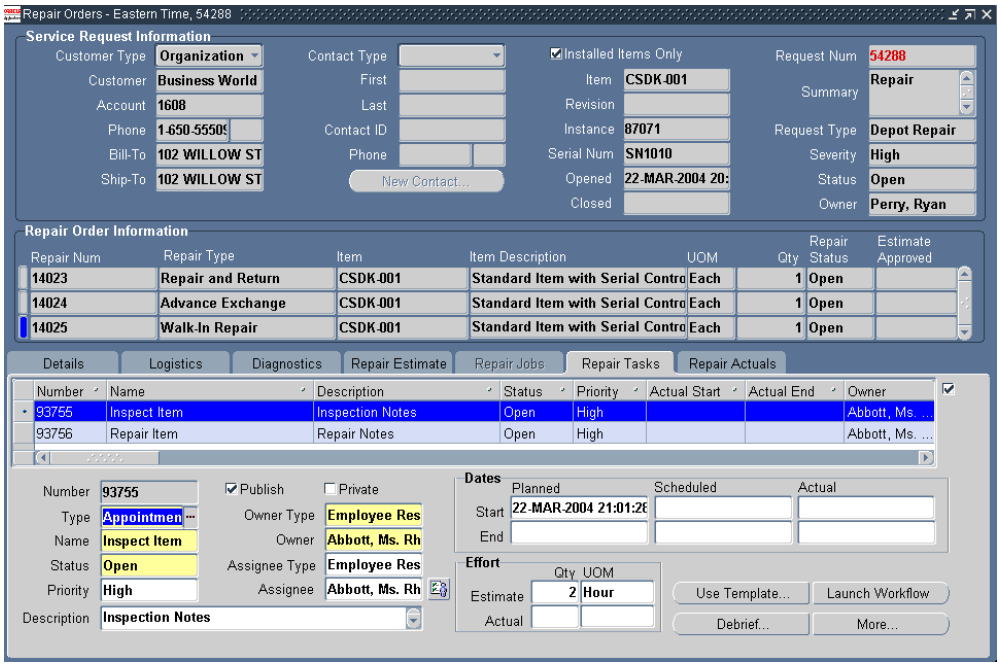
   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. Select the relevant record from the Results area of the Find Repair Orders window, and click OK.

   The Depot Repair Workbench shows the selected Service Request and Repair Order details.

3. In the Depot Repair Workbench, click the Repair Tasks tab.

   If tasks have already been defined for the Repair Order, the table lists the tasks. If more than one task appears, selecting a different task displays the corresponding detail in the lower fields on the tab.



4. Enter the task information in the required fields by selecting from the list of values.

   For field descriptions, see The Repair Tasks Tab, page 2-35.

5. Enter the values in the Assignee and Owner fields (or change them) by selecting from the list of values.

   You can also change the Assignee field values from the Assignment Manager. To access the Assignment Manager, click the Assignment Manager button next to the fields. For additional information about the Assignment Manager, see *Oracle Common Application Components User's Guide*.

6. Choose the Planned Start and End Dates.

7. Click the Save icon to save the task record.

   A system-generated Task Number populates the Num field.

8. Optionally, you can click Add Tasks from Diagnostics. This adds tasks from task template groups associated with the service codes marked as applicable in the Diagnostics tab.

9. To manually launch workflow, select the task from the table, and click Launch Workflow.

   Based on the task, the workflow runs. The designated resources are reserved, and the workflow notifies the task owner of task creation through email.

Note: The Launch Workflow button is available only if resources have been assigned to the selected task.

10. To add or update task details, click More.

    The Task Details window opens.

    For more information, see Enter and Update Task Details, page 4-96.

Create a Repair Task Using a Task Template

The following procedures describe how to create a repair task using a Task Template.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must complete all steps in the relevant business scenario prior to creating the repair tasks for the Repair Order. For more information, see Oracle Depot Repair Business Scenarios..

Before you create a task from a Task Template, a template design must exist.

Navigation

Depot Repair > Repair Orders

Steps

1. Retrieve the Repair Order for which you want to create repair tasks.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. Select the relevant record from the Results area of the Find Repair Orders window, and click OK.

   The Depot Repair Workbench shows the selected Service Request and Repair Order details.

3. In the Depot Repair Workbench, select the Repair Tasks tab.

   If tasks have already been defined for the Repair Order, the table lists the tasks. If more than one task appears, selecting a different task displays the corresponding

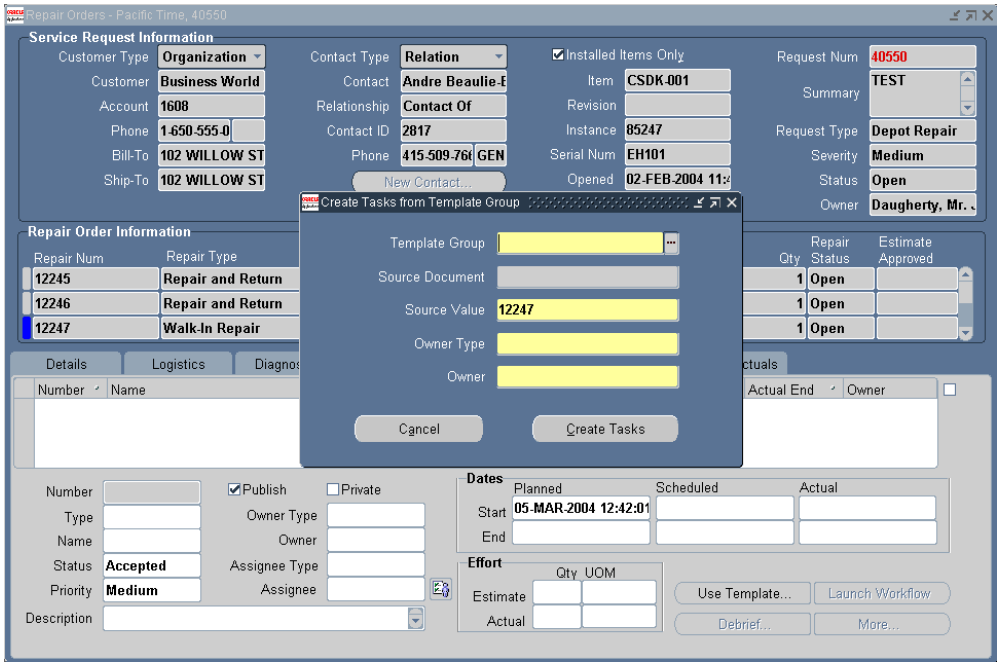
detail in the lower fields on the tab.

4. On the Repair Tasks tab, click Use Template.

   The Create Tasks from Template Group window opens.

5. In the Template Group field, select the Template Group based on the task which is to be created.

   Values in the Source Document, Source Name, Owner Type and Owner fields are default values. You can change these values.



6. Click Create Tasks.

   The Repair Tasks tab opens and displays a new task line that shows a system-generated Task Number in the Num field.

7. To manually launch workflow, click Launch Workflow.

   Based on the task, the workflow runs. The designated resources are reserved, and the workflow notifies the task owner of task creation through email.

   > **Note:** The Launch Workflow button is available only if a resource has been assigned to a selected task.

8. Click More to open the Task Details window to enter details such as resource assignments, dependencies, references, and contacts.

For more information, see Enter and Update Task Details, page 4-96.

Enter and Update Task Details

After a task record is created, you can update task information and task details. The following procedures describe how to update task information and to add task details.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

Task records that you want to update or add details to must exist in the database.

Navigation

Depot Repair > Repair Orders

Steps

1. Retrieve the Repair Order for which you want to update task details.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. Select the relevant record from the Results area of the Find Repair Orders window, and click OK.

3. The Depot Repair Workbench shows the selected Service Request and Repair Order details.

4. In the Depot Repair Workbench, select the Repair Tasks tab.

   If tasks have already been defined for the Repair Order, the table lists the tasks. If more than one task appears, selecting a different task displays the corresponding detail in the lower section of the window.

5. To update task information, make the necessary changes to the field values, and click the Save icon.

   For field descriptions, see the Repair Tasks Tab, page 2-35 topic.

   Entering Quality Results

6. If your task has any mandatory collection plans associated with it, you will not be

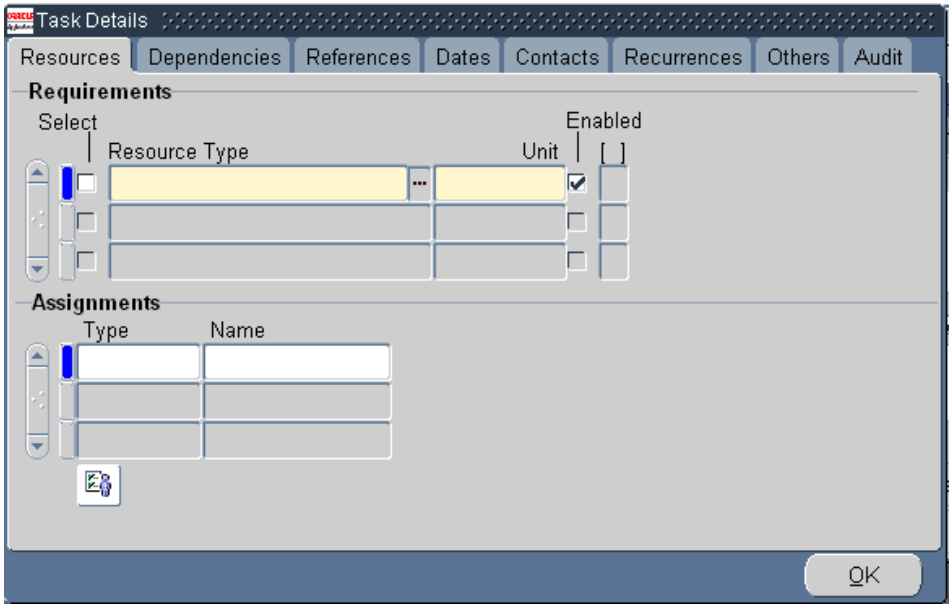
able to set the task Status to Closed unless you first enter quality results for the task. To do this, either click the Enter Quality Results icon in the toolbar, or select Tools > Enter Quality Results; then enter the information required.

Specifying Task Details

7. To specify task details, select the task for which you want to update details, and click More.

   The Task Details window opens. The Task Details window comprises the following tabs:

   - Resources: Assign personnel information to a task. This tab defines resource requirements, assignments, and scheduling information.
   - Dependencies: Determine the order of tasks. Oracle Depot Repair, however, does not enforce task dependencies.
   - References: Link the task to different documents or tasks with pertinent background information.
   - Dates: Identify more dates in addition to the planned dates, the scheduled dates, and the actual dates. You can track task progress by entering dates after task milestones such as task creation, resource reservation, or task completion.
   - Contacts: Create and manage multiple contacts assigned to a task. Contact information is obtained from customer information. To enter this information, you must identify a customer in the main task window.
   - Recurrences: Schedule tasks so as to occur automatically. Examples of intervals include daily, weekly, monthly, or yearly occurrences. To schedule recurring tasks, you must either specify a start date and the number of tasks to create, or the end date. The task dates are populated as the planned start and end dates.
   - Others: Identify additional information about the task, and select different configurations for each task. Setting flags customizes each task according to business needs.
   - Audit: Track each update to a task. The tab documents and dates the history of task change, and provides a trail from the original task through to the current task status.



8. Enter the field values on the different tabs as required.

   For detailed instructions, refer to the Task Manager topic in *Oracle Common Application Components User's Guide*.

9. Click OK to save your work and return to the Repair Tasks tab in the Depot Repair Workbench.

Prepare the Repair Tasks Debrief

On the Repair Tasks tab, you can click the Debrief button to display the Debrief Report, with Material, Labor, and Expense tabs. You can debrief a job with actual Material, Labor, and Expense repair charges.

For repair jobs that you have managed using Tasks, the Debrief provides the actual charges incurred during the repair that would be invoiced to a customer. If both estimate and debrief exists for a repair that you have managed using Tasks, the customer is invoiced based on charges that appear in the debrief.

> **Note:** The Debrief Report form does not let you apply contracts per charge line. If you are using the Debrief Report form to generate charges, the system automatically applies the contract at the Service Request level to the charge line.

The following procedures describe how to create the Debrief. This procedure is applicable only to repair processes that you have managed by using Tasks.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must complete all steps in the relevant business scenario prior to creating the repair tasks for the Repair Order. For more information, see Oracle Depot Repair Business Scenarios..

Navigation

Depot Repair > Repair Orders

Steps

1. Retrieve the Repair Order for which you want to update task details.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. Select the relevant record from the Results area of the Find Repair Orders window, and click OK.

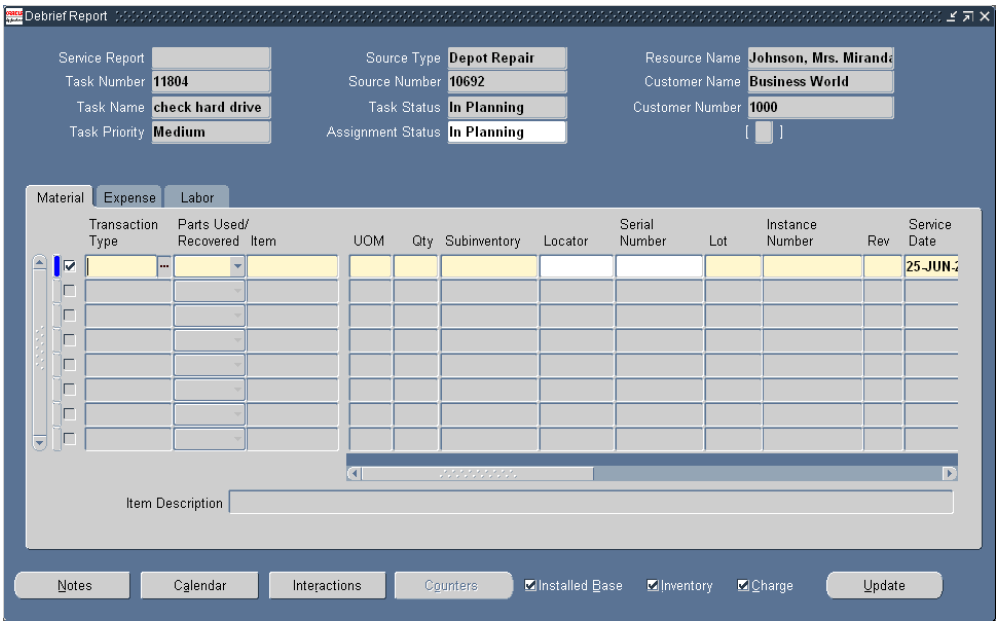
   The Depot Repair Workbench shows the selected Service Request and Repair Order details.

3. In the Depot Repair Workbench, select the Repair Tasks tab.

   If tasks have already been defined for the Repair Order, the table lists the tasks. If more than one task appears, selecting a different task displays the corresponding detail in the lower section of the window.

4. Select the task for which you want to create the report, and click Debrief.

   The Debrief Report window shows the selected task details populated in the fields at the upper part of the window. The lower half of the window comprises the Material, Expense, and Labor tabs.



5. Select the Material tab to enter required details of material transactions of the repair task.

6. Select the Expense tab to enter required details of other expenses of the repair task.

7. Select the Labor tab to enter required labor transaction details of the repair task.

8. Click Update to save the details.

   For detailed instructions and discussion on buttons and check boxes accessible from the Debrief Report window, refer to *Oracle Field Service User Guide*.

View Activities Related to a Repair Order

The Activity window displays a real-time view of events and activities that surround a Repair Order. This permits the depot agents and planners to know the exact status of each Repair Order line.

The following procedures describe how to view the activities that have elapsed at the depot in association with a Repair Order.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

None

Navigation

Depot Repair > Repair Orders

Steps:

1. Retrieve the Repair Order for which you want to view the elapsed depot activities.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

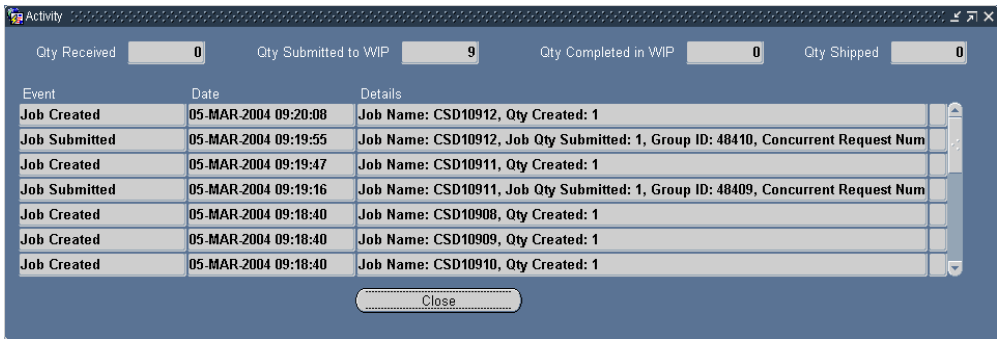
2. Select the relevant result from the Results area of the Find Repair Orders window, and click OK.

   The Depot Repair Workbench shows the selected Service Request and Repair Order details.

3. From the top menu, select Data > Activity.

   The Activity window displays the quantity received, quantity submitted to WIP, quantity completed in WIP, and quantity shipped. It also displays individual events, event dates, quantity, and other details. For detailed field descriptions, see Activity Tab, page 2-48.

   > **Note:** The fields, Quantity Submitted to WIP and Quantity Completed in WIP, appear only for repairs processed in WIP mode. However, when quantities are submitted in WIP mode across Repair Orders, these Quantity fields do not contain valid values.



4. If the Activity window does not display the updated information that you expect, you may need to run the appropriate information update program:

   - Click the Logistics tab, then click Refresh Logistics.

- Click the Repair Jobs tab, then click Refresh Job.

  Note: The programs triggered by the Refresh Logistics and Refresh Job buttons update the activity information only for the Repair Order currently selected in the Depot Repair Workbench.

For more information, see Update Repair Orders Concurrently, page 4-102.

Update Repair Orders Concurrently

The following concurrent programs update all the open Repair Orders at the same time:

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

To access these programs, from the Depot Repair Navigator, navigate to:

Depot Repair > Other > Run Requests.

The Submit a New Request window opens. In the Submit a New Request window, you can choose to submit a single request. When you submit a single request, the Submit Request window opens. In the Name field, select the program that you want to run. Choices include Depot Repair Receipt Update, Depot Repair Job (WIP) Update, or Depot Repair Shipment Update. You also specify to update quantity received, quantity submitted to or completed in WIP, and quantity shipped respectively, for all open Repair Orders.

In the remaining fields, you can schedule the program to run at times or intervals of your choice, choose whom to notify on completion, and choose whether to print or save the reports. For more information, refer to the online help available from these windows.

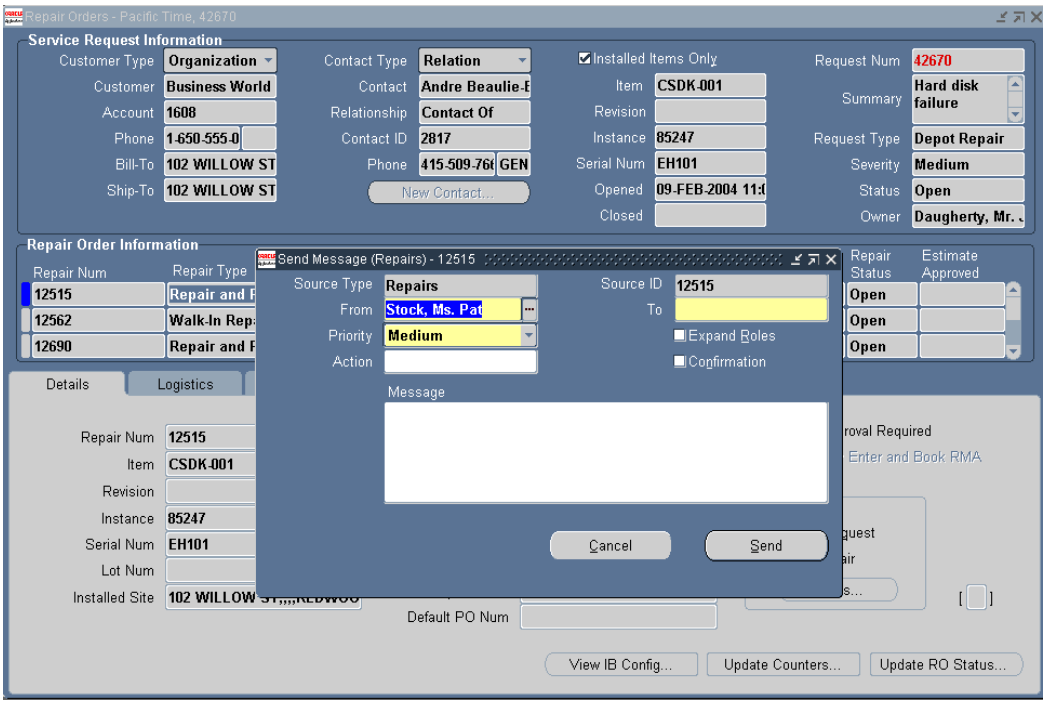
The Depot Repair Receipt Update concurrent program picks only the receiving lines that are delivered to a subinventory. This is to support business scenarios that involve quantity correction of goods received at the dock.

For example, during the inspection of goods received at a dock, you can correct or return some quantity of the goods delivered. This could be because not as many items were sent as the customer said they would, or the customer returned more than expected, such as, goods that were too damaged to qualify for a refund, or goods that your organization did not sell. Items are not considered as *received* until they pass the inspection, and are delivered to a subinventory. Only at this point does the Depot Repair Receipt Update concurrent program stamp the received quantity and show the change in the received quantity.

Send and View Workflow-Based Messages

At a high level, the Workflow-based Messaging functionality provides the ability to send a workflow notification message, and have that message link to the Repair Order selected in the Depot Repair Workbench at the time the message was sent. Messages can be of various types, from information-only to those that request actions or approvals from others. When the message recipient responds to the message linked to the specified Repair Order, that response is captured in the Repair Order's message history. A message can be sent to one or many recipients, and can be sent to group lists. Messages sent to multiple recipients can only be informational messages.

In Oracle Depot Repair, messages are tied to a Repair Order, and are sent from the Repair Orders form.



For more information on message types, sending, receiving, and viewing messages, and user procedures, see the *Oracle TeleService User Guide* and *Oracle TeleService Implementation Guide*.

Create a Ship Line Manually

The following procedures describe how to create a Ship line manually.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must complete all steps in the relevant business scenario prior to creating a ship line manually. For more information, see Oracle Depot Repair Business Scenarios..

Navigation

Depot Repair > Repair Orders

Steps:

1. Retrieve the Repair Order for which you want to create the Ship line manually.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. Select the relevant result from the Results area of the Find Repair Orders window, and click OK.

   The Depot Repair Workbench shows the selected Service Request and Repair Order details.

3. Select the Logistics tab in the Depot Repair Workbench.

4. In the Action Type field, select Ship.

5. Select the fields for the Ship line.

   The main fields that you must select are Action Code, Service Activity, and Price List.

   Note also the Add to Order field. Oracle Depot Repair lets you place all Return (RMA) and Ship lines on the same order.

   By default, all Return (RMA) and Ship lines appear on the next-highest Order Number created when the lines are transferred to Order Management.

   You can also select the specific order for the Return (RMA) or Ship line by selecting the Order Number in the Add to Order field before interfacing the specified line to Order Management.

   For field descriptions, see Logistics Tab, page 2-12.

6. Click the Save icon on the toolbar to save the record.

   The Ship line is created with the Status of Entered.

Ship a General Item

The term "general item" indicates an item that is not being refurbished.

Depending on the business scenario, an item being shipped might be repaired. Shipments can include repaired, replacement, loaner, or exchange items.

If you do not select a subinventory for the item, the subinventory is derived from the picking rule defined in the profile option CSD: Default Pick Release Rule for Sales Orders.

The Ship line that corresponds to the shipment goes through several stages of processing, and at each stage the Status is updated. The Status values that it passes through are Entered, Submitted, Booked, Released, and Shipped.

You may go through each processing stage one stage at a time, or process several stages in sequence automatically.

Enter Order (Submit to Oracle Order Management)

After a Ship line is created, its first Status is Entered.

When you submit the line to Oracle Order Management, and it is successfully interfaced, it gets an Order Number returned from Oracle Order Management, and its Status changes to Submitted.

After the Ship line has been interfaced with Oracle Order Management, it cannot be deleted.

Book Order

In this stage, the line must be booked in Oracle Order Management. The main effect of this in Oracle Depot Repair is that the Status of the line changes to Booked.

Pick Release

During the Pick Release processing, the application reserves the exact items to ship.

The Status of the Ship line at the end of the Pick Release stage changes to Released.

[For serialized items whose Serial Control is either Predefined or At Receipt, you are required to perform the Pick Release processing twice:

- The first time, you must enter the Serial Number in a separate Oracle Inventory window, but the Status of the Ship line remains as Booked.
- The second time, you automatically upgrade the Ship line Status to Released.]

Ship Confirm

At the end of the Ship Confirm stage, the item has been shipped and the Status of the line changes to Shipped.

Automatic Processing of a Ship Line

The standard way to process a Ship line for a general item is as follows:

1. Decide the stage you want to reach.
2. Click the Automate Order Processing steps through check box.
3. Select the radio button which corresponds to the stage you want to reach:
   - Enter Order
   - Book Order
   - Pick Release
   - Ship Confirm
4. Click Process.

> **Note:** You can optionally process the last stage, that is, with the Ship line in the Released status, by clicking the Ship button, and then entering data in Oracle Shipping Execution windows. For details of these windows, see the *Oracle Shipping Execution User's Guide.*

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must complete all steps in the relevant business scenario prior to shipping the general item. For more information, see Oracle Depot Repair Business Scenarios.

Navigation

Depot Repair > Repair Orders

Steps:

1. Retrieve the Repair Order for the item that you want to ship.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. Select the relevant order from the Results area of the Find Repair Orders window, and click OK.

   The Depot Repair Workbench shows the selected Service Request and Repair Order details.

3. Select the Logistics tab of the Depot Repair Workbench.

4. Click any field of the Ship line to make that line current.

5. Click the Process Trans check box.

6. Select the Automate Order Processing Steps Through check box.

7. Select one of the following radio buttons:

   - Enter Order
   - Book Order
   - Pick Release
   - Ship Confirm

8. For the special case where you have chosen Ship Confirm, for a serialized item whose Serial Control is At Sales Order Issue, enter the Source Serial Number.

9. Click Process.

   Depending on how many stages you have chosen to perform, a variety of procedures are performed.

   In all cases, acknowledge the message in any message window that appears.

   Enter Order

   If, at step 7, you chose Enter Order, the Status changes to Submitted.

   Book Order

   If, at step 7, you chose Book Order, the Status changes to Booked.

Pick Release

If, at step 7, you chose Pick Release, the Status generally changes to Released.

Pick Release for Items with Serial Control Predefined or At Receipt

For a serialized item that has Serial Control which is either Predefined or At Receipt, the resulting Status depends on whether you are performing the Pick Release processing for the first time or the second time.

1. The first time, you must enter a Serial Number, navigating through the Find Move Order Lines window that appears automatically, to the Transact Move Orders window.

   For details of the Find Move Order Lines window and the Transact Move Orders window, see the *Oracle Inventory User's Guide*.

   When you return from the Transact Move Orders window, the Status of the Ship line remains as Booked.

   Repeat the Pick Release processing (steps 5 through 9).

2. The second time you perform the Pick Release process, you do not have to enter any further data, and the Status changes to Released.

10. To see the Serial Number that you entered during the first-time Pick Release processing in the (Source) Serial Num field on the Logistics tab, click Refresh Logistics, after you complete the second-time Pick Release process.

11. To check if there has been a mismatch between the Serial Number in the Ship line and the Serial Number you entered in the Transact Move Orders window, select Data > Activity to display the Activity window. If a mismatch occurred, an alert message in the Activity window records the two Serial Numbers.

    When the Status of the Ship line is Released, the Pick Release stage is complete.

    Ship Confirm

    When processing the Ship Confirm stage, you should wait until the concurrent program Interface Trip Stop has completed successfully before you click Refresh Logistics, to see the changed value of the Status.

12. You can monitor the progress of the program by selecting Requests from the View menu on the toolbar, and selecting appropriate search criteria.

13. Click Refresh Logistics.

    The purpose of this is to update the Status on the Ship line, so that it reflects in Oracle Depot Repair the results of the procedures executed in other Oracle applications when you clicked Process.

    If, at step 7, you chose Ship Confirm, and the background concurrent process Interface Trip Stop completes successfully, the Status changes to Shipped.

14. When the transaction is completed, you can optionally view the shipping information in the Activity window, by selecting Data > Activity from the top menu.

Ship a Refurbished Item

In Oracle Depot Repair, after a refurbished item has been received from the Spares Management warehouse and repaired, it is ready to be shipped back to Spares Management.

> **Note:** Spares Management is a module of Oracle Field Service.

If you do not select a subinventory for the item, the subinventory is derived from the picking rule defined in the profile option CSD: Default Pick Release Rule for Sales Orders.

You must process the item through the Pick Release and a Ship stages. These stages are similar to the Pick Release and Ship Confirm stages for shipping a general item.

Where both options are allowed (that is, where the equivalent radio buttons are both enabled), you can either perform the two stages one at a time, or process both stages in sequence automatically.

For serialized items whose Serial Control is either Predefined or At Receipt, you are required to perform the Pick Release processing twice, as for general items. For more information, see Ship a General Item, page 4-105.

Manual Ship Processing for Items with Serial Control At Sales Order Issue

The only difference in the processing of a refurbishment item and a general item occurs in the final, Ship stage, and then only for the case of a serialized refurbished item, whose Serial Control is At Sales Order Issue.

To ship this type of item, you must use the manual method of clicking Ship and entering the Serial Number using Oracle Shipping Execution windows; you cannot use the automatic method of choosing Ship Confirm and clicking Process.

> **Note:** You must also use the manual method for partial shipments.

The following procedures describe the Move Out transaction, that processes the shipment of the refurbished item back to Spares Management.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

The Service Request and the associated refurbishment Repair Order or orders must have been created in the Spares Management module of Oracle Field Service.

The item must have been received and repaired.

Navigation

Depot Repair > Repair Orders

Steps:

1. Retrieve the Repair Order for which you want to ship the refurbished item.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. Select the relevant result from the Results area of the Find Repair Orders window, and click OK.

3. Click the Logistics tab.

4. Click any field of the Move Out line to make that line current.

   The Status of the Move Out line should be Booked.

   > **Note:** The following description assumes that you select the automatic Pick Release option when processing the Move Out line.
   >
   > Even if you select Ship Confirm as your first choice for processing the Move Out line, the application automatically processes the Pick Release stage first, then the Ship Confirm stage.

   Pick Release

5. Click the Process Trans check box for the Move Out line.

6. Click the Automate order processing steps through check box.

7. Select the Pick Release radio button.

8. Click Process.

   The Status of the Move Out line generally changes to Released.

Pick Release for Items with Serial Control Predefined or At Receipt

For a serialized item that has Serial Control which is either Predefined or At Receipt, the resulting Status depends on whether you are performing the Pick Release processing for the first time or the second time.

1. The first time, you must enter a Serial Number, navigating through the Find Move Order Lines window that appears automatically, to the Transact Move Orders window.

   For details of the Find Move Order Lines window and the Transact Move Orders window, see the *Oracle Inventory User's Guide*.

   When you return from the Transact Move Orders window, the Status of the Move Out line remains as Booked.

2. The second time you perform the Pick Release process (steps 5 through 8), you do not have to enter any further data, and the Status changes to Released.

9. To see the Serial Number that you entered during the first-time Pick Release processing in the (Source) Serial Num field on the Logistics tab, click Refresh Logistics, after you complete the second-time Pick Release process.

10. To check if there has been a mismatch between the Serial Number in the Move Out line and the Serial Number you entered in the Transact Move Orders window, select Data > Activity to display the Activity window. If a mismatch occurred, an alert message in the Activity window records the two Serial Numbers.

    When the Status of the Move Out line is Released, the Pick Release stage is complete.

    Manual Ship or Ship Confirm

11. For the case of a serialized refurbished item, whose Serial Control is At Sales Order Issue, or for partial shipments, the Ship Confirm button is disabled. In these situations, click Ship and enter the item's Serial Number in Oracle Shipping Execution windows. For details of these windows, see the *Oracle Shipping Execution User's Guide.*

    When you return to the Logistics tab, click Refresh Logistics. The Status changes to Shipped.

    This completes the manual ship processing for these special Move Out lines.

12. For all other cases, click the Process Trans check box for the Move Out line.

13. Click the Automate order processing steps through check box.

14. Select the Ship Confirm radio button.

15. Click Process.

When processing the Ship Confirm stage, you should wait until the concurrent program Interface Trip Stop has completed successfully before you click Refresh Logistics, to see the changed value of the Status.

You can monitor the progress of the program by selecting Requests from the View menu on the toolbar, and selecting appropriate search criteria.

16. Click Refresh Logistics.

    The purpose of this is to update the Status on the Move Out line, so that it reflects in Oracle Depot Repair the results of the procedures executed in other Oracle applications when you clicked Process.

    After the background concurrent process Interface Trip Stop has completed successfully, the Status changes to Shipped.

17. Optionally, from the top menu, select Data > Activity to see the details of the Move Out transaction in the Activity window.

Record Billing Data in Repair Actuals

When you have completed the repair and have determined the final billing for materials, labor, and expenses that you want to bill your customer, you need to put the billing amounts in Repair Actuals. Sources of billing amounts in Repair Actuals can include the estimate, WIP Summary, Task Debrief, or manual entries.

> **Note:** For WIP mode jobs, although it is not prohibited to create actuals from both WIP and Estimate sources, generally you will copy in from either WIP or Estimate sources.
>
> Similarly, for Task mode jobs, although you can copy in lines from both Task and Estimate sources, generally you will copy in from either Task or Estimate sources.

When you record the billing entries in Repair Actuals, the system creates charge lines in the Repair Actuals area. In turn, the system can transfer the billing data to other modules for invoicing.

> **Note:** The Debrief Report form does not let you apply contracts per charge line. If you are using Debrief Report form to generate charges, the system automatically applies the contract at the Service Request level to the charge line.

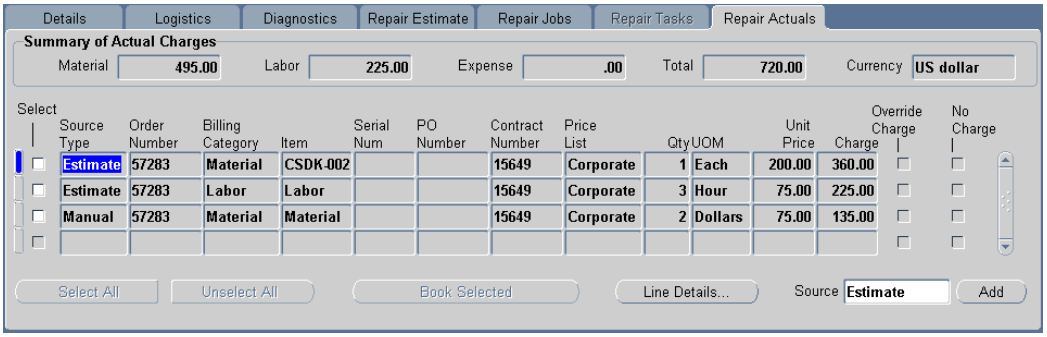
Topics that guide you through adding data into your Repair Actuals tab include:

- Add WIP Summary to Repair Actuals, page 4-113

- Add Task Debrief to Repair Actuals, page 4-116
- Add Estimate to Repair Actuals, page 4-117
- Create Manual Charges in Repair Actuals, page 4-118

See Also

- Book Repair Actuals, page 4-119



Add WIP Summary to Repair Actuals

If your Repair Order is in WIP mode, you can add the WIP Summary as a source for your Repair Actuals.

When you add from the WIP Summary to your Repair Actuals, the system adds all material, labor, and expense lines from the WIP Summary into the Repair Actuals.

Generally, when adding in lines from WIP Repair Jobs:

- Material Transactions are added as Material lines.
- Resources Transactions are added as Labor lines.

> **Note:** Before you can add WIP Summary data into the Repair Actuals, you must define a billing inventory item for all the BOM Resources that are associated with a WIP Repair Job. This requirement lets Depot Repair add the WIP Summary lines into Repair Actuals as material, labor, and expense items. For more information, see the *Oracle Depot Repair Implementation Guide*.

After you add WIP Summary lines into the Repair Actuals, you can:

- View the WIP Job Name in the Source column of the Repair Actuals tab to see the source of the added lines.

- Update the WIP Summary-sourced lines in Repair Actuals but not delete them. The updates you can perform are limited: under profile option control, you can either set No Charge for a charge line or you can override the charge.

  Note: If you manually override the charge, then discounts associated with the contract are not applied.

- View each line's details to let you view more information about the line, indicate whether or not to override charges, or indicate to make no changes.

  Important: After you have imported at least one line from a WIP Repair Job into the Repair Actuals, you cannot import any additional lines from that job.

  Additionally, lines will not be imported from WIP Repair Jobs shared across Repair Orders.

- Manually create additional charge lines. You can manually create charge lines before and after you add lines from the WIP Summary.

Upon importing the WIP Summary lines to the Repair Actuals, the system creates charge lines for each line.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must be processing a Repair Order.

Navigation

Repair Actuals tab

Steps

1. In the Source field, click the right-hand end of the field, then click the ellipsis (...) button.

   A window opens and displays the possible sources from which you can add data to Repair Actuals.

For a WIP mode repair, the options are WIP and Estimate.

For a Task mode repair, the options are Task and Estimate.

2. Select a Source and click OK.

3. Click Add.

   The system automatically populates rows and fields on the Repair Actuals tab from the source that you selected. An information window appears which records any errors and information about the lines added

   The Source field shows the Source Name. You should review each line on the Repair Actuals tab to:

   - Determine if any lines require overrides.
   - Determine if any lines should be at no charge.

4. (Not available for lines imported from Task Debrief.)

   If the profile option CSD: Allow Charge Override for Actuals is set to Yes, you override an amount on a line, as follows:

   1. Select Override Charge.
   2. In the Charge column, enter a new amount.

5. (Not available for lines imported from Task Debrief.)

   To change a line to No Charge, select the No Charge check box.

6. Click Save to record the changes.

View Line Details

On the Repair Actuals tab, you can view additional information about a charge line's details. Additional details include costing and charge information. You can access a charge line's details by selecting a charge line and clicking the Line Details button. An expanded window shows the detailed information.

See Also

- Record Billing Data in Repair Actuals, page 4-112
- Add Task Debrief to Repair Actuals, page 4-116
- Add Estimate to Repair Actuals, page 4-117
- Create Manual Entries in Repair Actuals, page 4-118

- Book Repair Actuals, page 4-119

Add Task Debrief to Repair Actuals

If your Repair Order is in Task mode, you can import the Task Debrief as a source for your Repair Actuals.

When you import from the Task Debrief to your Repair Actuals, the system imports all material, labor, and expense lines from the Task Debrief into the Repair Actuals.

> **Note:** The Debrief Report form does not let you apply contracts per charge line. If you are using the Debrief Report form to generate charges, the system automatically applies the contract at the Service Request level to the charge line.

After you import Task Debrief lines into the Repair Actuals, you can:

- View the Task Number in the Source column of the Repair Actuals tab to see the source of the imported line.
- Add additional Task Debrief lines to the Repair Actuals.
- Manually create additional charge lines. You can manually create charge lines before and after you add lines from the Task Debrief.

Upon importing the Task Debrief lines to the Repair Actuals, the system creates charge lines for each line.

> **Note:** You cannot update lines whose Source is Task.

For procedural information on how to add Task Debrief data to the Repair Actuals, see the Steps in the topic Add WIP Summary to Repair Actuals, page 4-114.

See Also

- Record Billing Data in Repair Actuals, page 4-112
- Add WIP Summary to Repair Actuals, page 4-113
- Add Estimate to Repair Actuals, page 4-117
- Create Manual Entries in Repair Actuals, page 4-118
- Book Repair Actuals, page 4-119

Add Estimate to Repair Actuals

If your repair includes an estimate, you can use the Repair Estimate as a source for your Repair Actuals.

When you import from the Repair Estimate to your Repair Actuals, the system imports all lines from the Repair Estimate into the Repair Actuals.

After you import Repair Estimate lines into the Repair Actuals, you can:

- Update, add, or delete the Repair Estimate-sourced lines in Repair Actuals.
- View each line's details to let you view more information about the line, indicate whether or not to override charges, or indicate to make no changes.
- Manually create additional charge lines. You can manually create charge lines before and after you add lines from the Estimate.

  Note: If you manually override the charge, then discounts associated with the contract are not applied.

Upon importing the Repair Estimate lines to the Repair Actuals, the system creates a charge line for each estimate line.

Note: After you have imported any estimate lines into Repair Actuals, any changes made to those source estimate lines are not automatically forwarded to the corresponding Repair Actuals lines. To take advantage of the new estimate changes, you must delete the corresponding Repair Actuals lines, and then re-import the changed source estimate lines.

For procedural information on how to add Estimate data to the Repair Actuals, see the Steps in the topic Add WIP Summary to Repair Actuals, page 4-114.

See Also

- Record Billing Data in Repair Actuals, page 4-112
- Add WIP Summary to Repair Actuals, page 4-113
- Add Task Debrief to Repair Actuals, page 4-116
- Create Manual Entries in Repair Actuals, page 4-118
- Book Repair Actuals, page 4-119

Create Manual Charges in Repair Actuals

In addition to adding billing data from other sources--such as the WIP Summary, Task Debrief, or Estimate--you can:

- Manually create entries in Repair Actuals.
- Update or delete the manual charge lines in Repair Actuals.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must be processing a Repair Order.

Navigation

Repair Actuals tab

Steps

1. To manually create a new charge line on the Repair Actuals line, select the new row on which you are adding a charge line.

   The Source Type field automatically indicates Manual.

2. Enter or select the Billing Category, Item, Price List, Qty, UOM, Pricing Attributes fields, and optionally, the PO Num field.

3. Optionally, complete the Contract Number field.

4. If the profile option CSD: Allow Charge Override for Actuals is set to Yes, you override an amount on one line, as follows:

   1. Select Override Charge.

   2. In the Charge column, enter a new amount.

      Note: If you manually override the charge, then discounts associated with the contract are not applied.

5. To change a line to No Charge, select the No Charge check box.
6. Click Save to record the changes.

See Also

- Record Billing Data in Repair Actuals, page 4-112
- Add WIP Summary to Repair Actuals, page 4-113
- Add Task Debrief to Repair Actuals, page 4-116
- Add Estimate to Repair Actuals, page 4-117
- Book Repair Actuals, page 4-119

Book Repair Actuals

After you have recorded your billing data in Repair Actuals, from one or more sources, and possibly entered charge lines manually in Repair Actuals, you can book selected charge lines.

The following procedures describe how to book selected Repair Actuals charge lines.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must be processing a Repair Order.

You must have charge lines in Repair Actuals, either manually entered or added in from a Source of Estimate, WIP, or Task.

Navigation

Repair Actuals tab

Steps:

1. Select either individual charge lines or click Select All if you want to book all the

charge lines in the Repair Actuals tab.

2. Click Book Selected.

Comments:

For lines whose Source is Task, the items used in the Debrief Report decrement inventory only after the Field Service concurrent program CSF: Update Debrief Lines is submitted. This concurrent program updates the Quantity On Hand (QOH) in the inventory.

Invoice a Customer

> **Note:** Tax, Shipping, and Freight charges are not calculated within Oracle Depot Repair, but are calculated in Order Management when orders transfer to Order Management. For this reason, the charge totals in the estimate lines and lines from Task Debrief may be different from the value charged on the invoice.

The following procedures describe how to invoice a customer.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must complete all steps in the relevant business scenario prior to invoicing the customer. For more information, see Oracle Depot Repair Business Scenarios..

Navigation

Accounts Receivable

Steps:

1. Invoice the customer by using normal business procedures.

   For more information, see the *Oracle Receivables User Guide*.

Close a Repair Order

The following tasks describe how to close a Repair Order.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must complete all steps in the relevant business scenario prior to closing the Repair Order. For more information, see Oracle Depot Repair Business Scenarios..

Navigation

Depot Repair > Repair Orders

Steps:

1. Retrieve the Repair Order for the item that you want to ship.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. Select the relevant result from the Results area of the Find Repair Orders window, and click OK.

   The Depot Repair Workbench shows the selected Service Request and Repair Order details.

3. Confirm that the quantity on the Repair Order is complete.

4. Consult or create notes if necessary.

   For detailed instructions, see Create and Maintain Notes, page 4-37.

5. In the Details tab of the Depot Repair Workbench, click Update Status.

   The Update Status window opens. In the Update Status window, you can update the Repair Order status. The Repair Order can remain Open, be on Hold, or Closed.

6. Select Close by selecting the option button, and click OK to close the Repair Order line.

   You can select a Reason Code from the list of values, and enter additional details

supporting the status update.

7. Click the Save icon on the toolbar to save the record.

Close a Service Request

The following procedures describe how to close a Service Request.

Module

Oracle Applications Navigator

Responsibility

Depot Repair Super User

Prerequisites

You must complete all steps in the relevant business scenario prior to closing the Service Request. For more information, see Oracle Depot Repair Business Scenarios..

Navigation

Depot Repair > Repair Orders

Steps:

1. Retrieve the Service Request that you want to close.

   For more information, see Find Service Requests and Repair Orders, page 4-32.

2. Select the relevant result from the Results area of the Find Repair Orders window, and click OK.

   The Depot Repair Workbench shows the selected Service Request and Repair Order details.

3. In the Service Request Information area of the Depot Repair Workbench, change the status of the Service Request to Closed by selecting from the list of values.

4. Enter the date closed.

5. If required, create notes stating the reason for the Service Request closure.

   For detailed instructions, see Create and Maintain Notes, page 4-37.

6. Click the Save icon to close the Service Request.

7. Alternatively, if the Request Num hyperlink is enabled, you can click the Request Num link to launch the Update Service Request page. You can use this page to change the service request status and update the SR Resolution Code.

Create and Process an Internal Party Refurbishment

In Oracle Depot Repair, you can create and process items that need to be refurbished that belong to an internal party. In these cases, the items to be refurbished do not move from an external location, such as a Spares Management warehouse, they remain in the internal party location.

Note: Spares Management is a module of Oracle Field Service.

Create the Service Request

You must first create a Service Request, and explicitly choose an internal party for your customer.

An internal party is defined as a customer set up in at least one of the following ways:

- The customer is the Party Name set up in the Installed Base Install Parameters.
- The customer is set up in Oracle Order Management with a classification type of Internal.

For more information on setting up internal parties, see the *Oracle Depot Repair Implementation Guide.*

Create the Repair Order

When you create the Repair Order, you must select a Repair Type that has been set up with a Repair Type Ref of Refurbishment, and whose Internal Order check box has not been set.

For more information on setting up Repair Types, see the *Oracle Depot Repair Implementation Guide.*

Process the Repair Order

After the Repair Order has been created, the Logistics, Estimates, and Repair Actuals tabs are disabled, as is the tools option menu Tools > Coverage.

The main operations that you perform on internal party refurbishment items are repairs to be carried out through WIP Repair Jobs or Tasks.

The only special considerations that apply to the internal party items to be refurbished are as follows:

- For serialized items, that are Installed Base trackable, the lists of values for Serial Num and Instance show all item instances owned by the internal party, and whose Oracle Installed Base usage is In-Inventory.
- For serialized items, that are not Installed Base trackable, the lists of values for Serial Num and Instance show all item instances whose Oracle Installed Base usage is In-Inventory.

View Repair Orders in Oracle iSupport

Oracle Depot Repair customers can now search for their Repair Orders through a self-service user interface in Oracle iSupport.

Oracle iSupport authenticates the user and displays only the Repair Orders for accounts which the user is authorized to view. For each Repair Order, summary and detail information, including Repair Order status, can be displayed.

The procedure to view Repair Orders in Oracle iSupport is as follows:

1. Login to Oracle iSupport.
2. Click the Accounts tab.
3. Select the Repair Orders menu item.

   The Repair Order Summary page appears.
4. Click the Repair Order Number hyperlink for a Repair Order.

   The Repair Order Details page appears.

You can also use the Saved Searches function in Oracle iSupport to assist subsequent searches.

For more information, see the *Oracle iSupport User Guide*.

Third Party Flows

The repair centers interface with the third parties to execute many of customer's service requirements. They track the movement of products, work and financial obligation between all the parties involved in executing a repair.

The functions for managing repair operations across multiple parties consists of the following:

- Third Party Logistics for Repairs
- Invoice Third Party
- Supplier Warranty Claims

- Invoice Third Party

Third Party Logistics for Repairs

Broken products, repaired products, and exchanges are moved and tracked between service organization, customer, and third parties. The Depot Repair application supports the following models of third party repair logistics:

- Ad hoc Repairs

  A repair organization manually creates orders to ship items to a third party or RMA items back from a third party. Outside processing orders for repair service are automatically generated from repair jobs.

- Cross Dock Repairs

  A repair organization sends broken customer product out for third party repair immediately upon receipt. Depot Repair defaults the appropriate repair vendor and ship to location based on customer defined disposition rules. Overdue returns trigger escalation notifications. Third party refurbishment status is tracked via workflow and/or iSupplierPortal.

- Portal Repairs

  A repair organization provides a third party repair shop with technician portal access. The third party views repair orders assigned to them, update status, capture time and materials, and capture symptoms and root causes. The repair organization keeps the repair intelligence without exposing customer or pricing information to an outside party.

- Control Tower Repairs

  A repair organization coordinates the repair process without executing any repair or fulfillment operations in house. Customer broken products are routed to third party repair shops while exchanges are sourced from OEMs or third party distribution centers. Depot Repair defaults the appropriate repair vendor, and ship from inventory based on customer defined disposition rules. Overdue returns and refurbishments trigger escalation notifications. Third party refurbishment status is tracked via workflow and/or iSupplierPortal.

Setting Up Repair and Return with Third Party

1. Navigate to the Repair Types page. The Repair Type Summary region displays the existing repair types in the system.

2. To create a new repair type, click the New icon on the menu option.

3. Enter the required information in the following fields:

   - Repair Type: Enter the name of the repair type.

- Description: Enter description of the repair type.
- Business Process: Select Depot Repair from the list of values.
- Repair Mode: The default value is Work In Process. The other available options are Task Mode and None.

  Note: You must select WIP Mode to use the Repair Technician Portal.

- Repair Type Ref: It defaults if you select a seeded Repair Type.
- Third Party Ship and RMA: Select the Ship and RMA Service Activity Billing Types from the list of values.

  The list of values displays the Service Activity Billing Types, which are setup in the Charges setup windows. These values must be associated with a third party RMA line and third party Ship line to indicate what OM line types to use, what operating unit to associate them with, what contract entitlements apply, and so on.

  You must set up the Service Activity Billing Types under the Pre-Repair and Post-Repair columns in order to have a RMA line under pre-repair, and a Ship line under post-repair.

- Third Party checkbox: Selecting the check box creates a third party ship and RMA line at time of repair order creation if a Service Activity Billing Type is selected in the Third Party RMA and ship columns. If a Service Activity Billing Type is selected for the Ship column but not the RMA column, only a ship line will be created at time of repair order creation. Likewise, if a Service Activity Billing Type is selected for the RMA column but not the Ship column, only an RMA line will be created at time of repair order creation.

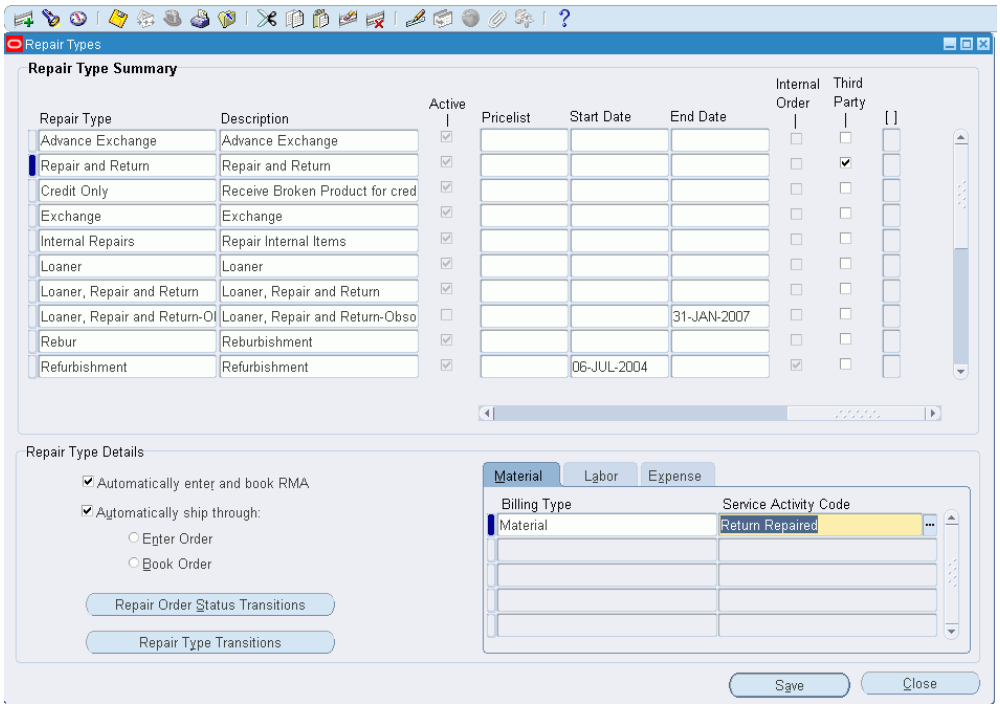
  If the third party flag is not checked, no Third party lines will be auto-created, even if service activities are entered in the Third Party Ship and RMA fields.

  Note: A repair type having third party lines can also have regular lines, provided the Service Activity Billing Types are set up for them in their respective columns.

4. Click Save.
5. In the Repair Type Details region, enter Service Activities in the Material, Labor, and Expense tabs. This is optional and is required only when a customer creates Estimate or Actual lines. They are not needed if no billing is done in Estimates or Actuals.

6. Select Automatically enter and book RMA, and Automatically ship through options for third party shipments. This is optional and depends on the business process of the repair center. You can use any of the following options: auto-create, auto-enter, or auto-book. Automatically process through option enables the ship lines to create a charge line, or enter an unbooked line in OM, or book a line in OM.

   This is optional and depends on the business process of the repair center.

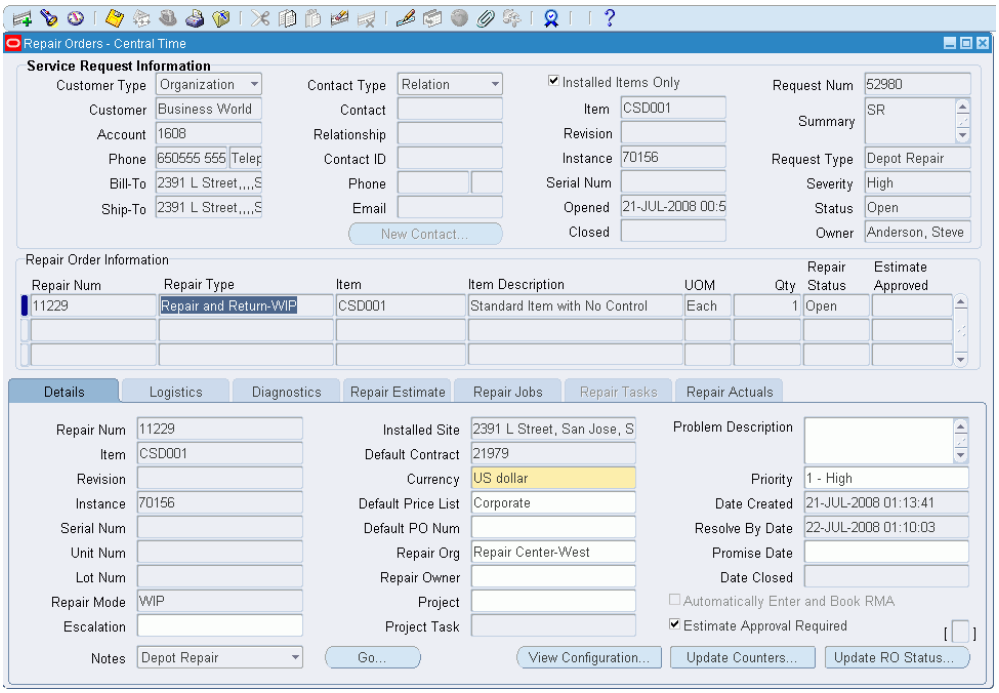


7. Click Save. Close the Repair Type form.

8. Navigate to the Repair Orders page.

9. Create a new Service Request.

10. Create a new Repair Order.



11. Click Save.

12. Navigate to the Logistics tab.

    You can view four lines in the Action Type column. Return and Ship lines for regular repair and return and Ship Third Party and Return Third Party lines for third party (RMA and Ship).

13. Receive the item in inventory. For more information, see: Auto-Receive an Item., page 4-69

14. Select the row to ship an item to the third party and select the Process Trans check box.

15. The third party account field should have defaulted at time of ship line creation if the disposition rules were set up correctly. You cannot change the account if the line is set to automatically book. Click the Ship radio button.

16. Click the Process button. Item is shipped to the third party for repair and the status of the line shows Shipped.

17. Receive the item from third party using third party RMA line. Item is received from third party and the status of the line changes to Received.

18. Ship the item back to customer through regular ship line.

Invoice Third Party

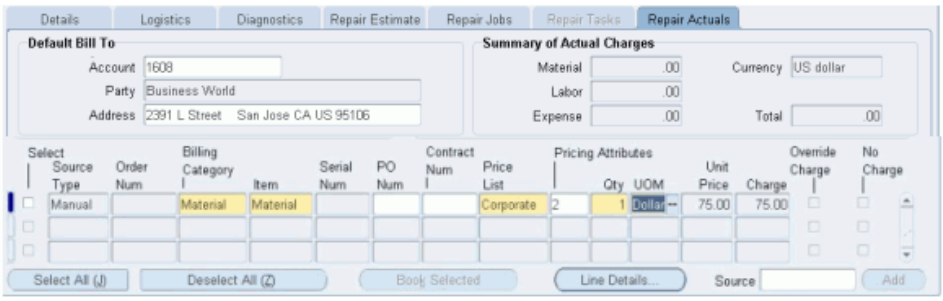
Depot Repair allows sending repair invoices to a different party from that which logged the service request. Invoices can be sent to multiple parties for a single repair order.

Updating the Invoice Third Party Flow

1. Navigate to the Depot Workbench and query for a repair order.

2. Click the Repair Actuals tab. The tab displays the following information:

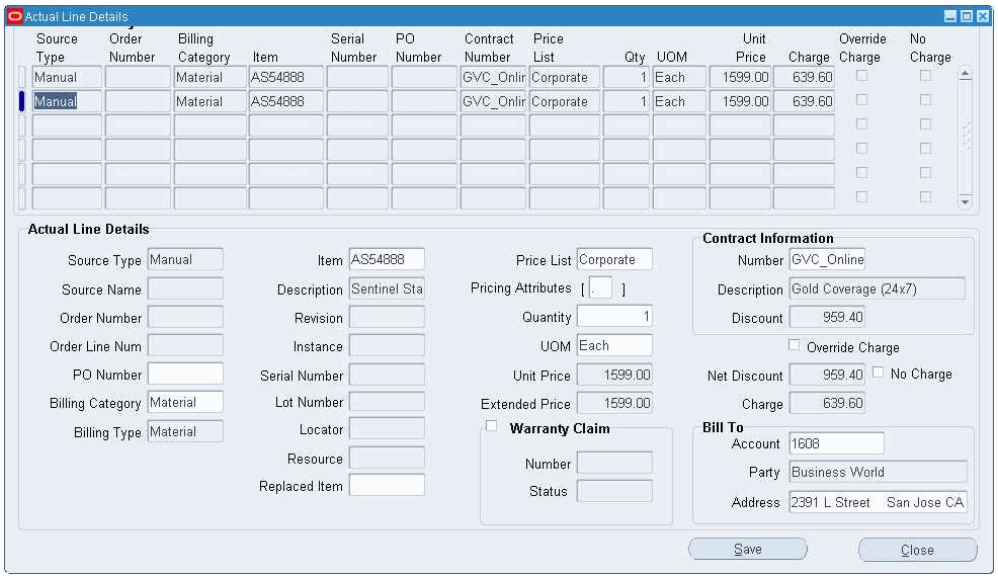
   - The Total column reflects the total charges associated with the repair order if the Actual Lines are billed to more than one party.



   - The Default Bill To Account, Party, and Address default from the information entered on the Service Request.

   - You can change the default information. Changing the Default Bill To Account, Party, and Address will not impact the already created lines. It will impact the lines created after the change.

3. Click the Line Details button to navigate to the Actual Line Details page.



The Actual Line Details page displays the following information:

- Bill To Account, Party and Address details for each corresponding line, default from Actuals tab.
- You can update the Bill To Account, Party or Address fields if you choose to bill a different party, account, or address than that specified on the Service Request for a specific charge line.

Supplier Warranty Claims

Organizations performing repairs on products manufactured by other companies need a mechanism for reporting and settling warranty claims with the Original Equipment Manufacturers (OEM) or suppliers. The mechanism consists of the following:

- Send Claim to Supplier

  Depot Repair enables you to capture claim data and trigger the claim submission workflow. Multiple claims can be made against multiple vendors per repair order. The OM Line Flow is used as the mechanism for triggering communications between a repairer and a supplier. The standard Accounts Receivable invoice that OM generates is used for settling third party claims.

- Track Approval Status and Claim Number from Supplier

  Depot Repair provides fields to capture the supplier warranty claim number and warranty claim status from the supplier's claim management system. Multiple claim numbers and statuses can be tracked per repair order.

Capturing Warranty Claim Information

1. Navigate to the Depot Repair Workbench and query for a repair order.
2. Click the Repair Actuals tab.
3. Click the Line Details button to navigate to the Actual Line Details page.
4. To capture warranty claim information, select the Warranty Claim checkbox in the Actual Line Details region.
5. Enter the Number and Status for the warranty claim. These fields are non editable if you do not select the Warranty Claim option.
6. Select a Replaced Item from the list of values. Replaced item shows list of items belonging to the Organization. The replaced item information is sent along with the warranty claim information.
7. Click Save.

Execute Outside Processing

A depot repair technician can trigger the creation of a purchase order for outside processing by completing an Outside Processing (OSP) operation in the Repair Technician Module. See: WIP Implementation Guide, for more information about setting up OSP operations.

Select Repair Parts from Dynamic Repair BOM Window

Depot Repair provides a new region in the Repair Technician module to enable a technician to view any bill of materials, or alternate bill of materials. This module also enables the technician to choose a routing. The technician can check off the removed, replaced, or repaired parts. You can add the selected parts first to a repair estimate, and then create a job from the estimate.

Select Repair BOM

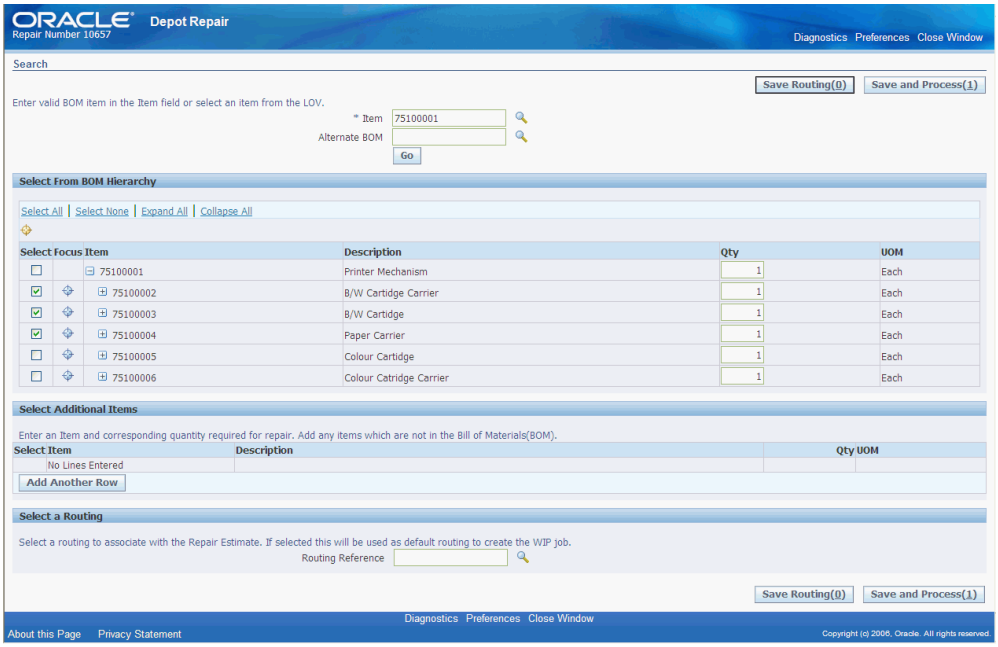
The Dynamic Repair BOM screen enables the technician to quickly capture the parts required for a repair. Upon completion of the inspection, the selected parts are automatically added to the repair order estimate.

1. Navigate to the Depot Repair Workbench and query an item.
2. Click the Repair Estimate tab on the Repair Order page.
3. Select the Select Materials button to navigate to the Expanded BOM window.

4. In the Search region, enter a valid BOM item in the Item field or select an item from the list of values. You can also select an Alternate BOM from the list of values.

5. Click Go. The Select From BOM Hierarchy regions displays those items in the BOM hierarchy which have billing type as Material defined in Inventory Item Master.

6. Select the BOM components required in the repair. These materials appear as new estimates lines on the Repair Estimates tab at completion of triage.



7. The Select Additional Items region enables you to enter an Item and corresponding quantity required for repair. Add any items which are not in the existing BOM.

8. You can select a routing to associate with the Repair Estimate in the Select a Routing region.

> **Note:** You can save only a single Routing at one time, and that Routing can only be viewed on the Select Material window. You can modify the saved routing if required. The routing is used to create a job from estimate.

9. Click the Save and Process button to commit the selection of desired components. Close the window.

10. Click OK on the alert to trigger the refresh in the Estimate tab.

11. The following values default for Estimate lines created from the Expanded BOM

window:

- Source Type: Repair BOM
- Billing Category: Material
- Contract Number: Use the contract associated to the repair order if a contract exists
- Price list: Default the Price lists selected on the Details tab

Source Type	Billing Category	Item	Contract Number	Price List	Pricing Attributes	Qty	UOM	Unit Price	Estimated Charge	Override Charge	No Charge
Manual	Labor	Labor		Corporate	.	1	Hour	150.00	150.00	☐	☐
Repair BOM	Material	75100002		Corporate	.	1	Each	10.00	10.00	☐	☐
Repair BOM	Material	75100003		Corporate	.	1	Each	10.00	10.00	☐	☐

Line Details... | Add Lines from Diagnostics | Select Materials... | Create Job | Save Estimate

Create Job from Estimate

Once the repair estimate is created, a repair manager works with the customer to approve the estimate. After the approval of the estimate, the repair manager initiates the repair by generating a repair job from the estimate.

To create job from estimate

- Select the Create Job button on the Repair Estimate tab.

  Clicking the Create Job button initiates and follows the process flow outlined in the section Repair Jobs tab, page 2-30.

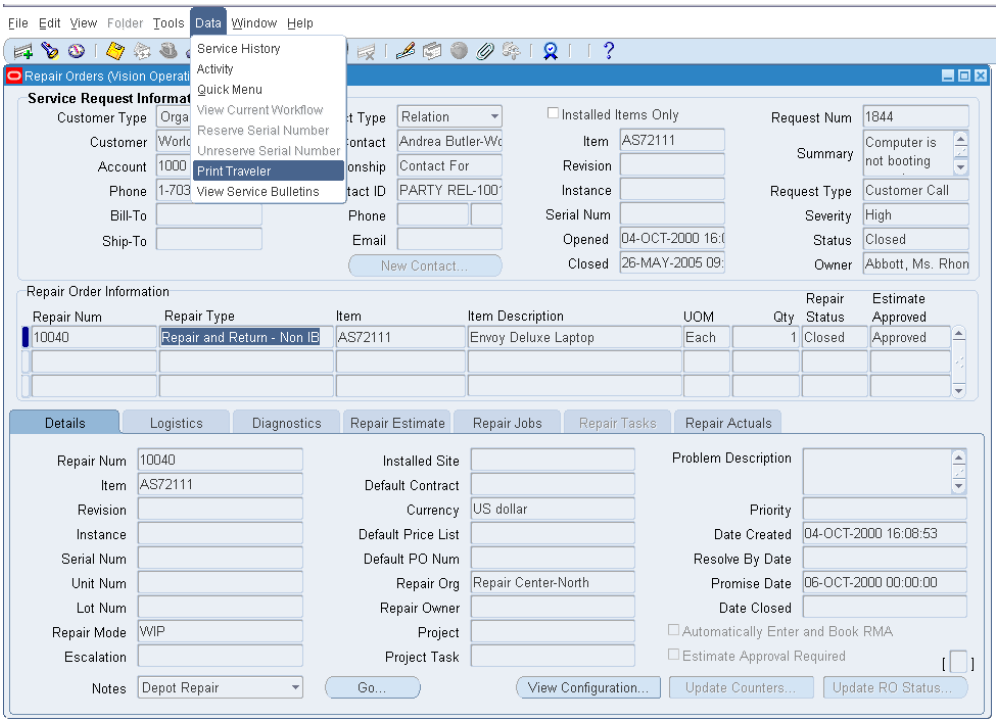
  > **Note:** The Submit Job button and the Select Materials button appear only if the function to view these buttons is granted.

Print Traveler Document

Depot Repair provides an out-of-box traveler document to enable the repair technicians to scan in maximum data thereby reducing the time consumed in data entry. Traveler documents allow easy identification and disposition of items in the repair shop. Bar coded serial numbers and repair order numbers allow technicians to quickly find repair records without typing.

To print a traveler document:

1. Navigate to the Depot Repair Workbench.
2. Create a Repair Order or retrieve an existing repair order.
3. Select the Print Traveler option from the Data menu.



This command prints the traveler.

Depot provides a standard traveler format, and also a barcoded traveler, both of which can be tailored to a customer's preferences using XML Publisher.

View Service Bulletins using Depot Repair Workbench

Depot Repair automatically links a service bulletin to a repair order based on customer defined service bulletin rules. A number of pre-defined bulletin types are seeded in the product. You can add any additional bulletin types to fit your business needs. You can view service bulletins from the Depot Repair Workbench.

The Depot Repair Workbench enables the repair managers, coordinators, billing clerks, and other users to view service bulletins. The Depot Repair Workbench is enhanced to allow a user to view the service bulletins associated with a repair order from the Workbench.

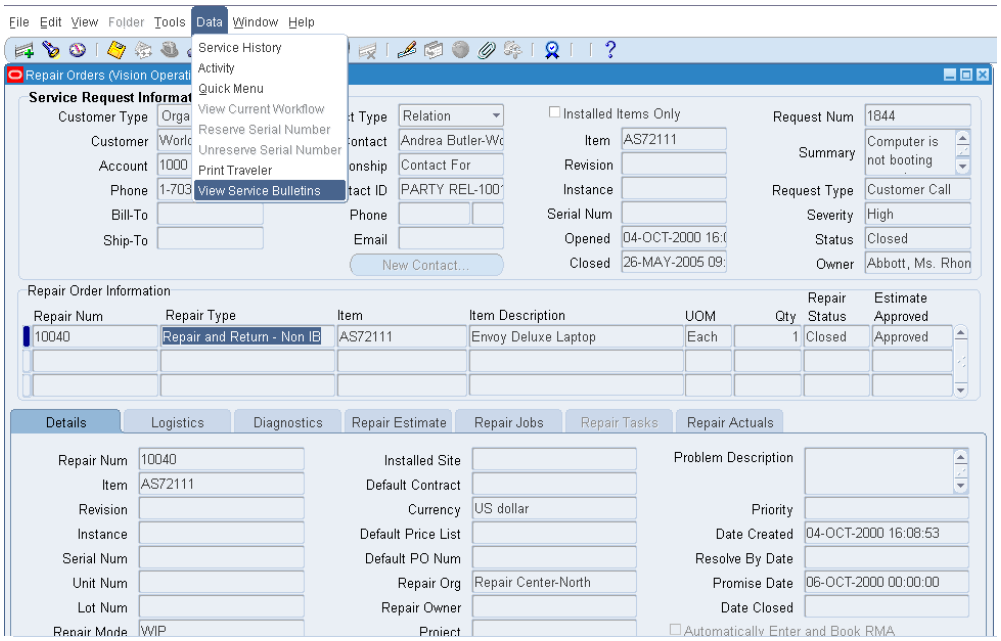
To view a service bulletin from the Depot Repair Workbench:

1. Navigate to the Depot Repair Workbench.

2. Create a Repair Order. Alternatively, you can search and retrieve an existing repair order.

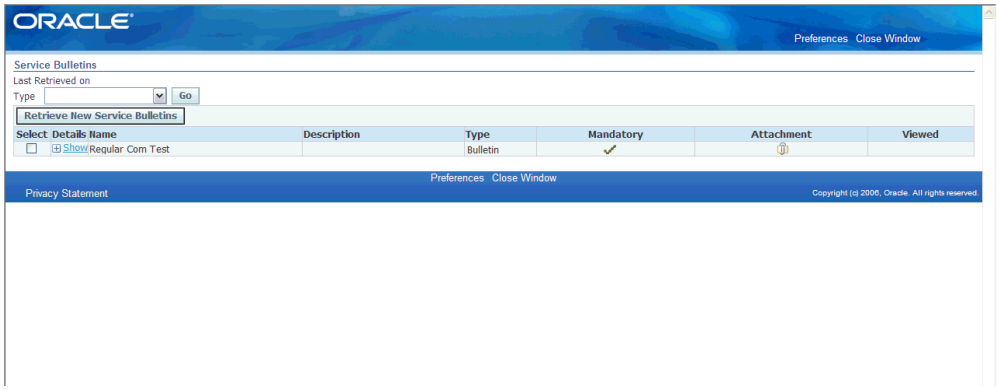
   The Repair Orders page opens.

3. Click the View Service Bulletins option from the Data menu.



The Service Bulletins page opens.

4. The Service Bulletins page displays the existing service bulletins if the Retrieve Service Bulletins concurrent program is running. Click Retrieve New Service Bulletins button to display any additional new service bulletin.



5. Select the service bulletin and click Show to display the service bulletin details.

Related Topics

Define Triggers for Service Bulletins

View Service Bulletins from the Repair Technician Module

View Read Only Workbench

Oracle Depot Repair provides the ability to launch the Depot Workbench in read-only mode. The Depot Workbench provides numerous data and functionality that is not specific to any specific user type. It provides functions to repair managers, service representatives, receiving clerks, shipping clerks, billing clerks and many more. The read-only mode allows the users to access data that they need but restricts them from performing functions outside of their purview.

To view the Depot Workbench in read-only mode, set the profile option, CSD: Read Only Workbench, to Yes.

To Access a Read-only Depot Workbench:

1. Navigate to the Depot Workbench. The Workbench launches in read-only mode. You can only view data, but not execute any functions.

2. The read-only mode allows you to click certain buttons and view menu options. The disabled functions/buttons are:

   - Create new service request
   - Create new contact
   - Create new repair order
   - Create Note - Details Tab
   - Change Status - Details Tab
   - Counters - Details Tab
   - Configuration - Details Tab
   - Process Transaction Checkboxes - Logistics Tab
   - Process Transaction Through Checkbox - Logistics Tab
   - Process button - Logistics Tab
   - Receive - Logistics Tab
   - Ship - Logistics Tab
   - Create Job - Repair Jobs Tab
   - Create Task - Repair Tasks Tab

- Capture Quality Plan - Repair Tasks Tab
- Create Estimate, Estimate Line - Repair Estimates Tab
- Create Job from Estimate - Repair Estimates Tab
- Submit Actuals - Repair Actuals Tab

The disabled menu items are:

- Reserve/Un-reserve Serial Number
- Split Repair Order

5

Repair Manager Portal

This chapter outlines the broad set of capabilities that a repair manager performs in the course of normal repair center operations.

This chapter covers the following topics:

- Overview
- Repair Manager Portal Page
- Using the Repair Order Backlog region
- Using the Quality Event Watchlist region
- Using the Advanced Search page
- Using the Create Repair Order page
- Setting Up Aging Threshold
- Setting Up Quality Threshold

Overview

The Repair Manager Portal provides the ability to monitor and manage the return center from a single screen. The Portal provides instant visibility to bottlenecks and process exceptions and allows you to manage the exceptions quickly. It allows a manager to:

- Monitor and report product quality issues:

  Managers set quality thresholds for an item regarding the number of repairs during a specified time. The system triggers workflow notification when the quality thresholds exceed.

- Monitor and manage work backlog and resources:

  Managers allocate resources to ensure that the highest priority work is done first and all the work is completed on time. Managers set aging thresholds for how long

repairs are open or in the same status without changing. System triggers notification for the ones passed aging thresholds and due dates.

- Monitor and manage processing exceptions and escalations:

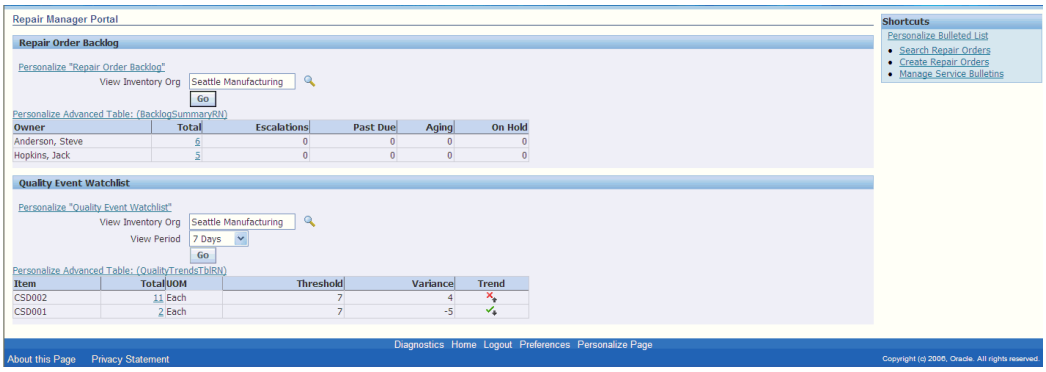
  Managers monitor work orders needing attention or approval and drill down to the details of respective repair orders. Managers update repair orders to remove escalations, change ownership, change priority, and so on.

- Create, update and search repair orders:

  Managers create new repair orders and/or update existing repair orders. Managers can perform a mass-update of ownership, priority, due date, and other values on repair orders. Additionally, they can search existing repair orders and save the search queries, if required.

Repair Manager Portal Page

The header of the Repair Manager Portal page is the Repair Order Backlog region and the footer is the Quality Event Watchlist region. Additionally, you can use the Shortcuts section to navigate to the Search Repair Orders page, Create Repair Orders page, and Manage Service Bulletins page.



For more details on the regions, select one of the following:

- Using the Repair Order Backlog region, page 5-2

- Using the Quality Event Watchlist region, page 5-3

Using the Repair Order Backlog region

A Repair Order Backlog region is a summary table that indicates for each of the resources how many repair orders they own, how many are escalated, past due, aging or on hold.

The Repair Order Backlog region displays the following information:

- View Inventory Org: Displays the default organization to which you belong based on your user profile organization. You can choose other organization if required.
- Owner: Displays the resources that are assigned the repair orders.
- Total: Displays the number of repair orders for the owner in total.
- Escalations: Displays the number of escalated repair orders for the owner.
- Past Due: Displays the number of past due repair orders for the owner.
- Aging: Displays the number of aged repair orders for the owner.
- On Hold: Displays the number of repair orders for the owner that are on hold.

All the non-zero numerical entry in the columns mentioned above is hyperlinked. Click any hyperlink to navigate to drill down to a details table for any resource or category combination.

Using the Quality Event Watchlist region

A Quality Event Watchlist region is summary table that indicates how many of each item type are returned for a selected organization and time period. Additionally, this region indicates a pre-set threshold for returns in a selected period and an indicator of whether the number of returns is trending upward or downward from the prior period. You can drill down to a details table for any item.

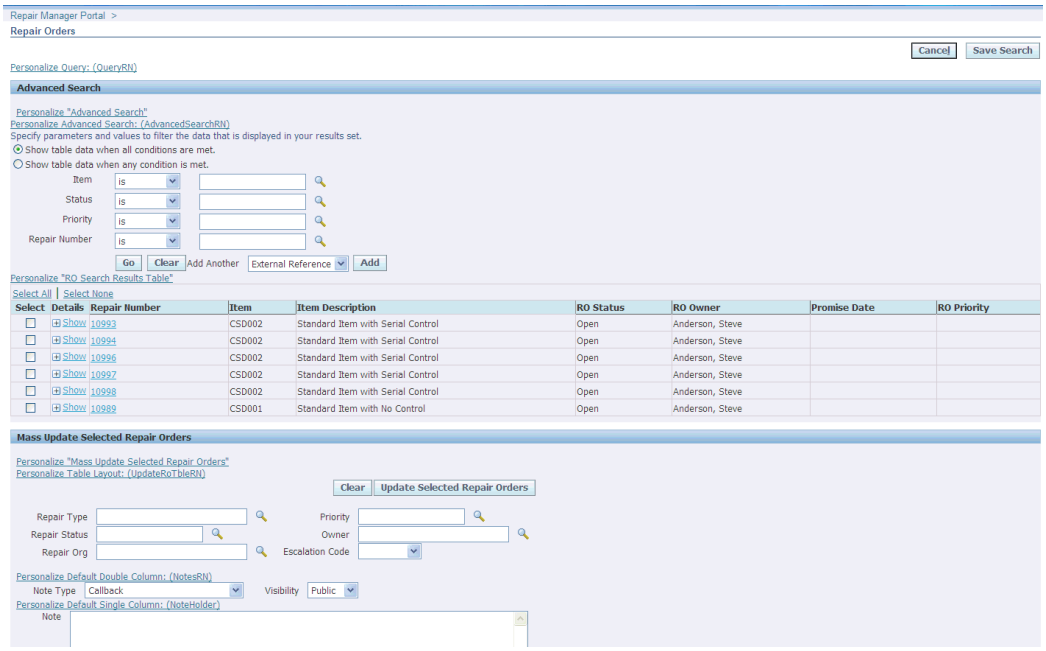
The Quality Event Watchlist region displays the following information:

- View Inventory Org: Displays the default organization to which you belong based on your user profile organization. You can choose other organization if required.
- View Period: Defaults to 7 days. You can select any value for the view period.
- Item: Displays the items returned.
- Total: Represents the number of repair orders for the item during the selected period.
- UOM: Unit of measurement of the item.
- Threshold: Displays the quality threshold for each item as defined in the Quality Threshold Setup table. As the period changes the threshold updates to match the selected period.
- Variance: Indicates the difference between Total and Threshold. Has plus or minus pre-fix. Red for plus, green for minus.

- Trend: The indicator displays whether the number of repair orders has increased, decreased or stayed the same relative to the prior time period. Red arrow indicates increase, green arrow indicates decrease, and black line indicates same as prior period.

Using the Advanced Search page

The Advanced Search page provides advanced search capability to search repair orders using dynamic queries with many different search criteria.



You can navigate to the Advanced Search page in the following ways:

- From the Repair Order Backlog region:

  Click any numeric hyperlink on the Total, Escalations, Past Due, Aging, or On Hold columns to navigate to the Advanced Search page. This page displays pre-populated data for the Owner/column combination you choose. Click a repair order hyperlink to drill down to the Repair Technician module and see the details of that repair order.

- From the Quality Event Watchlist region:

  Click the numeric hyperlink on the Total column to navigate to the Advanced Search page. This page displays pre-populated data for the Item/column combination you choose. Click a repair order hyperlink to drill down to the Repair Technician module and see the details of that repair order.

- From the Shortcuts panel:

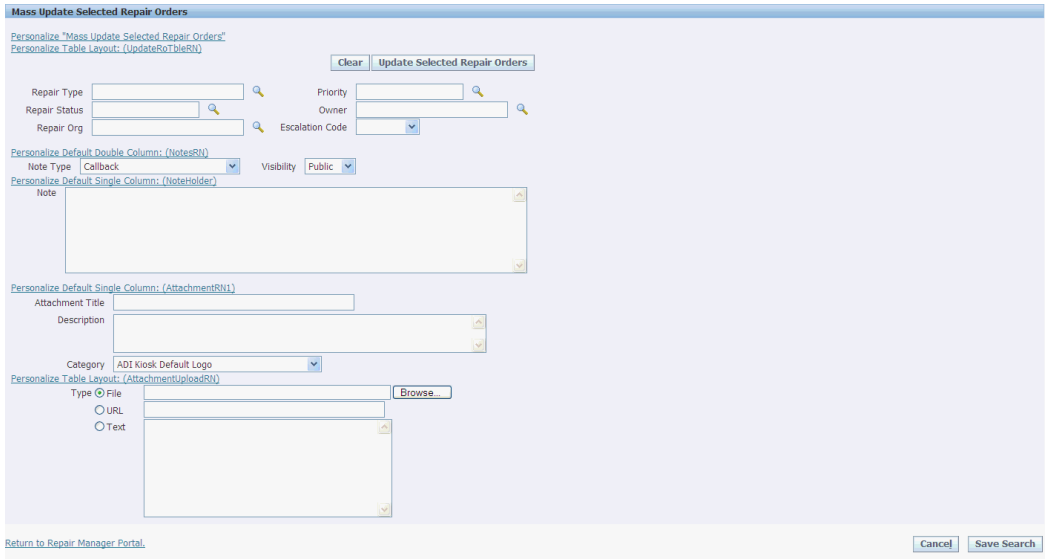
Click the Search Repair Orders link on the right hand panel on Repair Manager Portal to navigate to the Advanced Search page.

The Advanced Search page enables you to perform a search using the following criteria:

- Item
- Status
- Priority
- Repair Number
- Repair Owner
- Service Request
- External Reference

Mass Update Selected Repair Orders region

The Mass Update Selected Repair Orders region enables you to select one or more repair orders and perform mass update of attributes like ownership, priority, due date, and other values on repair orders.



The Mass Update Selected Repair Orders region displays the following information:

- Repair Type: Contains a list of values of the user-defined Repair Types. Repair type requires that both the old and new repair type allow the current repair order status.
- Repair Status: Status of the Repair Order. Repair Status can only be updated to a

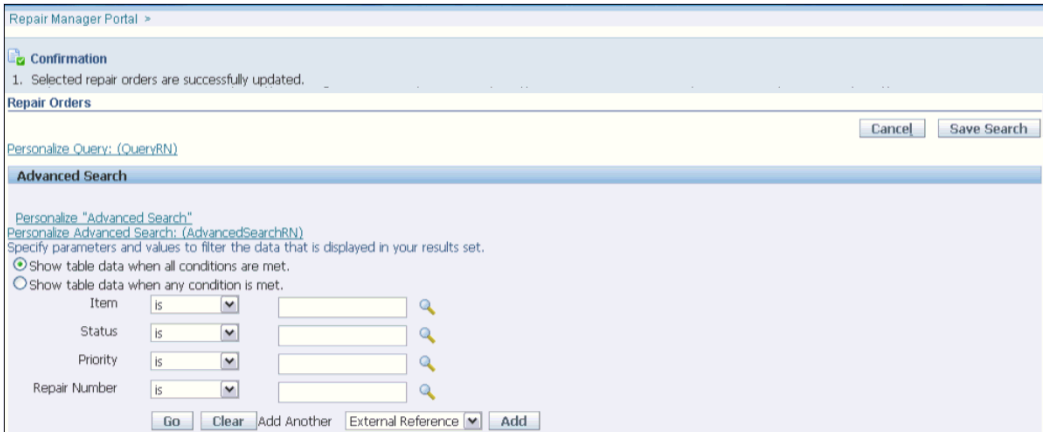
status which has a valid transition defined from the current repair order status on the repair order.

- Repair Org: Enter the organization to search.
- Priority: Priority of the repair order.
- Owner: Service depot resource responsible for execution and completion of the repair.
- Escalation Code: Indicates whether the repair order is escalated, and if so, what type of escalation it is.
- Note Type: Limited to Repair Order Note Types.
- Visibility: Indicates whether the Note is public or private.
- Note: Enter the desired note.
- Attachment Title: Title of the attachment.
- Description: Description of the attachment.
- Category: Indicates the category to which an attachment belongs.
- Type: Type of attachment.

To mass update selected repair orders:

1. Select the repair orders you want to update from the Advanced Search results table.
2. Enter the changes in the Mass Update Selected Repair Orders region.
3. Click Update Selected Repair Orders button to process your request.

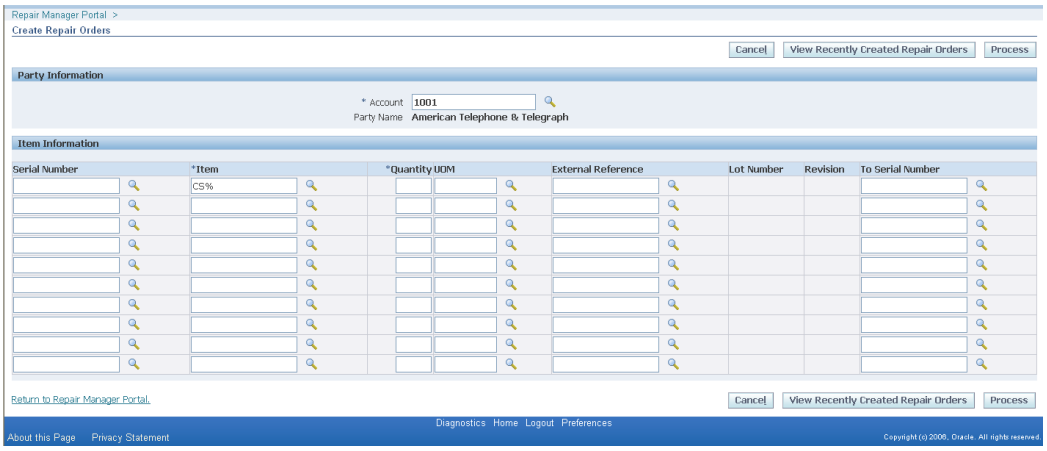
A confirmation message on mass update appears at the top of the Advanced Search page.



Using the Create Repair Order page

The Create Repair Order page enables you to create multiple repair orders at a time. You create repair orders using bulk serial number capture or quick entry of item and serial. Defaulting Rules apply to repair orders you create on this page.

Click Create Repair Orders link on the right panel of Repair Manager Portal to navigate to the Create Repair Order page.



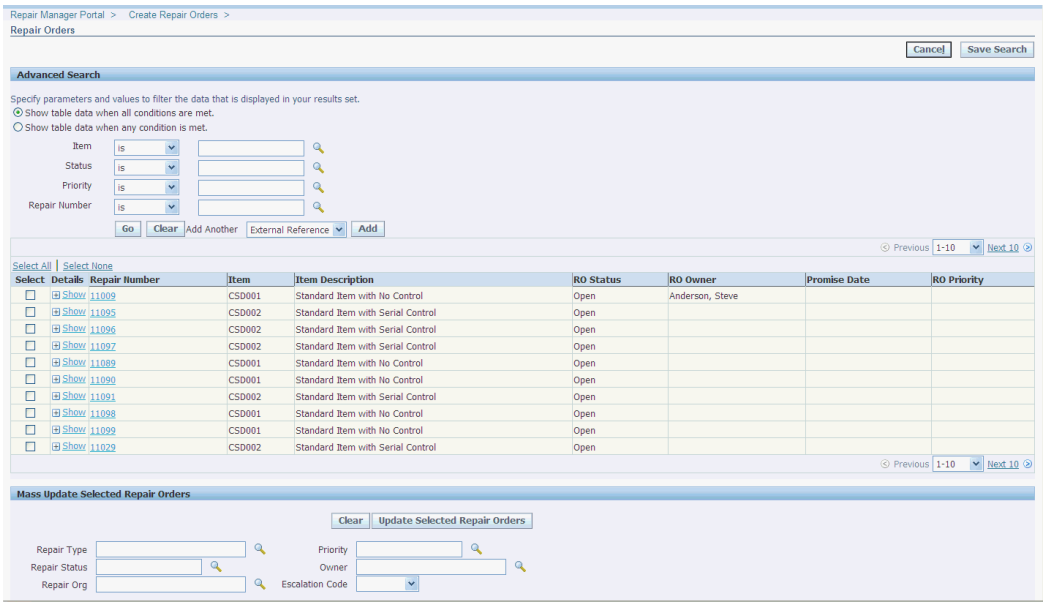
This page displays the following information:

- Party Information region:
  - Account: Enables you to query on Party.
  - Party Information: Displays the party name for the selected account.
- Item Information region:
  - Serial Number: Enter a single serial number or enter the first serial number in

the range.

- Item: Select the item.
- Quantity: Enter the quantity.
- UOM: Enter the unit of measurement.
- External Reference: Capture unique external reference number, if any.
- Lot Number: Enter the lot number for a lot controlled item.
- Revision: Enter the revision number for a revision controlled item.
- To Serial Number: Enter the final serial number in the range.

- View Recently Created Repair Orders: Displays the details of the recently created repair orders. Click this button to navigate to the Advance Search page and view the repair orders.
- Process: Processes the creation of new repair orders.



Defaulting rules apply to creation of repair orders the same way as it is applied when creating repair order from Depot Workbench.

Setting Up Aging Threshold

Aging is defined as the amount of time from repair orders creation or the amount of

time that a repair order is in a specific status. Aging is related to elapsed calendar time and not to actual repair time. The unit of measure (UOM) for aging is time-bound, for example, days, hours, minutes, and so on.

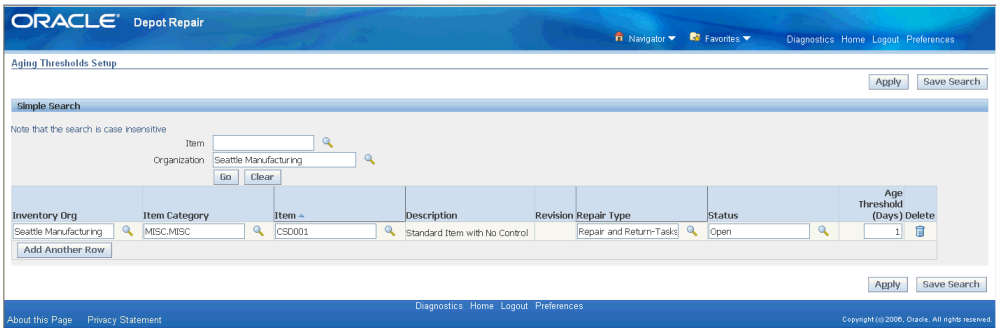
To set up aging threshold:

1. Navigate to the Aging Thresholds Setup page from the Depot Repair Setup menu.

2. Select an organization. To search for an existing aging threshold go to step 3 or continue to step 4 to set up a new aging threshold.

3. Click Go to search for an existing aging threshold in the selected organization.

4. Click the Add Another Row button to enter aging threshold details.



5. Enter the following information:

   - Inventory Org: Displays the default organization to which you belong based on your user profile organization.

   - Item Category: Select the item category.

   - Item: Select the item.

   - Description: Describes the item.

   - Revision: For revision-controlled items, you can optionally specify thresholds to specific revision number.

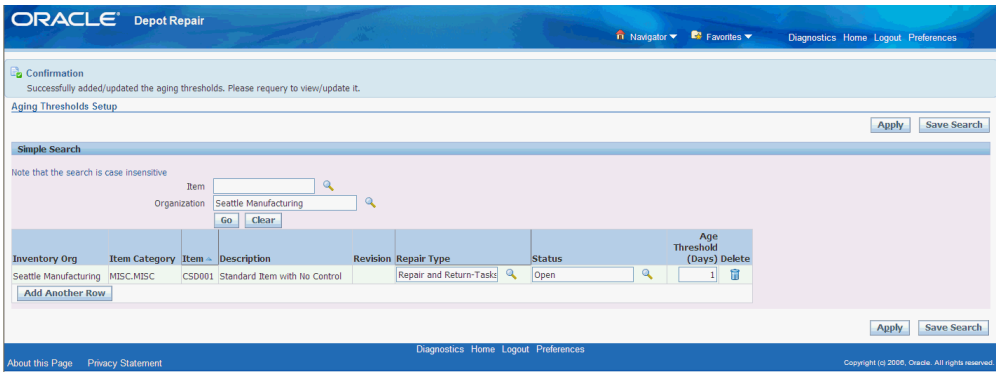
   - Repair Type: Specifies the repair type for which age threshold applies.

   - Status: Specifies the status to which age threshold applies.

   - Age Threshold (Days) : Specifies the number of days at which a repair is considered aging. It must be a positive value (>0).

   - Delete: This icon deletes an aging threshold entry.

6. Click Apply to record the new aging threshold.



A confirmation message appears on the top of the page.

Setting Up Quality Threshold

Quality thresholds setup page enables you to create item record and corresponding quantity per day. Use quality thresholds to set how many items can be returned per day.

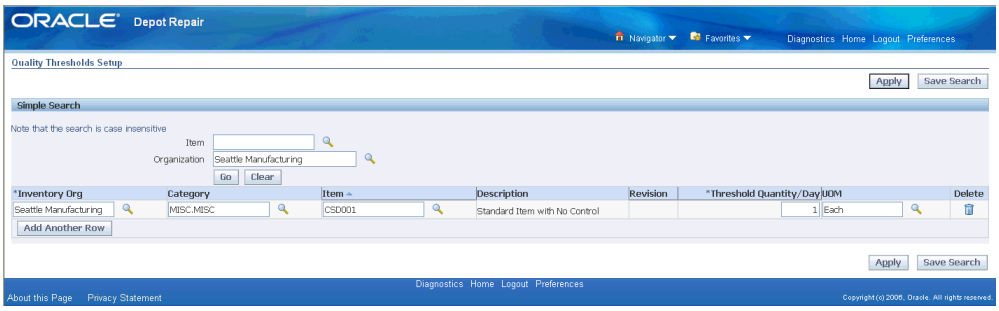
To set up quality threshold:

1. Navigate to the Quality Thresholds Setup page from the Depot Repair Setup menu.

2. Select an organization. To search for an existing quality threshold go to step 3 or continue to step 4 to set up a new quality threshold.

3. Click Go to search for an existing aging threshold in the selected organization.

4. Click the Add Another Row button to enter aging threshold details.

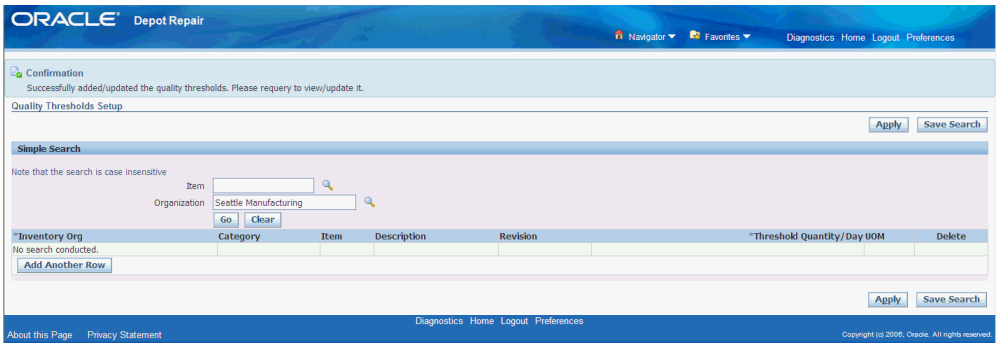


5. Enter the following information:

   - Inventory Org: Displays the default organization to which you belong based on your user profile organization.

- Category: Select the item category.
- Item: Select the item.
- Description: Describes the item.
- Revision: Active only for revision-controlled item.
- Threshold Quantity/Day: Represents the number of returns per day at which a repair is considered a quality event. It must be a positive value (>0).
- UOM: Describes the item's unit of measurement.
- Delete: This icon deletes a quality threshold entry.

6. Click Apply to record the new quality threshold.



A confirmation message appears on the top of the page.

6

Recalls

This chapter covers the following topics:

- Overview
- Recall Process Flow
- Creating a Recall Event
- Using the Details Tab
- Using the Items Tab
- Using the Corrective Actions Tab
- Using the Metrics Tab
- Finding a Recall

Overview

A recall is an action taken to address a problem with an item that makes it likely to fail, cause injury, or violate safety laws. A recall is not always an intimation to a customer to discontinue using the product or return it to the company. It means that the item or device needs to be checked, adjusted, recharged or fixed. Recalls are also called field change orders (FCOs), field actions, technical bulletins, and safety alerts.

A recall is of two types depending on where the recall action takes place:

- Correction: A correction addresses a problem with an item in the place where it is used or sold. This is managed by providing information to end customers to fix the problem, sending replacement part to swap out the defective part, or sending a field service agent to resolve the issue.

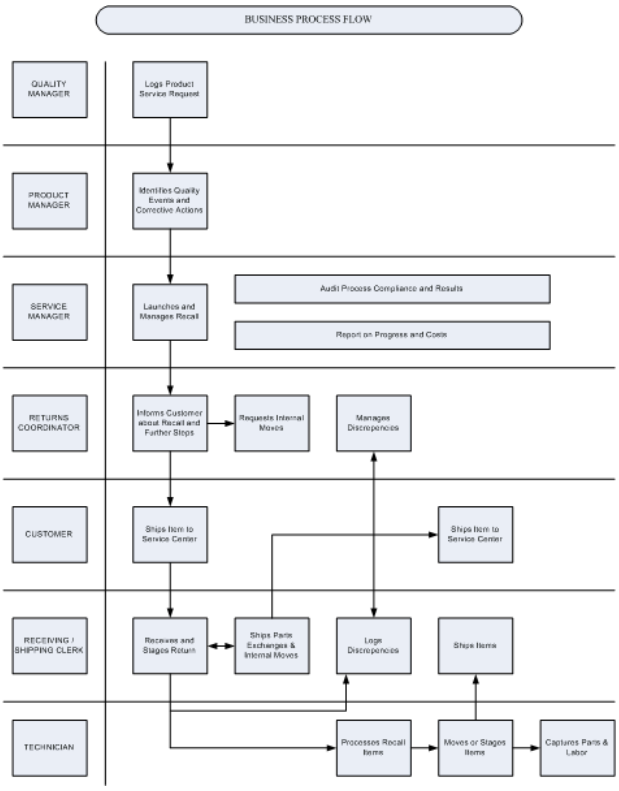
- Removal: A removal addresses a problem with an item by removing it from where it is used or sold. Removals include items in warehouse inventories; spare pools or parts inbound in transit. A company may ship a replacement product to the customer or the customer may return the product to a depot for repair. Removals

also include items replaced in the place of purchase.

When a company recalls an item, it contacts the impacted parties, supplies information on how to correct the problem, and ensures a plan to prevent the recurrence of the same. Sometimes unsold finished goods are recalled from internal warehouses and refurbished items are recalled from the exchange pool. In such cases, notification and corrective action are directed to the appropriate internal parties. In the cases where the manufacturer issuing the recall is not aware of the end consumers, he only notifies the distributors and instructs them on the various corrective actions to take.

Recall Process Flow

There are different types of user types involved in a typical recall business flow.



Quality Manager: Responsible for monitoring customer complaints and the return stream to determine the potential quality event. The Quality Manager can log a product service request in Agile to indicate to the product management and engineering teams that a quality event has occurred.

Product Manager: Works with the Quality Manager to determine if a product service request indicates a legitimate quality event that requires corrective action. If action is required, the Product Manager works with the Engineering and Service teams to determine the best corrective action for the problem.

Service Manager: Responsible for launching and managing the recall effort. The Service Manager provides reports on recall progress and cost, and is responsible for ensuring that service fulfillment is performed.

Returns Coordinator: Works through the queue of recall orders to notify customers of the recall and next steps. He is also responsible for requesting the movement of materials from one location within the enterprise to the appropriate processing location. Additionally, he is responsible for moving materials to another internal or external location after completion of service processing.

End Customer: Receives notification of recall via phone, E-mail or letter. He is responsible for shipping the correct item or part to the appropriate location based on the information provided. He should be able to view details and status for their recalled product online.

Receiving Clerk / Shipping Clerk: Receiving Clerks receive returned materials at the receiving dock. They enter returned material information into the system; log discrepancies between expected and actual returns, and stage material for the next step in processing. Shipping Clerks pack and ship materials to their next destinations, both within an organization or external to it.

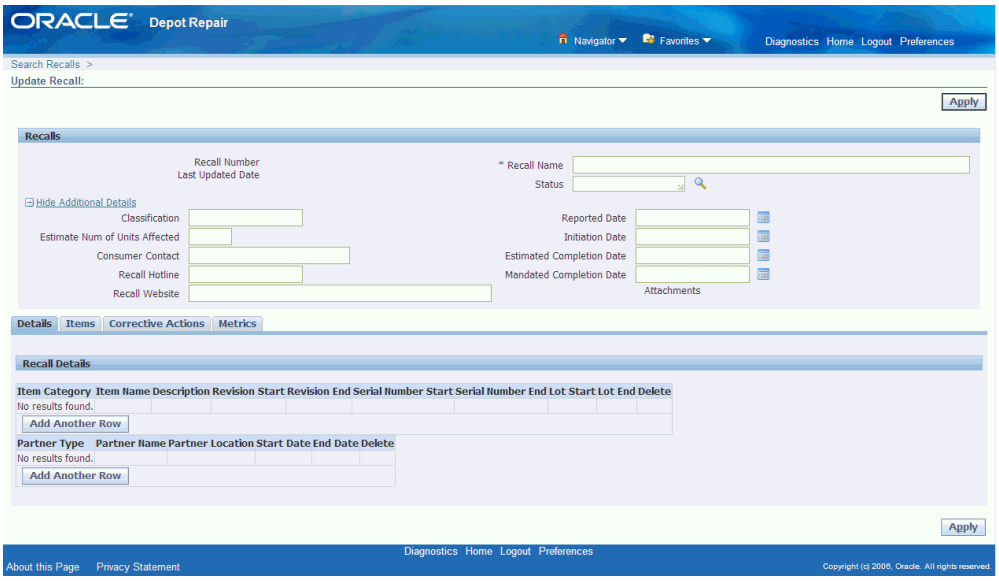
Service Technician (internal or third party): Responsible for processing recalled items. This involves performing repair, upgrade, hazardous material removal, part swap, and retirement processing or recycling. He is responsible for tracking the actions they perform, the parts that they use and the hours they spend on each job.

Creating a Recall Event

A recall event must be unique. It is described by attributes that makes it clear as to what event or problem triggered the recall, when it was initiated, who initiated it, and the actions needed to resolve it. The recall record is linked to all the related service requests, repair orders, logistics operations, and service operations required to resolve the recall. These linked connections are required to accurately track the scope, progress and cost of a recall.

To create a recall event:

1. Navigate to the Search Recalls page and click the New Recall button. The Create Recall page opens. This page enables you to create a new recall or view and update the attributes of an existing recall record.



2. Enter the following details in the fields provided. Fields marked as * are mandatory fields.
   - Recall Number: System generated unique identifier for the recall. It is not updateable.
   - Recall Name: Unique name of the recall.
   - Status: The status of the recall.
3. Expand Hide Additional Details to enter the following details:
   - Classification: Codes indicating categorization.
   - Estimated Number of Units Affected: Estimation of units being affected by the recall.
   - Consumer Contact: Employee or contractor who customers contact with recall queries.
   - Recall Hotline: Number that customers call to get details about the recall.
   - Recall Website: Web site for consumers to find out information about the recall.
   - Reported Date: Date on which recall is made public.
   - Initiation Date: Date on which recall activity starts.
   - Estimated Completion Date: Date on which recall is anticipated to terminate.

- Mandated Completion Date: Date on which a regulatory body mandates recall completion.
- Attachments: Represents standard Oracle Applications attachments. You can link attachments to a particular recall.

4. Click Apply to save the new recall. The Update Recalls page opens.

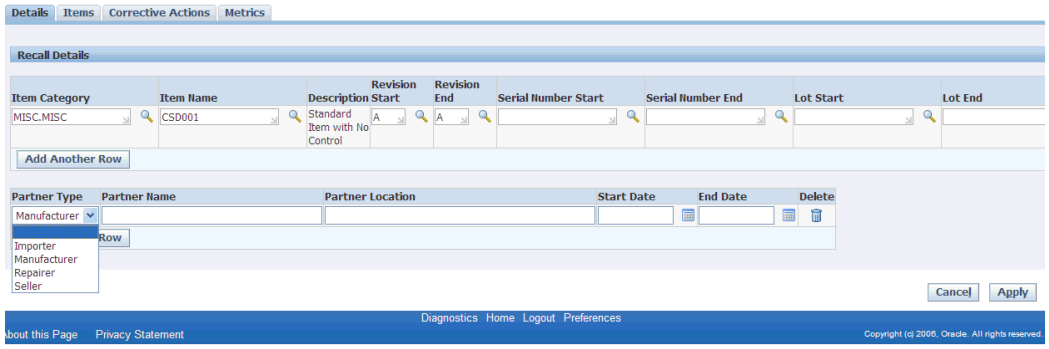
What's Next

The main body of the Create Recall/Update Recalls page contains four tabs - Details, Items, Corrective Actions, and Metrics. For more details about these tabs, select one of the following:

- Using the Details Tab, page 6-5
- Using the Items Tab, page 6-6
- Using the Corrective Actions Tab, page 6-9
- Using the Metrics Tab, page 6-11

Using the Details Tab

The Recall Details region of the Details tab enables you to update the attributes of a recall.



The various attributes that can be updated are:

- Item Category: Includes product category, family, or line. You can include multiple categories in a recall.
- Item Names: Name of the item. You can include multiple names in a recall.
- Description: Description of the selected item.

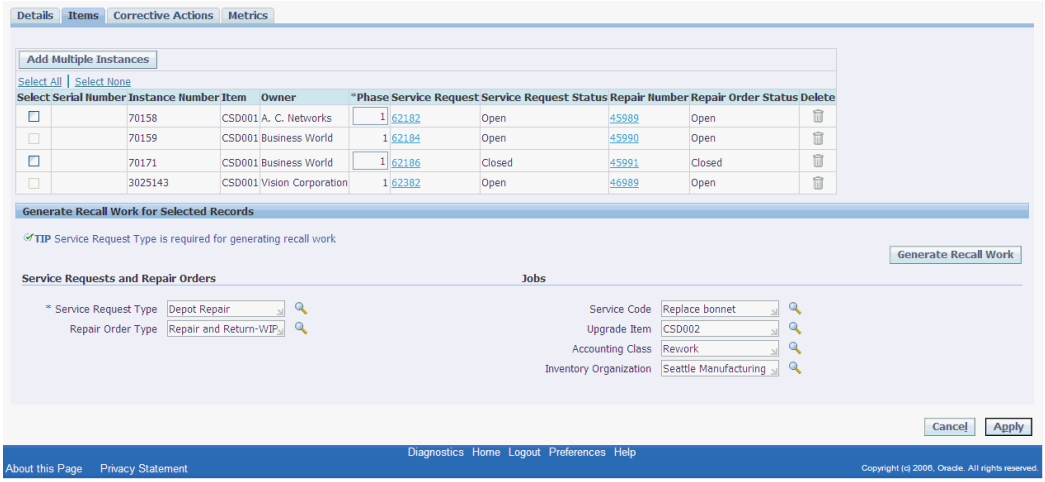
- Revision Start and End: The iterative value assigned to an item with multiple design configurations.
- Serial Number Start and End: The serial numbers stamped on item instances that uniquely identify them. Recalls sometimes apply to specific ranges of serial numbers, or to serial numbers with specific prefixes or suffixes.
- Lot Start and End: Lot numbers tie together groups of items that came from the same production run, shipment, configuration or other arbitrary association. A recall may include multiple lot numbers.
- Partner Type: You can filter by specific partners namely:
  - Importer: Party or parties that imported the finished good into the country of sale.
  - Manufacturer: Party or parties that manufactured a finished good that is under recall.
  - Repairer: Party or parties that repaired a finished good that is under recall.
  - Seller: Vendor party or parties that sold an item to the end customer.
- Partner Name: Name of the specific partner
- Partner Location: Location of the specific partner
- Start Date: The start date of the recall
- End Date: The end date of the recall

After entering all the required attributes, click the Apply button to save the changes to the Recall.

Using the Items Tab

The Items tab contains a list of all known item instances impacted by the recall. You can link each item instance to a service request, repair order and an associated WIP job during recall execution.

You can click on the Service Request number or Repair Number to drill to the service request and repair order windows.

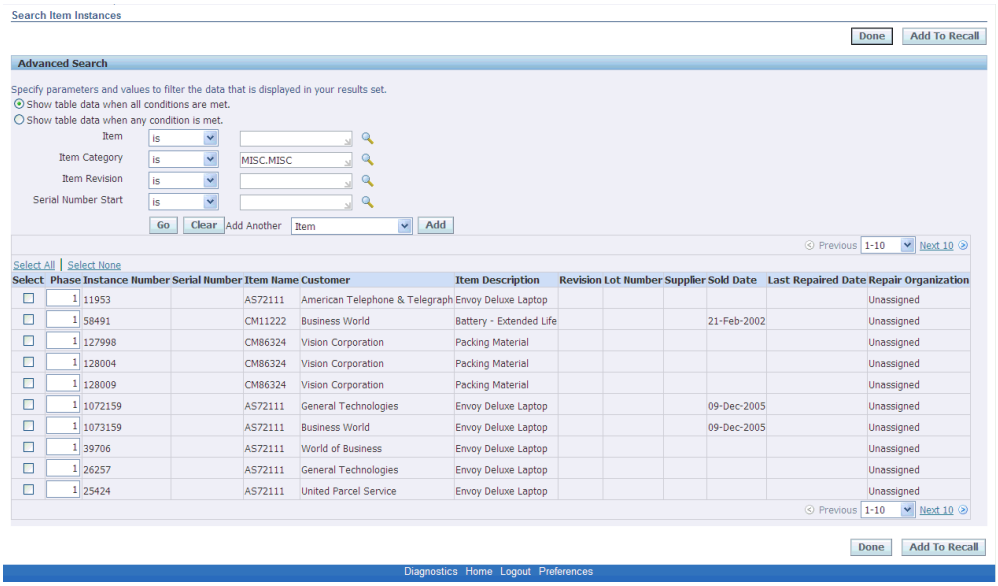


To use the items tab:

1. Click the Add Multiple Instances button to navigate to the Search Item Instances page. The Search Item Instance page allows you to perform advanced searches against the Install Base.

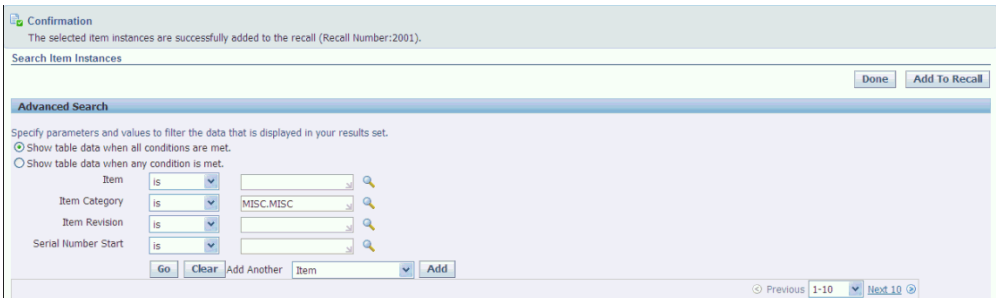
2. Specify any one of the mentioned search parameters to query for the required item instance. To add more search parameters, select a parameter from the Add Another list and click the Add button.

3. Select the Go button to display the Install Base instances matching your search criteria.



4. Select the item instance you want to add or click the Select All option to add all the item instances.

5. Click the Add to Recall button. A confirmation message appears confirming the addition of item instances.



6. Click the Done button. The Update Recall page appears with the selected item instance(s).

7. Select one or more instance numbers and click the Generate Recall Work button to generate service requests, repair orders and/or repair jobs for them. The quantity on the repair order is directly derived from the quantity specified in Install Base for the instance.

   - If you enter only the Service Request Type and click Generate, it creates a service request for each selected item instance, or if there are multiple non-serialized quantities create a single service request for the entire non-serialized quantity.

- If you select both Service Request Type and Repair Order Type and click Generate, it creates a service request and repair order for each item instance, again consolidating multiple non-serialized quantities.

- If you enter a Service Request Type, a Repair Order Type and a Service Code and click Generate, it creates a service request, repair type and repair job for each checked item instance, again consolidating multiple non-serialized quantities.

- If no service request exists for an item, you cannot generate repair orders and jobs. Similarly, if no repair order exists, you cannot generate a job for an instance. However, if a service request was previously created for an instance, then you can generate a repair order and job for it at a later time.

- If an upgrade item is specified, and a job is created for the selected instance, the job is created for the upgrade item and not for the item specified by the instance. This job has at least one material requirement line with item as the item of the selected instance.

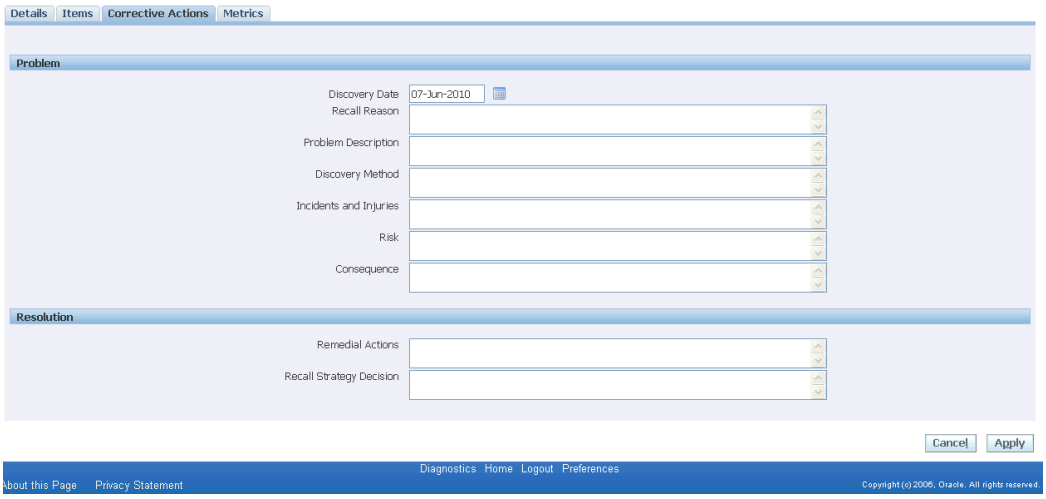
8. The system generates a service request, repair order, and work order for the specific item instance.

9. You can navigate to the Repair Order page of the Technician Portal by clicking on the Repair Number link generated on the Items tab. The Repair Execution tab displays the operations, materials and resources specified by the Service Code that displayed on the Items tab before you clicked Generate Recall Work.

Using the Corrective Actions Tab

When a company recalls an item, it contacts the impacted parties, supplies information on how to correct the problem, and puts a plan in place to prevent the problem from happening again. Sometimes unsold finished goods are recalled from internal warehouses and refurbished items are recalled from the exchange pool. In such a case, notification and corrective action are directed to the appropriate internal parties. In some cases, the manufacturer issuing the recall may not know the end consumers, and notifies their distributors and instructs them on the corrective actions to take.

The Corrective Actions tab stores information regarding the reason for the recall, risk, discovery and resolution plan.



Problem Region

The Problem region enables you to enter the problem details. Enter the following information in the fields provided:

- Discovery Date: The date on which the company realized that a recall is needed.
- Recall Reason: Descriptive text describing why a particular recall was made.
- Problem Description: Description of the problem that resulted in a need for recall.
- Discovery Method: Description of how the problem was identified.
- Incidents and Injuries: Description of notable cases of occurrence, especially those involving injuries.
- Risk: Describes the possible risks introduced if the recall is not made.
- Consequence: Description of the potential impact to customer health, customer satisfaction, company reputation and company finances.

Resolution Region

Resolution region enables you to enter the details of the remedial actions taken. Enter the following information in the fields provided:

- Remedial Actions: Description of specific actions that need to be taken to resolve the problem under recall.
- Recall Strategy Description: Description of the plan of action for the recall. This is required for reporting to regulatory agencies. This includes a description of the

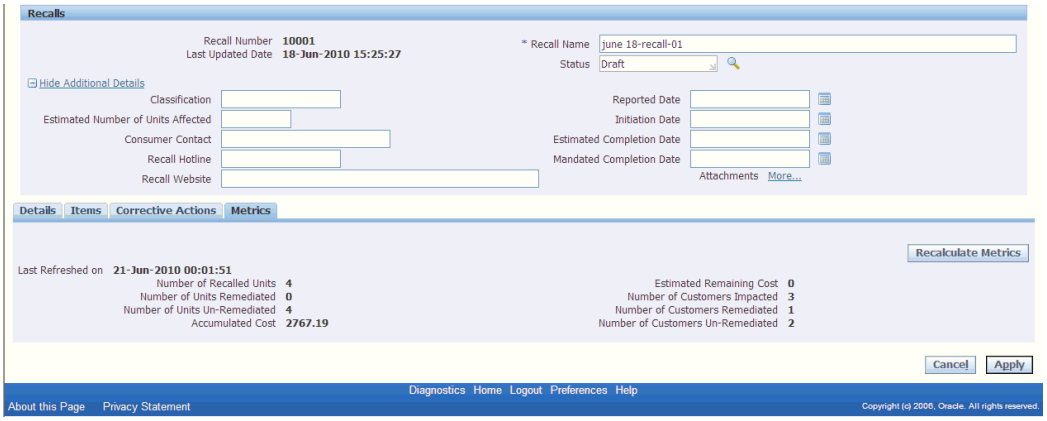
different phases of the recall.

After entering the problem and resolution details, click the Apply button to save the changes to the Recall.

Using the Metrics Tab

The Metrics tab provides information regarding how many item instances are impacted, how many customers are impacted, how many items still require processing, and how many customers are still impacted.

Additionally, the Metrics tab tracks the accumulated cost of the recall so far and the estimated remaining cost of the recall.



The various fields in the Metrics tab display the following information:

- Number of Recalled Units: Derived from the number of item instances linked to a recall. If item instances have multiple quantities, the total quantity is aggregated.
- Number of Units Remediated: Derived from the quantity of Install Base (IB) instances linked to the recall with closed service requests. If an IB instance with multiple quantities is linked to a service request, and the service request is still open, the system considers the entire quantity un-remediated. If the service request is closed, the system considers the entire quantity remediated.
- Number of Units Un-remediated: Derived from the number of item instances linked to a recall for which no closed service request exists. In cases where item instances linked to the recall have no service request, these instances are included as un-remediated.
- Accumulated Cost: The calculation for accumulated cost factors in the cost of issued material and transacted labor time for jobs linked to the recall.
- Estimated Remaining Cost: Derived as, (Accumulated cost till date / Number of units used for calculation of accumulated cost) * Number of item instance quantities

that are eligible but not yet costed

Number of item instances that are eligible but not yet costed, represent all the instances that do not have a positive cost yet, minus the closed service requests (SR). Since a closed SR is a remediated unit, you must not consider it for the calculation of estimated cost remaining.

Example

A recall has 4 instances linked to it and the quantity for all the instances in Install Base (IB) is 1.

Instance 1 has SR, RO and WIP job created and some part and labor costs are recorded against it. Assume the cost is $100.00

Instance 2 has SR, RO and WIP job created but no part of labor costs recorded against it.

Instance 3 has SR and RO created but no WIP job created against it yet.

Instance 4 has only SR created and the SR is closed.

The Estimated Remaining Cost: in this case is (100/1)*2.

- Number of Customers Impacted: Derived from the unique number of customers linked to the recall. This is determined from the install base instances linked to the recall.
- Number of Customers Remediated: Derived from the unique number of customers linked to the recall for which all service requests are closed.
- Number of Customers Un-remediated: Derived from the unique number of customers linked to the recall whose service requests are not all closed.
- Click the Recalculate Metrics button to refresh the Recall Metrics.

Finding a Recall

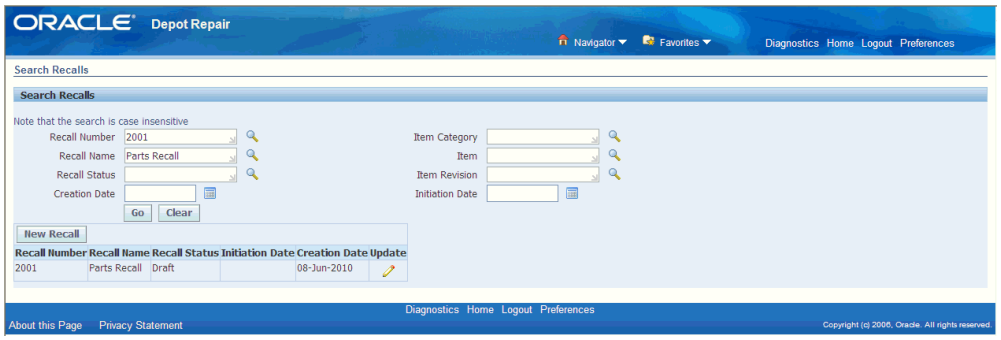
On the Search Recalls page, you can retrieve Recall records from the database. A search in Oracle Depot Repair enables you to retrieve Recalls based on parameters related to a Recall. You can use a combination of these parameters to restrict your search so as to retrieve only the Recall that you want.

To find a recall:

1. Navigate to the Search Recalls page.
2. Enter any one of the following search parameters:
   - Recall Number

- Recall Name
- Recall Status
- Creation Date
- Item Category
- Item
- Item Revision
- Initiation Date

3. Click the Go button. The results area displays the recall record matching your search criteria.



7

Returns Dashboard

This chapter covers the following topics:

- Overview
- Returns Business Intelligence Page Overview
- Using the Returns Tab
- Using the Eco-Impact Tab

Overview

Returns Dashboard enables the organizations to monitor its return streams to reduce returns processing costs, recover value from returned assets, build better products, and minimize its impact on the environment. Returns Dashboard also helps to adhere to various environmental regulations such as WEEE and ROHS. These laws require organizations to take back products that a customer no longer wants, take back packaging materials, track the recycling programs and scrap contributions, and remove hazardous materials from returns and dispose them properly. Organizations require tools to help manage these new requirements, minimize their costs and provide the reporting necessary to comply with the legislation.

The Returns Dashboard enables you to perform the following:

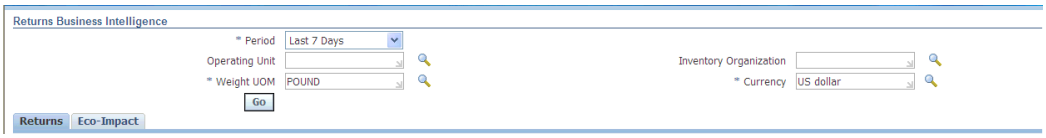
- Monitor how much material is being returned through each return stream: Returns dashboard helps to monitor how much material is returned from customers and the value of that material. This helps to reduce the overall number of returns, monitor the return stream to react quickly to rapidly increasing returns, and create programs to increase the recovery of higher-value assets.

- Monitor how much scrap and hazardous material comes from returns: Companies have legal and ethical responsibility to monitor and mitigate their impact on the environment. In addition to energy consumption and carbon emissions, manufacturing and retail companies produce significant amounts of scrap and hazardous waste. Returns Dashboard provides the capability to monitor how much

of the return stream ends up in scrap so that effective ways are developed to re-use and recycle materials and to build products that create less waste and hazardous material.

Returns Business Intelligence Page Overview

The Returns Business Intelligence page displays current Returns Streams and Material Disposition metrics. The header of the Returns Business Intelligence page enables you to select the time period and organizational scope for which you want to see data.



- Year to Date displays data for the current year.
- Quarter to Date displays data for the current quarter of the selected year..
- The Last 7 Days allows you to pick the last seven days (inclusive).
- Choosing a specific date displays data only for that date.
- Choosing the current date, month, quarter or year, the Dashboard displays data for that period-to-date.

You can view metrics for across all operating units and also view metrics for any operating unit if the profile option, CSD: Returns Dashboard Visibility Level, is set to Enterprise level. If you have operating unit visibility, and MOAC is enabled, the Operating Unit field in the Returns Dashboard header requires you to pick an operating unit you have access to via MOAC setup, in order to query Returns metrics. If MOAC is not enabled and the profile is set to Operating Unit, then the operating unit field in the Returns Dashboard is not updateable and is set to the operating unit specified by the profile MO: Operating Unit.

To view the relevant return streams, enter the fields mentioned above and click the Go button. The Returns tab and Eco-Impact tabs populates with the information of the specified period.

The body of the Returns Business Intelligence page contains two tabs - Returns and Eco-Impact. For more details about these tabs, select one of the following:

- Using the Returns Tab, page 7-3
- Using the Eco-Impact Tab, page 7-4

Using the Returns Tab

The Returns tab displays a consolidated report of the number of units returned by the return stream

Returns | Eco-Impact

Return Stream Comparisons

TIP Prior Period = Same Period in Prior Year

Return Stream	Units Returned			Returned Weight		Returned Value	
	Selected Period	Prior Year	Percent Change	Selected Period	Prior Year	Selected Period	Prior Year
Customer Return For Credit	5			150		250	
Retired Assets	1			30		906.65	
Retired Spares	2	4	-50	60	120	100	200
Trade In		10			300		500
e-Waste	1			30		50	

The Return Stream Comparisons region displays the following information.

- Return Stream: Return Streams are lookups associated with an Order Management (OM) return reason code. Returns must have an OM reason code that is linked to a Return stream in order to be shown in this table.

- Units Returned Selected Period: Represents the number of units on RMAs for the specified return stream within the period of analysis. You can query this from the Sales Order and Repair Order tables.

- Units Returned Prior Year: Represents the number of discrete units returned to the business that map to the specified return stream during the prior year. Prior year represents same period of time as the selected period, except in the prior year. For example, if the selected period is March 1st-31st 2010, then the prior year data is returns from March 1st-31st 2009.

- Returned Weight Selected Period: Represents the total weight of all units returned that map to the specified return stream. The weight of any item is defined for it in the Inventory Item Master.

- Returned Weight Prior Year: Represents the total weight of all units returned during the prior year. The weight of any item is defined for it in the Inventory Item Master.

- Returned Value Selected Period: Represents the total value of all units returned that map to the specified return stream. The value of any item is specified as the standard cost of that item in Cost Management.

- Returned Value Prior Year: Represents the total value of all units returned during the prior year. The value of any item is specified as the standard cost of that item in Cost Management.

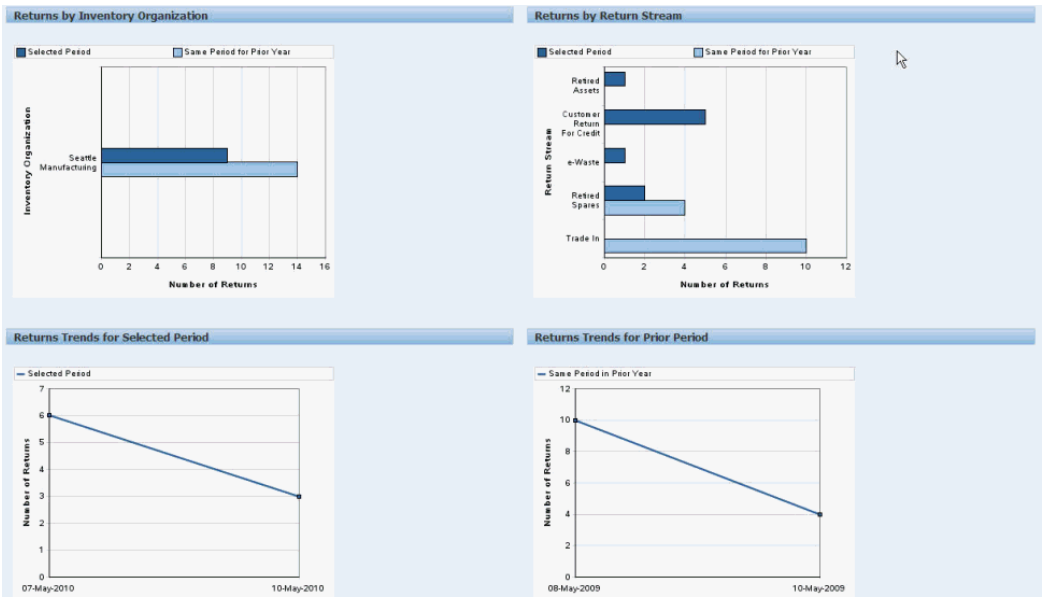
The Returns by Inventory Organization graph represents the flow of returns for a particular inventory organization for a selected period and its corresponding previous

year.

The Returns by Return Stream graph represents the flow of returns for various return streams for a selected year and its corresponding previous year.

The Returns Trends for Selected Period graph shows the total flow of returns for a selected period.

The Returns Trends for Prior Period graph shows the total flow of returns for the previous period.



Using the Eco-Impact Tab

The Eco-Impact Tab provides a comparative analysis of targeted eco-impacts. The tab provides the following information:

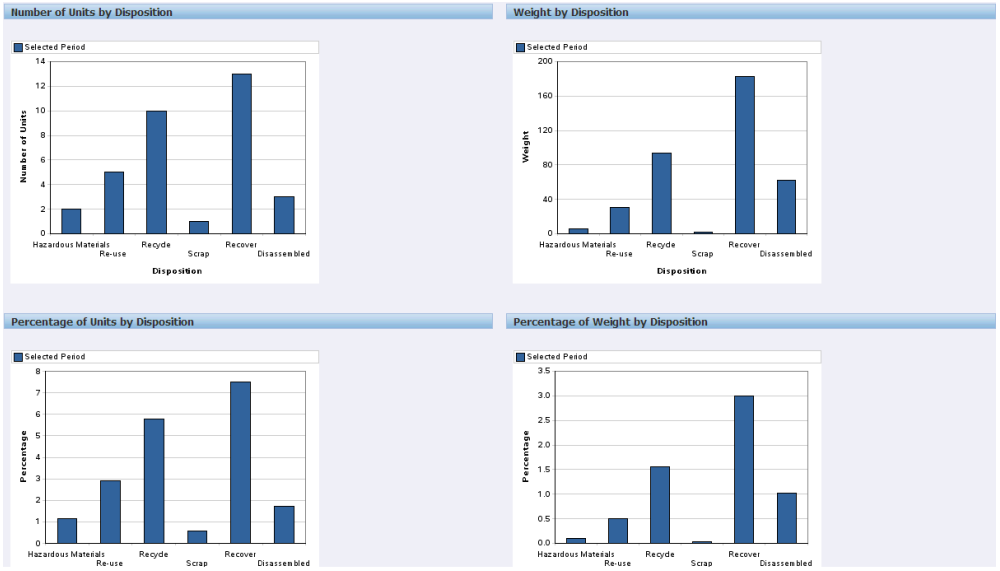
- Number of Units by Disposition shows the number of units for each disposition in the selected period vis a vis the prior period and the percentage change in these periods. Green threshold indicators indicate that everything is operating within acceptable limits.

- Weight by Disposition shows the total weight of the units transacted for each disposition in the selected period vis a vis the prior period and the percentage change. Green threshold indicators indicate that everything is operating within acceptable limits.

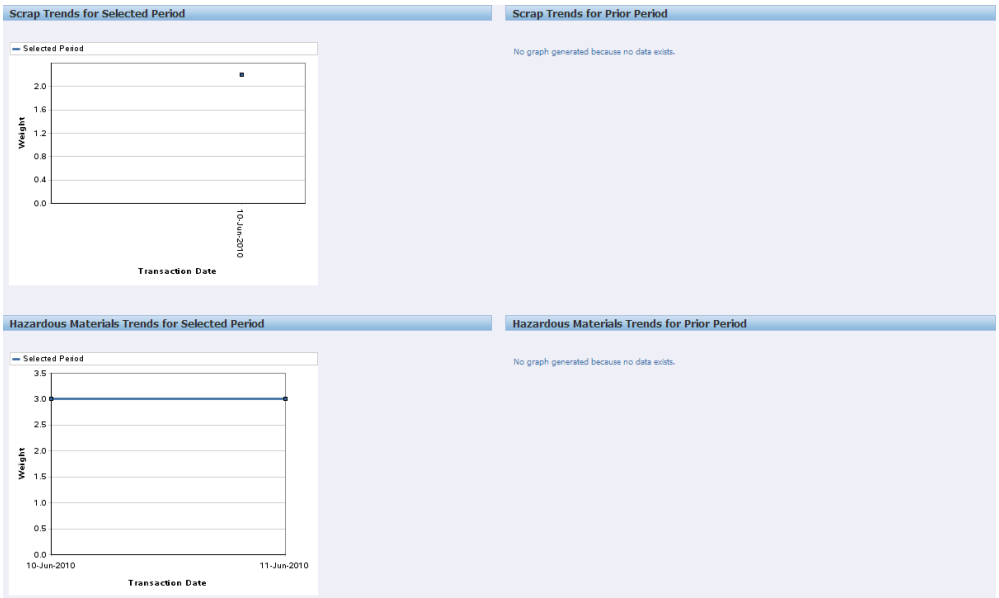
- Percentage of Units by Disposition shows the number of units dispositioned against the number of units returned in all return streams expressed as a percentage.

- Percentage of Weight by Disposition shows the total weight dispositioned against

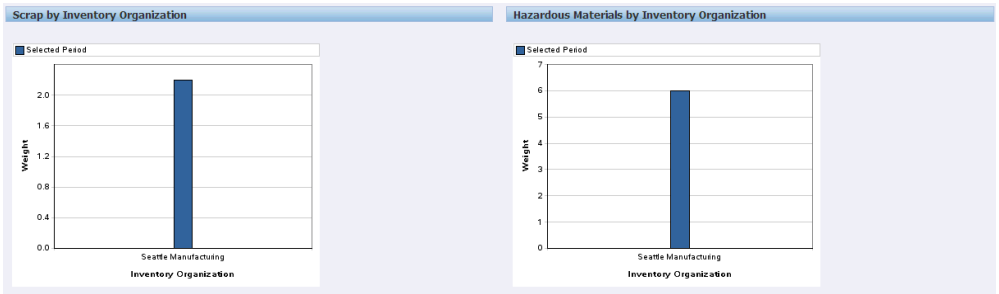
the total weight returned in all return streams expressed as a percentage.



- Scrap Trends for Selected Period shows time-series trends for weight of material sent to scrap during the analysis period.
- Scrap Trends for Prior Period shows time-series trends for weight of material sent to scrap during the same period in prior year.
- Hazardous Materials Trends for Selected Period shows time-series trends for weight of material disposed as hazardous materials during the analysis period.
- Hazardous Materials Trends for Prior Period shows time-series trends for weight of material disposed as hazardous materials during the same period in prior year.



- Scrap by Inventory Organization shows the weight of returned material sent to scrap for a particular Inventory Organization.
- Hazardous Materials by Inventory Organization shows the weight of returned material disposed as hazardous materials for a particular Inventory Organization.



Note: All the Scrap and Hazardous Materials metrics are measured by the amount/weight of the materials that were WIP negative issued or returned with a reason code that belongs to the Scrap/Hazardous Materials dispositions that were setup.

8

Receiving Returns using the Bulk Receiving Module

This chapter describes how to easily receive items into the depot that arrive with or without an RMA.

This chapter covers the following topics:

- Overview
- Entering and Processing Bulk Receive Data
- Bulk Receive Items Processing Logic

Overview

The Bulk Receiving module enables you to record the information required to process repair order items when they arrive in the depot with or without a return materials authorization (RMA). This module enables a receiving clerk to process both expected and unexpected receipts using the same screen.

In general, you use the bulk receiving function to create a batch of items per customer per shipment. The items can have any of the following attributes: :

- Serialized or non-serialized
- Trackable or non-trackable - the tracking is performed by Oracle Installed Base
- Lot controlled
- Locator controlled
- Revision controlled

All combinations of these attributes are allowed.

The bulk receiving module facilitates the following:

- For a returned item if a matching RMA exists, the system automatically receives the item against that RMA. In this case, the receiving clerk does not need to know the RMA number.
- For a returned item if no matching RMA exists but an open RMA exists for that customer, the system automatically creates a Repair Order (RO) and RMA with the item received.
- For a returned item if no SR, RO, or RMA exist, the system automatically generates the SR, RO, and RMA and receives the item against it. The system marks such an RMA as an unexpected receipt.
- For a returned item, you can capture unique external reference number, if any, using bulk receiving. You can personalize this field to capture the required external reference number.
- In case of over-receipt, the system automatically receives the material by creating new RMA lines to match the over-received quantity. Corresponding new ship lines are also created for repair types that require them, and the system tracks this material as unexpected for later audit.
- In case of under-receipt, the system automatically receives the materials returned and then split off separate open RMA lines for the materials pending receipt.
- Few customers log a service request for items they return, but do not specify the item numbers, serial numbers or quantities. The service request is used to track that a shipment was sent for service. At receipt, you can open a SR to match the items received, and have the system automatically create the RO and RMA numbers for each returned item.
- Bulk receiving supports capture of locator, lot and revision controlled items at the time of receiving.

Bulk Receive Process Overview

For each batch perform the following operations:

1. Enter either the customer account number, or a service contract number - from which Oracle Depot Repair derives the account number.

   Note: The search criteria in the header region are only used to uniquely identify a Party and Account. It does not filter the search to limit serial numbers.

2. For each item, enter as much of the following data as you know:

- Item Name
- Serial Number, for serialized items
- Quantity (mandatory)
- UOM

  If the UOM is not entered, the primary UOM of the item is derived.

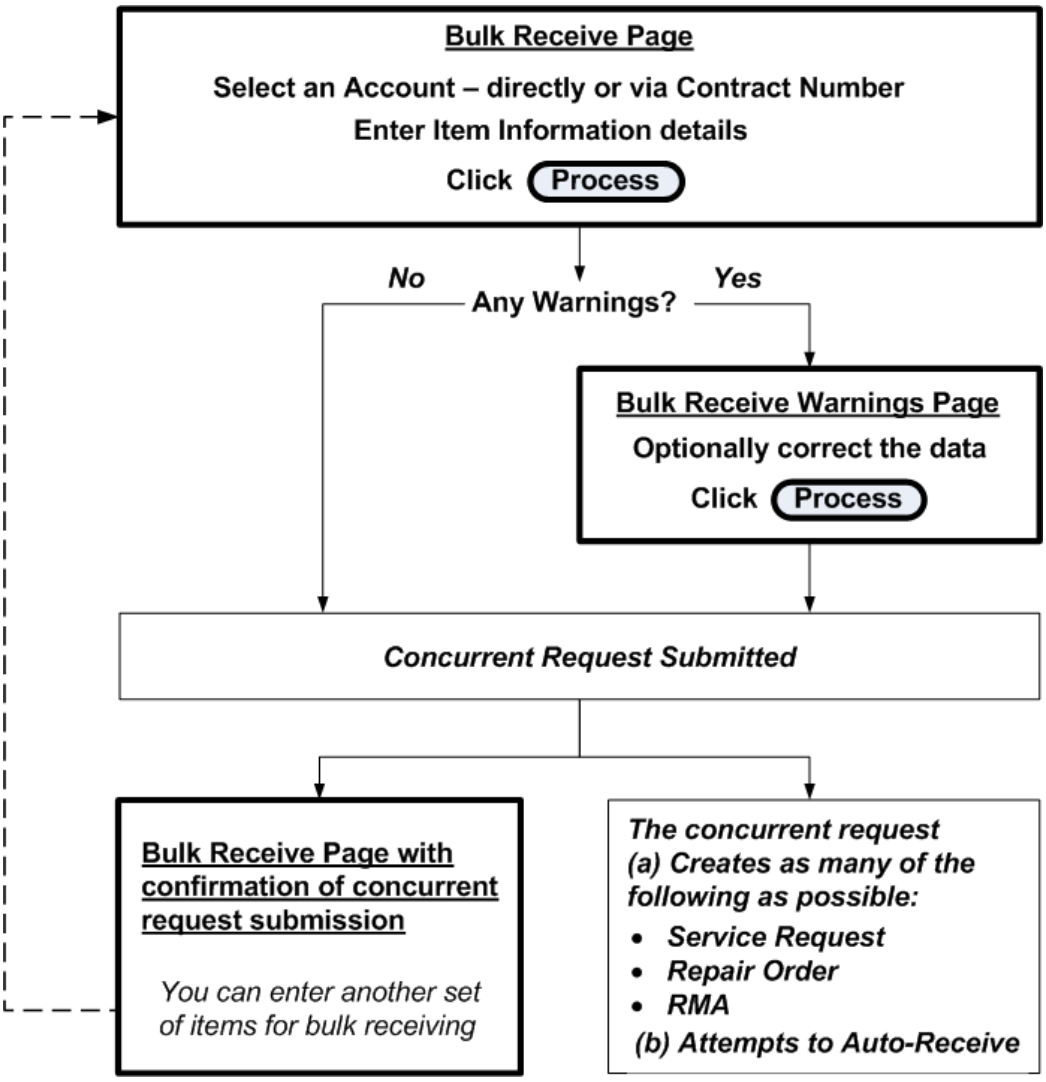
3. Click Process to process the batch; if there are any problems with the data entered for any item, you can correct the data, and then process the batch.

A concurrent request is submitted, whose objective is to create the following objects for each batch of items:

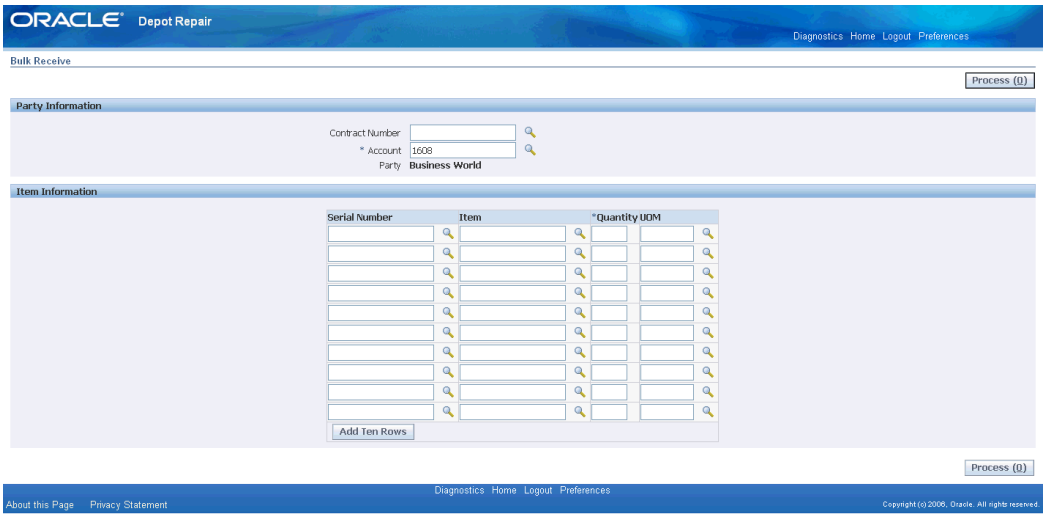
- One service request
- A repair order and an RMA for each item

The concurrent request will also attempt to auto-receive the items. When an item is auto-received, its status in the Return line in the Logistics tab of the Depot Repair Workbench is set to Received.

The following diagram shows an overview of the Bulk Receive processing, as performed in two pages, the Bulk Receive page and the Bulk Receive Warnings page.


Bulk Receive Page
Select an Account – directly or via Contract Number
Enter Item Information details
Click Process
No
Any Warnings?
Yes
Bulk Receive Warnings Page
Optionally correct the data
Click Process
Concurrent Request Submitted
Bulk Receive Page with confirmation of concurrent request submission
You can enter another set of items for bulk receiving
The concurrent request
(a) Creates as many of the following as possible:
Service Request
Repair Order
RMA
(b) Attempts to Auto-Receive

Entering and Processing Bulk Receive Data



Steps

1. Select the Account or Contract Number.

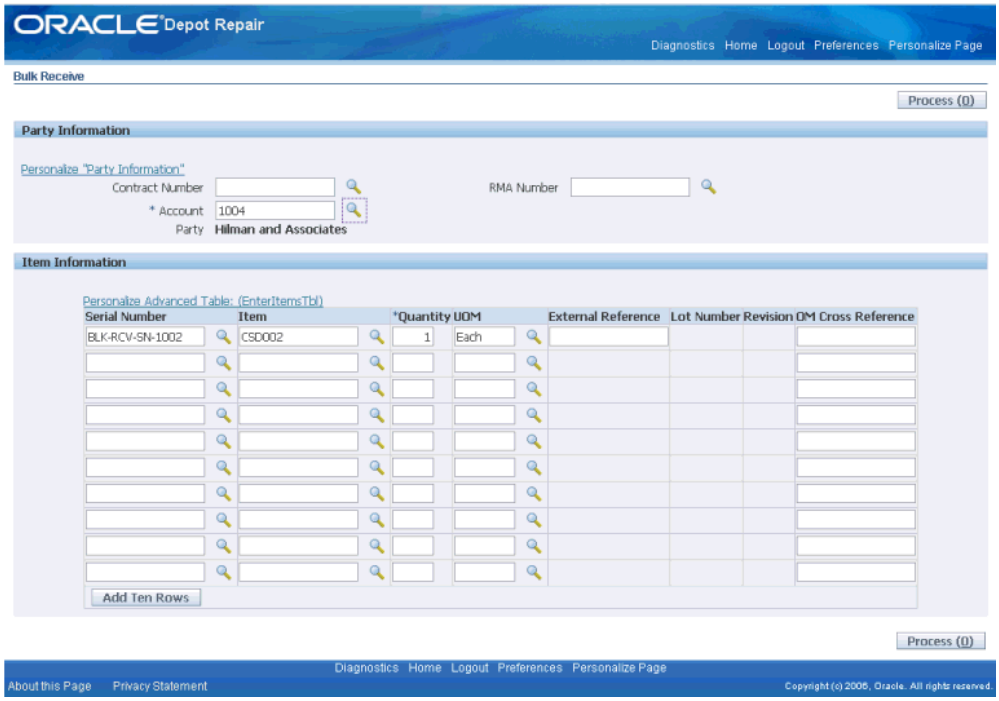
   Oracle Depot Repair uses Contract Number to derive the Account.

   The Party is derived from the Account.

2. For each item, you enter as much of the following data as you know:

   - Item Name
   - Serial Number, for serialized items
   - Quantity (mandatory)
   - UOM

3. For processing the expected receipts, set the profile option, CSD: Enable Expected Receipts for Bulk Receiving, to Yes. The Party Information region has Incident Number that defaults the account details and is used if there are any unplanned receipts. A new unplanned Repair Order is created against this incident number if it is entered.

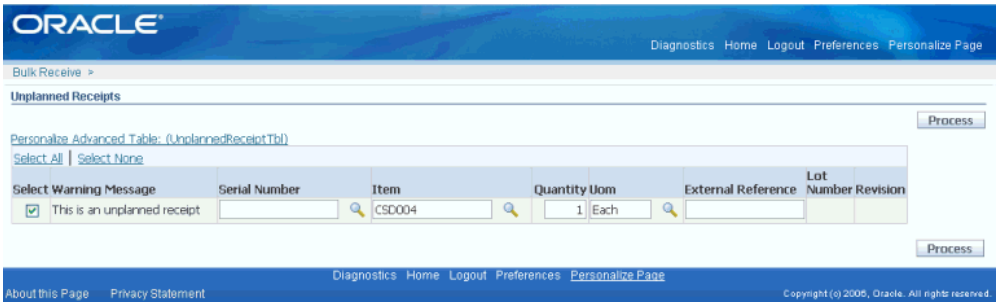


To proceed without processing the expected receipts, continue with the following steps.

4. Click Process.

5. If there are no problems with any of the data, continue at step 9.

6. If there is at least one problem, the Bulk Receive Warnings page appears.



7. You can optionally edit any of the fields.

8. Click Process.

9. The Depot Repair Bulk Receive Items concurrent request is submitted. A confirmation message shows the request number and the Transaction number parameter associated with the request.

Note: Note down the Transaction number. In case there are any errors in the processing of the entries, it can be reused in a subsequent submission of the concurrent request - see step 12.

10. The concurrent request attempts to create the following objects for each data row, depending on what data has been entered:
    - One service request
    - A repair order and an RMA for each item

    The concurrent request will also attempt to auto-receive the items.

11. To see the results of the concurrent request, examine the output of the request.

    The report shows which objects were created, and also any errors.

12. After you correct the errors, you can explicitly resubmit the Depot Repair Bulk Receive Items concurrent request, entering as a parameter the same Transaction number that appeared in the confirmation message at step 8. This resubmitted concurrent request will attempt to process only the error entries.

Bulk Receive Items Processing Logic

The objects created during the Bulk Receive processing depend on the following:

- The predefined attributes of each item
- Whether or not you entered all the required attribute values for the item
- Predefined profile options

Predefined Item Attributes

The item attributes are associated with the item when it is defined in Oracle Inventory. The item attributes examined by the Bulk Receive processing logic are as follows:

- Whether the item is trackable by Oracle Installed Base
- Whether the item is serialized, and if so, how is the serial number attached to the item instance - predefined, at receipt or at sales order issue?

Item Data Entered on Bulk Receive Page

The main consideration for entering bulk receive data is to enter item identification and serial numbers when required for serialized items.

If you enter insufficient or mismatching data, you will get warnings on the Bulk Receive Warnings page.

> **Note:** After you have entered either an Account or a Contract Number, for each item entry - that is, each data row entered in the Bulk Receive page - the Bulk Receive processing logic always creates a service request, which you can edit later.

Use of Profile Options

Default Values

Several fields in the objects created by Oracle Depot Repair derive their values from profile options.

The profile options used for default service request values are:

- CSD: Default Service Request Owner for Bulk Receiving
- CSD: Default Service Request Severity for Bulk Receiving
- CSD: Default Service Request Status for Bulk Receiving
- CSD: Default Service Request Summary for Bulk Receiving

  This provides the Problem Summary for the service request.
- CSD: Default Service Request Type for Bulk Receiving
- CSD: Default Service Request Urgency for Bulk Receiving

The profile option used for repair orders is:

- CSD: Default Repair Type for Bulk Receiving

The profile option used for RMAs is:

- CSD: Default Subinventory for Bulk Receiving

Ownership Transfer

The profile option CSD: Transfer of Ownership for Bulk Receiving is used when all the following conditions apply:

- A serial number is entered on a Bulk Receive row.
- The item is defined as trackable by Oracle Installed Base.

- The party associated with the entered serial number does not match the party in the Bulk Receive batch header.

If an item instance for the serial number does not exist, it is created, else the existing item instance is updated.

For both item instance creation and item instance update, the item instance owner is set according to the value of CSD: Transfer of Ownership for Bulk Receiving, as follows:

- If the value of the profile option is Yes; the item instance owner is set to the Bulk Receive party.
- If the value is No, the item instance owner is set to the party associated with the entered serial number, with the following Note: "Install base owner will be changed to the entered Party."

Bulk Receive Processing Logic Table

> **Note:** In this section, the term Internal Party refers to the Party Name set up in the Oracle Installed Base Install Parameters.

If you do not enter the Item field in a Bulk Receive row, then only a service request is created, with the following attributes:

- Party = Internal Party
- Note = "No item has been entered"

If you enter an Item in a Bulk Receive row, the table following shows the different processing options that occur.

Key to the abbreviations in the following table:

- *IB = Oracle Installed Base*
- *RMA = Return Material Authorization*
- *RO = Repair Order*
- *SN = Serial Number*
- *SR = Service Request*

IB-trackable Item?	Serialized Item?	Serial Number Entered?	Other	Processing Logic
Yes	Yes	Yes	SN matches the Item entered	Create SR, RO, RMA, and attempt to Auto-Receive.
Yes	Yes	Yes	SN does not match the Item entered	New IB instance and SN created for the Item. Create SR, RO, RMA, and attempt to Auto-Receive.
Yes	Yes	No	-	Create SR for specified party. If Quantity > 1, then create RO in Draft status; if Quantity = 1, then create RO, RMA, and attempt to Auto-Receive.
Yes	No	Yes	-	Create SR for Internal Party with Note = "Serial number has been entered for a non-serialized item."
Yes	No	No	-	Create SR, RO, RMA, and attempt to Auto-Receive.
No	Yes	Yes	SN matches the Item entered	Create SR, RO, RMA, and attempt to Auto-Receive.

IB-trackable Item?	Serialized Item?	Serial Number Entered?	Other	Processing Logic
No	Yes	Yes	SN does not match the Item entered	If SN is Predefined, then create SR for Internal Party with Note = "Cannot create new Serial num for a Predefined Serialized item". If SN is At Receipt or At Sales Order Issue, then create new SN and create SR, RO, RMA, and attempt to Auto-Receive.
No	Yes	No	-	Create SR for specified party. If Quantity > 1, then create RO in Draft status; if Quantity = 1, then create RO, RMA, and attempt to Auto-Receive.
No	No	Yes	-	Create SR for Internal Party with Note = "Serial Number has been entered for a non-serialized item."
No	No	No	-	Create SR, RO, RMA (all for specified party), and attempt to Auto-Receive.

Comments

If you enter a Serial Number for a serialized item, and a Quantity greater than 1, a error message appears warning you that the Quantity should be 1. Click the link in the error message to take you back to the error row.

If you do not correct the error and continue to Process, the repair order that is created will be in Draft status. You can then enter the individual serial numbers through the standard Oracle Depot Repair facility Tools > Capture Serial Numbers.

9

Executing Repairs using the Repair Technician Module

This chapter describes an enhanced set of operations to process repair items.

This chapter covers the following topics:

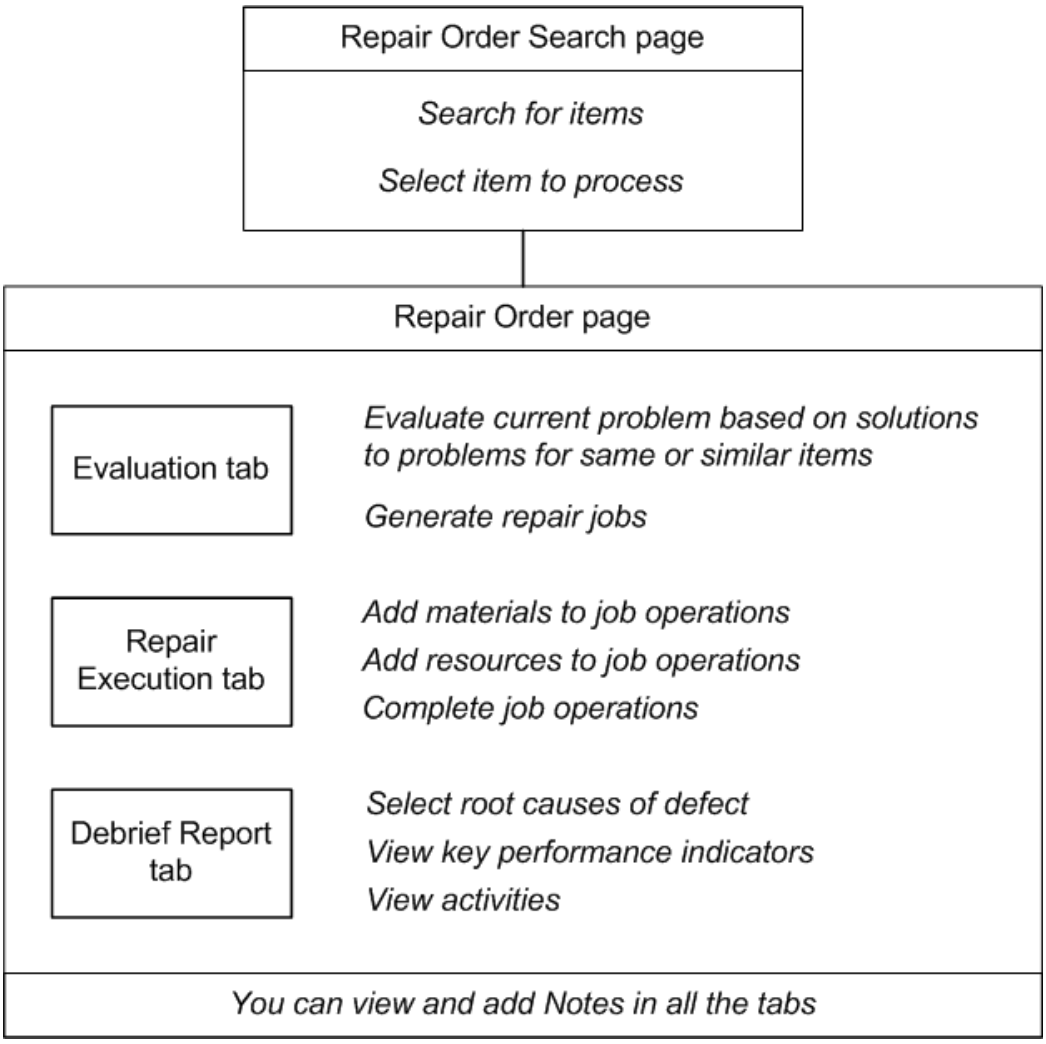
- Overview
- Searching for Repair Orders
- Repair Order Page Overview
- Using the Evaluation Tab
- Using the Repair Execution Tab
- Using the Debrief Report Tab
- View Service Bulletins from the Repair Technician Module
- Manage ECOs
- Backflush Non Serialized Repair Parts
- Auto-Issue Repair Items to Jobs
- Using Time Clock

Overview

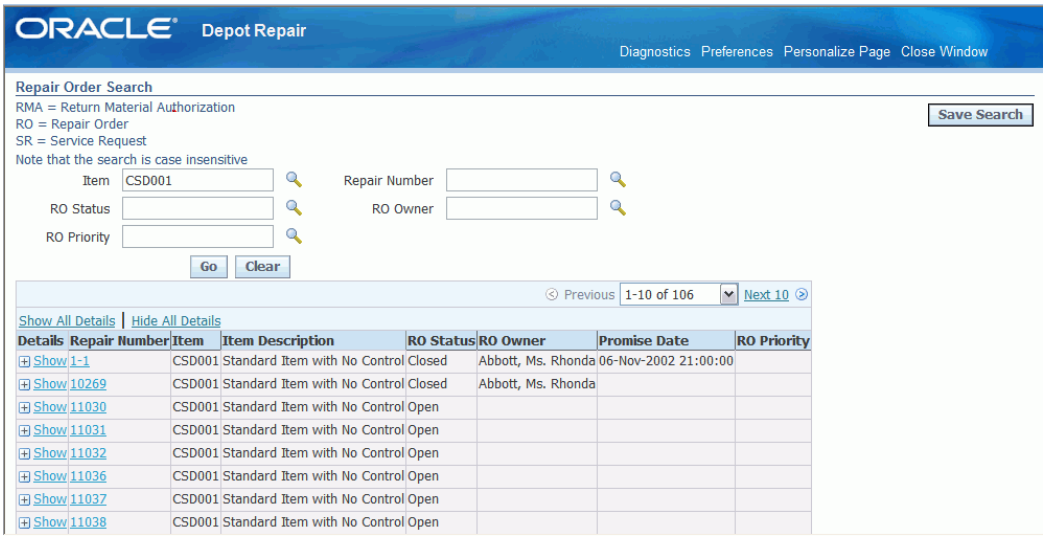
High volume repair is an enhancement to the standard repair and return process. It automates and facilitates the creation of work orders, procuring and issuing materials, and assigning resources with minimal input and decision making from a repair technician. Based on a finite number of possible symptoms and a finite number of responses to those symptoms, the system can recommend or dictate work to be done, materials demanded, and resources needed for low complexity repairs based on symptoms captured by a technician.

The following diagram shows an overview of the high volume repair processing, to be

performed in two pages, the Repair Order Search page and the Repair Order page.



Searching for Repair Orders



In the Repair Order Search page, you can search for all non-draft repair orders.

The seeded default search parameters are

- Item
- Repair Number
- Repair Order Status
- Repair Order Owner

After filling in one or more search parameters, click Go to perform the search.

In the results area, you can hide or show details about each repair order.

Click the Repair Number link to continue processing a repair order in the Repair Order page.

Repair Order Page Overview

The top of the Repair Order page contains general information about the item instance that is being repaired. You can also show or hide repair order details in this region.

Note: You can view the Recall Number link if it's view is personalized. Click on the link to drill down to the view-only Recall Details screen.

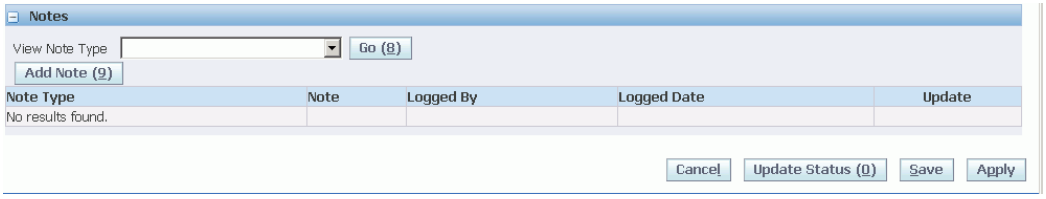
The main actions to perform in this page are controlled by the buttons: Save, Apply, Cancel, and Update Status.

The main body of the Repair Order page contains three tabs - Evaluation, Repair Execution, Debrief Report - where you perform the main repair order processing.

For more details about these tabs, select one of the following:

- Using the Evaluation Tab, page 9-4
- Using the Repair Execution Tab, page 9-7
- Using the Debrief Report Tab, page 9-12

The Notes region, at the bottom of the page, is to allow you to view and add notes.



Using the Evaluation Tab

The Evaluation tab enables you to examine summary information about previous repair orders and service requests for the current repair order item instance, and also the diagnostic codes and service codes associated with the current repair order item. After

evaluating this information, you can generate one or more WIP jobs.

The first-ever display of the Evaluation tab for a repair order item shows the following:

- All the diagnostic and service codes that have been associated with the repair order item.
- All the repair orders that reference the current repair order item instance.
- All the service requests that reference the current repair order item instance.

The main tasks to perform in the Evaluation tab are to select - that is, mark as Applicable - diagnostic codes and service codes to generate WIP jobs with appropriate bills and routings.

Diagnostic Codes Region

The Diagnostic Codes region displays the diagnostic codes associated with the repair order item, that is, the diagnostic codes that fulfill at least one of the following conditions:

- The diagnostic code has the repair order item as one of its item domains.
- The diagnostic code has a category domain which is the same as the category of the repair order item.

Diagnostic Codes

Code	Name	Applicable	Frequency
DC4	Diagnostic Code 4	☐	0%
DC5	Diagnostic Code	☐	0%
DEMDC2	Demo Diagnostic Code 2	☐	0%

For more information, see the topic Setting Up Diagnostic Codes in the *Oracle Depot Repair Implementation Manual*.

The frequency indicates the percentage of times that the diagnostic code was marked as Applicable in all closed repair orders that are for the same repair item.

Using the Diagnostic Codes Region

- Mark one or more of the diagnostic codes as applicable.

  The applicable diagnostic codes are used in determining which service codes to use when you click Recommend Services in the Service Codes region.

Service Codes Region

The Service Codes region initially displays the service codes associated with the repair

order item, that is, the service codes which fulfill at least one of the following conditions:

- The service code has the repair order item as one of its item domains.
- The service code has a category domain which is the same as the category of the repair order item.

Service Codes

Recommend Services (1) | Generate Jobs (2)

Code	Name	Applicable	Recommendation	Job	Frequency
RMB-001	Replace Mother Borad	☑			8%

For more information, see the topic Setting Up Service Codes in the *Oracle Depot Repair Implementation Manual*.

The frequency indicates the percentage of times that the service code was marked as Applicable in all closed repair orders for the same repair item.

Using the Service Codes Region

1. Mark one or more service codes as Applicable.
2. Click Recommend Services.

   Note: To use this feature, you must have previously set up the recommendations. See Setting up Service Code Recommendations in the *Oracle Depot Repair Implementation Manual*.

   After you click Recommend Services, you may get several service codes returned and automatically marked as Applicable in the Service Codes region, depending on how you set up your recommendations.

   When the profile option CSD: Mandate Service Code Recommendations is set to Yes, then any service codes returned which had been set up with a Recommendation type of Always are automatically marked as Applicable and are disabled. This is to ensure that the service codes are used in any jobs generated from this region.

3. Click Generate Jobs.

   For each service code marked as Applicable, Oracle Depot Repair generates a WIP job, with any bills and routings that were previously associated with that service code.

   For more information, see Setting Up Service Codes in the *Oracle Depot Repair Implementation Manual*.

4. In the Service Code table, click the hyperlinked Job number to drill into the WIP Details. The WIP Details page provides information on the available quantity for

the parts required on a job, the operations which are for outside repair, and other details that are provided in WIP Jobs.

Using the Repair Execution Tab

The general objective of the Repair Execution tab is to enable you to process and monitor the WIP jobs that you have generated for a repair order item from the Evaluation tab of the Repair Order page.

In the Repair Execution tab, you can add materials and resources to jobs. To assist you in doing this, Oracle Depot Repair provides you with statistics of the most common materials and resources used in previous repair orders for the same item.

You can complete operations, and even complete jobs.

1. In the Repair Execution tab, you can also create jobs; to add materials and resources for these jobs, use WIP pages associated with Oracle Work In Process responsibilities.

2. Oracle Depot Repair provides E-records and E-signature (ERES) functionality in WIP mode via Oracle WIP.

The following two new profile options are introduced:

- CSD: Default Current Item Revision for Material Transactions
- CSD: Default Current Item Revision for Job Completions

When the profile options are set to Yes, the current revision defaults and you are not prompted to enter a revision. When the profile options are set to No, the revision does not defaults and you navigate to the Material Details page to choose a revision along with other required item details.

The two profile options behave independently, so that the revisions default for issuing materials but not job completions, or the other way round.

Repair Operations Region

The Repair Operations region shows the operations for the current repair order item instance, whether generated from the Evaluation tab, or created explicitly in the Repair Execution tab.

Using the Repair Operations Region

1. Add operations to a job - select the Add Another Row button to add an operation to the job.

2. Complete operations - select one or more operations, and click Complete.

3. Complete the job - select the Action Complete Job, select the job from the list of values, and click Go.

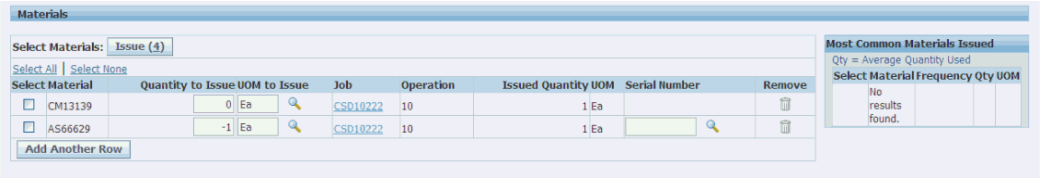
4. Drill into WIP Details – Click the Job link to navigate to the Job Details page to drill into the WIP details of the job.

Materials Region

The Materials region has two sub-regions:

- The general Materials area

- The Most Common Materials Issued area



The first-time display of the Materials area shows the materials automatically added to a job through service codes.

The Most Common Materials Issued area, if populated, shows which materials were used in previous similar repair jobs and repair orders.

Specifically, all closed repair orders for the current repair order item with completed or closed jobs are examined. The Frequency column for a material shows the proportion of those examined repair orders whose completed and closed jobs used the material. The Average Quantity Used shows the average units used in all the "matching" repair orders whose jobs contained the material, rather than in all the examined repair orders.

Using the Materials Region

1. Examine the materials in the Most Common Materials Issued area, and decide if they are relevant to the current repair order. If so, select one or more materials, and click Add to Materials.

   Note: You cannot add materials that already appear in the general

Materials area.

The selected materials appear in the general Materials area.

2. In the general Materials area, you can enter quantity and UOM values for a material before or after it is issued to a job.

3. If the quantity to issue is 1 for a serialized item, you must also enter the Serial Number for the item.

4. For materials added from the Most Common Materials Issued area, enter and select values for Quantity to Issue, UOM to Issue, Operation, and Job.

5. Click Save to save the data you have entered so far.

   If you selected an operation and job in the current session, the materials are added to the job details, but not issued to the job; the Job field displays a link to the job.

6. To issue materials to a job, select one or more materials, and click Issue.

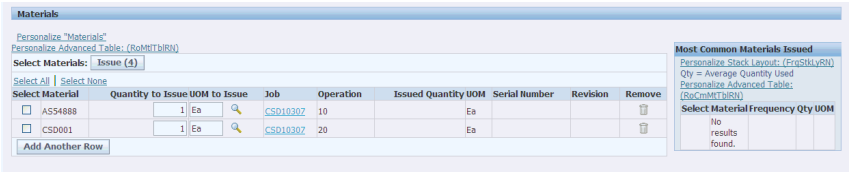
7. For materials that require more information, the Material Issue Details page appears.

   For example, if you want to issue more than one serialized item, you must enter the serial numbers here. Also, if your item has lot control, you must enter the lot number here.

8. After you have issued materials, the general Materials area shows the Issued Quantity and the primary UOM.

9. You can continue to enter Quantity to Issue values, including negative integer quantities.

   Note: You can personalize the Materials table to enable the hidden Revision field. The Revision field allows you to enter and transact revision-controlled items. If the revision field is blank for a revision-controlled item, you are directed to the Material Issue Details page at time of issue or at time of operation or job completion for items with Assembly Pull Supply Type.. If the revision field and all other required fields are entered then the item is issued immediately.



The Revision field defaults to the latest revision for revision- controlled items if the profile option CSD: Default Current Item Revision for Material Transactions is set to Yes. When the profile is set to No, the revision field is not defaulted and it is left blank.

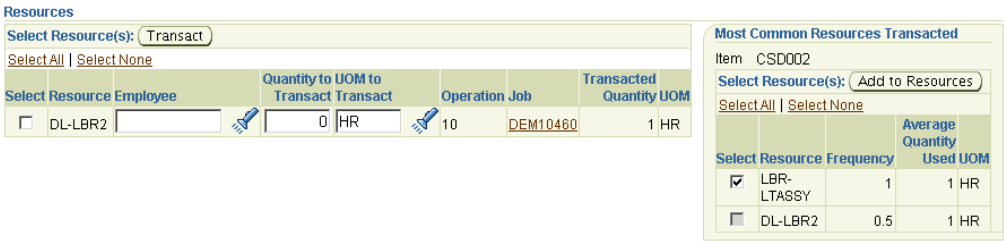
You can personalize the Materials table to display the Request Parts button that enables a technician to create a purchase requisition for one or more items on the Materials table.

You can personalize the Materials table to display the Material Transaction Reason Code column that provides Disposition Code that is used in the Eco-Impact tab of the Returns Dashboard. For more information on the Returns Dashboard, please see: Returns Dashboard chapter.

Resources Region

The Resources region has two sub-regions:

- The general Resources area
- The Most Common Resources Transacted area



The first-time display of the Resources area shows the resources automatically added to a job through service codes.

The Most Common Resources Transacted area, if populated, shows which resources were used in previous similar repair jobs and repair orders.

Specifically, all closed repair orders for the current repair order item with completed or closed jobs are examined. The Frequency column for a resource shows the proportion of those examined repair orders whose completed and closed jobs used the resource. The Average Quantity Used shows the average units used in all the "matching" repair

orders whose jobs contained the resource, rather than in all the examined repair orders.

Using the Resources Region

1. Examine the materials in the Most Common Resources Transacted area, and decide if they are relevant to the current repair order. If so, select one or more materials, and click Add to Resources.

   Note: You cannot add resources that already appear in the general Resources area.

   The selected resources appear in the general Resources area, with the Employee field set to the value of the profile option CSD: Default HR Resource.

2. In the general Resources area, you can enter quantity and UOM values for a resource before or after it is transacted to a job.

3. You can select a new employee.

4. For resources added from the Most Common Resources Transacted area, enter and select values for Quantity to Transact, UOM to Transact, Operation, and Job.

5. Click Save to save the data you have entered so far.

   If you selected an operation and job in the current session, the resources are added to the job details, but not transacted to the job; the Job field displays a link to the job.

6. To transact materials to a job, select one or more resources, and click Transact.

7. After you have transacted resources, the general Resources area shows the Transacted Quantity and the primary UOM.

8. You can continue to enter Quantity to Transact values, including negative integer quantities.

   Note: When you transact the resources in the Repair Technician Portal either by Work In process (WIP) move or manual transact, the records are put into WIP interface tables. A WIP concurrent program then processes it. The control comes back immediately to Repair Technician Portal page. However, the actual transaction data is not posted to the WIP tables immediately. Thus, if we try to import the repair actuals from WIP immediately after completing the job, the actuals may be incomplete at times.

Using the Debrief Report Tab

The Debrief Report tab enables you to view certain post-repair details, such as activity events, summary activity statistics, and key performance indicators, such as time to repair.

You can also select one or more defect types to associate with the repair order.

Root Cause of Defect Region

Evaluation | Repair Execution | Debrief Report

Root Cause of Defect

Applicable	Defect Code	Description
☐	BATTCORR	Battery Corrosion
☐	HDDELECT	Hard Drive - Electrical Failure
☐	HDDMECH	Hard Drive - Mechanical Failure
☐	MBDMGD	Motherboard Damaged
☐	NTF	No Trouble Found
☐	RAMDMGD	RAM Module Damaged

The Root Cause of Defect region lists the defects that you can associate with the repair order. You can optionally select one or more of the defects as applicable to the repair order.

Defect code domain setup enables you to link each root cause code to specific items or item categories. The Repair Technician module displays only the root cause codes that match the item or category of the item on the repair order.

Refer to Oracle Depot Repair Implementation Guide for details on Setting Up Defect Code Domains.

Key Performance Indicators and Activities Regions

Key Performance Indicators

Repair Start	19-Oct-2004
Repair Complete	19-Oct-2004
Time to Repair	0 Hours 0 Minutes
Promise Date	
Late Completion	

Activities

Date	Event
19-Oct-2004 11:27:21	Repair Order Status Updated
06-Nov-2002 13:39:46	Shipment Completed
06-Nov-2002 13:31:32	Job Completed
06-Nov-2002 13:30:10	Job Submitted
06-Nov-2002 13:29:15	Estimate Status Updated
05-Nov-2002 22:00:00	RMA Received

The view-only Key Performance Indicators and Activities region provides statistics about the repair order, including a history of the repair activity events.

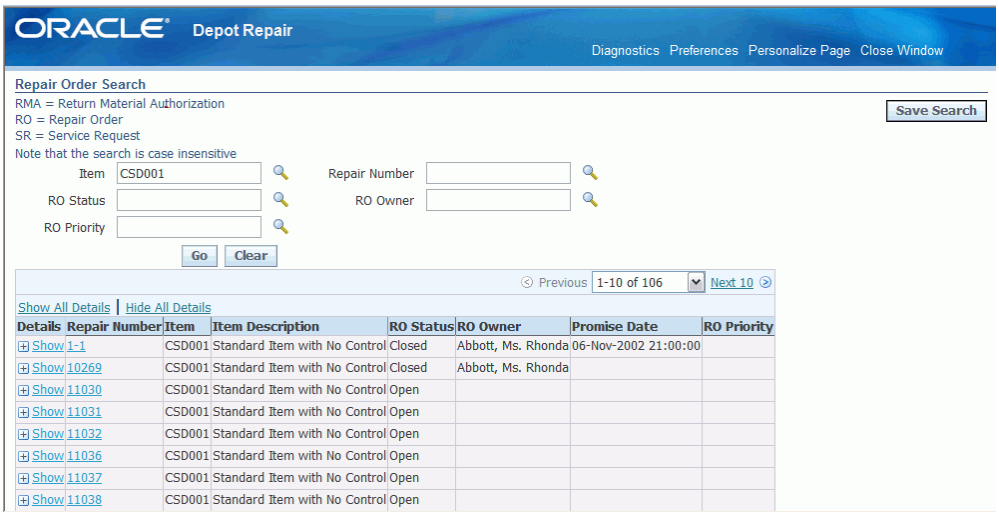
View Service Bulletins from the Repair Technician Module

Depot Repair automatically links a service bulletin to a repair order based on customer defined service bulletin rules. A number of pre-defined bulletin types are seeded in the product, but you can add any additional bulletin types to fit your business needs. Service bulletins provide information to repair managers and technicians regarding:

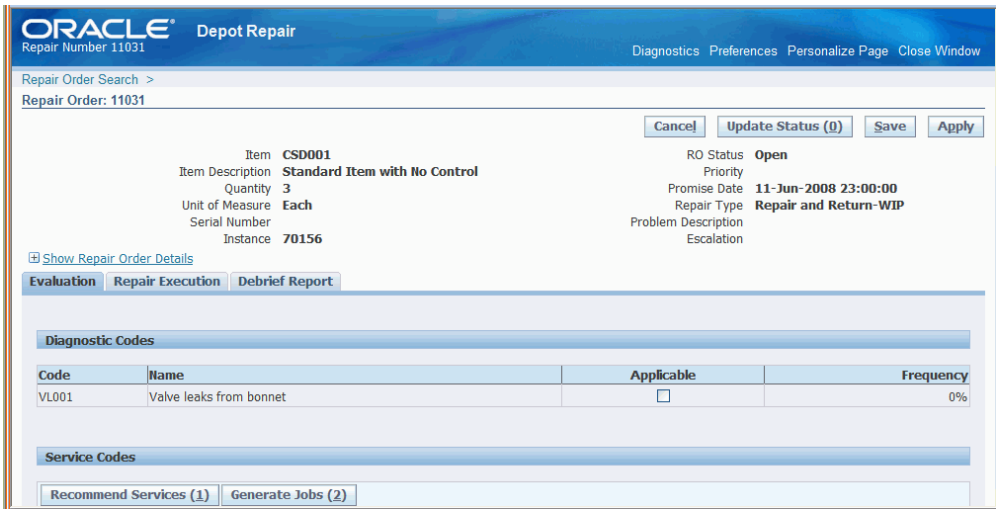
- Recalls
- ECOs, FCOs, or Supercessions
- Regulatory Compliance - WEEE, RoHS, International Laws
- Parts Shortages
- Up-sells and Cross-sells
- Special Customer Entitlements, Priority, or Expedited Processing
- Processing Exceptions - Late Repair Orders, RMAs, Loaners, or Vendor Shipments

To view service bulletins:

1. Navigate to the Repair Technician module. Query the repair order number for the item to associate the service bulletin.



2. Click on the repair order number link to navigate to the Repair Order page. The Repair Order page displays the detailed information of the corresponding repair order number.



3. In the Service Bulletins region, click Retrieve New Service Bulletins to display the newly created service bulletins. You can view a service bulletin by Type. For example:

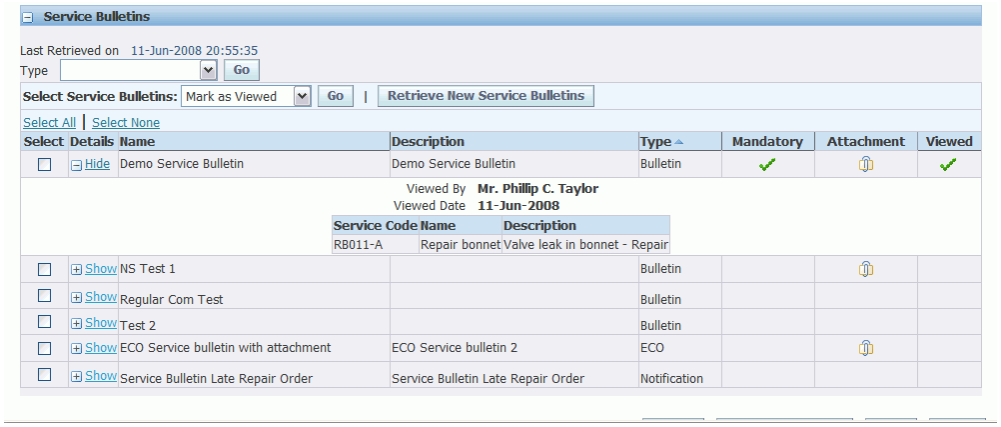
   - You can retrieve multiple service bulletins within one repair order. In this case, one repair order triggers multiple service bulletins.

- You can retrieve service bulletin for Chronic Repair Order. Set the profile CSD: Number of Days in Quality Check period to use this feature.

  Note: The Depot Repair Service Bulletin Retrieval concurrent program checks the set of applicable repair orders and links any service bulletins which apply to them and have not already been linked. This supports business scenarios that need to check all open repair orders for service bulletin applicability. This concurrent program scans a selected set of open repair orders based on parameters such as:

  - Service Bulletin Type
  - Repair Order Status
  - Repair Order Inventory Organization
  - Repair Organization
  - Repair Order Item

4. Select a service bulletin and click Show to display the following details:



- The Mandatory flag represents that the service bulletin is marked as mandatory in the setup stage. This also indicates to the repair technician that this service bulletin is mandatory.

- The Attachment icon represents that an attachment is added to the service bulletin. Click the attachment to download the attachment.

- The Viewed flag represents you have selected the service bulletin to Mark as Viewed from the list of values at the time when the service bulletin was set up.

You can view who has viewed the service bulletin and the date of viewing. You can mark a service bulletin as unviewed by selecting Mark as Unviewed.

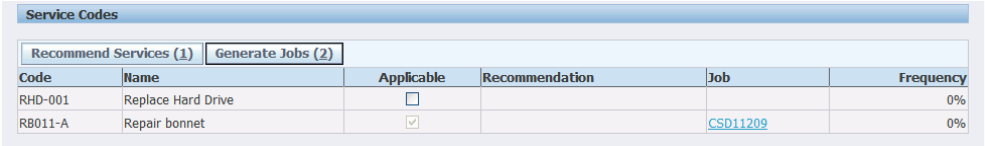
It enables a service organization to capture whether or not a technician has viewed and complied with a bulletin that contains an instruction. No enforcement for this exists within the application, but this provides a tracking mechanism if you choose to enforce it.

- The Service Code represents that a service code is linked to the service bulletin.

5. Navigate to the Service Codes region. The selected Applicable checkbox represents that a service code is linked.

   These service codes are attached to the service bulletin on the setup page. When you retrieve the service bulletin and attach it to an RO, if any of the service codes linked to the service bulletin at time of bulletin setup are valid for the repair item and inventory organization then the Applicable checkbox on the Service Codes region of the Evaluation tab is checked.

6. At this point, repair technicians can generate jobs from these service codes by clicking Generate Jobs. Once you generate a job, the job number displays in the Job column and the Applicable checkbox is disabled.



Service Codes

Recommend Services (1) | Generate Jobs (2)

Code	Name	Applicable	Recommendation	Job	Frequency
RHD-001	Replace Hard Drive	☐			0%
RB011-A	Repair bonnet	☑		CSD11209	0%

Manage ECOs

Engineering Change Orders (ECO) occur when a product has a fault, or when the technical team designs a better way to build it, finds better parts, or regulators specify that certain parts cannot be used anymore. Under these circumstances, the technical team creates a new revision of the master plan for the parts included, the technique to manufacture, or repair an item. Technically, this process requires the creation of new bills of material, route and/or service code.

In Depot, the following two steps occur in the processing of an ECO:

- A Service Bulletin notifies the repair technician that an ECO exists for the item (the repair technician pushes the Check ECO button).

- The service bulletin automatically applies the specific service code to the repair for taking the ECO.

  Note: If the ECO is applied already, the profile stops the notification

from triggering each time, assuming you have already applied the ECO the first time you were notified. This prevents you from receiving constant notifications.

When a repair job is created from the Evaluate tab of the Repair Tech Portal, it uses the service code from the bulletin. Thus when the repair technician goes to the Execute tab in the Repair Tech Portal, he will see the parts and operations that the ECO requires.

Backflush Non Serialized Repair Parts

Backflushing implies automatically performing an inventory material transaction whenever an operation is completed or whenever a job is completed. There are two Supply Type setup options in Inventory/BOM that allow backflush:

- Assembly Pull: Assembly Pull issues the material to the job when the job is completed
- Operation Pull: Operation Pull backflushes the item when the Operation is completed.

If either of these values are chosen for the supply type, then the item backflushes, if its non-serialized. This function reduces the repair technician clicks on jobs where components are not tracked serially.

Auto-Issue Repair Items to Jobs

The high volume repair centers mostly create a single job for any item they repair. When an item is repaired using a WIP job, the item must be issued to that job, and when the job is completed the same item is transacted to the WIP completion subinventory.

Auto-issue repair item to jobs feature enables a depot to automatically add the repair item as material demand for a job, thus freeing repair technicians from additional data entry.

Using Time Clock

A repair technician works on repairs from his queue. To begin work, a technician selects the next physical item on the cart or shelf, takes that item to work area, and queries the repair order in the system by scanning or entering the serial number. One option is to start the clock automatically once a repair order opens and the other option is to punch in work starts. The Time Clock functionality enables a technician to clock in and clock out the time for a repair. The system tracks the amount of time a technician spends clocked in on a repair and automatically capture that time as a resource transaction. The technician need not manually track time spent on a job or enter information into the system. The technician can pause the clock when taking breaks and allocate time to

different operations.

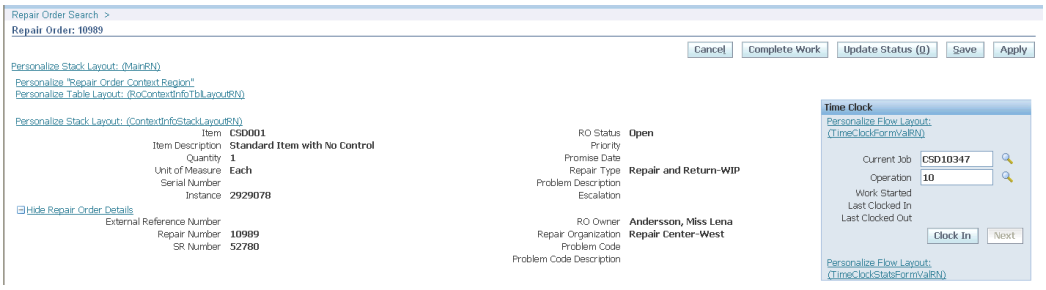
Time clock facilitates a repair technician in the following ways:

- It enables the technicians to mark the start time of a repair. This time is logged in the system. This is triggered by opening the repair or by manually clocking in.

- It enables the technicians to clock out a repair. You may clock out for various reasons: lunch break, resource shortage, missing parts, and the like. Clock out stops the clock but no other actions are triggered. This time is logged in the system.

- When a repair is finished, technicians perform many actions like: complete operations, complete jobs, log labor hours, transact resources, issue materials, change repair status, or kick off a workflow. The Complete Work button enables them to stop the clock and trigger these actions automatically.

The Repair Technician page contains a header level bin named Time Clock that facilitates clock in and clock out.



The Time Clock bin has the following layout:

Operation

- This field defaults to the first operation on the Operations table.

- If no operation exists, this field is left blank but defaults to operation 10 when creating Resource lines. You can select different operation from the list of values but you cannot select an operation outside of the Operations table.

- You can update the Operation LOV before you clock in your time. You cannot update an operation once you clock in as the clock in time operates against a specific operation.

- Operation LOV displays operations sequentially.

Work Started

- Work Started field displays the first clock in time for a technician.

- You can view the work-started time for your repair order only.

Last Clocked In

- This timestamp displays the last recorded clock in time and date for the current technician.
- This field is blank for the first time the technician opens the repair order.
- When you clock in the time, this field reflects this new clock in time.
- When you clock in the second time, the original clock in time is overwritten with the new time.

Last Clocked Out

- This timestamp displays the last recorded clock out time and date for the current technician.
- This field is blank of you are clocking out for the first time.
- When you clock out, this field reflects this new value.
- When you clock out the second time, the original clock out time is overwritten with the new time.

Clock In and Clock Out

- Clock In and Clock Out are same buttons with toggled text.
- This button displays Clock In when the clock is stopped and Clock Out when the clock is running.
- You can clock in / clock out against a particular job multiple times.
- Clock In button creates your record in the Resource Time table for the repair order, resource item, resource name, operation, and clock in time.
- Clock Out button updates the clock out time for your record in the Resource Time table for the repair order, resource item, resource name, operation and clock out time.
- You can clock in and clock out when there is no job or operation. The system assumes that all the time accrues to the first job created.

> **Note:** If you fail to clock in or clock out you can notify the manager. The manager then opens the repair order and adjusts the total labor on the Resources table and updates the repair order status. This assumes that personalization is used to restrict access to the Resource table. In the absence of this personalization, you can add or remove resource time from the table.

Next

- This button permits to clock out from current operation and clock in to the next one.
- The button is enabled when you clock in the first time and it is disabled when you clock in to the final operation for a repair order.
- This creates a new resource record in the Resource table. The Operation LOV gets updated to the next operation in the sequence. If more than one operation exists, the sequence is to complete all operations on the lowest job number first, then the next lowest job number operations and so on.
- A new clock in record is also created for the resource item, resource name and new operation.

The Repair Technician page contains a header level button named Complete Work that enables you to stop the clock and trigger various actions like: complete operations, complete jobs, log labor hours, transact resources, issue materials, change repair status, or kick off a workflow.

- This button is enabled using personalization.
- When you click this button, materials, resources, operations, and jobs are processed first. Then the status is updated which triggers the workflow.
- Clicking this button automatically clocks out the technician if it is not done already.
- When issuing serialized items, you have to manually capture the serial number before clicking Complete Work button.
- This button processes only the un-issued items, transacts only the un-transacted resources and completes the un-complete operations or jobs.

> **Note:** Both the Time Clock bin and Complete Work order button are enabled by personalization.

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