Oracle® Depot Repair

Implementation Guide

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Oracle Depot Repair Implementation Guide, Release 12.2

Part No. E48963-19

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Depot Repair Implementation Guide.*

See Related Information Sources on page x 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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This chapter discusses the key concepts, features, and process flows of Oracle Depot Repair.

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A Oracle Depot Repair Public APIs

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B Oracle Depot Repair Lookup Codes

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

C Oracle Depot Repair Update Programs

This appendix presents the Oracle Depot Repair update programs.

D Oracle Depot Repair Workflows

This appendix presents the Oracle Depot Repair workflows.

Related Information Sources

Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter and query data, and run concurrent requests using the user interface (UI) of Oracle E-Business Suite. It includes information on setting preferences and customizing the UI. In addition, this guide describes accessibility features and keyboard shortcuts for Oracle E-Business Suite.

Oracle Depot Repair User Guide

This book provides information on key concepts, features, process flows, and user interface of Oracle Depot Repair, and the tasks that can be performed from quick services like routine maintenance to complex overhauls, as part of an enterprise-wide solution for managing depot business process.

Oracle E-Business Suite: Administering Enterprise Command Centers

This book describes various tools and features of Oracle Enterprise Command Center Framework that can be used to manage and monitor Enterprise Command Centers.

Oracle E-Business Suite: Extending Enterprise Command Centers

This book provides an overview of the Oracle Enterprise Command Center Framework architecture and the anatomy of an Enterprise Command Center dashboard. It also describes how to extend Enterprise Command Center dashboards to meet requirements specific to your implementation.

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
- Integration with Other Oracle Modules
- Business Function Impacts

What is Oracle Depot Repair?

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

The depot repair process includes the return of broken and serviceable items, their diagnoses and job estimates, customer approvals and services management, and subsequent return of items to customers. You use the collection of charges for materials, labor, and expenses for the services to invoice the customer.

The depot service 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 service.

Customers expect quick and seamless service processing. Oracle Depot Repair provides end-to-end service 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

- Service Type Processing, page 1-2

- Job Management, page 1-2

- Service Resolution Management, page 1-2

Customer Management

Oracle Depot Repair uses a call center environment to improve customer interaction with service depots. Customers 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 depots for service needs.

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

Key customer management features include:

Oracle Depot Repair Workbench

The Service 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 Service Orders, open Service Requests, active contracts, and other details for a selected customer. In the Find Service Orders window, service agents can query for Service Orders, to see the Service Order statuses, jobs, and 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 service 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 Service Order item is matched up with the solution in the Oracle Knowledge Management database, Oracle Knowledge Management can assist in the Service Order processing by providing charge lines for WIP and Task estimates, and Bills and Routings for WIP Jobs.

Service Type Processing

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

Oracle Depot Repair supports the following Service 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

- Third Party Repair, page 1-2

- Return Only Repair, page 1-2

Repair and Return

Use this Service Type when a customer returns the broken or damaged item to the service depot for service. After completion of the service, you return the serviced item to the customer. This Service 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 serviced item and invoice the customer.

Loaner, Repair and Return

This Service Type combines two Service 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 Service Type requires two RMA Orders and two Sales Orders. Use this Service Type when a customer uptime is critical.

Exchange

This Service 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 Service Type assumes that the serviced item does not return to the customer. The system can generate an internal Service Order for the returned item, but there is not necessarily an association between the serviced item and the original exchange item.

Advance Exchange

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

Replacement

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

- Link the replacement item to the original item in the Oracle Installed Base.

- Change thestatus of the replaced item to indicate that it is out of service and that the new item has replaced it.

Standard

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

Refurbishment

A Service Order and its associated Service Request can be created in the Spares Management module of Oracle Field Service as a result of a demand for refurbishment or replenishment. The Service Order has a Service 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 serviced 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/serviced items are shipped via the Internal Order.

Third Party Repair

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

third party service execution, an Outside Processing (OSP) operation is created in the 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.

Return Only Repair

The return only repair functionality is used when a service 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.

Job Management

Use either of the following service modes to manage services:

- WIP (Work In Process): Recommended for use when the services 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 services 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 service modes on separate tabs in the Oracle Depot Repair area.

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

Service Resolution Management

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

- Automatically creating charge lines based on Service Type.

- Creating and approving estimates.

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

- Creating Jobs and releasing them to shop floor.

- Providing flexible options for receiving items and shipping items.

- Invoicing of final charges.

Business Process Flows

Oracle Depot Repair supports the following business process flows:

- Logistics and Maintenance with Call Center Facility, page 1-7

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

- Internal Service Operations, page 1-7

You can use either Oracle Work In Process (WIP) or the Task Manager (in Oracle Common Application Components) to manage the service process. Based on your choice, the Service Type for a given Service Order determines which service 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 depot service agent. The service depot agent can then create a Service Order and an estimate (if required) and seek approval from the customer for further processing.

Depending on the Service Type, the depot service agent completes the different RMA and Sales Order lines to assist the completion of the service process. The service mode (associated to the Service Type) determines whether to use Oracle WIP or JTF Tasks to manage the Job. After the service completion, the depot returns the serviced item to the customer. The system captures the material, labor, and expenses that the service 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.

Internal Party Service Operations

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

Integration with Other Oracle Modules

Oracle Depot Repair integrates with the following Oracle modules:

Assignment Manager

Oracle Depot Repair uses Assignment Manager to schedule technicians to all open and planned 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 service routers that the system uses for a submitted WIP Job, and to create a bill of materials for an item that is linked to a service router.

Contracts (Contracts Core and Service Contracts)

Oracle Depot Repair integrates with Oracle Service Contracts to manage service contracts associated with a customer's Install 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

Counter events and alerts provide a valuable tool to track critical service events that can affect a customer or items in the Install Base. Oracle Depot Repair uses the Counters module to update item counters periodically, whenever a depot technician performs work on the item, and saves it in the Install Base record. The Oracle Counters module also permits a service provider to set up logical or derived counters that use formulas that incorporate calendar dates, time, and cycle counts to trigger an event, such as a

warranty or service contract expiration, or to alert the service provider when to schedule preventive maintenance on a customer's Install Base item. The system can send alerts by the email 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. 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 service on-site, the service 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.

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.

Install Base

Oracle Install Base is a repository that tracks all install customer items. Oracle Install Base maintains and updates each item record to reflect the most current configuration. Service organizations must rely heavily on their install base to provide accurate customer and item information. The install base permits quick access to all item records and information. Oracle Depot Repair leverages this information to expedite the service process when services involve incompatibility, configuration, revision, or counter history issues. Oracle Depot Repair integrates with Oracle Install 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 Install Base serialized item or component. Depending on the definition of Oracle Install 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 Service Order tracking is now supported in Oracle iSupport. Oracle Depot Repair customers can now search for their Service Orders through an Oracle iSupport self-service user interface. Oracle iSupport will properly authenticate the user and display only Service 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 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 Service 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 service 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 service 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 services.

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 service, and while receiving or shipping an item.

Purchasing

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

Receivables

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

Resource Manager

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

Task Manager

Oracle Depot Repair uses the Task Manager to assist service 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 service process that is intended to manage simple service work that does not require extensive tracking or management processes. After task completion, the technician uses the Debrief Report in Oracle Depot Repair to log the material, labor, and expense transactions. For more information, see the Oracle Common Application Components User's Guide.

TeleService (Charges)

With the Charges module, a service organization can bill customers for provided services in response to Service Requests. Charges also creates a return material authorization (RMA) to return a defective item for service, loan, or replacement. Returns from a customer occur for a variety of reasons including damage, shipment error, and service. 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 Service 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 Service Order header. The TeleService APIs populate the Service Request number into the Service Order Header. Service depot business flows always start with the creation of a Service Request.

Work in Process

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

> **Note:** The Depot Repair modules do not include all features of Work In Process, Order Management or other E-Business Suite applications. For more information about Oracle E-Business Suite applications, see the respective product user or implementation guides.

Business Function Impacts

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

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

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

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

2

Overview of Setting Up

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

This chapter covers the following topics:

- Setting Up Oracle Depot Repair
- Related Applications Setup
- Key Implementation Decisions
- Implementation Starting Point
- Implementation Checklist
- WIP and Task Mode Setup Considerations
- Considerations for Related Applications Setup

Setting Up Oracle Depot Repair

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

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

Related Applications Setup

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

- Oracle General Ledger
- Oracle Bills of Material

- Oracle Inventory

- Oracle HRMS

- Oracle Work in Process

- Oracle Order Management

- Oracle Purchasing

- Oracle Payables

- Oracle Receivables

- Oracle Common Application Components

- Oracle Installed Base

- Oracle Customer Support

- Oracle Customer Care

- Oracle TeleService

- Oracle Contracts Core

- Oracle Service Contracts

- Oracle Field Service

- Oracle iSupport

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

Key Implementation Decisions

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

Loading Customer and Contact Information

Oracle Depot Repair requires that customer information be imported into the system from already available sources. However, Oracle Depot Repair allows you to capture

customer contact data in real-time. There may be situations when contact data is already available from other systems. In such cases, you may want to import available customer information along with relationship data.

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

Resource Creation

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

Calendar Definition

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

Location Definition

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

Knowledge Base Management

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

Service Request Builder Setup

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

Service Type Setup

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

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

- Advance Exchange

- Exchange

- Loaner

- Loaner, Repair and Return

- Refurbishment

- Repair and Return

- Replacement

- Standard

- Third Party Repair

- Return Only Repair

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

WIP and Task Modes

Determine the complexity of the service management processes required by your organization. Either Oracle WIP or the Task Manager (in Oracle Common Application Components) can be used to manage the service process. WIP mode is recommended for use when the Jobs require a series of sequential steps and materials management. WIP mode is recommended if the business is using Oracle Costing or Oracle Value Chain Planning applications for service. Task mode is recommended for use when the services require minimal steps that are not necessarily completed in sequence. Task mode should only be used if Oracle Costing and Oracle Value Chain Planning applications are not used for service. To the user, both of these processes are managed via separate tabs in the user interface.

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

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

Implementation Starting Point

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

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

Defining an Oracle Applications User

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

- System Administrator

- Depot Repair Super User

- Foundation Administrator

- Support Administrator

- Knowledge Management Administrator

Use the Users window to define Oracle Applications users. Oracle Application user will need to be uniquely identified by an application user name. For detailed instructions on creating application users, please refer to Oracle E-Business Suite Setup Guide.

Implementation Checklist

This checklist summarizes each of the steps you must follow to implement Oracle Depot Repair. It includes setup steps for data that may be shared with other Oracle applications, but is required by Oracle Depot Repair. If you have already defined this information when setting up other Oracle Applications, you can skip these steps.

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

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

Step No.	Setup Step	Reference
17	Set Up Notes	*Oracle Common Application Components Implementation Guide*
18	Set Up Resource Manager	*Oracle Common Application Components Implementation Guide*
19	Set Up Task Manager	*Oracle Common Application Components Implementation Guide*
20	Set Up Assignment Manager	*Oracle Common Application Components Implementation Guide*
21	Set Up Knowledge Management	*Oracle Knowledge Management Implementation Guide*
22	Set Up Installed Base	*Oracle Installed Base Implementation Guide*
23	Set Up Counters and Counter Templates	*Oracle Installed Base User Guide*
24	Set Up Contracts Core	*Oracle Contracts Core Implementation Guide*
25	Set Up Service Contracts	*Oracle Service Contracts Concepts and Procedures Guide*
26	Set Up Field Service	*Oracle Field Service Implementation Manual*
27	Define Depot Repair Lookup Codes	Chapter 3, *Oracle Depot Repair Implementation Guide*
28	Define Depot Repair Profile Options	Chapter 3, *Oracle Depot Repair Implementation Guide*
39	Define Depot Repair Users	Chapter 3, *Oracle Depot Repair Implementation Guide*
30	Set Up Service Types	Chapter 3, *Oracle Depot Repair Implementation Guide*
31	Set Up Statuses, Status Transitions, and Service Type Transitions	Chapter 3, *Oracle Depot Repair Implementation Guide*

Step No.	Setup Step	Reference
32	Define Depot Repair Reason Codes	Chapter 3, *Oracle Depot Repair Implementation Guide*
33	Set Up Diagnostic Codes	Chapter 3, *Oracle Depot Repair Implementation Guide*
34	Set Up Service Codes	Chapter 3, *Oracle Depot Repair Implementation Guide*
35	Set Up Service Code Recommendations	Chapter 3, *Oracle Depot Repair Implementation Guide*
36	Set Up Depot Repair Update Programs	Chapter 3, *Oracle Depot Repair Implementation Guide*
37	Set Up Service Bulletins	Chapter 3, *Oracle Depot Repair Implementation Guide*
38	Set Up Defaulting Rules	Chapter 3, *Oracle Depot Repair Implementation Guide*
39	Setting Up Serial Reservations	Chapter 3, *Oracle Depot Repair Implementation Guide*
40	Setting Up Aging Threshold	Chapter 3, *Oracle Depot Repair Implementation Guide*
41	Setting Up Quality Threshold	Chapter 3, *Oracle Depot Repair Implementation Guide*
42	Setting Up Defect Codes	Chapter 3, *Oracle Depot Repair Implementation Guide*
43	Setting Up Recall Status	Chapter 3, *Oracle Depot Repair Implementation Guide*
44	Setting Up Recalls	Chapter 3, *Oracle Depot Repair Implementation Guide*
45	Setting Up Eco-Impact Threshold	Chapter 3, *Oracle Depot Repair Implementation Guide*

Step No.	Setup Step	Reference
46	Setting Up Return Stream Reasons	Chapter 3, *Oracle Depot Repair Implementation Guide*
47	Setting Up Material Disposition Reasons	Chapter 3, *Oracle Depot Repair Implementation Guide*

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

WIP and Task Mode Setup Considerations

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

To process services in Task mode, you must set up Task Manager and Assignment Manager.

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

Similarly, if you are processing services only in WIP mode, you need to set up WIP; but do not have to set up Task Manager and Assignment Manager. For more information, see Job Management, page 1-2.

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

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

Considerations for Related Applications Setup

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

- Inventory, page 2-10

- Locations, page 2-11

- Employees, page 2-11

- Bills of Material, page 2-12

- Work in Process, page 2-13

- Purchasing, page 2-13

- Order Management, page 2-13

- Service Request, page 2-14

- Charges, page 2-14

- Tasks, page 2-15

- Knowledge Management, page 2-15

Setting Up Inventory

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

For example, in the Service tab:

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

- For items to be tracked in Oracle Installed Base, select the check box Track in Install Base.

- Select Enabled for the Service Request field.

Comments

1. You must set up items in the Inventory Organization specified by the value of the profile option Service: Inventory Validation Organization.

2. For items to be returned, set up the following Order Management and Inventory flags, as required: Returnable, Customer Ordered, Customer Order Enabled, Shippable, Transactable, and Invoiceable.

3. For items to be shipped, set up the following Order Management and Inventory flags, as required: Customer Ordered, Customer Order Enabled, Shippable, Transactable, and Invoiceable.

4. When you use bills or routings for your WIP mode Jobs, the following must be set

up as inventory items:

- Each bill and each component of the bill.

- Each routing.

5. When you use task parts for your Task mode Jobs, the following must be set up as inventory items:

- Each component item of the task part.

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

- Oracle Inventory User's Guide.

- Oracle Purchasing User's Guide.

- The section Setting Up Items in Oracle Inventory in the Oracle TeleService Implementation Guide.

Setting Up Locations

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

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

Defining Employees

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

- The Default Owner of a Service Request must be an employee.

- When you set up resources, you typically associate one or more employees with a resource.

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

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

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

- Managing Your Workforce Using Oracle HRMS.

- Oracle Purchasing User's Guide.

- The section Setting Up Resource Manager in the Oracle Common Application Components Implementation Guide.

Setting Up Bills of Material

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

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

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

Comments

1. For each bill, ensure also the following conditions:

   - The parent item is defined as an Inventory Item.

   - Each component of the bill is set up as an Inventory Item, with a Billing Type of category Material.

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

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

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

3. For each routing, ensure also the following condition:

   - The item for which routing is being set up is defined as an Inventory Item.

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

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

- Oracle Bills of Material User's Guide.

- Oracle Inventory User's Guide.

- The Price Lists chapter in the Oracle Order Management Suite Implementation Manual.

Setting Up Work in Process

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

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

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

Setting Up Purchasing

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

> **Note:** While booking an RMA for receiving an item that is both serial and lot controlled, if we pass the serial number information and miss out the lot number, the receiving transaction processor fails. This happens as the program tries to match the lot number we entered with null value and fails eventually. To process a receipt in such a scenario, you must set Validate Lots on RMA Receipts option in Receiving Options page to Unrestricted. This permits you to receive different lot number than the one on the RMA line.

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

Setting Up Order Management

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

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

For more details, please refer to Setting up Charges for Oracle Depot Repair, page 4-3.

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

Setting Up Service Requests in Oracle TeleService

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

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

Setting Up Charges in Oracle TeleService

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

1. Oracle Order Management and the Charges module in Oracle TeleService must be set up correctly to ensure that items can be used in the Depot Repair process. See Setting Up Inventory, page 2-10.

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

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

4. Also, use the Service Request Multi Org Set Up window to set the defaulting rules for the charges operating unit. If the Oracle Applications installation is a multi-org installation, then Oracle Depot Repair derives the appropriate operating unit for the order interfaced to Order Management based on the sequence associated with these rules. If not, the operating unit is derived from the profile option MO: Operating Unit.

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

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

- Oracle TeleService Implementation Guide

- Setting up Charges for Oracle Depot Repair, page 4-3

Setting Up Tasks

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

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

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

Setting Up Knowledge Management

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

Operations in Related Oracle Applications

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

1. Set appropriate profile options in Oracle Depot Repair:

   • CSD: Enable Knowledge Management to Yes.

   • CSD: Use Tasks from Knowledge Base Solutions to Yes.

2. Set up Diagnostic Codes and Service Codes in Oracle Depot Repair.

   For more information, see Setting Up Diagnostic Codes in Oracle Depot Repair, page 4-41 and Setting Up Service Codes in Oracle Depot Repair, page 4-41.

3. Set up Bills and Routings in Oracle Bills Of Material, if WIP mode is used. To use Depot Repair WIP mode, you need to set BOM Resource's Charge Type to WIP Move.

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

Operations in Oracle Knowledge Management

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

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

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

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

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

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

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

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

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

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

3

Oracle Depot Repair Command Center Setup

Depot Repair Command Center Configuration

Setting Up Depot Repair Command Center

The Depot Repair Command Center product configuration setup must be completed after the installation and common configurations are completed as described in My Oracle Support Knowledge Document 2495053.1, *Installing Oracle Enterprise Command Center Framework, Release 12.2.*

Setup and Configuration Steps

To complete setup of the Depot Repair Command Center:

1. Set profile options, page 3-2

2. Configure descriptive flexfields for search, page 3-3

3. Load Depot Repair data, page 3-4

Setting Profile Options for Depot Repair Command Center

Set a value for this profile option to specify how the Depot Repair Command Center controls data from supported Depot Repair pages:

Profile Option Name	Description	Default Value

CSD: Command Center Push Options	Determines whether or not data is pushed from supported Depot Repair pages to ECC and when this push occurs. Use the following options: • Push From Command Center- This option will only ensure the push of data from supported Depot Repair pages, if the data update was initiated from the Depot Repair Command Center. • Always - This option will always push data to the Depot Repair Command Center from supported Depot Repair pages, regardless of how the page was launched. • Never - This option will never push data from the supported Depot Repair pages into the Depot Repair Command Center.	Push From Command Center

Configuring Descriptive Flexfields for Search

Enterprise command centers support Descriptive Flexfields (DFFs) that enable you to search on DFF attributes. After you configure DFFs you must run the data load process to ensure the DFF attibutes are available in the command center.

For additional information about configuring and customizing flexfields, see the *Oracle E-Business Suite Flexfields Guide* and My Oracle Support Knowledge Document 2495053.1, *Installing Oracle Enterprise Command Center Framework, Release 12.2.*

The following table describes the DFFs available in the Depot Repair Command Center dashboards:

| Dashboard	Data Set	DFF Title	DFF Name	DFF Attribute Group Name
Open Service Orders Resolved Service Orders	csd-repairs csd-repairs-closed	Repair Order Descriptive Flexfield	CSD_REPAIRS	Additional Information
Open Service Orders Resolved Service Orders	csd-repairs csd-repairs-closed	Additional Information for Agents	CS_INCIDENTS _ALL_B	SR Information for Agents
Open Service Orders Resolved Service Orders	csd-repairs csd-repairs-closed	Additional Information	CS_INCIDENTS _ALL_B_EXT	SR Additional Information
Open Service Orders Resolved Service Orders	csd-repairs csd-repairs-closed	Carrier Information	REPAIR_CARRI ER_INFORMATI ON	Carrier
Open Service Orders Resolved Service Orders	csd-repairs csd-repairs-closed	Processor Information	REPAIR_PROCE SSOR_INFORM ATION	Processor
Open Service Orders Resolved Service Orders	csd-repairs csd-repairs-closed	Return Attributes	REPAIR_RETUR N_ATTRIBUTES	Return Information

Loading Depot Repair Data

Use the Depot Command Center Data Load concurrent program to load depot repair data into Enterprise Command Center data sets. Use the **Submit Request** window to run the concurrent program.

(N) **Depot Repair** >**Others** >**Run Request**

> **Note:** To set up profile options before running data loads, see: Setting Profile Options for Depot Repair Command Center, page 3-2.

To load Depot Repair data into Depot Repair Command Center:

1. Choose **Single Request** and click **OK**.

2. In the **Name** field on the **Submit Request** window, select **Depot Command Center Data Load**.

3. Use the **Parameters** window to enter the parameters information.

4. Select the appropriate **Load Type**.

    - **Full Load** - This process loads all Depot Repair data and is required to be run for the first data load. The full data load process also includes metadata load. If you select and run full load for subsequent requests, then this program clears all Depot Repair data from ECC and loads fresh data.

    - **Incremental Load** - This process loads the data modified and updated from the previous load only. Incremental load should be scheduled to run as often as required to keep the ECC dashboard current.

    - **Metadata Load** - This process loads the metadata that describes the data set attributes, including Descriptive Flexfield (DFF) attributes, used in Enterprise Command Center. You must initially run the Metadata Load to load DFF setup information to the Enterprise Command Center. After the DFF setup is initially loaded, running incremental or full data loads on a regular basis will maintain the DFF attributes.

5. In the **Languages** field, enter one or more language codes for the output. For multiple language codes, use the format AA,BB,NN. For example, enter US,AR,KO. If the field is blank, then the data will be loaded for the base language only (usually US).

6. In the **Log Level** field, select the program to report. The default value is ERROR.

7. In the **SQL Trace** field, select **TRUE** to enable SQL trace. Otherwise, select **FALSE**.

8. In the **Data Set** field, you can choose to load either the data sets for open service orders or for closed service orders. If the field is blank, then both data sets will be loaded.
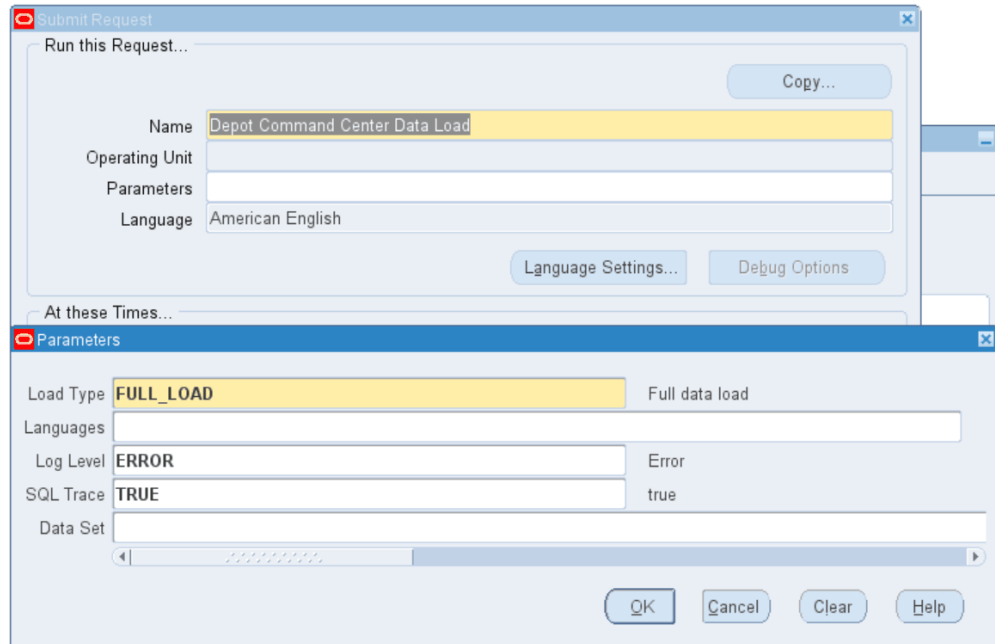
9. Click **OK** on the **Parameters** window.

10. Click **Submit** to submit the concurrent request.

11. Review your request using the **Requests** page.

12. Monitor data loading using the **Data Load Tracking** page of the ECC Developer responsibility.

4

Oracle Depot Repair-Specific Setup Steps

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

This chapter covers the following topics:

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

- Setting Up Serial Reservations

- Setting Up Aging Threshold

- Setting Up Quality Threshold

- Setting Up Defect Codes

- Setting Up Recall Status

- Setting Up Recalls

- Setting Up Eco-Impact Threshold

- Setting Up Region Geographies

- Setting Up Return Stream Reasons

- Setting Up Material Disposition Reasons

- Setting Up Internal Requisitions and Internal Sales Orders

- Setting Up Supplier Warranty

- Setting Up Returns Portal Parameters

- Using the Return Portal for eClaims

- Setting Up Return Types

- Setting Up Activity Rules

- Managing Users

- Login Interfaces

- Roles, Responsibilities, and Permissions

- Creating Oracle Depot Repair Users

- Charges and Service Types Setup Example

- Setting Up Transfer Install Base Ownership

- Integrating with Advanced Pricing

- Using Time Clock Bin

- Using Complete Work Button

- Using Request Parts Button

Completing the Prerequisite Setups

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

Setting Up Charges for Oracle Depot Repair

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

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

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

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

- Defining Billing Type Codes, page 4-3

- Mapping Billing Type Codes to Billing Categories, page 4-4

- Defining Service Activities and Billing Types, page 4-5

- Defining Service Business Processes, page 4-7

- Defining Installed Base Transaction Sub Types, page 4-8

- Setting Up Time and Material Labor Schedules, page 4-11

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

A Service Activity Code is a type of action to be performed, for example, replace, return, install, drain, fill. The combination of Billing Type and Service Activity defines the Order Type for a given operating unit. It also provides the basis upon which discounts for a Service Contract can be applied.

Defining Billing Type Codes

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

To define Transaction Billing Type Codes:

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

window:

Service Request > Setup > Customer Support Lookups.

2. Query up the Lookup Type MTL_SERVICE_BILLABLE_FLAG.

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

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

Mapping Billing Type Codes to Billing Categories

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

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

Switch responsibilities to Customer Support, Vision Operations and navigate to Setup > Charges > Billing Type Attributes.

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

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

Defining Service Activities and Billing Types

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

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

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

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

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

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

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

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

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

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

To Define Service Activities and Billing Types:

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

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

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

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

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

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

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

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

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

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

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

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

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

Defining Service Business Processes

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

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

To Define Service Business Processes:

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

   Service Request > Setup > Charges > Service Business Process.

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

3. Select the Depot Repair check box.

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

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

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

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

Defining Installed Base Transaction Sub Types

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

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

Transaction Sub Types Window

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

Transaction Sub Types Area

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

Source Info and Non Source Info Areas

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

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

  > **Note:** Transaction sub types defined as shipments, that is, which
  > have OM_SHIPMENT as their source transaction type, should not
  > have Reference Reqd checked in the Source Info area. This is
  > because Shipping does not understand and does not need Installed
  > Base reference numbers.
  >
  > Also, for non-serialized Installed Base trackable items, when an
  > item is shipped back to the customer, a new instance with a new
  > Installed Base reference number is created in Installed Base for the
  > shipped instance. For a serialized Installed Base trackable item, the
  > shipped item instance is identified in Installed Base by the shipped
  > item and the serial number.

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

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

warranty information is transferred.

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

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

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

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

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

Source Transaction Types Area

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

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

To Define Installed Base Transaction Sub Types:

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

   Service Request > Setup > Charges > Install Base Transaction Types

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

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

Setting Up Time and Material Labor Schedules

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

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

Service Request > Setup > Charges > T&M Labor Schedule.
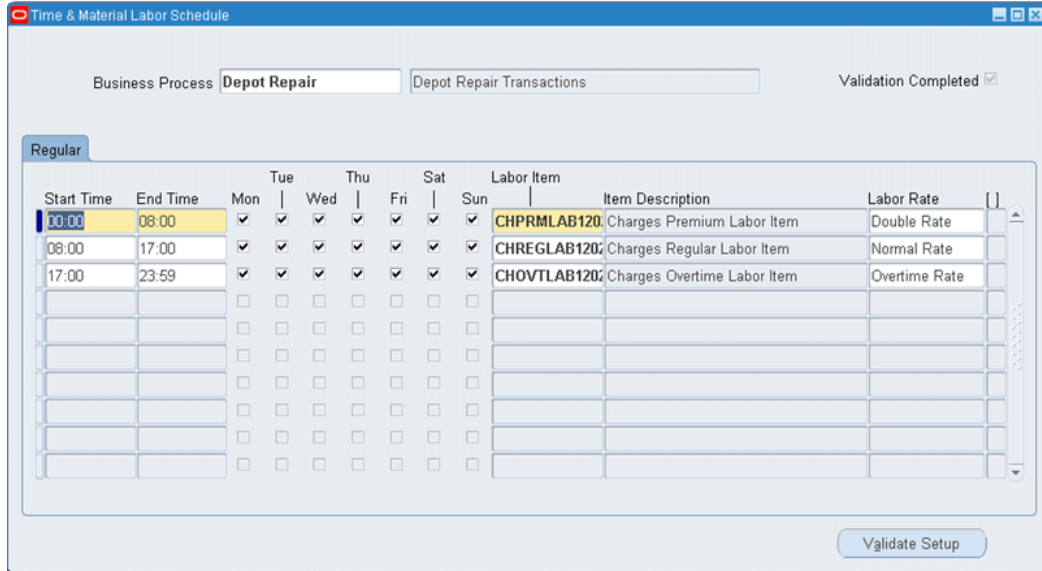
For more information, please refer to the Oracle TeleService Implementation Guide.

Setting Up Service Types

Oracle Depot Repair supports the following Service Types:

- Advance Exchange

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

- Exchange

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

- Loaner

  The depot sends a loaner item to the customer.

- Loaner, Repair and Return

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

- Repair and Return

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

- Replacement

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

- Standard

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

- Refurbishment

  A Service Order and its associated Service Request is created in the Spares Management of Oracle Field Service as a result of a demand for refurbishment or replenishment. The Service Order has a Service 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 serviced item back to Spares Management.

- Third Party Repair

  For a third party service execution, an Outside Processing (OSP) operation is created in the Technician Portal. Essentially, completing the OSP operation triggers the creation of a purchase order with a request to procure service from a third party.

- Return Only Repair

  The return only repair functionality is used when a service type is setup to have an RMA line. In this case, there is no corresponding ship line.

- Service Campaign or Recall

  A service campaign is a coordinated set of service actions focused on a specific set of customers or products in a business's install base. 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.

- Supplier Warranty

  Supplier warranty provides the ability to manage supplier warranty claims resulting from maintenance and service work.

- Customer Take-back Request

  This functionality enables you to process the take-back request of items from the customers.

- Trade-in or Upgrade

This function enables you to process a trade-in or upgrade using the Returns Portal.

The Service Types Screen

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

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

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

- Customize the Service Types.

- Select Service Modes for Service Types. A Service Order is created with the service mode defined for the chosen Service Type.

- Select Service Type Ref for custom Service Types.

- Select Business Process for Service Types.

- Select default Service Activity Codes for RMA order (Return) and Sales order (Ship) lines for the Service Type. The default item transactions are created with the order and line types associated with the Service Activity Billing Type for the Service Type and service item. This classifies the created RMA order and Sales order lines for respective Service Types.

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

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

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

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

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

only if using Estimates functionality.

- Select to Calculate Resolve By Date based on the RMA receipt date or the service order creation date.

  Alternatively, select to Calculate Resolve By Date based on a specific service order status by setting the profile option CSD: Calculate Resolve By Date from Entitlement to Yes. See: Setting up Oracle Depot Repair Profile Options, page 4-50.

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

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

Service Types Setup Fields

Control	Description	Editable	Seeded Values
Service Type	A short description of the Service Type. This description appears in the application during Service Type selection	Yes	Same name as Service Type Ref, but editable
Description	A more detailed explanation of the Service Type	Yes	--
Active (check box)	This read-only field indicates if the Service Type is active, based on the Start Date and End Date	No	--
Business Process	The combination of Service Type Ref and Business Process identifies the applicable Transaction Billing Types	Yes	Depot Repair
Service Mode	Determines whether Oracle WIP or the Task Manager module of Oracle Common Application Components is used for Job management	No	Task WIP

Control	Description	Editable	Seeded Values
Service Type Ref	Identifies the type of application logic that applies to the Service Type	No	Advanced Exchange Exchange Loaner Loaner, Repair and Return Refurbishment Repair and Return Replacement Standard
Pre-Service RMA	Classifies the created RMA order (Return) line for respective Service Type reference. If Service Type reference does not require this RMA line, this entry is disregarded.	Yes	--
Pre-Service Ship	Classifies the created Sales order (Ship) line for respective Service Type reference. If Service Type does not require this Sales order line, this entry is disregarded.	Yes	--
Post-Service RMA	Classifies the created RMA order (Return) line for respective Service Type reference. If Service Type reference does not require this RMA line, this entry is disregarded.	Yes	--
Post-Service Ship	Classifies the created Sales order (Ship) line for respective Service Type reference. If Service Type reference does not require this Sales order line, this entry is disregarded.	Yes	--

Control	Description	Editable	Seeded Values
Third Party Ship	Classifies the Service Activity Billing Types. These values must be associated with a third party Ship line to indicate what OM line types to use, what operating unit to associate them with, and what contract entitlements apply.	Yes	--
Third Party RMA	Classifies the Service Activity Billing Types. These values must be associated with a third party RMA line to indicate what OM line types to use, what operating unit to associate them with, and what contract entitlements apply.	Yes	--
Pricelist	Identifies the default price list for the Service Type.	Yes	--
Start Date	The effective start date of the Service Type	Yes	--
End Date	The effective end date of the Service Type	Yes	--
Internal Order (check box)	For Internal Order Refurbishments	Yes	--
Third Party (check box)	For creating a third party ship and RMA line if a Service Activity Billing Type is selected in the Third Party column.	Yes	--
Calculate Resolve By Date	Specifies whether the date by which a service order should be resolved based on repair order creation date or RMA receipt date.	No	At Service OrderCreation At RMA receipt

Control	Description	Editable	Seeded Values
Automatically enter and book RMA	Decides whether to default Auto RMA check box as checked or unchecked for Service Orders. When a Service Order is created with this check box selected, an RMA (Return) line is entered and booked automatically. You can still manually override the default for individual Service Orders.	Yes	--
Automatically ship through: *Radio buttons:* -- Enter Order -- Book Order	*This is available only for service types whose Service Type Ref is Advance Exchanged Exchange, Loaner, or Loaner, Repair and Return.* When a Service Order is created with this check box and one of the radio button options selected, a Ship line is created and processed according to the option chosen: -- Enter Order results in ship line Status of Submitted. -- Book Order results in ship line Status of Booked.	Yes	--
Material	Enables the classification of Material charge lines for Order Management processing	Yes	Material
Labor	Enables the classification of Labor charge lines for Order Management processing	Yes	Labor
Expense	Enables the classification of Expense charge lines for Order Management processing	Yes	Expense

For details on seeded Service Types setup, see Charges and Service Types Setup Example, page 4-113.

To Set Up Service Types

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

    Depot Repair > Setup > Service Types

2. To define a new service type, click the New icon on the menu option.

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

4. To set up Third Party Service Type, select Third Party Ship and RMA.

    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.

5. Select the Third Party check box to create a third party ship and RMA line if a Service Activity Billing Type is selected in the Third Party column.

    You can select the third party check box and only set up an RMA line. It defaults the RMA line at SO 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 service 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.

6. Save your work.

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

   - Service Mode

   - Service Type Ref

   - Business Process

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

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

Setting Up Defaulting Rules

Service types, service owner, priority and other service order values default at the time of service order creation based on customer defined rules. The fields that default are, Inventory Organization, RMA Receiving Organization, RMA Receiving, Subinventory, Service Organization, Service Owner, Service Priority, Service Type, Ship from Organization, Ship from Subinventory, and Vendor Account. Rules are based on service item, service location, customer, contract, and the like.Defaulting rules can also be set up for Processor, Carrier, and Disposition based on Service Type.

To Set Up Defaulting Rules

1. Navigate to the Defaulting Rules page. This page displays the summary of existing defaulting rules.
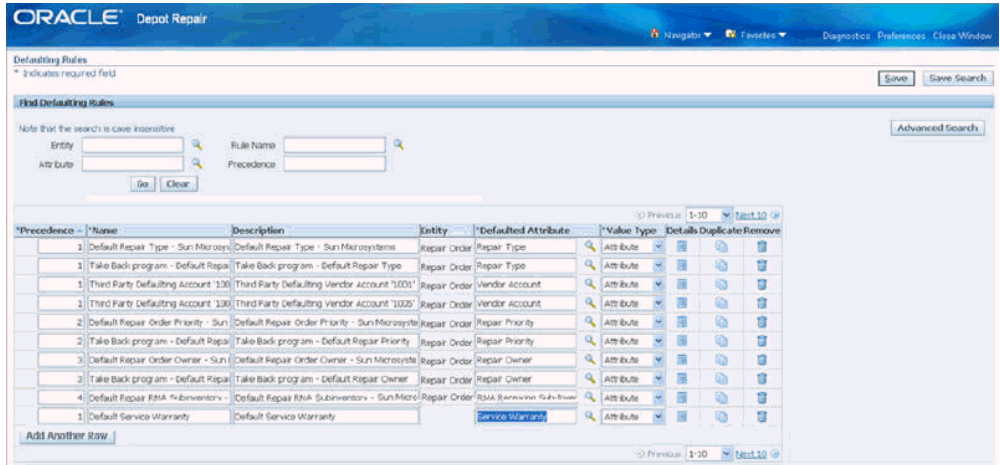
2. To set up a new defaulting rule, click Add Another Row button.

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 to 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 service order.
     - Create SO Flag

     - Inventory Organization

     - Job Accounting Class

     - Job Inventory Organization

     - Job Status

     - Material Issue Sub-Inventory

     - Material Transaction Reason Code

     - Pick Release Rule

- Price List

- RMA Receiving Organization

- RMA Receiving Sub-Inventory

- Service Organization

- Service Owner

- Service Priority

- Service Type

- Service Warranty

- Ship From Organization

- Ship From Sub-Inventory

- Vendor Account

- Value Type: Valid list of values for Value Type are:

  - Attribute: This indicates the type of value, and not the value itself. It can be either PL/SQL, profile or a constant as specified in the setup.

  - 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.

    > **Note:** PL/SQL API field for defaulting rules is limited to 30 characters or less.

  - Profile: This defaults the value stored in the specified profile option to the Depot Workbench when this rule is evaluated to be true. When you select Profile as the value type, and there are multiple levels of profile setting, the system behaves in the same way it does for other profile option selections.

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. Select the Service Type to default.

6. 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.

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

8. Click Save to save the Defaulting Rule.

9. Duplicate icon duplicates the condition.

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

Setting Up Service Bulletins

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

To Set Up Service Bulletin

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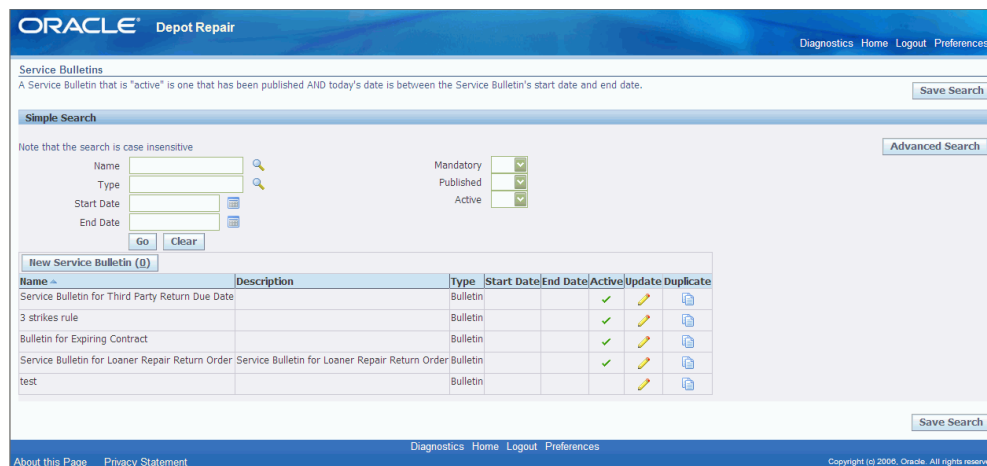
2. Click the New Service Bulletin button to navigate to the Create Service Bulletins page.

3. 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 Service Orders with Non-Installed Base items.

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

- Mandatory: Select this checkbox to mark the service bulletin as mandatory on the service 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.

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

5. 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.

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

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

8. 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.

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

10. Enter the required rule conditions and click Apply.

11. 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.

Setting Up Statuses, Status Transitions, and Service Type Transitions

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

Statuses in Earlier Releases of Oracle Depot Repair

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

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

Terminology

State

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

Status

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

Each status associated with a state inherits the limitations that are associated with that state. Statuses associated with Hold or Closed states restrict users as to what operations they can perform in Oracle Depot Repair. For more information, see Constraints on User Operations, page 4-26.

You can create as many statuses as you want.

> **Note:** The Draft state is a special case, and has one status, Draft. Both the Draft status and the Draft state are used by the system only. For

example, you cannot associate any of your own statuses to the Draft state.

Service Order Status Transitions

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

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

Service Type Transitions

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

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

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

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

Constraints on User Operations

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

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

- Update a Service Order, other than change the Status

- Select or change the Default Contract field on the Coverage window launched through the menu path Tools > Coverage

- Create, update, submit, or book logistics lines

- Create a job

- Perform Material or Complete Job Transactions

- Create or update tasks

- Split a service order

- Update counters

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

- Update the Service Order Status

- View and update Notes

- View Configuration, from the Details tab

- Send and view messages, from the Data menu option

- View Coverage and Contracts

- Enter Task Debrief

- View and Refresh Jobs

- Print estimates

- View the current workflow

Overview of Status and Transition Setup Processes

This section consists of the following topics:

- Creating the Status Lookup, page 4-26

- Associating the Status to a State, page 4-26

- Adding a Status Transition to a Service Type, page 4-26

- Creating a Service Type Transition, page 4-26

Creating the Status Lookup

You must first create a service status lookup.

Steps

1. From the Depot Repair Navigator, use the following path to open the Service

Statuses Lookup window:

Depot Repair > Setup > Service Statuses
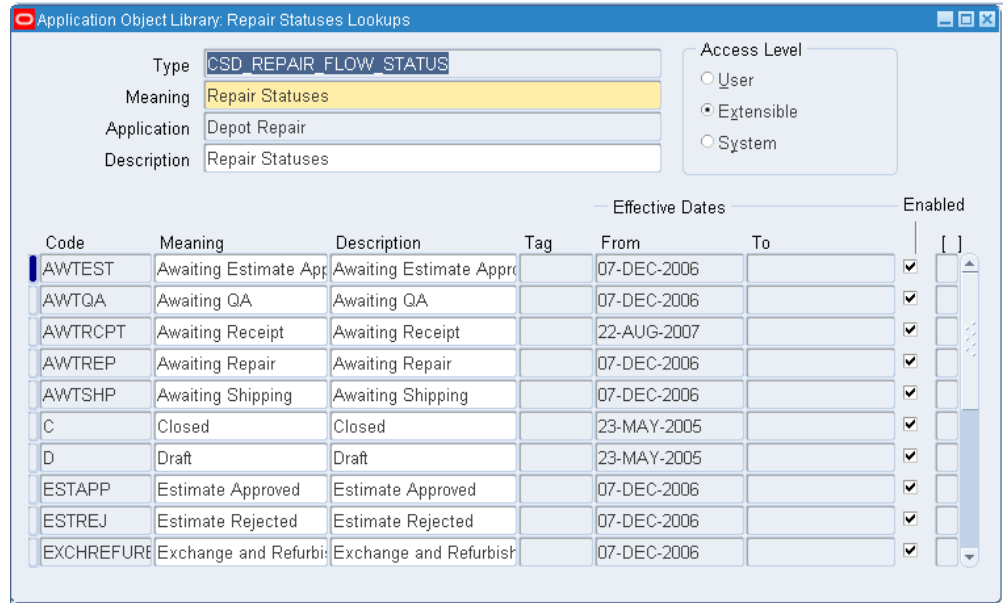
2. Add a new record, with values for Code and Meaning.

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

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

5. Save your work.

Associating the Status to a State

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

There are limitations on the operations that can be performed on a service order set to a Status associated with either the Hold or the Closed State. For details, see Constraints on User Operations, page 4-26.

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

> **Important:** You can delete non-seeded Status-State associations, but you should do so with great care. Service orders whose latest status resulted from a deleted Status-State association may be corrupted.

Steps

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

   Depot Repair > Setup > Service Order Status Set-Up
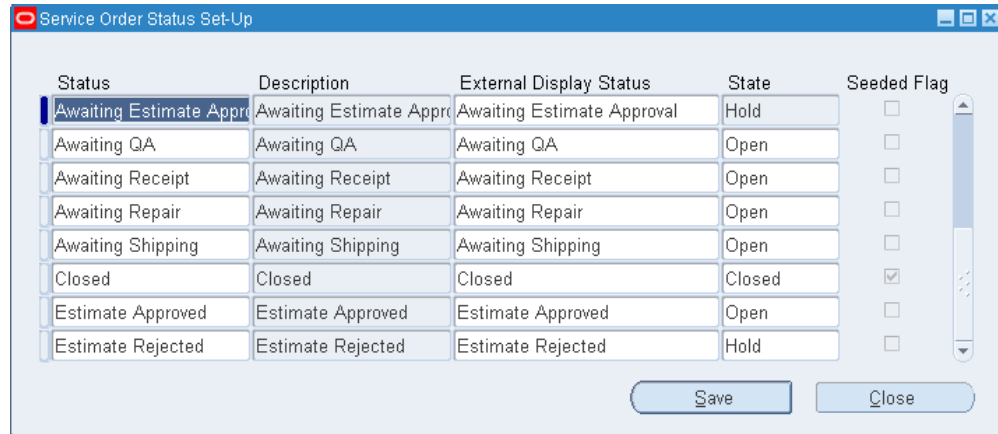
2. Select the Status and State.

3. Optionally enter a Description.

4. Save your work.

Adding a Status Transition to a Service Type

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

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

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

Steps

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

   Depot Repair > Setup > Service Types

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

3. Select a Start Status.

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

   - Select a Current Status and a Next Status.

   - Optionally select a Workflow that is to initiated when the service order status changes from the Current to the Next status.

   - Optionally check Require Reason, if you want to make it mandatory for a status changer to enter a reason at the time of status change.

   - Optionally check Capture Activity, if you want changing to the Next status to result in the creation of a viewable Activity.

   - Optionally enter a Description.

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

6. For each status transition, select the transition and optionally select one or more milestones.

   Service Start or Service End are seeded milestones provided by Oracle Depot Repair to help businesses indicate for any given Service Type as to which statuses in that flow mark the beginning and end points for that metric. These milestones help to measure and report how long it takes for a business to complete a repair.

Select Service Start or Service End as milestones for any transition to display the metrics for a service order in the Technician Portal. The earliest Service Start time and the latest Service End time, taken at the times of the status transitions, are recorded for the service order, and appear as Key Performance Indicators in the Debrief Report tab of the Technician Portal. Users can create and add other milestones for tracking and reporting.

7. Save your work.

Creating a Service Type Transition

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

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

Steps

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

   Depot Repair > Setup > Service Types

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

   The From Service Type field shows the current service type.

3. For each service type transition, perform the following in the Rule area:

   • Select a Common Status and a To Service Type.

   • Optionally check Require Reason, if you want to make it mandatory for a service type changer to enter a reason at the time of service type change.

   • Optionally check Capture Activity, if you want changing to the new service type to result in the creation of a viewable Activity.

4. For each service type transition, select the transition and, in the Allow Responsibilities area, either select the check box "Allow all responsibilities" or select individual responsibilities for which the service type changes are allowed.

5. For each service type transition, select the transition and optionally enter a

Description.

6.   Save your work.

Setting Up Service Request Types for Depot Repair

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

Each service request type can be linked to an existing Oracle Workflow process. The workflow can be automatically launched when the service request is created (not when it is updated) or manually launched depending on the settings you enter while defining service request types.

You must define at least one service request type for Oracle Depot Repair use. Typically you define one service request type called Depot Repair. However, you can use any name for the service request type, so long as it is associated with a Business Process that can be used in Oracle Depot Repair. See Defining Business Processes, page 4-7.

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

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

To Set Up Service Request Types

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

Service Request > Setup > Definitions >Service Requests Types

The window lists all the existing service request types.

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

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

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

4. In the Business Process field, select the Business Process for which this service request type is being created. In this case, the Business Process is Depot Repair.

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

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

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

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

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

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

10. Save your work.

Setting Up Depot Repair Reason Codes

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

Oracle Depot Repair provides the following seeded Reason Codes:

Code	Description
ADV_EXCH	Advanced Exchange
APPRV	Customer Approves the RMA
EST	Estimate Approved
HOLD	Repair On-Hold
LOANER	Loaner
PRCD RPAIR	Proceed with Repair
REJECT_1	Product Unrepairable
REJECT_2	Declined Repair
REV_EST	Revised Estimate Approved

Code	Description
WAIT_1	Customer Contacted
WAIT_2	Awaiting Approval

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

> **Note:** You can define additional reason Lookup Codes using the Lookups window. For detailed instructions, see Defining Oracle Depot Repair Lookup Codes, page 4-47.

To Set Up Depot Repair Reason Codes

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

   Depot Repair > Setup > Reason

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

   • Type: refers to the Lookup Type and is seeded value that the user cannot modify

- User Name: refers to a user definable value for this Lookup Type

- Application: refers to the application that owns the reason types being defined

- Description: refers to the description of the Lookup Type

- Code: is the unique code assigned to a reason type

- Meaning: represents the meaning of the Code

- Description: refers to the description for the Code

- Tag: refers to an optional additional category hard code, and is not used by Depot Repair

- Effective Date From: represents the first date that the Reason Code was available and valid

- Effective Date To: represents the last date the Reason Code was available and valid

- Enable check box: when selected, enables the use of the Reason Code while using Oracle Depot Repair

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

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

Setting Up Customer Profiles

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

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

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

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

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

Service Requests > Setup > Customer Management > Customer Profiles

Follow these steps to setup Customer Profiles:

- Define Profile Rating Lookup Codes

- Define Profile Variables

- Define Drilldowns

- Define Profile Checks

- Define Profile Groups

- Define Dashboard Groups

- Associate Profiles with Modules

- Define Preferences

- Define Rating Labels

- Define Categories

- Run the Customer Profile Engine

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

Setting Up Diagnostic Codes in Oracle Depot Repair

Oracle Depot Repair provides the ability to associate service 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 service efforts for customer charges and depot service history.

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

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

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

For details of setting up Service Codes in Oracle Depot Repair, see Setting Up Service Codes in Oracle Depot Repair, page 4-41.

For details of setting up Diagnostic Codes and Service Codes in Oracle Knowledge Management, see Setting Up Knowledge Management, page 2-15.

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

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

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

To Set Up Diagnostic Codes in Oracle Depot Repair

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

   Depot Repair > Setup > Diagnostic Codes

   The window lists all the existing Diagnostic Codes.
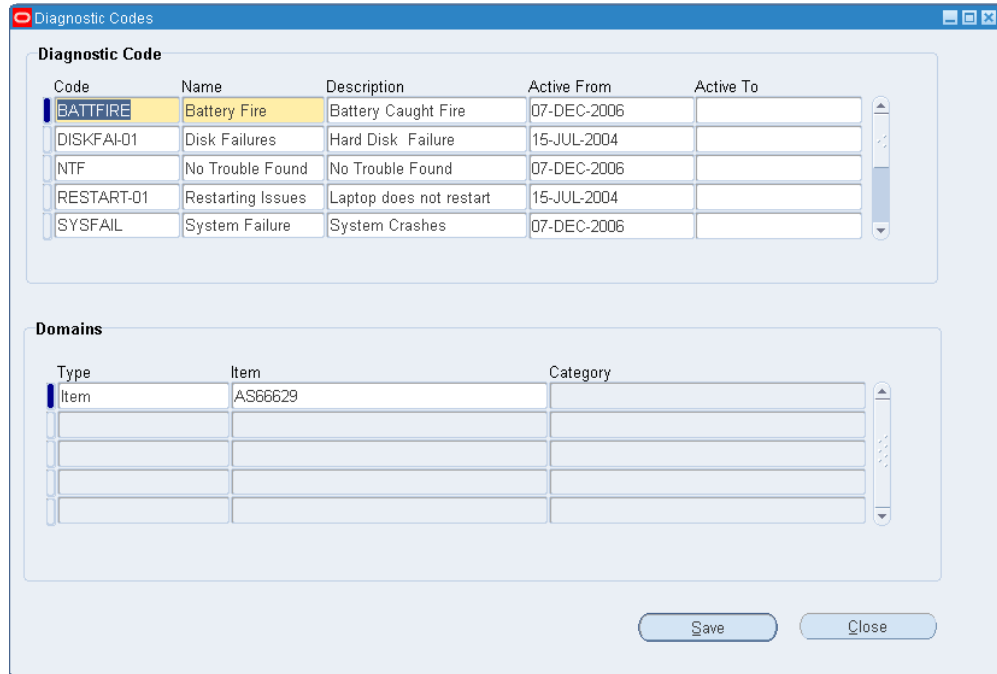
2. Click the New toolbar button to create a blank row for defining your Diagnostic Code.

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

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

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

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

6. Optionally, set the Active To date field.

7. Click the Depot Repair Diagnostic Codes DFF field to open the Depot Repair Diagnostic Codes window. Add a DFF value to the diagnostic code and click the Save.

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

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

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

11. Click the Depot Repair Diagnostic Codes DFF field to open the Depot Repair

Diagnostic Codes window. Add DFF value to the diagnostic code and click the Save.

12. Repeat steps 7 to 11 for as many domains as you want to associate with the Diagnostic Code.

13. Click the Save Button to save your setup.

Setting Up Service Codes in Oracle Depot Repair

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

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

You can use Service Codes with or without Diagnostic Codes.

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

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

For details of setting up Diagnostic Codes in Oracle Depot Repair, see Setting Up Diagnostic Codes in Oracle Depot Repair, page 4-39.

For details of setting up Diagnostic Codes and Service Codes in Oracle Knowledge Management, see Setting Up Knowledge Management, page 2-15.

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

• One or more items

• One or more item categories

   The item categories belong to the category set selected for the profile option CSD: Default Category Set for Diagnostic Codes and Service Codes.

• One or more reference bills

• One or more alternate bills

• One or more reference routings

• One or more alternate routings

• One or more task template groups

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

To Set Up Service Codes in Oracle Depot Repair

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

   Depot Repair > Setup > Service Codes

   The window lists all the existing Service Codes.

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

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

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

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

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

6. Optionally, set the Active To date field.

7. In the DFF field, enter flexfield information associated with the Service Code. The DFF name is Depot Repair Service Codes.

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

- Click the Domain tab, if it is not visible

- Select either Item or Category from the Type list of values

- Depending on your choice of Type, select either an Item or a Category from the appropriate list of values.

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

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

- Click the Bills and Routings tab.

- Select the organization from the Org list of values.

- To associate a bill, select from the Bill Reference list of values, and if you require an alternate bill, select also from the Bill Alternate list of values.

- To associate a routing, select from the Routing Reference list of values, and if you require an alternate routing, select also from the Routing Alternate list of values.

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

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

- Click the Task Template Groups tab.

- Select the task template group from the Name list of values.

   This also populates the Description field.

Repeat this step for as many task template groups as you want to associate with the Service Code.
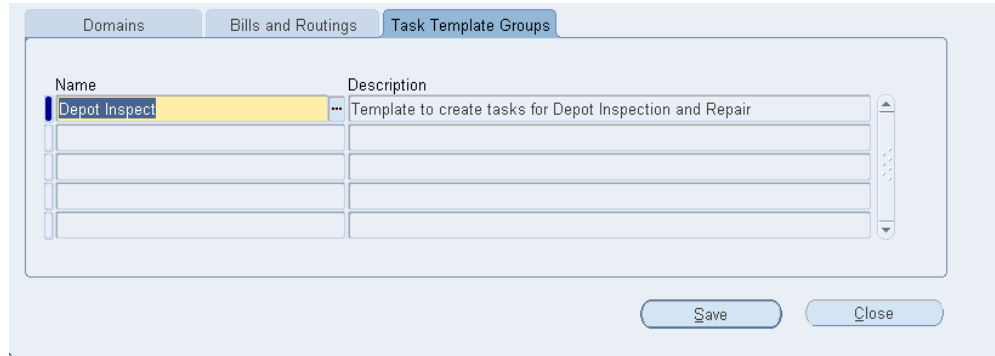
11. Click the Save icon on the toolbar to save your setup.

Setting Up Service Code Recommendations

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

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

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

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

- A name

- A service code and one of its domains

- A recommendation type of Sometimes or Always

- One or more requirements involving diagnostic codes and their domains; each requirement mandates either the existence or the absence of a diagnostic code and one of its domains

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

- Recommendation Name: S7_D1Y_D99N

- Recommendation Type: Always

- Service Code: S7

- Diagnostic Requirement 1: Must Have D1

- Diagnostic Requirement 2: Must Not Have D99

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

1. You click the Recommend Services button.

2. The system checks all the diagnostic codes in the Diagnostic Codes region against all the requirements of the service code recommendations.

3. If all the requirements of one or more recommendations are fulfilled, the corresponding service code or codes are added to the Service Codes region.

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

For details, select from the following:

1. Querying Service Code Recommendations, page 4-44

2. Adding Service Code Recommendations, page 4-44

Querying Service Code Recommendations

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

   The window shows the existing service code recommendations.

2. Select a recommendation to see its diagnostic code requirements at the foot of the screen:

3. Optionally, click the Update icon for a recommendation to update it.

4. For a new recommendation, click Add Recommendation, page 4-44.
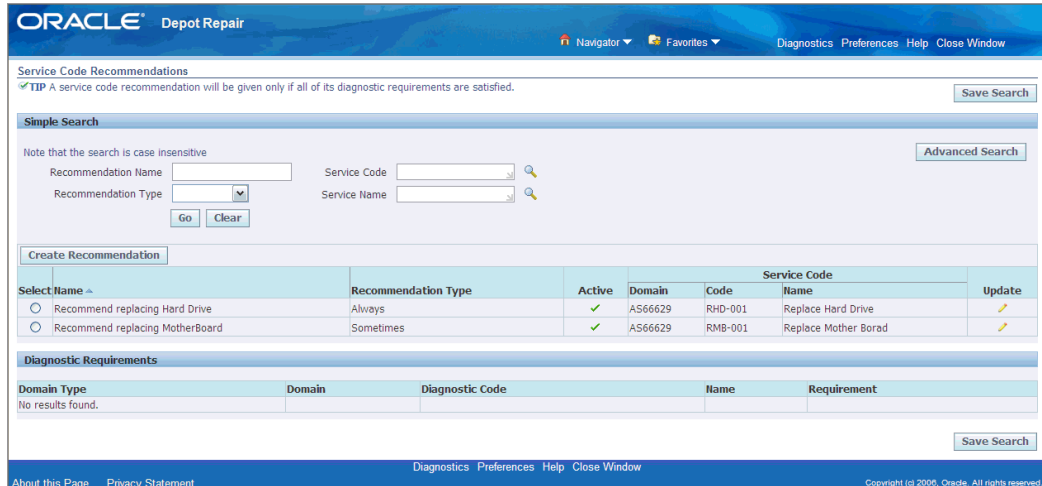
Adding Service Code Recommendations
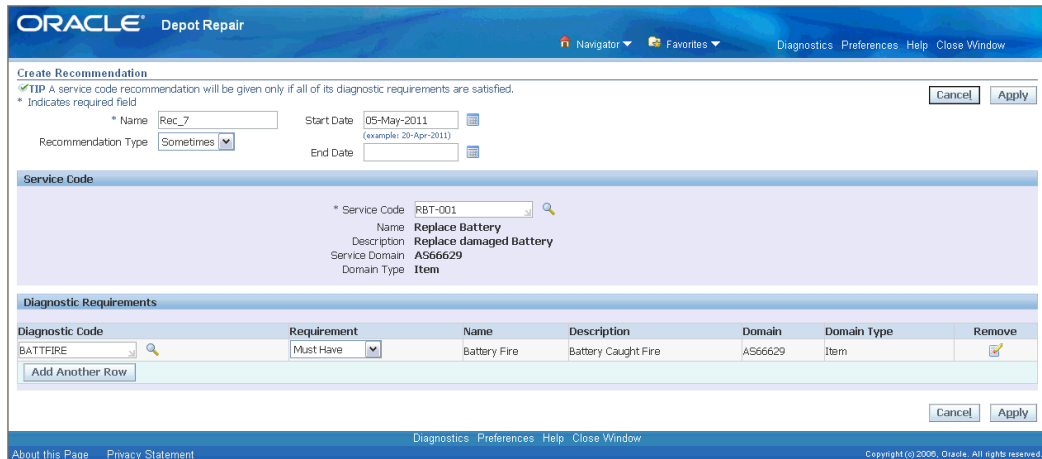
1. Enter a Name for the recommendation.

2. Select a Recommendation Type, of Sometimes or Always.

3. Optionally, select a Start and End Date.

4. Select a Service Code.

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

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

   For each diagnostic requirement, select the following

- Diagnostic Code

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

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

- Requirement - either Must Have or Must Not Have

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

7. Save your work.

Defining Oracle Depot Repair Lookup Codes

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

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

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

Lookup Type	Description
CSD_APPROVAL_STATUS	Repair Approval Status (Approved, Rejected)
CSD_ESTIMATE_STATUS	Estimate Status (Accepted, Bid, Closed, Draft, Hold, Rejected)
CSD_EST_BILLING_TYPE	Estimate Billing Type (Expense, Labor, Material)
CSD_EVENT	Repair Event (Customer Approved, Charges Recorded, Repair Diagnosed, Repair Job Completed)
CSD_PRODUCT_ACTION_CODE	Product Transaction Action Code for Service Orders (Customer Item, Exchange, Loaner, Replacement, Defective, Usable)

Lookup Type	Description
CSD_PROD_ACTION_TYPE	Depot Service Order Product Transaction Action Types (Return, Ship, Move In, Move Out)
CSD_PRODUCT_TXN_STATUS	Product Transaction Status (Booked, Entered, Received etc.)
CSD_REASON	Reason for current status of repair process (Customer Approves the Estimate, Estimate Approved, Repair On Hold)
CSD_REJECT_REASON	Estimate Reject Reasons (Customer Reject, Machine Unavailable, Resource shortage)
CSD_REPAIR_MODE	Service Mode for the depot repair processes (WIP, Tasks, None, All)
CSD_REPAIR_STATUS	Service Status (Closed, Open, On Hold)
CSD_REPAIR_TYPES	Depot Service Types (Advance Exchange, Walk-In with Return and Repair etc.)
CSD_RO_TXN_STATUS	Service Order Transaction Status (OM Booked, OM Received, OM Released etc.)
CSD_UNIT_OF_MEASURE	Lead Time Unit of Measure (Hour, Week, Day)
CSD_WIP_JOB_STATUS	Job Status (Released, Unreleased)
CSD_WARRANTY_STATUS	Supplier Warranty Status (Rejected, Submitted, Approved)
CSD_SOURCE_TYPE	Repair BOM
CSD_DEF_ENTITY_ATTR_RO	Service Owner, Ship From Sub-Inventory, RMA Receiving Sub-Inventory, Service Organization, Ship From Organization, Inventory Organization, RMA Receiving, Organization, Service Priority, Service Type, Vendor Account

Lookup Type	Description
CSD_BULLETIN_TYPES	Notification, Recall, Regulatory Compliance, Soft Entitlement, ECO, Bulletin
CSD_BULLETIN_SOURCE_TYPE	Rule, Manual
CSD_DEFAULTING_ENTITIES	Service Order
CSD_DEFAULTING_VALUE_TYPES	Attribute, PL/SQL API, Profile
CSD_RULE_TYPES	Service Bulletin Rule, Defaulting Rule
CSD_RULE_OPERATORS	<>, <, >, =
CSD_BULLETIN_FREQUENCY	Apply Once Per Repair, Apply Once Per Item Instance
CSD_ESCALATION_CODES	New, Reopened
CSD_BULLETIN_ACTION	Mark as Viewed, Mark as Unviewed
CSD_WARRANTY_VIOLATION	Yes, No
CSD_REWORK	Yes, No
CSD_RECALL_FLOW_STATUS	Recall Flow Status (Closed, Draft, Open)

To Define Oracle Depot Repair Specific Lookup Codes

Switch to the Application Developer responsibility.

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

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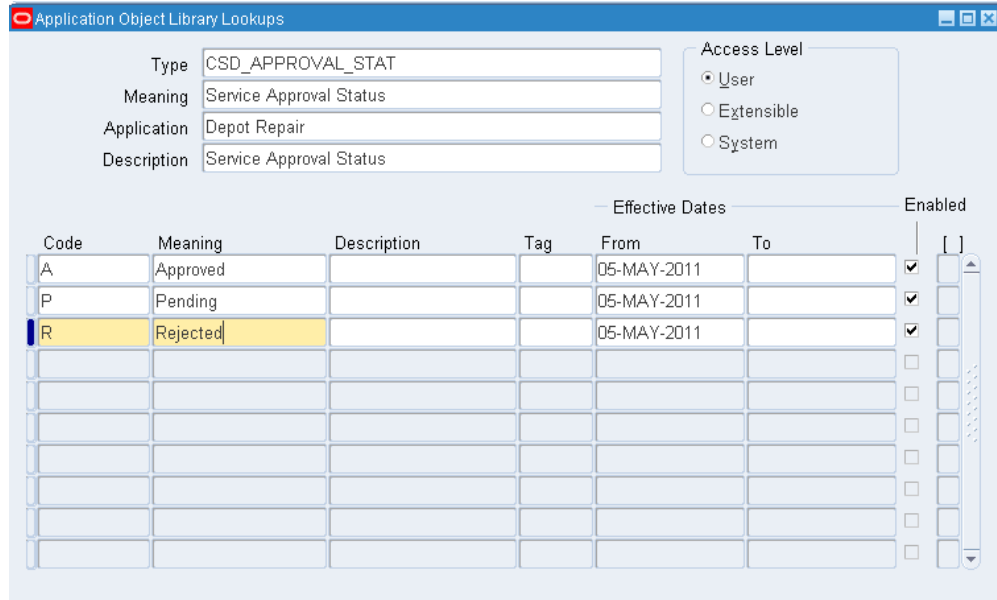
2. Run a query to display the details of the Lookup Type under which you want to define the lookup code. Several lookup types (listed above) are pre-seeded in Oracle Depot Repair.

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

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

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

6. Optionally enter a description in the Description field.

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

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

9. Save your work.

Setting Up Oracle Depot Repair Profile Options

Profile options are changeable parameters that affect the way your application looks and behaves. As System Administrator, you control how Oracle Depot Repair operates

by setting profile options to the values you want. You can set profile options at four different levels: site, application, responsibility, and user. For a detailed discussion of User Profile options, refer to the Oracle E-Business Suite Setup Guide.

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

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

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Add to Order Num Within Service Order Default	No	Yes or No	When the new item transaction is created, the Add to Order Number is derived based on this profile and CSD: Add to Order Num Within Service Request Default. The Bulk Receiving program honors this profile.
CSD: Add to Order Num Within Service Request Default	No	Yes or No	When the new item transaction is created, the Add to Order Number is derived based on this profile and CSD: Add to Order Num Within Service Order Default. This profile takes the precedence over CSD: Add to Order Num Within Service Order Default. Setting this profile will cause it to use the order number of the Service Request. The Bulk Receiving program honors this profile.
CSD: Allow Charge Override for Actuals	No	Yes or No	Determines whether to allow overriding of the Charge field for Actuals lines.
CSD: Allow Charge Override for Estimates	No	Yes or No	Determines whether to allow overriding of the Estimated Charge field for Estimate lines.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Allow Creating WIP Job Without RMA	No	Yes or No	Determines whether the creation of a WIP Job without an RMA is allowed.
CSD: Allow Price Override for Logistics Lines	No	Yes or No	Determines whether to allow overriding of the Price field in the Logistics Tab. Cannot be updated by a User, only by Sysadmin. If not set, the value is taken as No.
CSD: Automatically Clock In to Time Clock		Yes and No	When set to Yes, this profile option automatically clocks you in to the first available operation on the first available job when you log into the Technician Portal or access the Technician Portal from the Execute Job button in the Depot Repair Workbench or from the Work Details button in the Returns Portal. **Note:** Ensure you personalize and enable the Work Details button in Returns Portal Service Order Details page and the Returns Portal Confirmation page. If you select No for this profile, you will not be automatically clocked in when you access the Technician Portal.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Automatically Receive Items	Prompt Before Auto-Receive	Never Automatically Receive Always Automatically Receive Prompt Before Auto-Receive	Determines whether or not you will be prompted to automatically receive items in the Logistics tab of the Depot Repair workbench. If you select: • Never Automatically Receive, you will not be asked to auto receive and the Oracle Receiving forms appears. • Always Automatically Receive, you will be able to, if the items are eligible, to auto-receive using the Auto Receive Item popup without any prompt. If not eligible, the Oracle Receiving forms appear to recieve the items. • Prompt Before Auto-Receive, you will be asked if you would like to auto-receive using the Auto Receive Item popup or else the Oracle Receiving forms appear.
CSD: Automatic Service Bulletin Retrieval after Service Order Creation	No	Yes or No	This will specify the default sub-inventory to use when issuing materials in the Technician Portal.
CSD: Automatic Serial Number Reservation	None	Yes or No	If this profile is set to yes, the serial number is automatically reserved before pick release, sparing the user from having to manually reserve it using the Data->Reserve Serial Number menu option.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Bulk Receiving Logistics	Process through Receiving Orders	Process through Booking Orders Process through Receiving Orders	This profile option gives you the option to create a service order with or without automatic receiving transactions in the Bulk Receive module. You can select from the following values: • Process through Booking Orders: Select this value to ensure you create a service order without running the Receiving Transactions concurrent program automatically. • Process through Receiving Orders: Select this value to ensure that you can create a service order and run the Receiving Transactions concurrent program automatically to receive the service order.
CSD: Calculate Resolve By Date from Entitlement	No	Yes or No	If set to Yes, this profile calculates the Resolve by Date starting from a specific service order status rather than only from service order creation. **Note:** In addition to setting the profile option to Yes, the Entitlement milestone needs to be set under RO Status Transitions Setups in order for this calculation to be kicked off during a status change.
CSD: Close SR When All Service orders are Closed	None	Yes or No	When set to Yes, automatically closes the Service Request when the last Service Order is closed.
CSD: Create IB Instance at Service Order Creation	No	Yes or No	If this profile set to Yes, it creates IB instance at service order creation. It will not ask you whether you want to create IB instance or not. If this profile set to NO, it will ask you whether you want to create IB instance during creation of service order.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Create Logistics Lines for OSP	No	Yes or No	Setting this profile to Yes enables a technician to automatically create a third party ship and RMA line on the Logistics tab whenever an OSP operation is completed.
CSD: Complete Work Service Order Status	No	Yes or No	This profile option specifies the flow status that the service order will be changed to when the complete work button is clicked.
CSD: Currency Conversion Type	None	Daily conversion types available in GL (gl_daily_conversion_types)	Conversion type to use when converting a cost to the currency of an estimate charge line.
CSD: Customer Approval Required	Yes	Yes or No	Determines whether customer approval of the estimate is required for creating a Job.
CSD: Custom Estimate Report Concurrent Name	None		Name of the concurrent program to launch for custom estimate reports
CSD: Custom Traveler Concurrent Name	None		Name of the concurrent program to launch for custom travelers
CSD: Debug Level			This profile is no longer in use. Use the FND debug profile options to enable debugging.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Default Actuals Account from Customer Account	Null	Yes or No	This profile defaults the customer account information in the service request header to the Default Bill To Account field in the Actuals tab on the Depot Repair Workbench. Use the following values: • Select Yes to default the customer account information that appears in the service request header to the Default Bill to Account field in the Actuals tab. Upon booking, the actual lines will be booked to the customer account. • Select No to default the service request's bill-to-account information, regardless of whether or not it is the same as the customer account, to the Default Bill To Account field in the Actuals tab. Upon booking, the actual lines will be booked to the Bill-to account. If the profile value is null, then the default behavior will be the same as when the profile is set to No.
CSD: Default BOM Resource	No	Yes or No	This profile option specifies the BOM resource to transact when clocking out. Before you set profile CSD: Default BOM Resource, you must set the profile CSD: Default Repair Inventory Org first.
CSD: Default Completion Sub-Inventory	None		The default subinventory to use when completing a job in the Technician Portal
CSD: Default Current Item Revision for Job Completions	Yes	Yes or No	Whether or not to default the latest item revision when completing a job in the Technician Portal

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Default Current Item Revision for Material Transactions	Yes	Yes or No	Whether or not to default the latest item revision for materials in the Technician Portal
CSD: Default Category Set for Diagnostic Codes and Service Codes	Inv.Items	<Category Set>	Determines the default Category Set for setting up Diagnostic Code and Service Code domains.
CSD: Default Country Code (Phone)	None	< free text >	Specifies the Default Country Code for phone number fields.
CSD: Default Department for Operations	None		The department to default for a new operation on a job in the Technician Portal if the job does not have a routing reference.
CSD: Default HR Resource	None		The default employee for a resource on a job in the Technician Portal
CSD: Default Instance-Party Association Type	None	Any value defined in Install Base > Instance Party Account	Relationship Types Form Automatically creates instance party association to support rental flow. If the profile is set to a value, it will automatically create an association between two parties and process repair orders and charge lines. **Note:** If the instance is not owned by the service request customer (the instance may be internally owned or it may be owned by another external customer), then the code automatically creates the relationship between the SR customer and the item instance. The relationship value comes from the profile.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Default Job Name Prefix	No	<Any user entered value is allowed>	Specifies the Default Job Name Prefix used while submitting a Job for creation. This profile is applicable only when the profile CSD: Use CSD as Job Name Prefix is set to No.
CSD: Default Job Status	None	Released or Unreleased	Determines the default Job status.
CSD: Default Labor Item for Estimate Line From Tasks	None	Eligible labor items from Inventory	Labor item to use when auto-creating estimate labor lines from tasks.
CSD: Default Logistics Addresses to Primary Customer Account Sites	None	Yes or No	If set to yes: Depot Repair workbench will to default the Bill To and Ship To on the Logistics lines from the Primary Customer Account Sites for the users Operating Unit. If no primary account site can be found, then the logistics addresses will be defaulted from the SR bill-to and ship-to fields. If set to no: The logistics bill to and ship to addresses defaulted from the bill-to and ship-to fields in the SR.
CSD: Default Logistics Warehouse	Yes	Yes or No	If this profile set to Yes, it will default the warehouse on the logistics line. If the value set to NO, it will not default the warehouse on the logistics line.
CSD: Default Material Sub-Inventory	None	1 Any valid subinventory	This will specify the default sub-inventory to use when issuing materials in the Technician Portal.

Profile Name	Default Value (Site Level)	Possible Values	Description
		2. Null	If set to Null, users will not be required to enter supply subinventory information in the Technician Portal when creating the material requirements if the supply type of operation is push. .
			Note: If the Null value is selected, users will be required to enter supply subinventory information during issue transactions in the Technician Portal if the supply type of operation is pull and assembly pull and not push.
			Note: This profile needs to have a value if the WIP supply type is operation pull or assembly pull and can be left as null otherwise.
CSD: Default Material Sub-Inventory Locator	None	All valid subinventories in a particular inventory organization and subinventory.	This profile option is the default profile used for transacting materials from Technician Portal if the item is locator controlled or the subinventory is locator controlled. Use this profile option to specify from where to source material when issuing materials to jobs.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Default Material WIP Supply Type	Null	Null, Push, Assembly Pull, Operation Pull	This profile allows a repair organization to specify a single supply type, generally Push, for all materials used in repairs. This overrides setups done in the Item Master. This is applicable for organizations that use only a single supply type in the repair business and do not want to have distinct setups for manufacturing versus repair when the repair supply type is always the same. If set, this default supply type will be used for material requirements manually created in the Technician Portal or created from Estimate lines. **Note:** If the value is null, the WIP supply type defaults from the setup in the Item Master.
CSD: Default Pick Release Rule for Usable SubInventory	None	All valid and active pick release rules.	This is the default pick release rule when performing a move out action from depot in the spares to depot flow. The usables are picked up from this subinventory and are staged.
CSD: Defective Pick Release Rule for Defective Sub Inventory.	None	All valid and active pick release rules.	This is the default pick release rule when performing a move in action to depot in the spares to depot flow. The defectives are picked up from this subinventory and are staged.
CSD: Default Pick Release Rule for Sales Orders	None	Standard, etc.	Determines default Pick Release Rule for Service Order related sales orders.
CSD: Default Price List	None	< Price List >	Sets the default price list for the Depot Repair application.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Default Program Created Service Request Severity	None	<List of Incident Severities>	When creating Service Requests from RMA lines via concurrent manager, this severity will be used for the Service Request.
CSD: Default Program Created Service Request Status	None	<List of Incident Statuses>	1. When creating new Service Requests for internal order refurbishments, this status will be used for the Service Request. 2. When creating Service Requests from RMA lines via concurrent manager, this status will be used for the Service Request.
CSD: Default Program Created Service Request Type	None	<List of Service Request Types for Depot Repair>	When creating Service Requests from RMA lines via concurrent manager, this type will be used for the Service Request.
CSD: Default Program Created Service Request Urgency	None	<List of Incident Urgencies>	1. When creating new Service Requests for internal order refurbishments, this urgency will be used for the Service Request. 2. When creating Service Requests from RMA lines via concurrent manager, this urgency will be used for the Service Request.
CSD: Default RMA Subinventory	None	List of subinventories	The default Subinventory to RMA an item into from the depot workbench
CSD: Default Return Reason Code for RMAs	Damaged Product	Damaged Product, etc.	Determines default Return Reason Code for item transaction: RMAs.
CSD: Default Service Order for New Lines	Yesor	Yes or No	Determines whether to default line values into the new line when you arrow down from last service order line in the Depot Repair Workbench.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Default Service Type	Standard	<Service Types>	Determines default Service Type for new Service Orders.
CSD: Default Service Request Severity for Internal Service Order	None	<Service Request Severity>	When creating new Service Requests for internal order refurbishments, this severity will be used for the Service Request. List of values displays all active Service Request severities.
CSD: Default Service Request Type for Internal Service Order	None	<Service Request Types>	When creating new Service Requests for internal order refurbishments, this type will be used for the Service Request. List of values displays all active Service Request types.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Default Service Order Item as Material on Job	Yes	Yes/No or Non-Serialized Only	Setting this profile to Yes automatically defaults the Item value that is captured on the service order as a material demand for jobs. The service order item can be seen in the Materials table on the Execution tab of the Technician Portal as soon as a job is created. **Note:** When the profile CSD: Default Service Item as Material on Job is set to Yes, the Service Order item defaults when: • No other jobs having the Service Order item as a material requirement exist. • Pre-existing jobs are not in Released/Unreleased/On Hold/Complete status. Restrictions on Released/Unreleased/On Hold/Complete status exist as job status can be changed using the Technician Portal for these statuses causing a potential serial number validation conflict. Complete status is restricted because users can transact materials for completed jobs and Serial Number LOV field must remain editable for completed jobs. Setting this profile to Non-Serialized Only when repairing non-serialized items, defaults the repair item as material demand to more than one job. Businesses repairing non-serialized items may require more than one job, and this value defaults to all jobs instead of only the first job. **Note:** The Non-Serialized Only option is only valid for businesses always repairing only non-serialized items and not for

Profile Name	Default Value (Site Level)	Possible Values	Description
			business repairs for serialized items.
CSD: Default Service Order Inventory Org		Possible values of any of the valid defined Inventory Organizations.	Each service order is associated with an Inventory Org. This is used as the default value to create new logistics lines and for reporting. The profile is that value from which the default is derived.
CSD: Default Service Type for Bulk Receiving	None		Service Type of service orders created through Bulk Receiving module
CSD: Default Service Request Owner for Bulk Receiving	None		Owner for Service Requests created through Bulk Receiving module
CSD: Default Service Request Severity for Bulk Receiving	None		Severity for Service Requests created through Bulk Receiving module
CSD: Default Service Request Status for Bulk Receiving	None		Status for Service Requests created through Bulk Receiving module
CSD: Default Service Request Summary for Bulk Receiving	None		Summary statement for Service Requests created through Bulk Receiving module

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Default Service Request Type for Bulk Receiving	None		Service Request Type for Service Requests created through Bulk Receiving module
CSD: Default Service Request Urgency for Bulk Receiving	None		Urgency for Service Requests created through Bulk Receiving module
CSD: Default Service Order Status After Receiving		All service order flow statuses.	The default service order status after the item is received.
CSD: Default Service Order Status After Final Shipping	Null (none)	List of the all the service order status on the service order status set-up UI page.	It is the default service order status after the final shipping on the logistics line.
CSD: Default Service Request Status for Bulk Receiving	None	All valid service request statues.	This profile is referred when creating service request from bulk receiving screens. If this profile is not set, the bulk receiving concurrent program would fail to create the service request.
CSD: Default Service Order Organization	None	All active service order organizations	Default service owning organization.
CSD: Default Subinventory for Bulk Receiving	None		Subinventory to receive items into when using the Bulk Receiving module

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Default Work Summary for Service Request	None	< free text >	When creating Service Requests from RMA lines via concurrent manager, this work summary will be used for the Service Request.
CSD: Default WIP MRP Net Qty to Zero	None	Yes or No	Determines if the net quantity for a WIP job should be defaulted to zero.If it is set to null or No, then the net quantity will be set to job quantity.
CSD: Default WIP Accounting Class	None	All defined accounting classes for non-standard discrete jobs	Default accounting class used in the create job functionality. Used when the jobs get created from all channels except Submit Jobs form.
CSD: Descriptive Flexfield Context for Technician Portal Operations			Sets the descriptive flexfield context in the operations table of the Repair Execution tab in the Repair Technician Portal.
CSD: Descriptive Flexfield Context for Technician Portal Materials			Sets the descriptive flexfield context in the materials table of the Repair Execution tab in the Repair Technician Portal.
CSD: Descriptive Flexfield Context for Technician Portal Resources			Sets the descriptive flexfield context in the resources table of the Repair Execution tab in the Repair Technician Portal.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Directory for Depot Log Files			This profile is no longer in use. Use the FND debug profile options to enable debugging.
CSD: Enable Advanced Pricing	No	Yes or No	Setting this profile to YES enables the use of Advanced Pricing modifiers, qualifiers, static and dynamic pricing formulas, secondary price lists and price breaks on Estimates and Actuals.
CSD: Enable Auto Update of Service Order Status upon Receiving	No	Yes or No	Set this option to Yes to enable automatic update of service order status when the item is received.
CSD: Enable Costing	Yes	Yes or No	Enables/disables cost fields and buttons for estimates.
CSD: Enable Estimates	Yes	Yes or No	This determines whether the Estimate tab will be enabled or disabled.
CSD: Enable Expected Receipts for Bulk Receiving	No	Yes or No	Setting this profile to Yes enables the Bulk Receiving module to allow for expected receipts as well as unexpected receipts.
CSD: Enable Flexfield Defaulting for Service Orders Flexfield	No	Yes or No	Enables defaulting of values in the service orders flexfield. When set to yes, the create service order API will try to default values for the flexfield segments if anything is defined.
CSD: Enable Knowledge Management	None	Yes or No	If the user sets this option to No, the applicable Knowledge Management area in the Diagnostics tab will be grayed out. If this profile option is not set, Knowledge Management will be enabled.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Enable Project and Task for Actuals	None	Yes or No	Set this profile to Yes to transfer the project and task number to sales orders from depot repair actuals. **Note:** Remove OM constraints to allow project and task updates on booked sales order lines.
CSD: Estimate Report Print Mode	None	Oracle Report, HTML, PDF, RTF, TXT, XLS	Format for estimate reports
CSD: Enable Sales Order Drill-down	No	Yes or No	This profile enables the Sales Order hyperlink on the logistics tab and Actuals window.
CSD: Enable Service Request Drill-down	No	Yes or No	Set this profile to Yes to launch the Update Service Request page from the Request Num link.
CSD: Enable Service Order Drill-down	No	Yes or No	Set this profile to Yes to allow users to double-click on the Repair Number in the Depot Workbench to drill down to the Service Order Details OA page.
CSD: Environmental Impact Dashboard Visibility Level	Operating Unit	Enterprise, Operating Unit	This profile restricts your ability to query environmental impact dashboard at an enterprise or operating unit level.
CSD: Environmental Impact Dashboard Default Weight UOM	None	Any active UOM defined with UOM Class = Weight	This profile option defaults the Weight UOM field in the environmental impact dashboard header.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Extend Resolve By Date for Hold Time	None	Yes or No	Set this profile to Yes to automatically extend the Resolve by Date based on the amount of time service orders are in the hold status.
CSD: Generate Estimate Overwrite Policy	None	NULL Overwrite Draft and New Estimates Only Always Overwrite Existing Estimates	This profile option determines how to regenerate and overwrite existing estimates in the Technician Portal. To only regenerate an existing estimate with the status New, select the value NULL or Overwrite New Estimates Only To only regenerate an existing estimate with the status New or Draft, select the value Overwrite Draft and New Estimates Only. To regenerate an existing estimate regardless of the status, select the value Always Overwrite Existing Estimates.
CSD: Import WIP to Actuals - Net Quantity	Yes	Yes or No	If the profile set to Yes, the import actuals from WIP feature will only import the Net Quantity to Actuals line. If the profile set to No, it will import the issued quantity to actuals line.
CSD: Import WIP Job to Actuals Only If All Lines Are Successful	Null	Yes	When the profile is set to Yes, if any of the lines in a WIP job that cannot be imported due to warnings or errors, none of the lines in the WIP job are imported. You must correct the issues and attempt to import the WIP job again. When the profile is set to No, all lines in a WIP job that can be imported are imported even if one or more lines fails to import.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Import WIP Resources to Estimates	Untransacted Resources only	Transacted Resources only Untransacted Resources only Transacted and Untransacted Resources Do not import Resources	This profile determine which resources are added to the estimate when Generate Estimate button is used in the Technician Portal.
CSD: Import WIP Materials to Estimates	Untransacted Materials only	Transacted Materials only Untransacted Materials only Transacted and Untransacted Materials Do not import Materials	This profile determine which materials are added to the estimate when Generate Estimate button is used in the Technician Portal.
CSD: Job Name Generation Method	None	1. Auto-generate job name using standard prefix (CSD)	If set to 'Auto-generate job name using standard prefix (CSD)', the job name is auto-generated using the standard prefix (CSD). The Job Name Prefix field defaults to 'CSD', is not editable, and the job name will have a number appended after 'CSD'.
		2. Auto-generate job name using prefix from profile option	If set to 'Auto-generate job name using prefix from profile option', the job name is auto-generated using prefix from profile option. The Job Name Prefix field defaults to the value from the profile CSD: Default Job Name Prefix, is not editable, and the job name will be appended by a number after the prefix.

Profile Name	Default Value (Site Level)	Possible Values	Description
		3. Manually enter job name	If set to 'Manually enter job name', the job name is manually entered. The Job Name Prefix field defaults to the value from the profile CSD: Default Job Name Prefix, is editable, and the job name is generated exactly as entered, with no number appended.
CSD: Launch Change Organization Form	No	Yes or No	If this profile set to Yes, the Change Organizations Form auto launches once the Service Order form is open. If the profile set to No, the Change Organizations form does not auto launch once the service order form is open.
CSD: Mandate Service Code Recommendations	None	Yes or None	When a user clicks the Recommend Service Codes button in the Technician Portal, the service codes that are recommended as Always will be automatically checked and disabled so that the user must apply the service code when generating jobs.
CSD: Mode for Sales Orders	Order Details Form	1. Order Details Form	This profile option determines which Order Management user interface will be shown when the user attempts to apply or release a hold from Depair Repair's Service Order Details page. Select the default value Order Details Form to launch the Order Management Sales Order Form
		2. HTML UI View Order Details	Select HTML UI View Order Details to launch the Sales Order Details read-only HTML page
		3. HTML UI Update Order Details	Select HTML UI Update Order Details to launch the Sales Order Details updateable HTML page

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Number of Days to Rollback Currency Conversion	300	\<Integer value\>	Number of Days to rollback currency conversion when converting a cost from GL currency to currency of estimate charge line.
CSD: Number of Days in Quality Check Period	\<Null\>	\<Null\> or \<Any positive integer\>	A service bulletin can be created for Number of Services During Quality Check Period that checks to see whether an item instance has been returned multiple times within a defined time period. This is used to ensure that neither the item instance nor the service performed is of low quality. Setting the Number of Days in Quality Check Period to \<null\> will treat the check period as infinite and will check for repeat returns from the very first service record in the database. Any positive integer value will restrict the search to the number of days specified.
CSD: Number of days from the current date to default Return By Date	None	Any number	The Return By Date on a logistics line in the Depot Repair Workbench to the current date + the number of days specified in this profile option, if that logistic line's IB transaction type requires a source or non-source return.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Predictive Analytics Model	Best Model	Decision Tree Naïve Bayes Support Vector Machines Best Model	This profile option allows you to select the prediction model from the following available models: • Decision Tree • Naïve Bayes • Support Vector Machines The default value for this profile option is Best Model. If set to the default value, the application chooses from the three available models on the basis of whichever model performs better and returns the highest probabilty predictions.
CSD: Predictive Analytics Probability Threshold	50%	The value should be a percentage between 0% and 100%	This profile specifies the threshold for which recommendations will be shown in the Technician Portal. Only recommendations with a confidence level above the threshold will be shown.
CSD: Print Bulk Receipt Travelers	Yes	Yes or No	Enables the generation of bulk receipt traveler reports if the value is set to Yes. **Note:** Set CSD: Print Bulk Receipt Travelers as Y, in addition to setting RCV: Print Receipt Traveler profile option as Y or X.
CSD: Printer Name	None	<Printer Name>	Determines printer for printing estimate report.
CSD: Printer Required	None	Yes or No	Determines whether a printer is required.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Price List Derivation Excludes Contract Header	No	Yes or No	The service order price list derivation excludes the contract header if this profile set to Yes.
CSD: Process Auto Pick Release	All ship lines in an order	Selected ship line only / All ship lines in an order	This profile allows user to pick release all ship lines in an order or selected ship line only on the Depot logistics tab
CSD: Restrict Service Order Search by Manufacturing Organization	None	Yes or No	This profile option enables filtering by organization in the Find Service Order form if the value is set to Yes. When the profile option is set to Yes, and the user selects the Org from the Change Organization form, the Find Service Orders forms will filter by the organization that was selected.
CSD: Require Item For Service Request	Yes	Yes or No	Makes the item and related fields required/not required in the Service Request header.
CSD: Read Only Workbench	No	Yes or No	Set this option to Yes to view the Depot Workbench in read-only mode.
CSD: Returns Portal Mode	None	Consumer Returns	If the profile value is set as Consumer Returns, the user can register and login to the Returns Portal and can view/request only assigned returns.
		Store Returns	If the profile value is set as Store Returns, users can select customer information while requesting the returns and create new customer records. The Store Returns user can see all the return orders irrespective of the which depot they might be assigned to.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Requisition Lead Time (Days)	None	Any number	The need by date for an internal requisition is defaulted to the current date + the number of days specified in this profile option.
CSD: Service Mode for Depot Orders	Work In Process	Work In Process, Task, None/ Not Applicable, All	Determines Service Mode for Depot Repair Processes - site level.
CSD: Service Type Internal Service Order	None	List of values displays all Service Types where Service Type Ref is Refurbishment and Internal Order flag is checked.	List of values will display at least one value, as Oracle Depot Repair seeds one Refurbishment Service Type. Customer can add more Service Types with Refurbishment set for the Service Type Ref and Internal Order flag checked, for example, one each for Task and WIP mode. A value for this profile is required to create internal Service Orders from Spares Management.
CSD: Service Execution Mode	Technician Portal	Technician Portal or WIP Forms	Decides whether to use Technical Portal or traditional WIP forms for performing different actions like material transaction, resource transaction, move job, complete job etc. When this profile is set to Depot Execute Job button is rendered in jobs tab. When its WIP, we will get a Dropdown in the same tab with links to WIP forms.

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Show Depot WIP Transaction Descriptive Flexfield for Estimates	No	Yes or No	When the value is Yes, another DFF field appears in the Estimate Line Details window. When viewing the generated estimate lines after an estimate is generated from a WIP job, users can then see the DFF values from the material/resource line of the source WIP job that have been entered for materials and resources in the Technician Portal. DFF values are read-only and only viewable depending on the value of this profile option. The DFF will only have values if the user imports the estimate line from WIP and only if the user has entered DFF information in the Technician Portal.
CSD: Show Service Request Descriptive Flexfield	No	Yes or No	If set to Yes, a descriptive flexfield appears in the Service Request block of the Depot Repair Workbench. **Note:** If you set up the application to have context sensitive service request descriptive flexfields, then this profile must be set to No.
CSD: Transfer of Ownership for Bulk Receiving	None	Yes or No	Whether or not to automatically transfer ownership of an item being received through Bulk Receiving to the Service Request customer
CSD: Time Clock Next Button Transactions	None	Transact Time Clock Resource Only	Automatically populates the accrued time since clocking in to that operation on the Resources table. No other materials or resources are auto-transacted. Users will be clocked out of the current operation and clocked into the next operation.
		Transact Time Clock Resource and Complete Operation	Completes the operation before clocking into the next operation (in addition to the properties of Transact Time Clock Resource Only profile value)

Profile Name	Default Value (Site Level)	Possible Values	Description
CSD: Update Instance Number on Shipped Lines for Non-Serialized Installed Base Item	No	Yes or No	The update logistics and Shipment Update concurrent program does update the source instance number for the non serialized IB service item on the logistics ship line if this profile set to Yes
CSD: Update Logistics Program Error Handling	Stop On Error	Stop On Error or Process All	If the profile set to Stop On Error, the update logistics concurrent program will stop if there is any error. If the profile set to Process All, the update logistics concurrent program will skill bad record and continue process the rest of the record.
CSD: Use Tasks from Knowledge Management Solutions	Yes	Yes or No	When set to Yes, auto-creates estimate lines from tasks that are linked to applicable solutions (even if they are not linked via a service code), when you click Add Lines from Diagnostics in the Estimate tab.
CSD: Use Global Variables For Advanced Pricing	None	Yes or No	This profile option supports global variables for Oracle Advanced Pricing. Set this profile option to Yes to use global variables for Advanced Pricing, or else select No.
CSD: Validate bill-to and ship-to before opening Service Request	None	Yes or No	This will enable/disable the validation of bill-to and ship-to address before opening the service request in Depot Repair.
CSD: View Warning or Confirmation Messages in Logistics	None	Yes or No (A null value evaluates to No)	The pick release or ship confirmation shows a series of messages. When this profile is set to No, only one message will be shown.

Profile Name	Default Value (Site Level)	Possible Values	Description
RCV: Print Receipt Traveler	None	Y or N or X	This profile option runs the Receipt Traveler Concurrent program automatically during Auto-Receiving and prints the receipt traveler report.
			When set to Y, the receipt traveler report is printed in the RDF format.
			When set to X, the receipt traveler report is printed in the XML format.
			When set to No, the receipt traveler report is not printed.
			Note: When you set RCV: Print Receipt Traveler profile as Y or X, ensure you that you set the profile option CSD: Print Bulk Receipt Travelers as Y.

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

Profile Name	Possible Values	Description
Service: Default Group Owner for Service Requests	Profile options Service: Default Group Owner for Service Requests and Service: Default Group Owner Type for Service Request both have to be either defined or NULL	Restricts the Service Request Owner List of Values depending on the selected profile value.
Service: Default Group Owner Type for Service Request	Profile options Service: Default Group Owner for Service Requests and Service: Default Group Owner Type for Service Request both have to be either defined or NULL	Restricts the Service Request Owner List of Values depending on the selected profile value.

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

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

Profile Name	Possible Values	Description
JTFAM: Activate Auto Selection of Resources	Yes or No or Null	If the profile is set to Yes, the Assignment Manager limits the resources to the number of required resources for a particular Task Type. If the profile option is set to No or Null, the Assignment Manager shows all available resources regardless of resource requirements.

Setting Up Message Action Codes

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

Setting Up Serial Reservations

Serial Reservation is done for items serialized at receipt or predefined to avoid opening Transact Move Order screen. Depot uses group API to create batch and pick release.

> **Note:** The Transact Move Order screen is not required to ship items that are serialized at Sales Order Issue.

Auto-reservation takes place when the user pick releases the item, thus the serial number is not reserved immediately after booking in Depot.

The following criteria must be satisfied for the serial reservation capability to work:

- The subinventory is specified.

- The source serial number is specified.

- The line is of type Ship or Ship Third Party.

- The item on the ship line is defined in Item Master as Reservable.

- The item on the ship line is defined in Item Master as serialized At Receipt or Predefined.

Serial reservation is triggered when you process the pick release from the Depot Workbench. Items are not reserved after booking.

To activate auto reservation in Depot, please check the following setups:

1. Set profile: CSD: Automatic Serial Number Reservation to Yes

2. Navigate to the Release Rules page.

3. Click the Inventory tab and set the Auto Allocate to Yes.

4. Save and close the form.

5. Navigate to the Organization Parameters page.

6. Select the Revision, Lot, Serial And LPN tab.

7. In the Serial Control region, set Allocate Serial Numbers to No.

8. Save and Close the form.

9. Navigate to the Depot Repair Workbench and open a service order with a ship line on it.

10. In the Logistics tab, enter a Subinventory on the ship line. The selected subinventory from which you are shipping out must be reservable. The item you are shipping must be reservable (in the organization you are shipping out from).

For information on how to make a subinventory reservable, see: Inventory Attribute Group, *Oracle Inventory User's Guide*

Setting Up Aging Threshold

Aging is defined as the amount of time from service orders creation or the amount of time that a service order is in a specific status. Aging is related to elapsed calendar time and not to actual service 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. If you choose an Item Category, the Item field is disabled.

   - Item: Select the item. If you select an Item, the Item Category field is disabled.

   - Description: Describes the item.

   - Revision: For revision-controlled items, you can optionally specify thresholds to specific revision number.

   - Service Type: Specifies the service 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 service 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. If you choose a Category, the Item field is disabled.

   • Item: Select the item. If you select an Item, the Category field is disabled.

   • Description: Describes the item.

   • Revision: Active only for revision-controlled item.

   • Threshold Quantity/Day: Represents the number of returns per day at which a service 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.
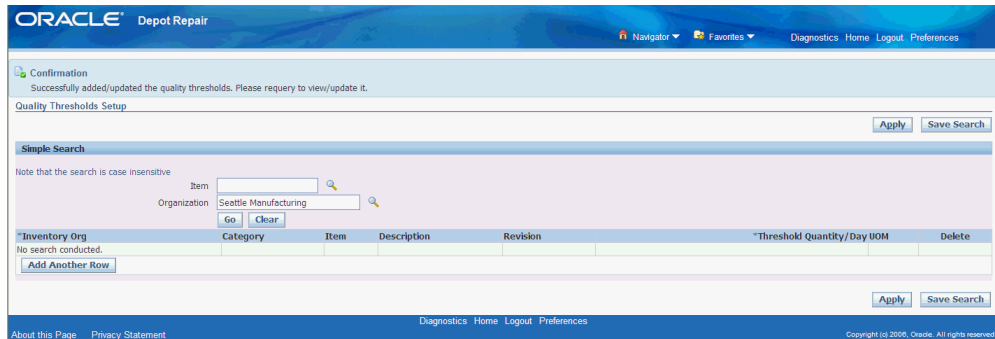
A confirmation message appears on the top of the page.

Setting Up Defect Codes

Defect codes capture the root cause of why an item required service. Though the system allows multiple root cause codes to be captured, most businesses will generally capture a single main cause for reporting and analysis purposes. You can set up defect codes to apply to all items universally or can be mapped to specific items or item categories.

Oracle Depot Repair provides a setup interface where each root cause code is linked to specific items or item categories. On the basis of this setup, the Technician Portal displays only the root cause codes that match the item or category of the required item.

To set up Defects Codes Lookup:
1. To populate the Defect Codes List of Values, set up the Defects Codes lookup. Use the Application Developer responsibility and navigate to Lookups > Application Object Library lookups.

2. Run the query type: CSD_DEFECT_CODES.

To set up defect code domains:
1. Navigate to Defect Code Domains page using the following path:

   Depot Repair > Setup > Defect Code Domains

   The page lists all the existing Defect Codes.

2. Click Add Another Row to create a blank row to define the new defect codes.

3. Select the new Defect Code from the list of values.

4. Select the Domain Type and the Item.

5. Repeat steps 2 to 4 for as many domains as you want to associate with the Defect Code.

6. Click Save to save the new setup.

7. A confirmation page appears displaying that the new setup is saved.

Setting Up Recall Status

The recall statuses indicate the stage of the recall lifecycle and critical milestones. Each status is associated with one and only one state. Each business defines its own status and transitions.

To set up recall status:

1. Navigate to the Recall Status Setup page. The page defaults to the existing statuses.

2. The Recall Status Transitions Setup region allows you to enter various recall statuses. Click the Add Another Row button to define new status.

3. Click the Apply button to save the new status.

Setting Up Recalls

The Recalls Setup page enables you to set up various recall options.

The Recall Options region displays the following information:

- The Service Request Defaults region contains the mandatory fields required for the creation of Service request from the Recalls page.

- The Service Order Default region specifies the default service type to be used for the Service Orders created via Recalls page.

- The Job Defaults region specifies the default job attributes to be used for the WIP jobs created via Recalls.

Recall Status Transitions region enables you to perform the following actions:

1. Specify the Default Start Status for the recall.

2. Setup status transitions if any. For example, you can set up a transition from Draft to Open. In this case, you can change the status of recall to Open only from draft. Any other status transition is disallowed.

Additional Information: A new concurrent program named Update Recall Metrics is created. This program is initiated from the Concurrent Program Manager, set to perform periodic updates, or is called real-time from the Update Recall Metrics button on the Recall page.

Setting Up Eco-Impact Threshold

The Eco-Impact Threshold Setup page enables you to setup the thresholds for:

- Percentage of Returned Units

- Percentage of Returned Weight

- Number of Units

- Weight

To facilitate the availability of data within a specific inventory organization for an entire operating unit or for the enterprise, the system allows setting up thresholds for each of these levels.

To define an eco-impact threshold:

1. Navigate to the Setup Eco-Impact Thresholds page. The Find Eco-Impact Threshold region enables you to search for existing thresholds. Enter any one of the following search criteria:

    *   Metric

    *   Disposition

    *   Visibility

2. Click the Go button. The thresholds matching the search criteria are displayed.

3. Click Add Another Row to define a new threshold.
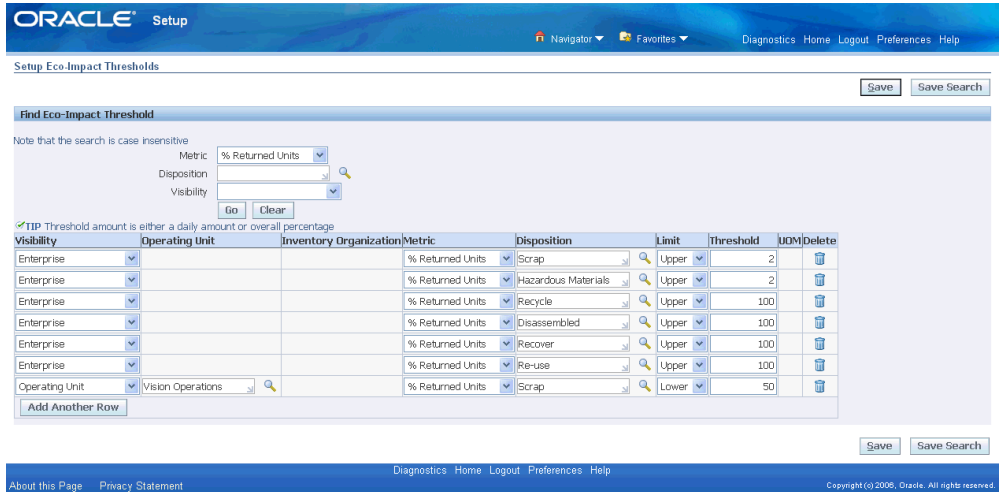
4. Select a Visibility from the list.

- If you select Enterprise, both the Operating Unit and Inventory Organization fields are not visible.

- If you select Operating Unit, the Operating Unit field is visible. You can enter the required operating unit.

- If you select Inventory Organization, the Inventory Organization field is visible. You can enter the required Inventory Organization.

5. Choose the appropriate Metric from the list.

- If you choose % Returned Units, the UOM field is disabled.

- If you choose % Returned Weight, the UOM field is disabled.

   > **Note:** The percentage (%) thresholds are an overall percentage for the period queried in the returns dashboard.

- If you choose Number of Units, the UOM field is enabled.

- If you choose Weight, the UOM field is enabled.

   > **Note:** The thresholds for Number of Units and Weight are a daily threshold.

6. Enter a Disposition. See: Setting Up Material Disposition Reasons

7. Enter the Limit. You can enter either Lower or Upper.

8. Enter the required Threshold value.

9. Click the Save button. A confirmation message appears stating that all eco-impact thresholds have been saved.

Setting Up Region Geographies

Geography Hierarchy is a data model that lets you establish conceptual parent-child relationships between geographies. A geography describes a boundary on the surface of the earth. Applications extrapolate information based on this network of hierarchical geographical relationships.

Oracle Trading Community Architecture (TCA) and other Oracle E-Business Suite applications leverage Geography Hierarchy for various location related use such as real-time address validation and tax calculation. The geography information is centrally located in TCA and shared among all the applications.

Use the Geography Name Referencing process to validate and map address elements of existing location table records against master reference geographies.

For details on how to set up Geography Hierarchy, see: Administering Geography Hierarchy, Oracle Trading Community Architecture Administration Guide.

In addition to the TCA Geography Hierarchy setup, you can setup Regions as lookups and map them to Geographies via Depot Repair's new Region Geography setup page.

To set up region geographies:

1. Navigate to the Region Geographies page. The Find Region Geographies region enables you to search for existing regions and geographies.
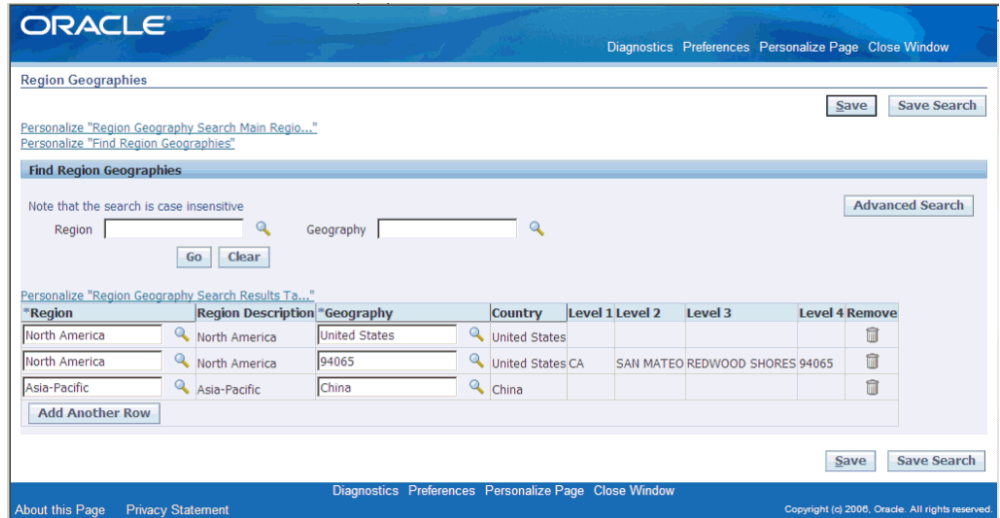
2. Enter any one of the following search criteria:

   • Region

   • Geography

3. Click the Go button. The region geographies matching the search criteria are displayed.

4. Click Add Another Row to define a new region.

5. Select a Region from the list.

6. Choose the appropriate Geography from the list to map the region.

7. Click Save to add the new region to the list.

Setting Up Return Stream Reasons

The Setup Return Stream Reasons page enables you to define which RMAs are grouped together into each return stream. Each RMA Return Reason Code is linked with only one single Return Stream. However, a Return Stream can be composed of many RMA Return Reason Codes.

To set up a new Return Stream for Return Reason:

1. Navigate to the Setup Return Stream Reasons page.

2. Search for a return reason that does not have a return stream associated with it.

3. Enter the Return Stream for the searched Return Reason.

4. If you select the Put on Market Offset check box, any returns for that return reason code is subtracted from the put on market total. If you leave the check box blank, the returns for that return reason code will not affect put on market data.

5. Click the Save button. A confirmation message appears stating that all return stream reasons have been saved.

Setting Up Material Disposition Reasons

The Setup Material Disposition Reasons page enables you to define which WIP Material Transactions are grouped together into each Material Disposition. Each WIP material transaction reason is linked with only one single Disposition. However, a Disposition can be composed of many Material transaction reason. Currently, only WIP returns and negative issues are counted in the disposition metrics for the Returns Dashboard.

To set up a new disposition:

1. Navigate to the Material Disposition Reasons page.

2. In the Search Material Disposition Reasons region, query the Material Transaction Reason that does not have an associated Disposition.

3. Click the Go button.

4. Enter the Disposition Name to associate.

5. Click the Save button. A confirmation message appears stating that all material disposition reasons have been saved.

Setting Up Internal Requisitions and Internal Sales Orders

Two key features within the Depot application automatically create internal requisitions and internal sales orders. The first is the Request Parts button on the Technician Portal

and the second is the Internal Moves screen.

The Request Parts button will automatically create an internal requisition and internal sales order for the parts selected on the Materials table. This enables a technician to request the parts they need without ever leaving the Technician Portal.

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 service order to track both internal and external logistical operations. You can perform logistical transactions without leaving the Depot Repair interface.

Prerequisites to create Internal Orders:

The following steps outline the setups required to use the Internal Requisition functionality.

Use the responsibility: Inventory, Vision Operations (USA)

1. Navigate to Inventory > Items > Master Items to ensure that the item for which you wish to create an internal requisition is defined in the Inventory Item Master. See: Defining Items, *Oracle Inventory User's Guide*.

2. The item must be assigned to both the Source and Destination Inventory Organizations. See: Assigning Items to Organizations, *Oracle Inventory User's Guide*.

3. Ensure the item is stockable (under Inventory tab in master items), Internal Ordered (under OM tab) and has a default subinventory defined (under Receiving tab).

4. Navigate to Inventory > Setup > Organizations > Shipping Networks to create the shipping network using the Shipping Networks window. You must select the Internal Order Required check box for Internal Orders. See: Defining Shipping Methods, *Oracle Inventory User's Guide*.

5. Navigate to Inventory > Setup > Organizations > Locations to create the location using the Location window. The location that you create is tied to the Destination Location in the requisition form to the Internal Customer to be used on the Sales Order window.

> **Note:** Internal Sales Orders will only ship if there is quantity of the item to be shipped on hand. Ensure that there is available inventory on hand in the source inventory organization before attempting to ship an internal order.

See: *Oracle Inventory User's Guide*

Switch to responsibility: Order Management Super User, Vision Operations (USA)

1. Navigate to Customers > Standard. Create an internal customer. You can also query for an existing internal customer.

2. Assign the location you created in Inventory setup. This association ties the customer to the location.

3. Create a Bill To Usage record for the new internal customer.

   > **Note:** You must create the customer in the Operating Unit of the Source Inventory Organization that is used on the Internal Requisition.

   See: Adding Customers using the Add Customer Window, *Oracle Order Management User's Guide*

Switch to responsibility: Purchasing, Vision Operations (USA)

1. (Optional) Navigate to the Item Costs Summary window and query for the item for which you wish to create an internal requisition.

2. The Item Costs Summary window shows the cost of the item to be requisitioned. Purchasing uses this cost as the price of the item on the Internal Requisition. Note that the item cost can be different in each inventory organization, and that the Internal Requisition will display the item cost as defined in the source (ship from) inventory organization.

3. Navigate to Supply Base > Sourcing Rules to setup a new sourcing rule. Select the All Orgs radio button option.

4. In the Shipping Organization table, add a row with Type of Transfer From. For the Org column, specify the source (ship from) inventory organization.

5. For the Shipping Method column, capture the desired shipping method.

6. Assign the newly created Source rule to the Assignment set identified by MRP: Default Sourcing Assignment Set profile. The assignment set mentioned in this profile is used by the PO system by default. Assign this sourcing rule at the organization level. See: Defining Sourcing Rules, *Oracle Purchasing User's Guide*.

Create internal orders automatically from the Create Service Orders HTML page

1. The Internal Moves screen will automatically create an internal requisition. To also automatically convert the internal requisition to an internal sales order, set the profile CSD: Automatically Create Internal Order to Yes.

2. The RMA Receiving Into organization parameter of the defaulting rules engine must be set up to derive the destination organization for the internal move orders.

3. The defaulting rules will default the value for destination organization only when the profile CSD: Automatically Create Internal Order to Yes.

> **Note:** Defaulting rules created for the RMA Receiving Inventory attribute can be used in the Depot application wherever RMAs are created. When creating defaulting rules ensure that they do not unintentionally impact standard RMA receiving flows.

Setting Up Supplier Warranty

Oracle Depot Repair provides a setup interface to perform the following actions using the Supplier Warranty functionality:

- Create and Edit Supplier Warranty Templates.

- Create and Edit Supplier Warranty Contracts.

- Link Supplier Warranty Contracts to Item Instances.

To create and edit supplier warranty templates:

1. Navigate to the Search Warranty Template page. This page enables you to search, view and edit an existing warranty template as well as to view its associated contracts. You can also use this page to create a new template or copy an existing template.

2. To search for an existing template, enter any of the following search criteria:

   - Template Name

   - Vendor Name

   - Template Status

   - Warranty Type

   - Item Number

   - Item Description

   - Item Status

3. Click Go to return all supplier warranty templates defined, according to the search criteria. You can edit or view the template or navigate to the contracts if they are available.

4. Click the Edit icon to navigate to the Update Warranty Template page for the template that you select.

5. Click the Copy Template icon to navigate to the Create Warranty Template page. This page defaults the information of the original template information. All fields, counters and Items are copied.

6. Click the Contracts icon to navigate to the Search Warranty Contract page with the template in context. This action queries all contracts based on the template. The Contracts icon is disabled if no contracts exist for the template.

7. Click the Create button to navigate to the Create Warranty Template page. Use this page to create a new template record.

8. Enter the following information on the header:

   • Template Name: Enter a unique name for the warranty template.

   • Vendor: Select the appropriate vendor from the list.

   • Contract Date Calculation: Select from the following two options:

       • Date: This option renders Start Date and End Date fields. During Warranty Contract creation you are automatically presented with a predefined Start Date for the Contract and the End Date as well.

       • Period: This option renders the Period and UOM fields. During the Warranty Contract creation, you select options that determine the start date. This Start Date is used with the Period and UOM values to calculate the End Date of the Contract. The Start Date value is based on either a user defined date or it is calculated based on a historical counter value.

   • Enabled: Template status. Enabled templates can be used as a basis to create new contracts, where Non-enabled templates cannot.

   • Type: Customer defined attribute during system setup that can be used to differentiate templates.

9. Click the Details tab.

10. Enter the following information on the Details tab:

    • Template Description: Add a description of the template.

    • Terms and Conditions: Enter the terms and conditions of the warranty template.

    • Reaction and Resolution Time: Further description relating to the terms and

conditions.

- Service Level Agreement: Further description relating to the terms and conditions.

- Template Start Date: Defaults to system date during Template creation. It is used for reference and in conjunction with Template End date in order to change the template status to Not Enabled.

- Template End Date: Does not defaults during Template creation and is not a required attribute. It is used for reference and in conjunction with Template Start date in order to change the template status to Not Enabled.

- Claim Labor Hours: Add a standard number of hours that can be claimed for contracts created from this template. This will reflect in the contract and can be used for reporting.

- Remarks: Open field for the user to document miscellaneous information.

- Attachments: Standard Oracle attachments can be added or deleted here. These attachments can be viewed on each Contract as well when they are created.

11. Click Apply to save the information.

12. Click the Items tab. This tab allows you to define the items to which the template can be associated and a warranty contract to be instantiated. This tab displays all the Items that have been associated to a template. Items can be associated to one or many templates.

13. Click the Add Warranty Items button to launch the Add Warranty Items page that allows you to search and select multiple items.

14. To associate more items to the template, click the Add Rows button. Enter the following item details:

- Item: Select the item you want to associate from the list values.

- Item Description: Defaults from the item you select.

- Enabled: Click the Enabled check box to allow additional Item instances to be instantiated by generating a Warranty Contract. Leave the Enabled check box blank to restrict the use of the Warranty Template to instantiate a contract for this item.

- Auto Assign: Used by a concurrent program to automatically generate new contracts, in pending status, for all enabled items as their corresponding item instances are introduced into install base. This function automates the search

and creation of contracts for newly introduced item instances.

15. Click Apply to associate the item to the warranty.

To create and edit supplier warranties:

1. Navigate to the Search Warranty Contract page. This page enables you to search, view and edit an existing warranty contracts.

2. To search for an existing warranty contract, enter any of the following search criteria:

- Warranty Contract Number

- Item

- Warranty Type

- Expiration Date

- Serial Number

- Unit Configuration

- Contract Status

3. Click the Show More Search Options to display additional search criteria:

- Template Name

- Claim Number

- OSP Order Number

- Vendor Name

- Claim Status

4. Click Go. The Results region displays all the contracts defined in the warranty contracts, according to the search criteria.

5. Select a warranty contract and click the Calculate Expiration button to recalculate the expiration due date for a selected warranty contract.

6. Click the Warranty Contract Number link to navigate to the View Warranty Contract page.

7. From the Results region select a warranty contract and click the Edit button to navigate to the Update Warranty Contract page.

8. Make the required changes to the contract and click Apply to update the warranty contract.

To link supplier warranties to item instances:

1. Navigate to the Search Warranty Instance page. This page enables you to search for the item instance to view or define a warranty contract from a warranty template.

2. Enter any one of the following search criteria:

   • Unit Configuration

   • Item

   • Instance Number

   • Serial Number

   • Lot Number

   • Template Name

   • Template Assigned

   • No Active Contract

   • Show Only Enabled Templates

   • Show Only Enabled Items

3. Click Go. The Results region displays all item instances defined in install base, according to the search criteria.

4. Click the Template Name link to navigate to the View Warranty Template page.

5. The Warranty Template for which both the Template Enabled and Item Enabled fields are checked, the Define Warranty icon displays. Click Define Warranty icon to navigate to the Create Warranty Contract page. All the predefined definitions are copied to the contract instance.

Setting Up Returns Portal Parameters

The Returns Portal provides an effective and efficient way to enable customers to return products. Customers may exchange or return products for service, testing, calibration or

trade-in credit. The Returns Portal allows customers, business partners, and retail associates and distributors to request returns directly via a web portal.

The following table lists the Return Portal parameters and default values:

Parameter Code	Name	Description	Default Values
CREDIT_CARD_AUTH_REQUIRED	Authorize Credit Card	Credit card authorization required	N
CHANGE_IB_OWNERSHIP	Change IB Ownership	Change IB ownership	N
CREATE_IB_FOR_RET	Create IB	Create IB for return	N
DISPLAY_CHARGES	Display Charges	Display Charges	N
IB_REQ_FOR_RET	IB required for return	Install base record required for return	N
REQ_RETURN_REASON	Return reason required	Return reason required	N
REQ_SERIAL_NUM	Serial Number Required	Serial Number Required	N

The system does not default Return Portal parameters and requires users to enter a parameter code and a value for it. While you can change the parameter names and descriptions, enter the parameter code as shown in the table. This is the internal code and cannot be changed. The value for a parameter code must be either Y or N. To enable a Returns Portal parameter, set the value as Y. Any other value will be treated as N.

> **Note:** You can use the Return Parameters page to create specific conditions for Returns Portal parameters under which the parameter is either Y or N. For example, you can choose to define rules for Return Parameters and create a condition where in the parameter Display Charges is enabled to Y only for a specific return type.

To set up returns portal parameters:

1. Navigate to the Returns Portal Parameters Page. This page displays the summary of

existing returns portal parameters.

2. Click Add Another Row to set up a new parameter.

3. Enter the values in the following fields:

   - Parameter Name: Enter a unique name for the parameter. Parameter name determines system behaviors for the entire business or only conditionally when specific conditions are true.

   - Description: Enter a description of the parameter.

   - Value: Enter a value of the parameter. Parameters are created with values that are enumerated list (Yes or No), integers, decimals, date times or LOVs.

4. Click Save to save the parameter.

   > **Note:** The application will only use seeded parameters. Customer-defined parameters can be used in custom code.

5. Click the Rules icon to navigate to the Parameter Effectivity Rules page. This page enables you to specify a set of rules that drive different parameter values based on business conditions.

6. Enter the values in the following fields:

   - Precedence: Each rule is assigned 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: Enter a unique name of the rule.

   - Description: Add a description of the rule.

   - Parameter Value: Parameter values are defined as enumerated lists [Yes, No], LOVs, database table values, integers, decimals or date times.

7. Click Save to save the new parameter effectivity rule.

8. Click the Details icon to navigate to the Parameters Effectivity Rule Definition page. This page lets you define a specific rule to determine the effectivity of a parameter value. The rule is defined by a rule name, description, precedence and set of conditions that determine whether the rule is true or not.

9. Enter the values in the following fields:

   - Rule Name: Enter a unique name for the rule.

- Description: Enter the description of the rule.

- Precedence: Enter precedence. Multiple rules can have the same precedence. However, the system stops evaluating rules as soon as it finds the first one that is true. As a result it is recommended that you give unique precedence to each rule.

10. Use the Effectivity Conditions region to define conditions. Click the Details icon to navigate to the Update Effectivity Condition page. This page allows you to define a specific rule condition that can be verified as true or false. A rule can consist of many conditions. If any one of the conditions of a rule is false, the entire rule is false.

11. Enter the values in the following fields:

- Operand: Conditions are created from a predefined list of possible operands. These operands are system values that are queried and evaluated against truth conditions. Operands include Return Type, Customer, Item, Item Category, Contract, Warranty Status, Ship From Location and Return To Location.

- Operator: Choose an Operator from the available values.

- Criterion: Determine the best suitable criterion for the specific rule condition.

12. Click Apply to save the information and return to the Parameter Effectivity Rule Definition page.

13. Click Apply on the Parameter Effectivity Rule Definition page to save the data and return to the Returns Portal Parameters page.

Using the Return Portal for eClaims

Users can deploy the Returns Portal as an eClaims Portal for third party service providers to log into via the Web. They can log reimbursement requests for performing repair work on behalf of the seller. The Returns Portal can be modified using OAF Personalization to:

- Display labels as Claim instead of Return.

- Restrict searches so partners can only view assigned orders.

- Hide data fields with any information partners should not have access to view.

The eClaims Portal uses the same DMZ architecture that allows customers and storefronts to securely use the Returns Portal outside the seller's firewall.

Using the eClaims Portal, an authorized service partner can log in and enter a claim to

be reimbursed for repairing a customer's product by:

- Entering the customer and product information.

- Checking the customer entitlements.

- Capturing any additional information required by the seller.

- Submitting the claim.

Sellers can setup the Portal to require partners request approval before performing repairs. After repair, the partner can capture the parts and labor required for the work, as well as failure codes, root cause codes and any other information required by the seller.

As the eClaims Portal uses the same schema as the Returns Portal, the claim itself is in effect just a specific type of service order. This means that both the seller and partner have visibility to the claim status and details, and can add notes or additional information to facilitate collaboration and adjudication. After reviewing and approving the claim, the parts and labor from the claim can be imported to the Actuals schema to submit to Accounts Payable to reimburse the partner.

An eClaims system is useful for a seller relying on a network of authorized service providers or as a dealer management system for a manufacturer relying on dealerships to sell and service their products.

Setting Up Return Types

The Return Type Setup Page allows you to set up the Return Types that are supported in the Returns Portal.

To set up return types:

1. Navigate to the Return Type Setup page.

2. Use the Find Return Types region to search for existing records of return types.

3. Click Add Another Row to define new return types.

4. Enter the values in the following fields:

    - Return Type: Enter a new return type.

    - Description: Enter the description of the return type.

    - Service Type: Select the appropriate service type from the LOV. You can map return types to service types.

    - Context: You can link a return type to a specific Return Type DFF context that

displays a specific set of DFF attributes on the Enter Returns page. It also drives the capture of additional information.

- Terms and Conditions: You can define Terms and Conditions that are displayed on the Review and Submit page for that return type. This field is not mandatory.

5. Click the Effectivity Rules icon to navigate to the Return Type Effectivity Rules page. Use this page to set up the rules for when a return type can be used.

6. Select the Always Applies option to always display the Return Type in the Return Type LOV on the Enter Returns page. Or, select the Applies Conditionally option to display the Return Type in the Return Type LOV only when one or more of the rules on this page are true.

7. Enter the values in the following fields:
- Precedence: Each rule is assigned 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: Enter a unique name for the rule.

- Description: Enter the description of the rule.

8. Click the Details icon to navigate to the Return Type Effectivity Rule Definition page. Use this page to define a specific rule to determine the effectivity of a Return Type.

9. Enter the values in the following fields:
- Rule Name: Enter a unique rule name.

- Description: Enter the description of the rule.

- Precedence: Multiple rules can have the same precedence. However, the system stops evaluating rules as soon as it finds the first one that is true. It is recommended that you give unique precedence to each rule.

10. Click the Details icon of the Effectivity Conditions region to navigate to the Update Effectivity Condition page. Use this page to define conditions that can be verified as true or false.

11. Enter the values on the following fields:
- Operand: Conditions are created from a predefined list of possible operands. These operands are system values that are queried and evaluated against truth

conditions. Operands include Return Type, Customer, Item, Item Category, Contract, Warranty Status, Ship From Location and Return To Location.

- Operator: Choose an Operator from the available values.

- Criterion: Determine the best suitable criterion for the specific rule condition.

12. Click Apply to save the data and return to the Return Type Effectivity Rule Definition page.

13. Click Apply on the Return Type Effectivity Rule Definition page to save the information and navigate back to the Return Type Setup page.

14. Click the Return Reasons icon on the Return Type Setup page to navigate to the Return Type to Return Reasons Mapping page. Use this page to choose a specific set of RMA Return Reasons to be applicable to the return type.

15. Select a Reason Code to display the same on the Return Reason LOV on the Enter Returns page. The Reason Codes that are not selected are not displayed on the Return Reason LOV.

16. Click Apply to save the data and return to the Return Type Setup page.

Setting Up Activity Rules

Activity rules allow a business trigger changes to the service order status or kick off a PL/SQL API based on user activities within the Depot application. These events can occur not just in the Depot Workbench but also the Technician Portal, Bulk Receiving Module, and Service Manager Portal.

The Activity Rules page allows users to enter new activity rules and specify the new service order status and PL/SQL API to call. Users can set up rules to change service order status or run a PL/SQL API based on events that are logged in the activity log in Depot Repair Workbench. Note however, that activity rules are driven by user action and not activity log. The string $ROLINEID$ is to be used in repair_line_id for the PL/SQL API. You can set up activity rules that work in conjunction with the estimate status updated event and the estimate status generated event associated with the Generate Estimate button in the Technician Portal.

> **Note:** The following rule conditions can be used in addition to the already existing conditions:
>
> - Pre-Update Estimate Status
>
> - Post-Update Estimate Status

To find activity rules:

You can use the Simple Search or Advanced Search capabilities in the Find Rules region in the Activity Rules page to find an activity rule.

1. Use the following criteria to run a query on rules:

   • Activity Event Type: Use this field to select from the following supported events:

      • Estimate Status Updated

      • Estimate Status Generated

         Note: The activities that trigger Activity Manager rules are currently limited Estimate Status Updated, and Estimate Generated (when the user clicks the Generate Estimate button in the Technician Portal).

   • New SO Status: Select a service order status from the list of values given in this field.

   • Rule Name: Select an existing activity rule name.

   • Precedence: Select a rule name by the precedence it has been assigned.

2. Click Go. The details of the rule display in the table.
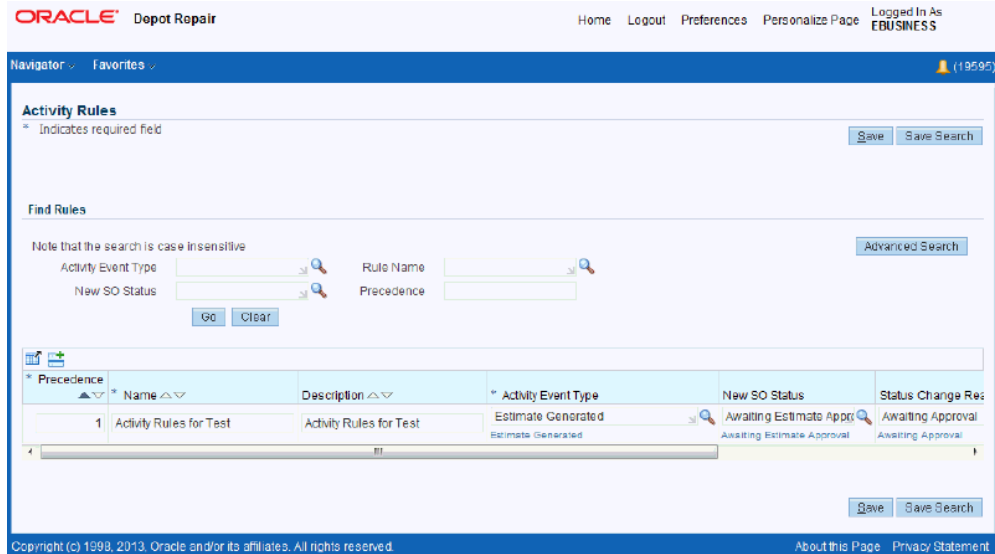
3. Click Details to update the activity rule in the Update Activity page.

4. Click Duplicate to copy and duplicate the activity rule.

5. Click Remove to remove the activity rule.

To set up activity rules:

You can use the Add Another Row functionality to enter details of a new activity rule.

1. Click the Add Another Row icon in the Rules table in the Activity Rules page.

2. Optionally, click to detach the table using the Detach Table icon.
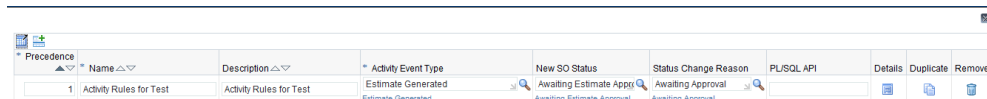
3. Enter the following details to set up a new activity rule:

- Precedence: Enter a number to specify the precedence you would like to assign the rule you are setting up. The lower the number , the higher precedence a rule has compared to other rules.

- Name: Enter a name for the activity rule.

- Activity Event Type: Use this field to select from the following supported events:

- Estimate Status Updated

- Estimate Status Generated

- New SO Status: Select a service order status from the list of values given in this field.

- Status Change Reason: Select the reason for the status change from the list of values.

- PL/SQL API: Enter the PL/SQL API.

4. Click Details to open the Update Activity page.

5. Click Save and Apply to create and enable the activity rule.

Managing Users

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

- Login Interfaces, page 4-112

- Roles, Responsibilities, and Permissions, page 4-112

- Creating Oracle Depot Repair Users, page 4-112

Login Interfaces

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

Roles, Responsibilities, and Permissions

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

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

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

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

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

Creating Oracle Depot Repair Users

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

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

Creating users involves the following tasks:

- Defining responsibilities

- Defining users

- Assigning responsibilities to users

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

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

Charges and Service Types Setup Example

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

Service Activities and Billing Types

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

Service Activity: Return for Repair, Installed Base Trackable Item

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

Perform the following set up.

Service Activity

- Service Activity: Return for Repair

- Line Category: Return

- Depot Repair Quantity Update check box: Selected

Billing Type

- Billing Type: Material

Order Management Header and Line Types

- Operating Unit: Vision Operations

- Order Type: Mixed

- Line Type: Return (Receipt)

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

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

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

Service Activity: Replacement, Installed Base Trackable Item

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

- Service Activity: Replacement

- Line Category: Order

- Depot Repair Quantity Update: Selected

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

Service Activity: Replacement, Non-Installed Base Trackable Item

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

Service Business Processes

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

Installed Base Transaction Sub Types

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

- Transaction Sub Type: Return for Repair. This Transaction Sub Type is seeded.

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

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

Service Types Setup

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

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

Service Type: Repair and Return, Installed Base Trackable Product

Enter the following values:

- Service Type: Repair and Return

- Business Process: Depot Repair

- Service Mode: Work in Process

- Service Type Reference: Repair and Return

- Pre-Service RMA: Return for Repair

- Pre-Service Ship: (Not Applicable)

- Post-Service RMA: (Not Applicable)

- Post-Service Ship: Ship Serviced Item

- Automatically Enter and Book RMA check box: Select

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

- Material: Material Transaction

- Labor: Labor Transaction

- Expense: Expense Transaction

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

Enter the following values:

- Service Type: Repair and Return, non-Installed Base

- Business Process: Depot Repair

- Service Mode: Work in Process

- Service Type Reference: Repair and Return

- Pre-Service RMA: Return for Repair, non-Installed Base

- Pre-Service Ship: (Not Applicable)

- Post-Service RMA: (Not Applicable)

- Post-Service Ship: Ship Serviced Item, non-Installed Base

- Automatically Enter and Book RMA check box: Select

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

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

- Material: Material Transaction

- Labor: Labor Transaction

- Expense: Expense Transaction

Service Type: Replacement, Installed Base Trackable Product

Enter the following values:

- Service Type: Replacement

- Business Process: Depot Repair

- Service Mode: None/Not Applicable

- Service Type Reference: Replacement

- Pre-Service RMA: (Not Applicable)

- Pre-Service Ship: (Not Applicable)

- Post-Service RMA: (Not Applicable)

- Post-Service Ship: Replacement

- Automatically Enter and Book RMA checkbox: Do not select (leave unchecked)

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

Service Type: Replacement, Non-Installed Base Trackable Product

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

Seeded Service Types Setup

This section describes the Service Type setup summary for all the seeded Service Types. The Service Type details can be set up as explained in the examples in the section Service Types Setup, page 4-113.

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

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

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

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

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

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

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

Setting Up Transfer Install Base Ownership

The following steps facilitate setting up transfer Install Base ownership function.

To set up transfer Install Base ownership:

1. Login with the System Administrator responsibility.

2. Navigate to the Menus page.
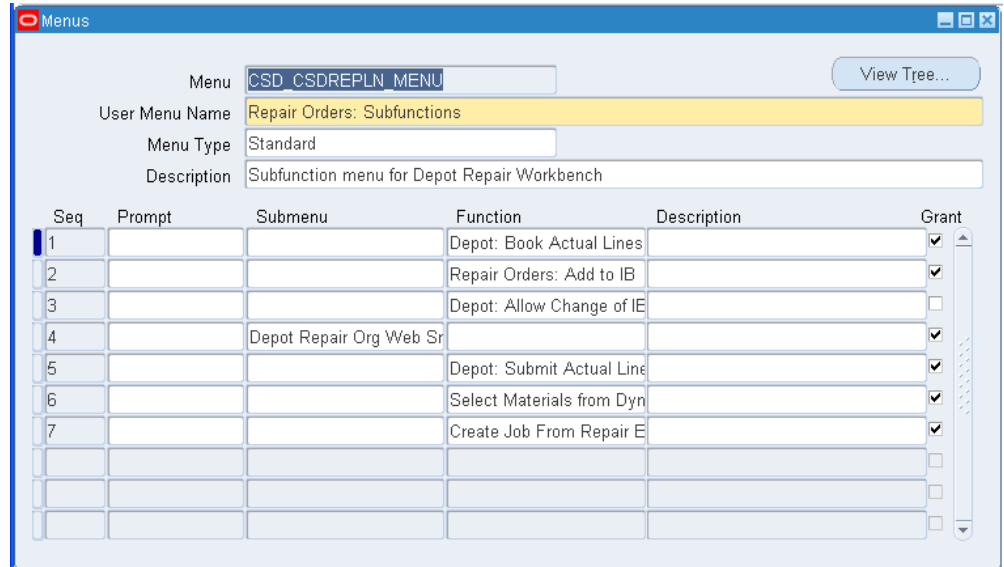
3. Query for the CSD_CSDREPLN_MENU in the menu field.

4. In the sub menus listed, locate the menu Depot: Allow Change of IB Ownership.

5. Select the Grant check box.

6. Click Save.

7. Click OK on the message window. This notifies you about the request being submitted to recompile the menu.

Integrating with Advanced Pricing

The Advanced Pricing integration enables various pricing features for Logistics lines, Estimate lines, and Actual lines in the application. It enables the following Advanced Pricing features:

- Support for Pricing Qualifiers Context: Customer, Attribute: Customer Name and Context: Modifier List, Attribute: Pricelist

- Pricing Modifiers

- Static and Dynamic Formulae

- Secondary Pricelists

- Price Breaks

> **Note:** Multi Currency Price List is not supported.

This integration is based on the certain assumptions:

- The Pricing Transaction Entity (PTE) for the depot repair process is ASO.

- Only automatic pricing modifiers are supported.

- Service Contracts discounts are applied after the pricing engine determines a list price based on modifiers and/or qualifiers, as applicable.

- The current release supports line level pricing calculations only and does not apply any header-level based pricing calculations.

- Freight and Special Charges and Sales Tax calculations are not enabled in the new integration.

To enable the Advanced Pricing integration, follow the steps:

1. Set the value for the profile CSD: Enable Advanced Pricing to Yes. By default, the value is set to No.

2. Set up Advanced Pricing (e.g. qualifiers, modifiers etc.) for the PTE ASO.

   > **Note:** If you do not wish to enable the additional Advanced Pricing features, do not change any setup. By default the price calculations behaves same as is.

Using Time Clock Bin

The Time Clock functionality enables technicians to clock in and clock out the time for a service. The system tracks the amount of time a technician spends clocked in on a service and automatically capture that time as a resource transaction. The Time Clock Bin displays by default in the Technician Portal and can be personalized using the profile option CSD: Time Clock Next Button Transactions.

You can also use the profile option CSD: Automatically Clock In to Time Clock to automatically clock in technicians to the first available operation on the first available job when they log into the Technician Portal or access the Technician Portal from the Execute Job button in the Depot Repair Workbench or from the Work Details button in the Returns Portal.

See: Setting Up Oracle Depot Repair Profile Options, page 4-50

> **Note:** In case of prior releases that require personalization of the Time

Clock Bin, complete the following steps:

1. Turn on Self Service Personalization. Set the profile options, Personalize Self-Service Defn and FND: Personalization Region Link Enabled, to Yes.

2. Query any existing service order.

3. Look for Stack Layout: (MainRN) in the personalization hierarchy.

4. Look for RoTimeClockCntRN.

5. Click on personalization pencil icon.

6. Look for Content Container: Time Clock and set the Rendered property to true at the required hierarchy scope.

7. Save the changes and return to the application.

   This makes the Time Clock bin visible in the Service Order page.

Using Complete Work Button

When a service is finished, technicians perform many actions like: complete operations, complete jobs, log labor hours, transact resources, issue materials, change service order status, or kick off a workflow. The Complete Work button enables technicians to stop the clock and trigger these actions automatically. The Complete Work button displays by default in the Technician Portal.

> **Note:** In case of prior releases that require personalization of the Complete Work Button, complete the following steps:

1. Turn on Self Service Personalization. Set profile option, Personalize Self-Service Defn, to Yes.

2. Query any existing service order.

3. Click on Personalize Page.

4. Click on the first personalization pencil icon on the page.

5. Look for Submit Button: Complete Work and set the Rendered property to true at the required hierarchy scope.

6. Save the changes and return to the application.

This makes the Complete Work button visible in the Service Order page.

Using Request Parts Button

The Request Parts button enables technicians to create a purchase requisition for one or more items on the Materials table. See: Setting Up Internal Requisitions and Internal Sales Orders, page 4-95

> **Note:** In case of prior releases that require personalization of the Request Parts Button, complete the following steps:

1. Turn on Self Service Personalization. Set profile options, Personalize Self-Service Defn and FND: Personalization Region Link Enabled, to Yes.

2. Query any existing service order and navigate to Service Execution tab.

3. Go to Material region personalization page.

4. Look for Flow Layout: (SelectMtlsRN) in the personalization hierarchy.

5. Look for Submit Button: Request Parts.

6. Click on personalization pencil icon and set the Rendered property to true at the required hierarchy scope.

7. Save the changes.

8. Scroll down the personalization hierarchy and look for Column: (mtlPurReqCol).

9. Click the personalization icon. Set the Rendered Property to yes at the required level.

10. Save the changes and go back to the application.

    This enables Request Parts button and the Requisition column on the Materials table.

A

Oracle Depot Repair Public APIs

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

This appendix covers the following topics:

- Depot Repair Public Packages

Depot Repair Public Packages

Oracle Depot Repair provides the following public APIs:

- CSD_REPAIRS_PUB

This API is the public interface for managing a service order. It allows creation of service orders for service requests and includes the following procedures:

Procedure Name	Description
CREATE_REPAIR_ORDER	This procedure create a service order.
UPDATE_REPAIR_ORDER	This procedure updates a service order.

- CSD_REPAIR_ACTUALS_PUB

This API is the public interface for managing a service order actual line. It allows creation of service order actual lines for a service request and includes the following procedures:

Procedure Name	Description
CREATE_REPAIR_ACTUAL_LINES	This procedure creates service order actual lines.
UPDATE_REPAIR_ACTUAL_LINES	This procedure updates service order actual lines.
DELETE_REPAIR_ACTUAL_LINES	This procedure deletes service order actual lines.
LOCK_REPAIR_ACTUAL_LINES	This procedure locks service order actual lines.

- CSD_LOGISTICS_PUB

This API is the public interface for managing service logistics. It creates and updates service logistics lines for a service order and includes the following procedures:

Procedure Name	Description
CREATE_DEFAULT_LOGISTICS	This procedure creates default logistics lines for the service order based on service type.
CREATE_LOGISTICS_LINE	This procedure creates a new service logistics line for the given service order.
UPDATE_LOGISTICS_LINE	This procedure updates a given logistics line.
CANCEL_LOGISTICS_LINE	This procedure cancels a given logistic line.

- CSD_REPAIR_ESTIMATE_PUB

This is the public interface for managing an estimate and includes the following procedures:

Procedure Name	Description
CREATE_ESTIMATE_HEADER	This procedure creates a new estimate header for a given service order.

Procedure Name	Description
CREATE_ESTIMATE_LINE	This procedure creates a new estimate line record under a given estimate header.
UPDATE_ESTIMATE_HEADER	This procedure updates a given estimate header.
UPDATE_ESTIMATE_LINE	This procedure updates a given estimate line.

- CSD_HV_WIP_JOB_PUB

This API is the public interface for managing transactions in the Technician Portal and includes the following procedures:

Procedure Name	Description
PROCESS_SAVE_MTL_TXN_DTLS	This procedure is called to process and save material transaction details.
PROCESS_SAVE_RES_TXN_DTLS	This procedure is called to process and save resource transaction details.
PROCESS_SAVE_OP_DTLS	This procedure is called to process and save operations transaction details.
CREATE_WIP_JOB	This procedure creates WIP jobs.

- CSD_REPAIR_HISTORY_PUB

This API is the public interface for retrieving detailed history for a service order and includes the following procedure:

Procedure Name	Description
GET_HISTORY_DETAIL	This procedure is called to get history details for a service order.

- CSD_TO_FORM_REPAIR_HISTORY_PUB

This API is the public interface for logging repair activity and includes the following procedure:

Procedure Name	Description
VALIDATE_AND_WRITE	This procedure is called to update CSD_REPAIR_HISTORY table.

• CSD_TO_FORM_REPAIR_JOB_PUB

This API is the public interface for managing repair jobs and includes the following procedure:

Procedure Name	Description
VALIDATE_AND_WRITE	This procedure is called to update the CSD_REPAIR_JOB_XREF table.

• CSD_INTERNAL_ORDERS_PUB

This API is the public interface for managing internal move orders. It allows creation of internal move orders and includes the following procedure:

Procedure Name	Description
CREATE_INTERNAL_MOVE_O RDER	This procedure creates internal move orders.

• CSD_RULES_ENGINE_PUB

This API is the public interface for managing default rules and includes the following procedure:

Procedure Name	Description
GET_DEFAULT_VALUE_FROM_ RULE	This procedure is called to derive the default value from the rule.

For more details see: Oracle Integration Repository

B

Oracle Depot Repair Lookup Codes

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

This appendix covers the following topics:

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

Depot Repair Types (CSD_REPAIR_TYPES)

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

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

Repair Type Reason (CSD_REASON)

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

Code	Description	Editable?
APPRV	Customer approves the RMA	No
EST	Estimate approved	No
HOLD	Repair on hold	No
REJECT_1	Product unrepairable	No
REJECT_2	Declined repair	No

Code	Description	Editable?
REV_EST	Revised estimate approved	No
WAIT_1	Customer contacted	No
WAIT_2	Awaiting approval	No

Repair Mode for the Depot Repair Processes (CSD_REPAIR_MODE)

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

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

Repair Approval Status (CSD_APPROVAL_STATUS)

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

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

Repair Status (CSD_REPAIR_STATUS)

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

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

Repair Event (CSD_EVENT)

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

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

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

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

Estimate Billing Type (CSD_EST_BILLING_TYPE)

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

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

Estimate Status (CSD_ESTIMATE_STATUS)

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

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

Estimate Reject Reasons (CSD_REJECT_REASON)

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

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

Product Transaction Action Codes (CSD_PRODUCT_ACTION_CODE)

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

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

Product Transaction Action Type (CSD_PROD_ACTION_TYPE)

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

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

Product Transaction Status (CSD_PRODUCT_TXN_STATUS)

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

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

Repair Order Transaction Status (CSD_RO_TXN_STATUS)

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

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

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

Units of Measure (CSD_UNIT_OF_MEASURE)

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

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

Repair Job Statuses (CSD_WIP_JOB_STATUS)

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

Code	Description	Editable?
RELEASED	Released	No
UNRELEASED	UnReleased	No

Recall Flow Statuses (CSD_RECALL_FLOW_STATUS)

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

Code	Description	Editable?
CLOSED	CLOSED	Yes
DRAFT	DRAFT	Yes
OPEN	OPEN	Yes

Material Dispositions (CSD_MATERIAL_DISPOSITIONS)

The following lookup values are seeded for Material Dispositions in Oracle Depot Repair.

Code	Description	Editable?
HAZMAT	Hazardous Materials	No
RECOVER	Recover	No
RECYCLE	Recycle	No
REUSE	Re-use	No
SCRAP	Scrap	No

Return Streams (CSD_RETURN_STREAMS)

The following lookup values are seeded for Return Streams in Oracle Depot Repair.

Code	Description	Editable?
CUST_CREDIT	Customer Return For Credit	Yes
TRADEIN	Trade In	Yes
TAKEBACK	Takeback	Yes

Code	Description	Editable?
INT_CREDIT	Internal User Return For Credit	Yes
TOOMUCH	Excess and Obsolete	Yes
RET_ASSETS	Retired Assests	Yes
RET_SPARES	Retired Spares	Yes
EWASTE	e-Waste	Yes

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Oracle Depot Repair Update Programs

This appendix presents the Oracle Depot Repair update programs.

This appendix covers the following topics:

- Overview
- Depot Repair Receipt Update
- Depot Repair Job (WIP) Update
- Depot Repair Shipment Update
- Depot Repair Business Intelligence Update
- Depot Repair XMLP Estimate Report
- Depot Repair Purge Message Stack

Overview

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

- Depot Repair Receipt Update, page C-1
- Depot Repair Job (WIP) Update, page C-3
- Depot Repair Shipment Update, page C-4
- Depot Repair Business Intelligence Update, page C-5

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

Depot Repair Receipt Update

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

Overview

Return Material Authorizations (RMA) to receive service items are created using the Logistics tab of the Service Orders window, or through internal requisitions and internal sales orders. RMAs are pushed into Order Management for standard processing, and subsequently into Inventory/Receiving for inspection and receiving. When an RMA related to a service order line is received, the program updates the total quantity received for the service order line, and creates a service order history record.

Program Logic

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

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

The program logic is as follows:

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

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

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

Dependencies

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

- Oracle Depot Repair, Release 11i

- Oracle Purchasing, Release 11i

- Oracle Order Management, Release 11i

- Oracle Inventory, Release 11i

Depot Repair Job (WIP) Update

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

Overview

WIP Jobs for service order lines are created using the Submit Jobs window and the Submit Jobs for Service Orders window. A given service order line can be represented by multiple Jobs in WIP, or multiple service order lines can be grouped as a single Job.

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

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

Program Logic

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

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

- When you click the Update Job button in the Jobs tab.

The program logic is as follows:

1. Click the Submit Jobs button in either the Submit Jobs window or in the Submit Jobs for Service Orders window.

2. Complete the WIP Job by clicking the Complete Job button in the Jobs tab in the Service Orders window.

3. Click the Update Job button on the Jobs tab.

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

parameter whether to run for a specific service order number and whether to update Job Completion information.

Dependencies

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

- Oracle Depot Repair, Release 11i

- Oracle WIP, Release 11i

Depot Repair Shipment Update

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

Overview

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

Program Logic

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

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

The program logic is as follows:

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

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

Dependencies

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

- Oracle Depot Repair, Release 11i

- Oracle Order Management, Release 11i

- Oracle Shipping Execution, Release 11i

Depot Repair Business Intelligence Update

Depot Repair Business Intelligence Update Program computes a number of business intelligence features in the Technician Portal. This program updates the frequency of occurrence for diagnostic codes and service codes. It also calculates the materials and frequencies displayed in the Most Common Materials bin and calculates the resources and frequencies displayed in the Most Common Resources bin.

Depot Repair XMLP Estimate Report

Depot Repair XMLP Estimate Report program generates a report that a service business presents to customers to provide a list of estimated charges for performing a service. This includes the item serviced, diagnostic codes, service codes and estimated material, labor and expense charges.

Depot Repair Purge Message Stack

The Depot Repair Purge Message Stack program handles error/warning/informational messages for Actuals, Estimates, and Serial Number capture. These messages are saved in the database and then displayed. When the issue goes away, the message is deleted by the system. However, in case the system fails to delete a message or if you want to manually clear out the message stack, you can do it by running this concurrent program.

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Oracle Depot Repair Workflows

This appendix presents the Oracle Depot Repair workflows.

This appendix covers the following topics:

- Overview
- Using Workflow to Auto-close Service Orders

Overview

Oracle Depot Repair uses Oracle Workflow technology to manage repair orders, repair order status changes, email notifications, service warranties and logistics. Oracle Workflow is an underlying technology that automates depot repair activities.

Oracle Depot Repair comes with the following workflows:

- CSD iSupport Process: when attached to the SR type, this workflow auto-creates service orders.

- CSD: Awaiting RMA Receipt Notification: sends out the notification that RMA receipt notification is pending.

- CSD: RMA Receipt Notification: sends out the notification to the SR customer contact about the receipt of the product. Needs to be tied to flow status transition.

- CSD: Auto-Create Service Orders for Recovered Parts: automatically creates service orders for parts recovered on a job upon a status change of the service order that spawned the job.

- CSD: Customer Email Notification: sends email notifications to the SR customer contact.

- CSD: Customer Service Rep Email Notification: notifies only the SR owner and not the group.

- CSD: Update Logistic Line Status: integrates with OM workflow and updates the logistic line status.

- CSD: Update Service Order Status to Close: integrates with OM workflow and update Service Order status after shipping.

- CSD: Process Service Warranty: automatically creates a service warranty when an item is shipped. See Doc ID 1488130.1 note in My Oracle Support.

To select a workflow for a service type:

1. Navigate to Depot Repair > Setup > Service Types.

2. Select a Service Type.

3. Click on Service Order Status Transitions.

4. Select a workflow in the Workflow field from the list of values. See: Adding a Status Transition to a Service Type, in the topic Setting Up Statuses, Status Transitions, and Service Type Transitions, page 4-26.

To select a workflow for a service bulletin:

1. Navigate to Depot Repair> Setup > Service Bulletins.

2. Enter details of Name, Description, and Type.

3. Select a workflow in the Workflow Process field from the list of values. See: Setting Up Service Bulletins, page 4-23.

To select a workflow for a service request type:

1. Navigate to Service Request > Setup > Definitions >Service Requests Types.

2. Select a service request type.

3. Select a workflow in the Workflow field from the list of values. See: Setting Up Service Request Types for Depot Repair, page 4-33.

Using Workflow to Auto-close Service Orders

You can use a workflow event to auto-close service orders after the repaired item is shipped. You can create a workflow event that checks to ensure that all Service Order logistics lines are closed and the Repair Type is Repair and Return (RR), Loaner, Repair, and Return (LRR), etc.

> **Note:** You can auto-close service order after ship line for certain service types, i.e., repair and return. Since shipments for Advanced Exchange Repair Types takes place prior to the return, rather than auto-close the service order after shipment, it should be closed after completion of the return activity.

Prerequisites:

- Use the profile option CSD: Default Service Order Status After Final Shipping to set the final status.

- Ensure the next service order status has a valid status in the Service Order Status Transition form and Require Reason is unchecked.

Integrating workflow events with the Order Management workflow

1. Navigate to Depot Repair > Setup > Service Types form. Note all Service Activities (both RMA and SHIP) selected for the Service Type you will be using for this enhancement request.

2. Navigate to Service Request > Setup > Charges > Service Activities and Billing Types form. Query for the Service Activities noted in Step 1. Note the Order Type and Line Type for the desired operating unit in the Order Management Header & Line Types region.

3. Navigate to Order Management > Setup > Transaction Types > Define form. Query for the Order Types noted in Step 2. Click Assign Line Flows button and find the Process Names associated with the Line Types noted in Step 2.

4. Launch Workflow Builder.

5. Open the Depot Repair Workflow CSD:Depot Repair Processes.

6. Open OM Order Line Type.

7. Find the Processes noted in Step 3.

8. Edit the OM line workflow for Return and Ship Line so that the CSD processes are part of the flow. You can drag and drop the activities, or right click and select new activity. Define the flow using connecting arrows.

9. Copy the processes from the Depot Repair Workflow to the OM Line workflow.

10. Add the desired Depot Workflow processes into the OM Line process:

   - For Return line, integrate at Ship - Line, Manual process node.
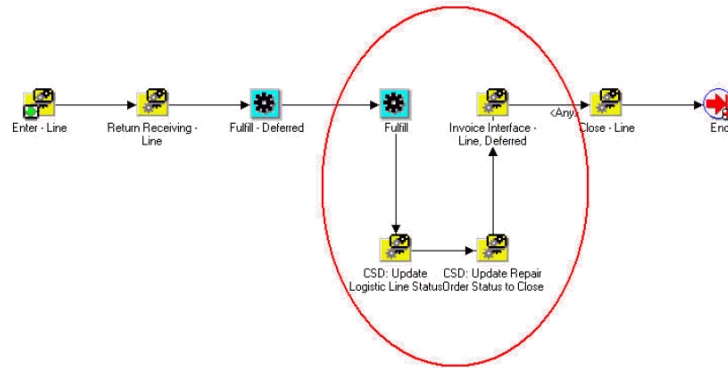
- For Ship line, integrate at Return Receiving - Line process node.
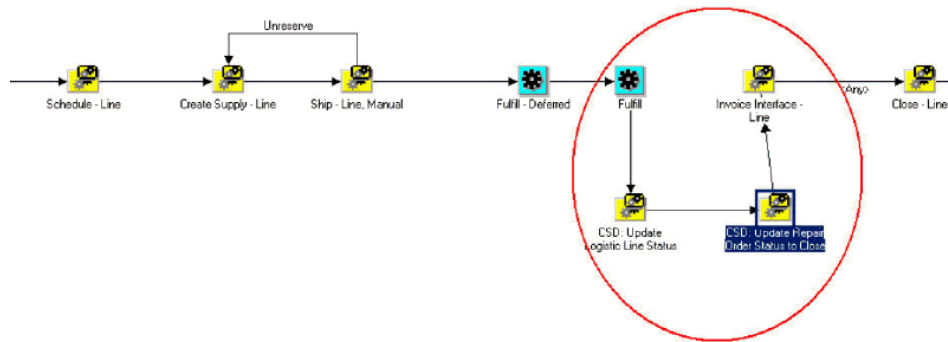
Integrating workflow events with the Order Management workflow for advanced exchange process

The Advanced Exchange process requires that the service order remains open after shipment and auto-closed after return. You can modify the process above as follows:

1. Use a different Order Line Type in the Service Activity Code used for Advanced Exchange Shipment.

2. In Order Management (Transaction Types) set up the order line type for the

Advanced Exchange Shipment to ensure that the steps do not close the service order after fulfillment. Leave the service order to remain open after shipment.

3. Create a different order line type for the Advanced Exchange Return Service Activity Code. Include CSD%Update% workflow activities to the OM line type workflow to auto-close the service order after completion.

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