

Oracle® Enterprise Asset Management

User's Guide

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Oracle Enterprise Asset Management User's Guide, Release 12.2

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Primary Author: Eary Simmons

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Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

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- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Enterprise Asset Management User's Guide*.

This guide is designed for users and administrators of the Oracle Enterprise Asset Management application. It assumes that you have a working knowledge of the principles and customary practices of your business area, along with specific application knowledge of the Oracle Enterprise Asset Management product.

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

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Structure

1 Oracle Enterprise Asset Management Overview

This chapter provides a high level overview of the Oracle Enterprise Asset Management application.

2 Setting Up

This chapter provides Enterprise Asset Management administrators necessary setup

information. You can also refer to the Oracle Enterprise Asset Management Implementation Guide for additional information, such as APIs and Profile Options.

- 3 eAM Work Management**
 - 4 Preventive Maintenance**
 - 5 eAM Planning and Scheduling**
 - 6 eAM Cost Management**
 - 7 Direct Item Procurement for eAM Work Orders**
 - 8 Contractor Services**
 - 9 eAM Property Manager**
 - 10 Process and Discrete Manufacturing Integration**
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 - 12 Integration with Oracle Time and Labor**
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 - 15 Oracle Service Integration**
 - 16 Secure Enterprise Search for Asset Lifecycle Management**
 - 17 Self Service Work Requests**
 - 18 Using the Self-Service Assets Tab**
 - 19 Maintenance User Workbench**
 - 20 Wireless Maintenance User Workbench**
- A Maintenance User can log on to a mobile device and view all work that is assigned to him/her. You can view today's Work Orders, overdue work, and Work Orders that you are assigned to you in the future.
- 21 Maintenance Super User**
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Related Information Sources

Oracle Assets User's Guide

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

Oracle Bills of Material User's Guide

This guide describes how to create various bills of material to maximize efficiency,

improve quality, and lower costs for the most sophisticated manufacturing and/or maintenance environments. By detailing integrated product structure and processes, flexible product and process definition, and configuration management, this guide enables you to manage product details within and across multiple sites.

Oracle Cost Management User's Guide

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

Oracle Enterprise Asset Management Implementation Guide

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

Oracle Human Resources User's Guide

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

Oracle Internet Procurement Implementation Guide

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

Oracle Inventory User's Guide

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

Oracle Work In Process User's Guide

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

Integration Repository

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

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

You can navigate to the Oracle Integration Repository through Oracle E-Business Suite Integrated SOA Gateway.

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.

Part 1

Welcome to Enterprise Asset Management

Oracle Enterprise Asset Management Overview

This chapter provides a high level overview of the Oracle Enterprise Asset Management application.

This chapter covers the following topics:

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

Introduction

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

This chapter contains the following topics:

- Overview of Oracle Enterprise Asset Management, page 1-2
- Asset Management, page 1-2
- eAM Work Management, page 1-4
- Integration with Other Oracle Application Products, page 1-5

- Required Products, page 1-5
- Optional Products, page 1-5

Overview of Oracle Enterprise Asset Management

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

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

eAM's comprehensive maintenance functionality supports asset lifecycle strategies for asset intensive industries, including metals and mining, manufacturing, pulp and paper, petrochemicals, facilities, and education. eAM eliminates the need for spreadsheets and disparate data repositories, by enabling companies to manage reactive, planned, preventive maintenance, and adopt a centralized, proactive strategy for managing asset maintenance across an enterprise.

eAM enables an organization to:

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

The following topics are included in this section:

- Asset Management, page 1-2
- eAM Work Management, page 1-4

Asset Management

eAM eliminates the need for point solutions that offer a limited, "flat" view of an asset

by expanding the visibility and ownership of an asset throughout an entire organization. Different entities may describe an asset in several ways:

- Fixed asset to an accounting department
- Leased asset to facilities management
- Piece of production equipment to operations
- Inventory item to materials management
- Maintainable asset to mechanical engineers

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

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

By first establishing asset groups, you can define assets and asset characteristics that can be inherited by the assets belonging to that group. Detailed information, such as nameplate data, engineering specifications, property detail, and other searchable characteristics are defined with asset attribute elements and values. Asset groups also define a default master bill of materials (BOM) for assets. This BOM can be edited for specific assets. Virtual assets can be designed to create a network of assets or routings. This combines several assets to a single work activity.

Oracle eAM enables you to quickly identify plants and facilities using an Asset Navigator (See: Defining Asset Numbers, page 2-74). You can view details of an asset, such as cost, hierarchal (parent/child) information, and launch transactions. You can also view current or historical configurations, and work details of an asset. As rotatable, inventory items of an asset are removed from and reinstalled into an asset, the asset genealogy and parent/child meter readings are recorded automatically. Attributes, such as cost history, bills of material, and document attachments can be associated with a specific asset.

You can view the locations of assets by using the built-in integration of web-based source map viewers of Google Maps or ESRI. The system also provides the provision to integrate with a third-party HTML based map viewer. Assets can be geocoded and then assets and work can be displayed in the map viewer based on user-entered search criteria. See Google Maps Integration, page 23-1 and ESRI Integration, page 24-1.

Asset Hierarchies

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

Related Topics

Defining Asset Numbers, *Oracle Enterprise Asset Management User's Guide*

Obtaining Asset Number Information, *Oracle Enterprise Asset Management User's Guide*

Viewing Asset Number Information, *Oracle Enterprise Asset Management User's Guide*

Viewing Capital Asset and Rebuildable Inventory Work Orders, *Oracle Enterprise Asset Management User's Guide*

Google Maps Integration, page 23-1

ESRI Integration, page 24-1

eAM Work Management

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

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

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

Related Topics

Obtaining Work Request Information, *Oracle Enterprise Asset Management User's Guide*

Integration with Other Oracle Application Products

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

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

Required Products

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

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

Optional Products

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

- Oracle Master Scheduling/MRP

- Oracle Property Management
- Oracle Financials
- Oracle Fixed Assets
- Oracle iProcurement
- Oracle Projects
- Oracle Project Manufacturing
- Oracle Purchasing
- Oracle Order Management
- Oracle Time and Labor

Part 2

Enterprise Asset Management Administration

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

This part contains the following chapter:

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

Setting Up

This chapter provides Enterprise Asset Management administrators necessary setup information. You can also refer to the Oracle Enterprise Asset Management Implementation Guide for additional information, such as APIs and Profile Options.

This chapter covers the following topics:

- Before You Begin
- Oracle Enterprise Asset Management Setup Overview
- Organization Setup
- Setting Up Organizations
- Enabling Organizations for Enterprise Asset Management
- Setting Up Installed Base Parameters
- Setting Up Services Fulfillment Manager Parameters
- Defining eAM Parameters
- General eAM Setup
- Setting Up Areas
- Defining Departments and Resources
- Defining Department Approvers
- Defining Miscellaneous Documents
- Setting Up Electronic Records and Signatures
- Creating XML Elements for EAM Work Order Completions
- Defining Lookups
- Asset Setup
- Using the Activity Workbench
- Rebuildable Item Setup

- Non-Stock Direct Item Setup
- Preventive Maintenance Setup
- eAM Planning and Scheduling
- Defining a Master Demand Schedule Name
- Defining a Material Requirements Plan Name
- Defining Plan Options
- Quality Integration Setup
- Creating Collection Elements
- Creating eAM Quality Collection Plans
- Creating eAM Quality Collection Plans for a Supplier
- Outside Processing Integration Setup
- Setting Up Outside Service Processing
- Setting Up Direct Items
- Cost Management Integration Setup
- Setting Up Cost Categories
- Setting Up Purchase Order Category Associations for Direct Items
- Setting Up eAM Cost Management
- Setting Up Zero Cost Rebuild Item Issue
- Process and Discrete Manufacturing Integration Setup
- Organization Setup
- Associating Assets with Production Equipment
- Encumbrance Accounting
- Project Manufacturing Integration Setup
- Project Definition
- Property Manager Integration Setup
- Setting Up eAM Prerequisites
- Executing the Export Process
- Executing the Asset Number Interface
- Service Integration Setup
- Creating Maintenance Service Request Types
- Enabling Service Requests for Assets and Rebuildables
- Enabling eAM Specific Fields

- Oracle Time and Labor Integration Setup
- Defining Persons as Users
- Creating Eligibility Criteria
- Work Order Billing Setup
- Setting Up Parameters
- Setting Up Costs for the Cost Plus Billing Basis
- Setting Up Prices for the Price List Billing Basis
- Service Attribute Setup
- Setting Up Billable Material
- Setting Up a Billable Resource
- Setting Up a Billable Activity

Before You Begin

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

Overview of Setting Up

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

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

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

Related Product Setup Steps

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

Setting Up Underlying Oracle Applications Technology

Ensure that you complete the following setup steps, including:

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

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

Oracle Enterprise Asset Management Setup Overview

Oracle Enterprise Asset Management (eAM) may have unique setups for each organization, including parameters, user defined lookups, and attributes. During the implementation process, the implementation team should discuss system and user options for Enterprise Asset Management. Users implementing Enterprise Asset Management should also have determined the structure of their organizations and user access via the Oracle System Administrator responsibility. This chapter covers the following topics:

- Organization Setup, page 2-5
- General Enterprise Asset Management Setup, page 2-16
- Defining Lookups, page 2-30
- Asset Setup, *Oracle Enterprise Asset Management User's Guide*
- Using the Activity Workbench, page 2-89
- Rebuildable Item Setup, page 2-110
- Non-Stock Direct Item Setup, page 2-119
- Preventive Maintenance Setup, page 2-121
- eAM Planning and Scheduling, page 2-151

- Quality Integration Setup, page 2-158
- Outside Processing Integration Setup, page 2-169
- Cost Management Integration Setup, page 2-180
- Process and Discrete Manufacturing Integration Setup, page 2-190
- Project Manufacturing Integration Setup, page 2-193
- Property Manager Integration Setup, page 2-198
- Service Integration Setup, page 2-202
- Oracle Time and Labor Integration Setup, page 2-206
- Work Order Billing Setup, page 2-212

Organization Setup

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

- Setting Up Organizations, *Oracle Enterprise Asset Management User's Guide*
- Enabling Organizations for Enterprise Asset Management, *Oracle Enterprise Asset Management User's Guide*
- Defining eAM Parameters, *Oracle Enterprise Asset Management User's Guide*

Setting Up Organizations

A valid organization is a requirement for Enterprise Asset Management setup. Decisions are made during implementation as to which organizations are enabled for Enterprise Asset Management. If the decided upon organizations already exist, you can skip this section and proceed to Enabling Organizations for Enterprise Asset Management, *Oracle Enterprise Asset Management User's Guide*.

To set up organizations:

1. Navigate to the Organization window.

Organization

Organization

Name: EAM Type:

Dates: From: 21-SEP-2009 To:

Location: IN1-Hyderabad Internal or External: Internal

Location Address: No.1, 2nd Floor.IIT Campus.Gachi Bowli..Hyderabad.Andhra Pradesh.500019.India

Internal Address: []

Organization Classifications

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

Others

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

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

6. Save your work.

Related Topics

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

Enabling Organizations for Enterprise Asset Management

Before you begin implementing Enterprise Asset Management (eAM), decide which organizations are eAM enabled. A valid organization must exist before you can enable the organization for Enterprise Asset Management (See: Setting Up Organizations, *Oracle Enterprise Asset Management User's Guide*).

To define an Enterprise Asset Management enabled organization:

You can create a new Enterprise Asset Management enabled organization, or convert an existing organization to an Enterprise Asset Management enabled organization. Oracle recommends that you keep Enterprise Asset Management organizations separate from production organizations. Enterprise Asset Management parameters are on the Inventory Parameters tab, within the Organization Parameters window.

1. Navigate to the Organization Parameters window.

Organization Parameters

Organization Parameters (EM1)

Inventory Parameters | Costing Information | Revision, Lot, Serial And LPN | ATP, Pick, Item-Sourcing

Organization Code: EM1

Item Master Organization: Vision Operations

Calendar: Vision01

Demand Class:

Move Order Timeout Period: Days

Move Order Timeout Action: Approve automatically

Locator Control: Determined at Subinventory level

Default On-Hand Material Status:

☐ Enforce Locator Alias Uniqueness

☒ Quality Skipping Inspection Control

☒ Allow Negative Balances

☐ Auto Delete Allocations at Move Order Cancel

Enabled Products & Features

☐ Manufacturing Partner Organization

☒ EAM Enabled

☐ Process Manufacturing Enabled

☐ WMS Enabled

☐ WCS Enabled

☐ LCM Enabled

EAM Organization: EM1 Seattle Maintenance

Capacity

Load Weight: UOM:

Volume: UOM:

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

For organizations that are not Enterprise Asset Management enabled, you can populate the EAM Organization field with an Enterprise Asset Management enabled organization code. The designated eAM organization maintains equipment items for the designated production organization. For example, if the current organization is a production organization, this is how you would identify a maintenance organization that is associated with the production organization (See: Overview of the Process and Discrete Manufacturing Integration, *Oracle Enterprise Asset Management User's Guide*). You can update this field, if asset equipment

association does not exist in this organization.

5. If you are using encumbrance accounting, you must enable this feature.
Navigate to the Costing Information page.

Costing Information

The screenshot shows the 'Organization Parameters (ENC)' window with the 'Costing Information' tab selected. The window has a title bar with standard OS controls and a tab bar with 'Inventory Parameters', 'Costing Information', 'Revision, Lot, Serial And LPN', and 'ATP, Pick, Item-Sourcing'. The 'Costing Information' tab contains the following fields and options:

- Costing Organization: Vision ENC
- Costing Method: Standard
- Rates Cost Type: (empty)
- Transfer to GL: Yes (dropdown menu)
- ☐ Reverse Encumbrance
- ☒ Project Cost Collect. Enabled
- ☐ Defer Logical Transactions
- Cost Cutoff Date: (calendar icon)
- Default Material Sub-Element: (empty)
- Material Overhead Sub-Element: (empty)
- Default Cost Group: CG-43508

Below these fields is a section titled 'Valuation Accounts' containing a table of account numbers:

	Valuation Accounts
Material	01-000-1410-0000-000
Outside Processing	01-000-1450-0000-000
Material Overhead	01-000-1420-0000-000
Overhead	01-000-1430-0000-000
Resource	01-000-1440-0000-000
Expense	01-510-7530-0000-000

6. Select the **Reverse Encumbrance** option.
7. Save your work.

Related Topics

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

For more information regarding encumbrance accounting, see Encumbrance Accounting, *Oracle Enterprise Asset Management User's Guide*

Setting Up Installed Base Parameters

Oracle Enterprise Asset Management is integrated with Oracle Installed Base. Therefore, the Installed Base parameters must be set up to ensure that assets are created correctly in eAM.

Creating an Internal Party

- ☐ Before you set up the parameters for Oracle Installed Base, you must first create an internal party. The internal party will be used to complete the Installed Base setup.

Follow these steps to create an internal party:

1. Navigate to the Customer Support - Asset Maintenance responsibility.
2. Click the Contact Center link.
3. Enter contact or customer details in the header section of the page.
4. Click the Party Information tab.
5. Press the F11 key. This action enables you to access fields in the page.
6. Enter all applicable information for the internal party.
7. Save your work.

You must perform the following steps in Oracle Installed Base:

1. Navigate to the Installed Base Administrator responsibility.
2. Under the Setups menu, click the Install Parameters link.
3. Set up the Install Parameters for Installed Base.
See "Set Up Installation Parameters", Setup Steps within Oracle Installed Base, *Oracle Installed Base Implementation Guide*.
4. Make sure that the Freeze check box has been selected.
If it is unchecked, then select the check box.
5. Save your work.

Setting Up Services Fulfillment Manager Parameters

Several transactions originating from Inventory and Order Management are processed in Installed Base, and these transactions must be serialized.

In order to guarantee the serialization of the transactions, you must perform the following steps to ensure that asset transfers are performed correctly in eAM:

1. Navigate to the SFM System Administrator responsibility.
2. Navigate to Administration, and then click the Queue Console link.
3. Click the Services button.
4. Select the SFM Event Manager Queue Service value.
5. Enter a value of 1 for both the Actual and Target to ensure that the Services Fulfillment Manager is up and running.
6. Save your work.

Related Topics

See "Ensure the Serializability of Transactions Processed in Oracle Installed Base," Implementation and Setup for New Users, *Oracle Installed Base Implementation Guide*.

Defining eAM Parameters

After you have established an Enterprise Asset Management enabled organization, set up specific Enterprise Asset Management parameters that determine organization level defaults for individual transactions. Setup information such as asset number defaults, cost defaults, work request information, and work order defaults.

Important: Before creating eAM Parameters, first create an Asset Subinventory in the current eAM-enabled organization (Inventory > Setup > Organizations > Subinventories). See: Creating Subinventories, *Oracle Inventory User's Guide*.

To define Enterprise Asset Management parameters:

1. Navigate to the Enterprise Asset Management Parameters window.

Enterprise Asset Management Parameters

Enterprise Asset Management Parameters (EM1)

Asset Number Defaults

☒ Asset Serial Number Auto Generation

Event Log Controls

Cost Defaults

Cost Element **Equipment** Cost Category **Maintenance**

Preventive Maintenance

☒ Implement From Horizon Start Date

Work Request

☒ Auto Approve ☒ Extended Log

☐ Default Asset from Employee Location ☒ Asset Number Mandatory

Work Order Defaults

WIP Accounting Class **MaintWAC** Maintenance Wip Accounting Class

Work Order Prefix **WO**

PM Work Order Prefix **PM**

Default Department

☐ Enable Workflow for Workorders ☒ Invoice Billable Items Only

☒ Enable Workflow for Safety ☐ Auto Firm on Release

☒ Enable Material Issue Requests ☐ Auto Firm On Create

☒ Value Rebuildables At Zero Cost

Account Defaults

Maintenance Offset **01-520-7530-0000-000**

2. Optionally indicate whether this organization has system generated asset numbers within individual asset groups. See: Defining Asset Groups, *Oracle Enterprise Asset Management User's Guide*. You can specify the starting serial number within the Organization Parameters window or the Master Item window, when defining asset groups. If the starting serial number is defined for the asset group, this definition overwrites the starting serial number within the Organization Parameters.
3. Optionally choose Event Log Controls to enable system events that are logged within the current organization. You can select the Log Enabled check box next to the events that you want logged for your assets. See: Asset Operational Logging, *Oracle Enterprise Asset Management User's Guide*.
4. The Cost Defaults region represents default cost information for future Work Orders, without defined cost elements within the work order.

Select an Enterprise Asset Management Cost Element to indicate how to capture cost overheads and any miscellaneous resource costs. Valid values are Equipment, Labor, and Material. See: Overview of eAM Cost Management, *Oracle Enterprise Asset Management User's Guide*.

5. Select a Cost Category to use as the default for departments that do not have a cost category defined. Department costs are then posted to the appropriate cost elements. Values are Maintenance, Operations, Contract, and any other values that you might have added within the extensible lookup table.
6. In the Preventive Maintenance region, optionally select the Implement From Horizon Start Date check box to bypass past due work order suggestions when executing the Preventive Maintenance process. If this check box is selected, suggested work orders, from the Horizon Start Date forward, are executed.
7. Indicate whether work requests are automatically approved upon creation, or if every user, with the responsibility assigned to the asset's current owning department, receives a notification via Workflow (See: *Oracle Applications Workflow and Defining Department Approvers, Oracle Enterprise Asset Management User's Guide*). This notification appears within self service, within the responsibility you use to log in.

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

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

8. Optionally select the Default Asset from Employee Location check box to indicate the default asset information when creating a work request. If this check box is selected, the Asset Number information defaults as the Location number exported from Oracle Property Manager. Oracle Property Manager is a separate product.
9. If you choose the Extended Log check box, the system keeps an audit trail of records when defining or updating work requests.
10. Optionally select the Asset Number Mandatory check box to indicate that the Asset Number field is mandatory when creating a work request.
11. Select the WIP Accounting Class default to ensure that Work Orders generated within Enterprise Asset Management have an established account code structure assigned to accept charges incurred by that work order.

The WIP accounting class codes available are of type, Maintenance. If a Maintenance type WIP accounting class does not exist, you can define a new one. If

you are using encumbrance accounting, you must include a budget account to capture encumbrance amounts. (See: Defining WIP Accounting Classes, *Oracle Work in Process User's Guide*).

Note: Cost Management handles maintenance work orders as nonstandard expense jobs.

12. Optionally enter a Work Order Prefix.

A prefix enables your organization to identify routine work orders.

Important: Do not use 'BFWO' (Budget Forecast Work Order) as a work order prefix as the system uses this prefix for work order numbers that are generated in a budget forecast.

13. Optionally select a Default Department.

Oracle recommends that you select a default department. This department defaults to maintenance work orders as they are entered. If a department does not exist on a work order, you cannot release it.

14. Optionally enter a PM Work Order Prefix.

This prefix enables your organization to identify Preventive Maintenance work orders. There is a limit of 30 characters.

15. Select the *Enable Workflow for Work Orders* check box to initiate approval processes for work orders and work permits. Work orders and work permits might require approvals or notifications at different stages in their lifecycles. Workflow automates this process. You can set up business events and event subscriptions (or use seeded events and subscriptions) within Oracle Workflow to indicate what events trigger Workflow. Seeded events that you can enable to trigger workflow are: Work Order creation, Work Order release approval, Work Order completion, Work Order status change, Operation completion, Work Permit release approval, Work Permit status update. See: Setting Up Oracle Workflow, *Oracle Workflow User's Guide* and Setting Up the Business Event System, *Oracle Workflow User's Guide*.

16. Optionally select the Enable Workflow for Safety check box to initiate the workflow processes for isolations, work clearances, and work permits used in safety management.

See Safety Management, page 27-2.

17. Indicate whether Material Issue Requests are enabled.

If this check box is selected, the Enable Material Issue Requests check box on eAM Work Orders defaults as selected.

18. Within the Work Order Defaults region, select the Value Rebuildables at Zero Cost to indicate that rebuildable components charge at zero cost (See: Setting Up Zero Cost Rebuild Item Issue, *Oracle Enterprise Asset Management User's Guide*). If this check box is selected, rebuildable items issued out of the subinventory expense account are issued at zero cost.

19. Indicate whether only billable items are invoiceable.

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

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

20. If you select the Auto Firm on Release check box, the dates on the work order cannot automatically reschedule, after the work order is at Released or On Hold statuses.

You can still manually reschedule a resource on the work order, thereby updating the dates on its corresponding operation and work order.

21. If you select the Auto Firm on Create check box, the dates on the Work Order cannot automatically reschedule, even in Draft and Unreleased statuses.

You can still manually reschedule a resource on the work order, thereby updating the dates on its corresponding operation and work order.

22. Within the Account Defaults region, select a Maintenance Offset account.

You can create or break a parent and child (hierarchy) relationship that exists between an asset number and a rebuildable serial number, manually using the Configuration History page. This account records what is sent to Inventory when a Rebuildable is removed from an Asset, and then transferred into inventory.

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

Debit Inventory

Credit Maintenance Offset

23. Within the Asset Move Defaults region, select a default Intermediate Subinventory and Intermediate Locator value.

Only the expense subinventories associated with your organization are available for selection.

This intermediate subinventory is the default subinventory to which all the assets undergoing miscellaneous receipt transactions are received while performing the Asset Move transfer. The Intermediate Locator value indicates the number assigned to the expense intermediate inventory.

See Using the Asset Move Workbench, *Oracle Enterprise Asset Management User's Guide*

24. Save your work.

General eAM Setup

General Enterprise Asset Management Setup tasks include the following:

- Setting Up Areas, *Oracle Enterprise Asset Management User's Guide*
- Defining Departments and Resources, *Oracle Enterprise Asset Management User's Guide*
- Defining Department Approvers, *Oracle Enterprise Asset Management User's Guide*
- Defining Miscellaneous Documents, *Oracle Enterprise Asset Management User's Guide*
- Setting Up Electronic Records, *Enterprise Asset Management User's Guide*

Setting Up Areas

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

To set up areas:

1. Navigate to the Area window.

Area

Area (EM1)

Area

		Effective Dates	
Area	Description	From	To
Warehouse	Warehouse Building	26-SEP-2002	
Fleet Garage	Fleet Services Garage	26-SEP-2002	
Prod IJM	Production Injection Molding Machine Area	26-SEP-2002	
Prod PPress	Productin Punch Press Area	26-SEP-2002	
Prod Assembly	Production Assembly Line Area	26-SEP-2002	
BLG 100	Office Building 100	26-SEP-2002	...

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

Defining Departments and Resources

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

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

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

1. Navigate to the Departments window.

Departments

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

Field	Value
Department	F-Maint
Description	Fleet Services Maintenance
Cost Category	Maintenance
Class	Maint Dept
Location	EM1 - Seattle IV
Project Expenditure Org	
Inactive On	

Buttons: Rates, Resources

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

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

7. Click the **Resources** button to add resources or crafts to the current department.

Resources

Resources (EM1) - F-Maint

Owned ☒

Main Planning

Resource	Description	Available 24 Hours	Share	UOM	Units	Check CTP	Group	Schedule by Instance
ATTK	Automotive Tool	<input type="checkbox"/>	<input type="checkbox"/>	HR	3	<input type="checkbox"/>		<input checked="" type="checkbox"/>
Mechanic1	Fleet Services Me	<input type="checkbox"/>	<input type="checkbox"/>	HR	3	<input type="checkbox"/>		<input type="checkbox"/>
TMREBUILD	Truck Motor Rebu	<input type="checkbox"/>	<input type="checkbox"/>	Ea	1	<input type="checkbox"/>		<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		<input type="checkbox"/>

Instances Tolerance Fences Shifts

Borrowed Resource

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

8. Enter the Resource to assign to the current department.
9. Optionally, for owned resources, indicate whether the resource is available 24 hours per day. You cannot assign shifts to a resource that is available 24 hours per day.
10. For owned resources, indicate whether this department can share the resource and capacity with other departments.
11. Enter the number of capacity Units (resource units) available for this department, for example, the number of machines for a machine resource.

Each resource can assign to any number of departments; multiple resources can be assigned to each department.
12. Optionally select the Check CTP check box to indicate that this resource is used in a Capable to Promise (CTP) check (See: *Capable to Promise, Oracle Master Scheduling/MRP and Supply Chain Planning User's Guide*).
13. Optionally enter a resource Group for the resource in this department.
14. Optionally select the Schedule by Instance check box to indicate whether the department resource should be scheduled at the instance level (specific employee name or piece of equipment).
15. For borrowed resources, enter the Owning Department.

16. Select the Planning tab. Optionally enter an Exception Set. The exception sets that you assign help to identify capacity problems (See: Planning Exception Sets, *Oracle Capacity User's Guide*).
17. Choose Instances to add employees (including contingent workers) or equipment to the current resource. An instance is a specific employee name or piece of equipment. See: People and Assignments, *Implementing Oracle HRMS*.

Instances

The screenshot shows a window titled "Instances (EM1) - Mechanic1". Inside the window is a table with two columns: "Number" and "Employee Name". The table has three rows of data. The first row has "1215" in the "Number" column and "Rome, Ms. Gerry" in the "Employee Name" column. The second row has "1216" in the "Number" column and "Short, Mr. Dave" in the "Employee Name" column. The third row has "947" in the "Number" column and "Moll, Mr. Joe" in the "Employee Name" column. The third row is highlighted with a blue background. To the right of the table is a vertical scrollbar. At the top right of the table area, there is a small icon of a document with a checkmark.

Number	Employee Name
1215	Rome, Ms. Gerry
1216	Short, Mr. Dave
947	Moll, Mr. Joe

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

Shifts

Shift Num	Description	Units
1	Normal daily shift	

Capacity Changes

1. Select a Shift Number.

The shifts available are those assigned to the workday calendar and assigned to the current organization.

2. Choose Capacity Changes to define capacity changes for a shift.

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

Defining Department Approvers

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

A work request can be rejected. If an approver rejects a work request, the notification is removed from that approver's notification list. You can re-assign a notification to

another user for approval or additional information; for example, the originator might need to provide additional information on the work request.

To define Department Approvers:

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

Department Approvers

Department	Description	Primary Approver
AS MAINT	AS MAINTENANCE DEPARTMENT	MFG

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

Related Topics

Work Requests, *Oracle Enterprise Asset Management User's Guide*

Home, *Oracle Enterprise Asset Management User's Guide*

Defining Miscellaneous Documents

You can create text and files, such as spreadsheets, graphics, and OLE objects. You can

attach these documents to a maintenance Work Order, asset, or operation.

To define miscellaneous documents:

1. Navigate to the Miscellaneous Documents window.

The screenshot shows the 'Miscellaneous Documents' window. At the top, there's a title bar with the window name. Below it, the form is organized into several sections. The 'Category' field is set to 'Miscellaneous'. The 'Title' and 'Description' fields are empty. The 'Source' section contains a 'Data Type' dropdown set to 'File' and a 'File' text field. The 'Usage' section has two radio buttons: 'Standard' (selected) and 'Template'. The 'Security' section includes a 'Type' dropdown set to 'Organization', an 'Owner' dropdown set to 'Seattle Maintenance', and a 'Share' checkbox. The 'Effective Dates' section has 'From' and 'To' date fields. At the bottom, there is a large empty area with a scroll bar and a button labeled 'Open Document...'. The window has a standard Oracle Applications look with a blue header and a light gray background.

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

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

Setting Up Electronic Records and Signatures

During work order completion, you can require electronic signatures and electronic records. These are provided using the Oracle ERES framework. Electronic signatures require a User Identification and password during the transaction. Electronic records provide a permanent snapshot of the transaction data that the user is verifying.

For more information regarding setting up electronic records and signatures, see the *Oracle E-Records Implementation Guide*.

To set up electronic records and signatures:

1. Navigate to the Electronic Records page (ERES Administrator > Setup > Configuration Variables).

Electronic Records

ORACLE Electronic Records

Home Logout Preferences Help Personalize Page Diagnostics

Evidence Store Utilities Setup Configuration Variables XML Elements Security Rules

Information
There is no configuration variable associated with the rule provided.

Configuration Variables

Search

Personalize "Search"
* Indicates required field

* Transaction Name EAM Work Order Completion - SSWA
Rule Name EAM Work Order Completion Approval Rule
Go

Personalize Stack Layout: (resultsRV)

Transaction Variables

Create

Variable Name	Description	Value	E-record	Update	Delete
E-record Required	Whether e-record is required	Y			
E-record Style Sheet	The e-record style sheet	eamwocomp.xml			
E-record Style Sheet Version	The e-record style sheet version	1.0			
E-signature Required	Whether e-signature is required	Y			

Rule Variables

Create

Variable Name	Value	E-record	Update	Delete
No results found.				

About this Page Privacy Statement Evidence Store Utilities Setup Home Logout Preferences Help Personalize Page Diagnostics Copyright (c) 2006, Oracle. All rights reserved.

2. Select *EAM Work Order Completion - SSWA* from the **Transaction Name** list of values.
3. Optionally select a **Rule Name**.
4. Choose Create to create Variable Names.
 - Select *E-record Required* from the **Transaction Name** list of values. Set this value to Y.
 - Select *E-signature Required* from the **Transaction Name** list of values. Set this value to Y.
5. Choose Apply.

Creating XML Elements for EAM Work Order Completions

All e-records are XML documents consisting of many XML elements. An XML element which is indexed and used for special purposes such as querying or creating security rules is called an Indexed XML Element.

You must set up XML elements to be used for EAM work order completions.

Use the following steps to create and index the XML elements for use in an Advanced Search.

1. Create the XML elements.
2. Run the E-record Indexed XML Element Maintenance concurrent program.
3. Run the Oracle E-Records XML Element Synchronization Program.

Creating XML elements for EAM work order completions:

1. Navigate to the XML Elements page (ERES Administrator > Administration Tasks > Setup > XML Elements).
2. Click the **Create Element** button and the Create Element page appears.
3. Enter *EAM* as the **Owner Application**.
4. Enter the **XML Element** name, for example, ASSET_ACTIVITY.
5. Enter the **Display Name**, for example, Activity.
6. Select the **Query Element** check box.
7. Click the **Apply** button.

The screenshot shows the 'Create Element' page in the Oracle E-Records application. The page has a blue header with the Oracle logo and 'Electronic Records' text. Below the header, there are tabs for 'Evidence Store', 'Utilities', and 'Setup'. The 'Setup' tab is active, and the 'XML Elements' sub-tab is selected. The page contains a form with the following fields and options:

- Owner Application:** A text field with 'EAM' entered.
- XML Element:** A text field with 'ASSET_ACTIVITY' entered.
- Display Name:** A text field with 'Activity' entered.
- Query Element:** A checked checkbox.
- Secure Element:** An unchecked checkbox.

At the bottom right, there are 'Cancel' and 'Apply' buttons. A small note at the top of the form states: 'An Element can be defined for all e-records or those conforming to a specific document type definition. It can be used as a Query Element to search e-records or as a Secure Element to create security rules for e-records. It is owned by an Oracle Applications module.'

8. You will receive a confirmation message indicating that the specific XML element has been created.

EAM XML Elements:

The following table includes the EAM XML elements to be defined.

Important: Use EAM as the Owner Application for each XML element.

Work Order Header XML Elements

XML Element	Display Name
ORGANIZATION_CODE	Organization Code
WORK_ORDER	Work Order Number
WO_DESC	Work Order Description
ASSET_GROUP	Asset Group
ASSET_GROUP_DESC	Asset Group Description
ASSET_NUMBER	Asset Number
ASSET_SERIAL_NUMBER	Asset Serial Number
ASSET_NUM_DESC	Asset Number Description
AREA	Area
LOCATION_CODE	PN Location Code
LOCATION_NAME	PN Location Name
ASSET_ACTIVITY	Activity
ASSET_ACTIVITY_DESC	Activity Description
CLASS_CODE	Accounting Class Code
ACTIVITY_TYPE	Activity Type
ACTIVITY_CAUSE	Activity Cause
ACTIVITY_SOURCE	Activity Source
SCHEDULED_START_DATE	Scheduled Start Date
SCHEDULED_END_DATE	Scheduled End Date

XML Element	Display Name
PM_SUGGESTED_START_DATE	PM Suggested Start Date
PM_SUGGESTED_END_DATE	PM Suggested End Date
DATE_RELEASED	Date Released
DATE_COMPLETED	Date Completed
PROJECT_NUMBER	Project Number
PROJECT_NAME	Project Name
TASK_NUMBER	Task Number
TASK_NAME	Task Name
PRIORITY	Priority
FIRM	Firm
WO_TYPE	Work Order Type
WO_DEPARTMENT	Work Order Department
SHUTDOWN_TYPE	Shutdown Type
SHUTDOWN_START_DATE	Shutdown Start Date
SHUTDOWN_END_DATE	Shutdown End Date

Completions XML Elements

XML Element	Display Name
ACTUAL_START_DATE	Actual Start Date
ACTUAL_DURATION	Actual Duration

XML Element	Display Name
ACTUAL_END_DATE	Actual End Date
RECONCILIATION_CODE	Reconciliation Code
SUB_INVENTORY	Completion Sub-Inventory
LOCATION	Location
LOT_NUMBER	Lot Number

Running the E-records Indexed SML Element Maintenance Concurrent Program:

You must run a concurrent program to index the XML elements that you created. The job of the concurrent program is to index all the non-indexed elements. The indexing consists of changing the status field in the table EDR_IDX_XML_ELEMENT_B and creating a section in the interMedia text index for the indexed XML element.

Important: After creating or updating an indexed XML element, you must run this program again in order to index the element.

Follow these steps to submit the program:

1. Navigate to the Submit Requests page (ERES Administrator > Requests > Run).
2. Enter the *E-record Indexed XML Element Maintenance* value in the Name field.
3. Click the **Submit** button.

Submit Request

Run this Request...

Copy...

Name: E-records Indexed XML Element Maintenance

Operating Unit:

Parameters:

Language: American English

Language Settings... Debug Options

At these Times...

Run the Job: As Soon as Possible

Schedule...

Upon Completion...

☒ Save all Output Files ☐ Burst Output

Layout:

Options...

Notify:

Delivery Opts

Print to: noprint

Help (C) Submit Cancel

Running the Oracle E-Records XML Element Synchronization Program:

When new, deleted, or changed XML elements are synchronized into the system, they are available for query on all existing records in the system. To make them available for query on new elements, the Oracle E-records XML Element Synchronization Program must be run. This program is run in the background as a cron job. It is run as often as necessary, based on the amount of querying done in your system. For example, if your system has several hundred records entered every day, and there is a need to have the ability to query these records immediately, then have this program run every hour.

After you have run the indexing concurrent program, submit the Oracle E-Records XML Element Synchronization Program.

Note: Oracle recommends that you schedule this program to run multiple times to pick up newly processed E-records.

Follow these steps to submit the program:

1. Navigate to the Submit Requests page (ERES Administrator > Requests > Run).
2. Enter the *Oracle E-Records XML Element Synchronization Program* value in the Name field.
3. Click the **Submit** button.

Related Topics

For more information regarding setting up XML elements, see the *Oracle E-Records Implementation Guide*.

Defining Lookups

Lookup codes must be decided upon and defined during the implementation process. Lookup codes fall within three categories: extensible, user defined, or system defined. If a lookup code is extensible, the existing lookup codes cannot be modified, but you can add new codes to the table. If lookup codes are user defined, all codes may be modified. If lookup codes are system defined, the existing codes cannot be modified, and new codes cannot be added to the table.

You must define Asset Lookups, Work Request Lookups, and Work Order Lookups.

This section includes the following topics:

- Activity Types, *Oracle Enterprise Asset Management User's Guide*
- Activity Causes, *Oracle Enterprise Asset Management User's Guide*
- Activity Sources, *Oracle Enterprise Asset Management User's Guide*
- Asset Activity Priorities, *Oracle Enterprise Asset Management User's Guide*
- Cost Category Codes, *Oracle Enterprise Asset Management User's Guide*
- Criticality Codes, *Oracle Enterprise Asset Management User's Guide*
- Asset Import Scope Codes, *Oracle Enterprise Asset Management User's Guide*
- Asset Import Statuses, *Oracle Enterprise Asset Management User's Guide*
- Asset Log User-Defined Events, *Oracle Enterprise Asset Management User's Guide*
- Contact Preferences, *Oracle Enterprise Asset Management User's Guide*
- Failure Code Types, *Oracle Enterprise Asset Management User's Guide*
- Work Request Statuses, *Oracle Enterprise Asset Management User's Guide*
- Work Request Types, *Oracle Enterprise Asset Management User's Guide*
- Work Order and Work Request Priority Codes, *Oracle Enterprise Asset Management User's Guide*
- Work Order Reconciliation Codes, *Oracle Enterprise Asset Management User's Guide*

- Work Order Types, *Oracle Enterprise Asset Management User's Guide*

Activity Types

Activity types are used to describe the type of maintenance work that is performed on an asset (See: Defining Activities, *Oracle Enterprise Asset Management User's Guide*). For example, Inspections, Lubrications, Overhauls, Calibration, and Repetitive work. Activity types are extensible (See: Defining Lookups, *Oracle Enterprise Asset Management User's Guide*).

To define activity types:

1. Navigate to the Oracle Manufacturing Lookups window.

Oracle Manufacturing Lookups

The screenshot shows the 'Oracle Manufacturing Lookups' window. At the top, there are fields for 'Type' (MTL_EAM_ACTIVITY_TYPE), 'Meaning' (Activity Type), 'Application' (Inventory), and 'Description' (Asset Activity Types). To the right, there is an 'Access Level' section with radio buttons for 'User', 'Extensible' (selected), and 'System'. Below these fields is a table with columns: Code, Meaning, Description, Tag, From, To, and Enabled. The table contains 10 rows of activity types, each with a numeric code and a description. The 'Enabled' column has checkboxes, all of which are checked.

Code	Meaning	Description	Tag	From	To	Enabled
1	Maintenance	Maintenance		26-JUN-2000		<input checked="" type="checkbox"/>
10	Calibration	Calibration		10-SEP-2003		<input checked="" type="checkbox"/>
11	Contracted	Contracted Service		10-SEP-2003		<input checked="" type="checkbox"/>
2	Replacement	Replacement		26-JUN-2000		<input checked="" type="checkbox"/>
20	Service	Service		23-OCT-2003		<input checked="" type="checkbox"/>
21	Janitorial	Janitorial		30-OCT-2003		<input checked="" type="checkbox"/>
25	Reformat	Department Reformat		04-MAR-2005		<input checked="" type="checkbox"/>
3	Inspection	Inspection		25-JUN-2001		<input checked="" type="checkbox"/>
4	Lubrication	Lubrication		25-JUN-2001		<input checked="" type="checkbox"/>
5	Repetitive	Repetitive		25-JUN-2001		<input checked="" type="checkbox"/>

2. Click the Find icon.
3. Select MTL_EAM_ACTIVITY_TYPE from the Type list of values.
4. Enter a numeric Code.

Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

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

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

Activity Causes

Activity cause codes are reasons for an asset failure. For example, Preventive, Normal Wear, Rework, and Breakdown. This information enables you to understand the dynamics that affect an asset's ability to perform. They establish critical data that is used for reporting and analysis of asset failure causes and the frequency of such conditions. Asset cause codes are referenced when setting up an activity (See: Defining Activities, *Oracle Enterprise Asset Management User's Guide*). Activity cause codes are extensible (See: Defining Lookups, *Oracle Enterprise Asset Management User's Guide*).

To define activity cause codes:

1. Navigate to the Oracle Manufacturing Lookups window.

Activity Cause Codes

Manufacturing Lookups

Type: MTL_EAM_ACTIVITY_CAUSE

Meaning: Activity Cause

Application: Inventory

Description: Asset Activity Cause

Access Level:
☐ User
☒ Extensible
☐ System

Code	Meaning	Description	Tag	Effective Dates		Enabled
				From	To	
1	Breakdown	Breakdown		26-JUN-2000		<input checked="" type="checkbox"/>
10	Accident	Accident		30-OCT-2003	30-MAR-2004	<input checked="" type="checkbox"/>
2	Preventive	Preventive		26-JUN-2000		<input checked="" type="checkbox"/>
20	Health & Safety	Health and Safety		20-NOV-2003		<input checked="" type="checkbox"/>
3	Modification	Modification		15-JUN-2001		<input checked="" type="checkbox"/>
4	Non-Equipment Work	Non-Equipment Work		15-JUN-2001		<input checked="" type="checkbox"/>
5	Normal Wear	Normal Wear		25-JUN-2001		<input checked="" type="checkbox"/>
6	Vandalism	Vandalism		25-JUN-2001		<input checked="" type="checkbox"/>
7	Rework	Rework		25-JUN-2001		<input checked="" type="checkbox"/>
8	Damage	Damage		06-FEB-2003		<input checked="" type="checkbox"/>

2. Select MTL_EAM_ACTIVITY_CAUSE from the Type list of values.

3. Enter a numeric Code.

Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

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

4. Enter the Meaning of the code, for example, Breakdown.

5. Enter a Description for the code.

6. Optionally enter a Tag to categorize lookup values. This field is for information purposes.

7. The Effective From Date defaults as the system date, but you can update this.

Optionally enter a Effective To Date to indicate an expiration date of the code.

8. Select the Enabled check box to enable this code for Enterprise Asset Management.

9. Save your work.

Activity Sources

Activity source codes are the reasons why activities are executed. For example, warranty compliance, OSHA compliance, or military specification requirements. Activity source codes are referenced when setting up an activity (See: Defining Activities, *Oracle Enterprise Asset Management User's Guide*). Activity source codes are extensible (See: Defining Lookups, *Oracle Enterprise Asset Management User's Guide*).

To define activity source codes:

1. Navigate to the Oracle Manufacturing Lookups window.

Activity Source Codes

The screenshot shows the 'Manufacturing Lookups' window with the 'Activity Source Codes' tab selected. The window contains several input fields and a table.

Form Fields:

- Type: MTL_EAM_ACTIVITY_SOURCE
- Meaning: Activity Source/Reason
- Application: Inventory
- Description: Asset Activity Source
- Access Level: ☒ User, ☒ Extensible, ☐ System

Table:

Code	Meaning	Description	Tag	From	To	Effective Dates	Enabled
10	Regulatory	Regulatory Compliance		07-JUL-2003			<input checked="" type="checkbox"/>
20	Warranty	Warranty Compliance		07-JUL-2003			<input checked="" type="checkbox"/>
30	Routine	Routine		01-AUG-2003			<input checked="" type="checkbox"/>
40	Vandalism	Vandalism		30-MAR-2004			<input checked="" type="checkbox"/>
50	Accident	Accident		30-MAR-2004			<input checked="" type="checkbox"/>
							<input type="checkbox"/>
							<input type="checkbox"/>
							<input type="checkbox"/>
							<input type="checkbox"/>
							<input type="checkbox"/>

2. Select MTL_EAM_ACTIVITY_SOURCE from the Type list of values.

3. Enter a numeric Code.

Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

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

4. Enter the Meaning of the code, for example, Breakdown.
5. Enter a Description for the code.

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

Asset Activity Priorities

Activity priority codes indicate asset activity priority levels, for example, Low, Medium, and High. Activity priorities are extensible (See: Defining Lookups, *Oracle Enterprise Asset Management User's Guide*).

To define activity priorities:

1. Navigate to the Oracle Manufacturing Lookups window.

Activity Priorities

Manufacturing Lookups

Type: WIP_EAM_ACTIVITY_PRIORITY
Meaning: WIP_EAM_ACTIVITY_PRIORITY
Application: Work in Process
Description: Asset Activity Priority

Access Level:
☐ User
☒ Extensible
☐ System

Effective Dates: From To

Code	Meaning	Description	Tag	From	To	Enabled	[]
1	Emergency	Emergency Work Prior		09-OCT-2002		<input checked="" type="checkbox"/>	
2	Urgent	Urgent Priority		09-OCT-2002		<input checked="" type="checkbox"/>	
3	High	High Priority		09-OCT-2002		<input checked="" type="checkbox"/>	
4	Routine	Routine Priority		13-FEB-2004		<input checked="" type="checkbox"/>	
5	Medium	Medium Priority		13-FEB-2004		<input checked="" type="checkbox"/>	
6	Low	Low Priority		13-FEB-2004		<input checked="" type="checkbox"/>	
						<input type="checkbox"/>	
						<input type="checkbox"/>	
						<input type="checkbox"/>	
						<input type="checkbox"/>	

2. Select WIP_EAM_ACTIVITY_PRIORITY from the Type list of values.
3. Enter a numeric Code.

Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

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

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

Asset Failure Source Types

Failure is reported on a work order. Each work order represents one single failure occurrence (event) for the asset specified on the work order (See: Failure Analysis Overview, *Oracle Enterprise Asset Management User's Guide*). You can optionally add more codes, specifying different source types. For example, you may specify different types of work orders with different source types. Asset failure source types are user-defined (See: Defining Lookups, *Oracle Enterprise Asset Management User's Guide*).

To define asset failure source types:

1. Navigate to the Oracle Manufacturing Lookups window.

[illegible]

- Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

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

Asset Import Scope Codes

The eAM Asset Number Open Interface enables you to import asset numbers into eAM, using a batch process. You can optionally import asset number attributes. You can create new asset numbers and attributes, or update existing asset numbers and attributes. See *eAM Asset Number Open Interface, Oracle Enterprise Asset Management Implementation Guide*. Define the process' parameter scope codes. Asset import scope codes are user-defined (See: *Defining Lookups*, page 2-30).

To define asset import scope codes:

1. Navigate to the Oracle Manufacturing Lookups window.

[illegible]

2. Select EAM_ASSET_IMPORT_SCOPE from the Type list of values.

- 3. Enter a numeric Code.**

Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

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

4. Enter the Meaning, for example, With Attributes.

- 5. Enter a Description.**

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

Asset Import Statuses

The eAM Asset Number Open Interface enables you to import asset numbers into eAM, using a batch process. You can optionally import asset number attributes. You can create new asset numbers and attributes, or update existing asset numbers and attributes. See eAM Asset Number Open Interface, *Oracle Enterprise Asset Management Implementation Guide*. Define the process' import statuses. Asset import statuses are user defined (See: Defining Lookups, page 2-30).

To define asset import statuses:

1. Navigate to the Oracle Manufacturing Lookups window.

Asset Import Statuses

Manufacturing Lookups

Type: EAM_ASSET_IMPORT_STATUS
Meaning: EAM_ASSET_IMPORT_STATUS
Application: Enterprise Asset Management
Description:

Access Level
☒ User
☐ Extensible
☐ System

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

2. Select EAM_ASSET_IMPORT_STATUS from the Type list of values.

3. Enter a numeric Code.

Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

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

4. Enter the Meaning, for example, Success.

5. Enter a Description.

6. Optionally enter a Tag to categorize lookup values.

This field is for informational purposes.

7. The Effective From Date defaults as the system date, but you can update this.

Optionally enter a Effective To Date to indicate an expiration date for the code.

8. Select the Enabled check box to enable this code for Enterprise Asset Management.

9. Save your work.

Asset Log User-defined Events

You can define events, and associate them to work order statuses. A work order might require approvals or notifications at different stages of its lifecycle. Workflow automates this process. You can initiate Workflow to generate notifications, approvals, transactions, and update a work order status. These statuses are used within your customized workflow (See: Setting Up Oracle Workflow, *Oracle Workflow User's Guide* and Setting Up the Business Event System, *Oracle Workflow User's Guide*). Asset log user-defined events are user-defined (See: Defining Lookups, *Oracle Enterprise Asset Management User's Guide*).

To define asset log user-defined events:

1. Navigate to the Oracle Manufacturing Lookups window.

Asset Log User-Defined Events

The screenshot shows the 'Manufacturing Lookups' window. The top section contains the following fields:

- Type: EAM_USER_EVENTS
- Meaning: EAM USER EVENTS
- Application: Enterprise Asset Management
- Description: Asset Log User Defined Events

On the right, there is an 'Access Level' section with three radio buttons: ☒ User, ☐ Extensible, and ☐ System.

Below these fields is a table with the following columns: Code, Meaning, Description, Tag, Effective Dates (From, To), and Enabled. The table contains several rows of predefined events, with the first row highlighted.

Code	Meaning	Description	Tag	From	To	Enabled
10	Incident Report	Incident Report		24-OCT-2006		<input checked="" type="checkbox"/>
20	Installation Sign-off	Installation Sign-off		24-OCT-2006		<input checked="" type="checkbox"/>
25	Installed	Installed		21-DEC-2006		<input checked="" type="checkbox"/>
30	Roadside Assistance	Roadside Assistance		24-OCT-2006		<input checked="" type="checkbox"/>
40	Visual Inspection	Visual Inspection		24-OCT-2006		<input checked="" type="checkbox"/>
45	Safety Check	Safety Check		21-DEC-2006		<input checked="" type="checkbox"/>
50	In Service	In Service		21-DEC-2006		<input checked="" type="checkbox"/>
60	Out of Service	Out of Service		21-DEC-2006		<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

2. Select EAM_USER_EVENTS from the Type list of values.
3. Enter a numeric Code.

Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

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

4. Enter the Meaning of the code.

database errors in the application.

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

Cost Category Codes

Cost category codes are used as the default for departments that do not have a cost category defined. Department costs are then posted to the appropriate cost elements. Valid values are Maintenance, Operations, Contract, and any other values that you might add within this extensible lookup table. See: Overview of eAM Cost Management, *Oracle Enterprise Asset Management User's Guide*.

To define cost category codes:

1. Navigate to the Oracle Manufacturing Lookups window.

BOM Cost Category Codes

Manufacturing Lookups

Type: BOM_EAM_COST_CATEGORY

Meaning: BOM_EAM_COST_CATEGORY

Application: Bills of Material

Description: Enterprise Asset Management Cost Category

Access Level:

☐ User

☒ Extensible

☐ System

Code	Meaning	Description	Tag	Effective Dates	Enabled	
				From	To	
1	Maintenance	Maintenance				<input checked="" type="checkbox"/>
2	Operations	Operations				<input checked="" type="checkbox"/>
3	Contract	Contract				<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

2. Select BOM_EAM_COST_CATEGORY from the Type list of values.

3. Enter a numeric Code.

Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

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

4. Enter the Meaning of the code, for example, High.

5. Enter a Description for the code.

6. Optionally enter a Tag to categorize lookup values.

This field is for informational purposes.

7. The Effective From Date defaults as the system date, but you can update this.

Optionally enter a Effective To Date to indicate an expiration date for the code.

8. Select the Enabled check box to enable this code for Enterprise Asset Management.

9. Save your work.

Criticality Codes

Criticality codes suggest the importance of an asset to an organization, for example, High and Low. An asset that has a direct impact on production or that is difficult to replace may be considered a critical asset. Asset criticality codes help you to determine the urgency of requested work. Asset criticality codes are referenced when defining an asset (See: Defining Asset Numbers, *Oracle Enterprise Asset Management User's Guide*). Asset Criticality Codes are extensible (See: Defining Lookups, *Oracle Enterprise Asset Management User's Guide*).

To define asset criticality codes:

1. Navigate to the Oracle Manufacturing Lookups window.

Asset Criticality Codes

The screenshot shows the 'Manufacturing Lookups' window with the following details:

- Type: MTL_EAM_ASSET_CRITICALITY
- Meaning: Asset Criticality
- Application: Inventory
- Description: Asset Criticality
- Access Level: ☐ User, ☒ Extensible, ☐ System

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

2. Select MTL_EAM_ASSET_CRITICALITY from the Type list of values.
3. Enter a numeric Code.

Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

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

Warning: Oracle recommends that you do not create more than 250

asset criticality codes in order to avoid performance issues.

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

Failure Code Types

Failure, cause, and resolution codes are organized into multiple tree structures called failure code sets, which are then assigned to asset groups. Each set provides asset group-specific information on the possible failures of an asset group, the possible causes of each failure, and the possible resolutions for each cause. Assets within an asset group inherit the assigned failure code set. At the work order level, failure tracking codes are entered to report a failure, its cause, and resolution. (See: Failure Analysis Overview, *Oracle Enterprise Asset Management User's Guide*). You can optionally update the meaning for the failure code types.

To define failure code types:

1. Navigate to the Oracle Manufacturing Lookups window.

Failure Code Types

Manufacturing Lookups

Type: EAM_FAILURE_CODE_TYPE

Meaning: Failure Code Type

Application: Enterprise Asset Management

Description: Failure Code Type

Access Level:
☐ User
☒ Extensible
☐ System

Code	Meaning	Description	Tag	Effective Dates		Enabled
				From	To	
10	Failure Code	Failure Code		03-17-2006		<input checked="" type="checkbox"/>
20	Cause Code	Cause Code		03-17-2006		<input checked="" type="checkbox"/>
30	Resolution Code	Resolution Code		03-17-2006		<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

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

Work Request Statuses

The Work Request Approval is the process of changing a work request status from Open to Awaiting Work Order. Maintenance work orders are linked to work requests with a status of Awaiting Work Order. When defining the Enterprise Asset Management parameters (See: Defining eAM Parameters, *Oracle Enterprise Asset Management User's Guide*), if the Auto Approve check box is selected, work requests are created with an automatic status of Awaiting Work Order, for that organization. If the check box is not selected, work requests are created with a status of Open; any user who

receives the notification (See: Defining Department Approvers, *Oracle Enterprise Asset Management User's Guide*) can change the work request status to Awaiting Work Order. A plant or facility might need to include additional statuses. Currently, the workflow cannot be customized to work with user-defined work request statuses. Work request approval statuses are extensible (See: Defining Lookups, *Oracle Enterprise Asset Management User's Guide*).

To define work request statuses:

1. Navigate to the Oracle Manufacturing Lookups window.

Work Request Statuses

Manufacturing Lookups

Type: WIP_EAM_WORK_REQ_STATUS
Meaning: WIP_EAM_WORK_REQ_STATUS
Application: Work in Process
Description: Work Request Status

Access Level:
☐ User
☒ Extensible
☐ System

Effective Dates: From To

Code	Meaning	Description	Tag	From	To	Enabled
1	Open	Open				<input checked="" type="checkbox"/>
2	Additional Information	Additional Information				<input checked="" type="checkbox"/>
3	Awaiting Work Order	Awaiting Work Order				<input checked="" type="checkbox"/>
4	On Work Order	On Work Order				<input checked="" type="checkbox"/>
5	Rejected	Rejected				<input checked="" type="checkbox"/>
6	Complete	Complete				<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

2. Select WIP_EAM_WORK_REQ_STATUS from the Type list of values.
3. Optionally add codes to the pre-existing list of codes. The codes that are pre-existing cannot be deleted; however the meaning can be modified.

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

4. Enter the Meaning of the code, for example, Open.
5. Enter a Description for the code.
6. Optionally enter a Tag to categorize lookup values. This field is for information purposes.

7. Optionally enter Effective From and To Dates to indicate an expiration date for the code.
8. Select the Enabled check box to enable this code for Enterprise Asset Management.
9. Save your work.

Work Request Types

Work request types describe and categorize Work Requests. For example, Manual, System, Routine, Capital, and Furniture. Work request types are extensible (See: Defining Lookups, *Oracle Enterprise Asset Management User's Guide*).

To define a work request type:

1. Navigate to the Oracle Manufacturing Lookups window.

Work Request Types

The screenshot shows the 'Manufacturing Lookups' window with the 'Work Request Types' tab selected. The form on the left contains the following fields:

- Type: WIP_EAM_WORK_REQ_TYPE
- Meaning: WIP_EAM_WORK_REQ_TYPE
- Application: Work in Process
- Description: Work Request Type
- Access Level: ☐ User, ☒ Extensible, ☐ System

Below the form is a table of existing work request types. The table has columns for Code, Meaning, Description, Tag, Effective Dates (From, To), and Enabled. The 'Enabled' column has a checkbox and a button.

Code	Meaning	Description	Tag	From	To	Enabled
1	New Business	New Business		06-FEB-2003		<input checked="" type="checkbox"/>
10	Routine	Routine Work Requests		25-SEP-2002		<input checked="" type="checkbox"/>
11	Refurbish	Refurbish		06-FEB-2003		<input checked="" type="checkbox"/>
12	Relocation	Relocation		06-FEB-2003		<input checked="" type="checkbox"/>
13	Property Damage	Property Damage		06-FEB-2003		<input checked="" type="checkbox"/>
14	Lighting	Lighting		06-FEB-2003		<input checked="" type="checkbox"/>
15	Power	Power		06-FEB-2003		<input checked="" type="checkbox"/>
16	Service Entrance	Service Entrance		06-FEB-2003		<input checked="" type="checkbox"/>
2	Outage	Outage		06-FEB-2003		<input checked="" type="checkbox"/>
20	Preventive	Preventive Maintenance		25-SEP-2002		<input checked="" type="checkbox"/>

2. Select WIP_EAM_WORK_REQ_TYPE from the Type list of values.
3. Enter a numeric Code.

Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

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

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

Work Order and Work Request Priority Codes

Work order priority codes contribute to the organization and execution of work orders. For example, High, Medium, and Low, or 1,2, and 3, respectively. Typically, a priority is assigned by the people entering work requests and work orders. The planner or supervisor compares this priority to the asset criticality (See: Asset Criticality Codes, *Oracle Enterprise Asset Management User's Guide*). These codes are entered when creating activity associations, work orders, and work requests. Typically, a priority is assigned by the person that enters the work request and its related work order. Priority specified during Activity association becomes the work order priority when a work order is created, using the activity association (See: Routine Work Orders, *Oracle Enterprise Asset Management User's Guide* and Work Requests, *Oracle Enterprise Asset Management User's Guide*). Work order priority codes are extensible (See: Defining Lookups, *Oracle Enterprise Asset Management User's Guide*).

To create work order priority codes:

1. Navigate to the Oracle Manufacturing Lookups window.

Priority Codes

Manufacturing Lookups

Type: WIP_EAM_ACTIVITY_PRIORITY
Meaning: WIP_EAM_ACTIVITY_PRIORITY
Application: Work in Process
Description: Asset Activity Priority

Access Level:
☐ User
☒ Extensible
☐ System

Effective Dates: From To Enabled

Code	Meaning	Description	Tag	From	To	Enabled
1	Emergency	Emergency Work Prio		09-OCT-2002		<input checked="" type="checkbox"/>
2	Urgent	Urgent Priority		09-OCT-2002		<input checked="" type="checkbox"/>
3	High	High Priority		09-OCT-2002		<input checked="" type="checkbox"/>
4	Routine	Routine Priority		13-FEB-2004		<input checked="" type="checkbox"/>
5	Medium	Medium Priority		13-FEB-2004		<input checked="" type="checkbox"/>
6	Low	Low Priority		13-FEB-2004		<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

2. Select WIP_EAM_ACTIVITY_PRIORITY from the Type list of values.

3. Optionally add additional codes to the pre-existing list of codes.

The codes that are pre-existing cannot be deleted; however the meaning can be modified.

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

4. Enter the Meaning of the code, for example, High.

5. Enter a Description for the code.

6. Optionally enter a Tag to categorize lookup values.

This field is for informational purposes.

7. The Effective From Date defaults as the system date, but you can update this.

Optionally enter a Effective To Date to indicate an expiration code for the code.

8. Select the Enabled check box to enable this code for Enterprise Asset Management.

9. Save your work.

Work Order Reconciliation Codes

Reconciliation codes detail how work orders and operations were completed. These codes usually fall within two categories: Completed as Planned or Partial Completion. You can further define the condition within these two types of completion statuses. These codes enable you to evaluate work orders by percentage completed or delayed, and if they were delayed, the reason for the delay. Reconciliation codes are extensible (See: Defining Lookups, *Oracle Enterprise Asset Management User's Guide*).

To define Work Order reconciliation codes:

1. Navigate to the window.

Work Order Reconciliation Codes

Manufacturing Lookups

Type: WIP_EAM_RECONCILIATION_CODE
Meaning: EAM Reconciliation Code
Application: Work in Process
Description:

Access Level:
☐ User
☒ Extensible
☐ System

Effective Dates: From To Enabled

Code	Meaning	Description	Tag	From	To	Enabled
10	Fixed Completely	Fixed Completeley		25-SEP-2002		<input checked="" type="checkbox"/>
20	Partial Repair	Partially Fixed		25-SEP-2002		<input checked="" type="checkbox"/>
30	Mfg Service Call	Contact Manufacturer fo		25-SEP-2002		<input checked="" type="checkbox"/>
40	Scrap	Scrap asset - not feasak		25-SEP-2002		<input checked="" type="checkbox"/>
50	Skipped	Skipped for Production F		08-JUL-2005		<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

2. Select WIP_EAM_RECONCILIATION_CODE from the Type list of values.

3. Enter a numeric Code.

Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

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

4. Enter the Meaning of the code, for example, Fixed Completely.
5. Enter a Description for the code.

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

Work Order Types

Work order types enable you to differentiate work orders. For example, Routine, and Rebuild. Maintenance management can use this information to sort and monitor work activity for reporting and budgeting. Work order types are referenced in the activity and work order.

Work order types are created manually or automatically. For example, rebuildable work orders are created automatically or manually (See: Rebuild Work Orders, page 3-13). Preventive maintenance work orders are created automatically, based on meter readings (See: Preventive Maintenance Work Orders, page 3-12).

Work order types are extensible (See: Defining Lookups, page 2-30).

To define work order types:

1. Navigate to the Oracle Manufacturing Lookups window.

Work Order Types

Manufacturing Lookups

Type: WIP_EAM_WORK_ORDER_TYPE

Meaning: EAM Work Order Type

Application: Work in Process

Description:

Access Level:

☐ User

☒ Extensible

☐ System

Code	Meaning	Description	Tag	Effective Dates	Enabled
				From To	
10	Routine	Routine Work Orders		25-SEP-2002	<input checked="" type="checkbox"/>
11	Reactive	Reactive Work Order		12-MAR-2004	<input checked="" type="checkbox"/>
12	Planned	Planned Work Order		12-MAR-2004	<input checked="" type="checkbox"/>
20	Preventive	Preventive Maintenance		25-SEP-2002	<input checked="" type="checkbox"/>
30	Emergency	Emergency Work Order		25-SEP-2002	<input checked="" type="checkbox"/>
40	Facilities	Facilities Work Orders		28-OCT-2003	<input checked="" type="checkbox"/>
50	Health & Safety	Safety Related Work		27-APR-2004	<input checked="" type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

2. Select WIP_EAM_WORK_ORDER_TYPE from the Type list of values.

3. Enter a numeric code.

Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

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

4. Enter the Meaning of the code, for example, Routine.

5. Enter a Description for the code.

6. Optionally enter a Tag to categorize lookup values.

This field is for informational purposes.

7. The Effective From Date defaults as the system date, but you can update this.

Optionally enter a Effective To Date to indicate an expiration date for the code.

8. Select the Enabled check box to enable this code for Enterprise Asset Management.

9. Save your work.

Asset Setup

Asset setup includes the following tasks:

- Setting Up Category Codes, page 2-55
- Defining Asset Groups, page 2-58
- Defining Activities, page 2-61
- Activity Association Templates, page 2-67
- Setting Up Attributes, page 2-70
- Defining Asset Documents, page 2-73
- Defining Asset Numbers, page 2-74
- Defining Asset Routes, page 2-83
- Setting Up Asset Bills of Material, page 2-86

Setting Up Category Codes

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

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

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

To set up category codes:

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

Categories

Structure Name	Category	Description	Enabled	Inactive On	Viewable by Supplier
Asset Management	AS EQUIPMENT.AS	AS EQUIPMENT ASS	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Asset Management	Actuator.Valve	Valve Actuator	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Asset Management	Asset.Asset	Default Asset Group A	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Asset Management	BLDG100.Room100	Building 100 room 100	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Asset Management	Boiler.System	Boiler Systems	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Asset Management	Building.L leased	Leased Building	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Asset Management	Building.Office	Office Building	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Asset Management	Building.Owned	Owned Building	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Asset Management	Car.Chassis	Car Chassis	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Asset Management	Car.HVAC	Car Heating, Cooling a	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>

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

To set up category sets:

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

1. Navigate to the Category Sets window.

Category Sets

Category Sets

Name: Enterprise Asset Management

Description: Enterprise Asset Management Category Set

Flex Structure: Asset Management

Controlled At: Master Level

Default Category: Maintenance Supply.Supply

☒ Allow Multiple Item Category Assignments

☒ Enforce List of Valid Categories

Category

- Actuator.Valve
- BLDG100.Room100
- Boiler.System
- Building.Learned
- Building.Office
- Building.Owned
- Car.Chassis

Category People Assign

2. Click the Find button, and then select Enterprise Asset Management.
3. A description defaults; you can optionally change it.
4. Select Asset Management from the Flex Structure list of values.
5. Indicate the Controlled At level. Valid values are Master Level, and Organization Level.
6. Enter a Default Category code for the Category Set.
7. If you select Allow Multiple Item Category Assignments, you can define a series of categories, such as Crane.Jib, and Crane.Overhead, that are associated to a single asset group.
8. If you select Enforce List of Valid Categories, you are preventing users from entering incorrect categories that are not associated with the asset group associated

with the asset being created.

9. Enter the Category Codes that you want to associate with this category set.
10. Select Assign to display a table enabling you to associate the categories with an Asset Group.
11. Save your work.

Defining Asset Groups

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

Note: If you have assets in your organization that are virtually identical (for example, the same manufacturer and model), consider creating an asset group for those assets.

Note: The Asset Groups page does not support electronic signatures. If you create an asset group, the record does not contain your electronic signature.

To set up asset groups:

1. Navigate to the Asset Groups page.

Asset Groups

The screenshot shows a window titled "Asset Groups (EM1)". Inside, there are several input fields and a section for serial generation. The "Asset Group" field contains "Lexus ES300". The "Description" field contains "2002 Make Lexus ES300 Car Fleet Maint. Group". The "Template" field contains "@Asset Group". To the right of the template field is a small icon of a document with a plus sign. Below these fields is a section labeled "Serial Generation". Inside this section, the "Generation" dropdown menu is set to "Predefined". The "Starting Prefix" field contains "LX000". The "Starting Number" field contains "4".

2. Enter the name of the Asset Group.
3. Enter a Description for this asset group, up to 240 characters.
4. Select the @Asset Group Template to quickly apply attribute values, and to ensure that the appropriate attributes are applied.

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

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

Asset Group Attributes

Attribute	Value
User Item Type	Asset Group
Item Status	Active
Inventory Item	Enabled
Transactable	Disabled

Attribute	Value
Serial Number Generation	Predefined
Effectivity Control	Model/Unit Number
EAM Item Type	Asset Group

5. In the Serial Generation region, select Predefined for the Generation value.
6. Define a Starting Prefix and Starting Number for this asset group. If Serial Generation is set at Item Level for the Organization, the system defaults the prefix, along with the starting number sequence, when a new asset number is created for this asset group.
7. Save your work.

To access failure analysis information:

You can access the Failure Set page to view failure tracking codes that are assigned to the current asset group.

1. From the Asset Groups page, select Maintain Failure Set from the Tools menu.

If the asset group does not have an associated failure set, this menu option is disabled. See: *Defining Failure Codes and Sets, Oracle Enterprise Asset Management User's Guide* and *Failure Analysis Overview, Oracle Enterprise Asset Management User's Guide*.

ORACLE® Asset Management

Home Logout Preferences Help Personalize Page Diagnostics

Failure History Failure Analysis **Failure Tracking Setup**

Failure Analysis: Failure Tracking Setup > Current Organization : EM1

Update Failure Set: Main

Name: Main End Date:

Description: Documentation Failure S

Failure Codes

Copy From Failure Set:

Failure	Description	Cause	Description	Resolution	Description	End Date	Clear	Delete
OLLK	Oil Leak	MECH	Mechanical	AJST	Adjust	<input type="text"/>	<input type="button" value="Clear"/>	<input type="button" value="Delete"/>
OLLK	Oil Leak	HYDR	Hydraulic	REPR	Repair	<input type="text"/>	<input type="button" value="Clear"/>	<input type="button" value="Delete"/>
OLLK	Oil Leak	MECH	Mechanical	REPR	Repair	<input type="text"/>	<input type="button" value="Clear"/>	<input type="button" value="Delete"/>
OLLK	Oil Leak	HYDR	Hydraulic	REPL	Replace	<input type="text"/>	<input type="button" value="Clear"/>	<input type="button" value="Delete"/>
OLLK	Oil Leak	MECH	Mechanical	REPL	Replace	<input type="text"/>	<input type="button" value="Clear"/>	<input type="button" value="Delete"/>

3 More rows

Assign Asset Groups

Asset Group	Description	Failure Code Required	Delete Assignment
Fleet	Fleet Asset Group	Yes	<input type="button" value="Delete"/>

3 More rows

2. Close the page.

To associate asset groups with multiple organizations:

1. From the Asset Groups page, select Item Details from the Tools menu.
2. Select the Organization Assignment tab.
3. Select additional organizations in the available table.
4. After saving your work, you can create assets for this asset group.

Defining Activities

Activities provide you with a standard template of jobs, which are applied to work orders, such as Routine or Preventive Maintenance. After these activity templates are created, they are associated with one or more asset numbers or rebuildables. They are also associated to a maintenance BOM and routing containing the materials and resources needed for operations, respectively. When work orders are created for assets associated to the activity, the material and resources associated with the current activity automatically copy to the work orders created.

There are three methods you can use to create an activity. You can create an activity within the Master Activity (Master Item) window, using the Activity Workbench, or from within a Maintenance work order.

To set up activities within the Master Activity window:

1. Navigate to the Activity (Master Item) window. The Master Item window is used to create asset groups, activities, and rebuildables.

Master Item

Master Item (V1)

Organization: V1 Vision Operations

Item: 30000 Mile TuneUp

Description: 30000 Mile Vehicle Maintenance

Display Attributes: ☐ Master ☐ Org ☒ All

Main Inventory Bills of Material **Asset Management** Costing Purchasing Receiving Physical Attributes

Asset Item Type: Asset Activity

Asset Activity Properties

Activity Type: Maintenance

Activity Cause: Normal Wear

Activity Source: Routine

Shutdown Type: Required

☐ Activity Notification Required

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

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

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

Activity Attributes

Attribute	Value
User Item Type	Activity
Item Status	Active
Inventory Item	Enabled
EAM Item Type	Activity

5. Select the Asset Management tab.

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

6. Optionally select an Activity Cause to specify what situation caused this work to generate. For example, Breakdown, Vandalism, Normal Wear, or Settings.
7. Optionally select an Activity Source. Activity Source codes are reasons activities are executed. For example, Warranty Compliance, OSHA Compliance, or Military Specification Requirements. See: Activity Sources, page 2-33.
8. Optionally select a Shutdown Type. This indicates whether a shutdown is necessary to perform this maintenance activity. For example Required, and Not Required. This field is for information purposes.
9. Optionally select an Activity Notification Required value to indicate whether the asset requiring work is mobile, and should be brought into the shop for repairs. This field is for information purposes.
10. Save your work. After saving your work, this activity can be associated with an asset.

To associate activities to multiple organizations:

1. From the Master Item window, select Tools from the Tools menu.
2. Select the Organization Assignment.
3. Select additional organizations in the available window.

4. Save your work.

To associate assets with activities:

After you have defined asset groups, assets, and activities, you can associate the activities with assets and rebuildables. However, you can streamline the creation of activities and associations using an Activity Association Template. Assets are associated with activities before entering the activity into a preventive maintenance schedule.

Note: The Activity Workbench is generally used to streamline your activity setups, including asset number and activity associations. Also, you can streamline the creation of activity associations using an activity association template. For example, when you create an asset group and the asset numbers within that group, you do not need to utilize the Association window to associate those asset numbers with an activity. If you create an Activity Association Template, the activity that you associate with the current asset number's asset group automatically determines the activity that is associated with the current asset number.

You can also use Oracle Web Services to automatically create, update and search for asset activity associations. These public interfaces enable you to more easily convert data from another instance or another system. These web services are annotated and available in the I-Repository along with other public Oracle APIs.

1. Navigate to the Activity Association window.

Activity Association

Activity Association (EM1)

Activity: 30000 Mile TuneUp
Description: 30000 Mile Vehicle Maintenance

Associations

Main Work Order Defaults

Asset Type	Asset Group	Asset Number	Priority	Effective Dates		[]
				From	To	
Capital	Vehicles	DTF35000		12-NOV-2002		
Capital	Vehicles	DTF35001		12-NOV-2002		...

2. Select an activity.
3. Within the Main tab, select Asset or Rebuildable from the Item Type list of values.
4. This field works directly with the Asset Group and Asset Item fields. If the Asset value is selected, then the Asset Group field refers to the asset group, and the Asset Number value refers to the asset number. If the Rebuildable value is selected, the Asset Group field refers to the rebuildable item, and the Asset Number field refers to the specific serial numbers for the current rebuildable item.
5. Select an Asset Group.
If the Asset field is populated in the Item Type field, your asset groups are available for selection.
6. Select an Asset Number.
Asset numbers associated with the previously selected asset group are available. Asset numbers are always serial controlled. If you select a non-serialized rebuildable in the Asset Group field, then an asset number value is not required.
7. Optionally select a priority code.
This field is for informational purposes.
8. Optionally enter Effective Dates.

If the Effective From field is left blank, it defaults to the system date. If the Effective To field is left blank, it defaults to NULL.

9. Click the Work Order Defaults tab.

Use this tab to optionally define default information that will appear for work order such as:

- Activity Cause: Defaults from the Activity definition, specifying what situation caused this work to generate. For example, Breakdown, Vandalism, Normal Wear, or Settings.
- Activity Type: Defaults from the Activity definition, indicating the type of maintenance activity to perform for this activity, and is used during job definition.

This code should remain generic, and should not describe the job in detail. For example, Inspection, Overhaul, Lubrication, Repair, Servicing, or Cleaning. Optionally, you can select an activity type.

- Tagging Required: Select this check box to indicate whether tag out procedures are required.

The area may need securing for operations required for carrying out a work order. Tags are generally printed and placed on an asset, warning the plant that the asset is shutdown, and should not be started. This check box helps the planner isolate those jobs that require a tagout. This is for informational purposes.

- Owning Department: Defaults from the asset number definition and indicates a planner or supervisor who is responsible for the activity or y or asset.
- Shutdown Type: This value defaults from the Master Activity information that was created within the Master Item window. This option indicates whether a shutdown is necessary to perform this maintenance activity, for example, Required or Not Required. This field is for informational purposes.
- WIP Accounting Class: Defaults from the eAM Parameters information for the current organization; you can update this value.
- Activity Source: This value defaults from the Master Activity information created in the Master Item window. Activity source codes are the reasons why activities are executed, for example, Warranty Compliance, OSHA Compliance, or Military Specification Requirements.
- Work Order Type: Select a value to differentiate work orders. For example, Routine, and Rebuild. Maintenance management can use this information to sort and monitor work activity for reporting and budgeting.

- Planner: Select a planner to be assigned to the work order.
- Firm: Select to indicate the work order is to be firmed and planning and scheduling will not automatically adjust the schedule, regardless of material or resource availability.
- Planned: Select to indicate that this is a planned order.
- Notification: Select if a notification is to be generated.

10. Save your work.

Activity Association Templates

Activities provide you with a standard template of jobs, which are applied to work orders, such as Routine or Preventive Maintenance. After the activity templates are created, they are associated with one or more asset numbers or rebuildables (See: Defining Asset Numbers, page 2-74 and Rebuildable Item/Activity Association, page 2-116). They are also associated to a maintenance BOM (See: Setting Up Activity Bills of Material, page 2-101) and activity routing (See: Defining Asset Routes, page 2-106), containing the materials and resources needed for operations, respectively. When work orders are created for assets associated to the activity, the material and resources associated with the current activity automatically copy to the work orders created.

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

Note: The Activity Workbench is generally used to streamline your activity setups, including Activity Association Templates (See: Using the Activity Workbench, page 2-89).

To create activity association templates:

1. Navigate to the Activity Association Template window.

Activity Association Template

Asset Type	Asset Group	Priority	Effective Dates		[]
			From	To	
Capital	Fork Lifts	Medium	05-JUN-2006		

2. Select a valid activity. The activity needs to already have been created within the Master Item window.
3. Within the Main tab, select an Item Type of Asset or Rebuildable.
4. Select an Asset Group. After this record is saved, this Asset Group is associated with the current activity. Each asset number created within the current asset group is automatically associated with the current activity.
5. Optionally select a Priority code. This value defaults from the Master Activity information created within the Master Item window.
6. Optionally enter Effectivity Dates for this Activity Template.
7. Click the Work Order Defaults tab.

Use this tab to optionally define default information that will appear for work order such as:

- Activity Cause: Defaults from the Activity definition, specifying what situation caused this work to generate. For example, Breakdown, Vandalism, Normal Wear, or Settings.
- Activity Type: Defaults from the Activity definition, indicating the type of maintenance activity to perform for this activity, and is used during job

definition.

This code should remain generic, and should not describe the job in detail. For example, Inspection, Overhaul, Lubrication, Repair, Servicing, or Cleaning. Optionally, you can select an activity type.

See Defining Activities, page 2-61.

- **Tagging Required:** Select this check box to indicate whether tag out procedures are required.

The area may need securing for operations required for carrying out a work order. Tags are generally printed and placed on an asset, warning the plant that the asset is shutdown, and should not be started. This check box helps the planner isolate those jobs that require a tagout. This is for informational purposes.

- **Owning Department:** Defaults from the asset number definition and indicates a planner or supervisor who is responsible for the activity or y or asset.
- **Shutdown Type:** This value defaults from the Master Activity information that was created within the Master Item window. This option indicates whether a shutdown is necessary to perform this maintenance activity, for example, Required or Not Required. This field is for informational purposes.
- **WIP Accounting Class:** Defaults from the eAM Parameters information for the current organization; you can update this value.
- **Activity Source:** This value defaults from the Master Activity information created in the Master Item window. Activity source codes are the reasons why activities are executed, for example, Warranty Compliance, OSHA Compliance, or Military Specification Requirements. Activity Sources, page 2-33.
- **Work Order Type:** Select a value to differentiate work orders. For example, Routine, and Rebuild. Maintenance management can use this information to sort and monitor work activity for reporting and budgeting.
- **Planner:** Select a planner to be assigned to the work order.
- **Firm:** Select to indicate the work order is to be firmed and planning and scheduling will not automatically adjust the schedule, regardless of material or resource availability.
- **Planned:** Select to indicate that this is a planned order.
- **Notification:** Select if a notification is to be generated.

8. Save your work.

Setting Up Attributes

You can define common characteristics data specific to asset groups, such as Facility Information, Engineering Specifications, Regulation Requirements, Horsepower, Voltage, and Square Footage, by creating attribute groups using descriptive flexfields. After the attribute group is created, you can then assign it to an asset group. This enables you to define additional characteristics data when defining an asset associated with the asset group. This provides extensive query capabilities. Attribute groups are descriptive flexfields, defined by segments and values.

For example, you can define an Attribute Group, Front Loader Nameplate data. This group can then be associated with the CARS Asset Group. When defining an asset within the CARS Asset Group, you can optionally utilize the attributes to specify nameplate data (specified data such as make, year, and model) for the asset. This creates a simplified way of entering specified data (See: Defining Asset Numbers, page 2-74) related to a specific Asset Group.

To set up attributes:

1. Navigate to the Descriptive Flexfield Segments window.

Descriptive Flexfield Segments

Application: Inventory Title: Asset Attributes

☒ Freeze Flexfield Definition Segment Separator: Period (.)

Context Field

Prompt: Context Value Value Set: Default Value: Reference Field:

☐ Required ☐ Displayed ☐ Synchronize with Reference Field

Context Field Values

Code	Name	Description	Enabled
Feeder Line	Feeder Line	Feeder Line	<input checked="" type="checkbox"/>
Fork Lift Classifications	Fork Lift Classifications	Fork Lift Data	<input checked="" type="checkbox"/>
HVAC Specifications	HVAC Specifications	HVAC Specifications	<input checked="" type="checkbox"/>
Injection Molding Specs	Injection Molding Specifications	Injection Molding Specifications	<input checked="" type="checkbox"/>
Loader Specifications	Loader Specifications	Loader Specifications	<input checked="" type="checkbox"/>
Location	Location	Location	<input checked="" type="checkbox"/>

Compile Segments

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

Segments Summary

Number	Name	Window Prompt	Column	Value Set	Displayed	Enabled
1	Make	Make	C_ATTRIBUTE1	15 Characters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Model	Model	C_ATTRIBUTE2	15 Characters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	Load	Max Weight Capacity	C_ATTRIBUTE3	15 Characters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	Mast	Max Reach Height	C_ATTRIBUTE4	15 Characters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>

Value Set New Open

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

To associate the attribute group with an asset group:

1. Navigate to the Attributes Assignment window.

In the below example, any asset created within the Fork Lifts asset group has the Fork Life Classifications attribute group available as an option for data entry.

Attributes Assignment

The screenshot shows the 'Attributes Assignment (EM1)' window. It has three input fields at the top: 'Item Type' with the value 'Capital', 'Asset Group' with the value 'Fork Lifts', and 'Description' with the value 'Fork Lift Asset Group'. Below these fields is a section titled 'Attribute Group' which contains a table. The table has four columns: 'Attribute Group Code', 'Attribute Group Name', 'Description', and 'Enabled'. The first two rows are populated: the first row has 'Fork Lift Classifications' in the first two columns, 'Fork Lift Data' in the third, and a checked checkbox in the fourth; the second row has 'Warranty Data' in the first two columns, 'Warranty Data' in the third, and a checked checkbox in the fourth. There are eight empty rows below these, each with an unchecked checkbox in the 'Enabled' column. A vertical scrollbar is on the right side of the table.

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

2. Select an Asset Group. See Defining Asset Groups, page 2-58.

3. Select an Attribute Group Code.

You can have an unlimited number of attribute groups associated with an asset group.

4. Save your work.

Defining Asset Documents

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

To define asset documents:

1. Navigate to the EAM Asset Documents window.

EAM Asset Documents

The screenshot shows the 'EAM Asset Documents' form. At the top, there are fields for 'Category' (set to 'Asset Attachments'), 'Title', and 'Description'. Below these are two main sections: 'Source' and 'Security'. The 'Source' section contains 'Data Type' (a dropdown menu) and 'File' (a text field). The 'Security' section contains 'Type' (a dropdown menu set to 'Organization'), 'Owner' (a dropdown menu set to 'Seattle Maintenance'), and a 'Share' checkbox. To the right of the 'Source' section is a 'Usage' section with radio buttons for 'Standard' (selected) and 'Template'. Below the 'Usage' section is an 'Effective Dates' section with 'From' and 'To' date pickers. At the bottom of the form is a large, empty text area for additional information.

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

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

Defining Asset Numbers

Enterprise Asset Management provides three methods in which you can enter a new asset. You can create them individually, by copying information from an existing asset, utilize the multiple asset entry method, or use the Import Asset Number interface.

You can also use Oracle Web Services to automatically create, update and search for asset numbers. These public interfaces enable you to more easily convert data from another instance or another system. These web services are annotated and available in the I-Repository along with other public Oracle APIs.

Warning: You cannot use "_" or "%" when creating an asset number using Oracle eAM.

In addition, when an asset is received and delivered to Inventory, an asset number is

created automatically.

Prerequisites

You must set up the following task prior to defining asset numbers in Oracle eAM:

- Define asset groups. See: Defining Asset Groups, page 2-58

To define assets individually:

1. Navigate to the Define Asset Number window.

The screenshot displays the 'Define Asset Number (EM1)' window. The top section contains input fields for 'Asset Number' (MDE-PO-100), 'Asset Group' (MDE-POS-ASSET), 'Asset Serial Number' (MDE-PO-100), 'Asset Category', 'Organization' (EM1), and 'Asset Type' (Capital). Below this is a tabbed interface with 'Main', 'Location', 'Safety', and 'Others' tabs. The 'Main' tab is selected, showing fields for 'Owning Department' (W-Maint), 'Criticality', 'WIP Accounting Class', 'Area', and checkboxes for 'Maintainable', 'Active', and 'Operation Log Enabled'. A 'Parent' section includes 'Asset Type' (Capital), 'Asset Number', and 'Asset Group'. At the bottom, there are buttons for 'Attributes', 'Resource Usage', 'Meters', and 'Associate Activity'.

2. Enter an Asset Number if you do not have them automatically generated, or accept or modify the default, if you have automatic number generation enabled (See: Defining eAM Parameters, page 2-11).

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

3. Optionally enter an Asset Description, up to 240 characters.
4. Select an Asset Group. This asset group is associated with this asset.

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

5. Enter a value in the Asset Serial Number field, or accept the default value that appears if automatic number generation is enabled.

Note: The Asset Serial Number can be modified to be identical to the Asset Number.

The Asset Serial Number might have a non-unique value across organizations, but the Asset Number must be globally unique, regardless of the defaulting value. When an asset number generates automatically at receipt by the Deliver to Inventory transaction, it defaults to the Item Instance number. You can change it, as long as it is a globally unique number.

6. Optionally associate this asset to an Asset Category. This is the Class and Subclass code, such as CRANE.OVERHEAD or BUILDING.FLOOR. See: Setting Up Category Codes and Sets, page 2-55.

7. Optionally, change the defaulted **Organization**. This organization may be different than the eAM-enabled organization that maintains the asset. You can define an Asset Group and Asset Number directly in the production organization.

You can define an Asset Group in an organization that is not eAM-enabled, if it is associated with an eAM-enabled organization in its Organization parameters.

In this Define Asset Number window, you can define an asset number for asset groups defined in the eAM-enabled organization itself, and also for asset groups that are defined in organizations that are maintained by the eAM organization, by specifying the organization in this field. The list of values includes the eAM-enabled organization, as well as all organizations that are not eAM-enabled but are associated with the eAM-enabled organization in their Organization Parameters.

8. Within the Main tab, optionally select an owning Department for this asset to represent the crew responsible for the asset. Notifications regarding work requests are sent to the Primary Approver of the work request's associated asset's current owning department (See: Defining Department Approvers, page 2-21).
9. Optionally select a Criticality code to indicate the importance of the asset to the organization. This field is for information purposes.
10. Optionally select a WIP Accounting Class to identify the Expense cost elements associated with the work performed, such as materials, labor, and resources.
11. Optionally enter the area where this asset resides. This is a user-defined listing of logical areas of work. For example, North Plant, East Wing, or Area 1 (See: Setting Up Areas, page 2-16).
12. Indicate whether this asset is maintainable. If the Maintainable check box is selected, you can create work requests and work orders for this asset.

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

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

13. Optionally select the Active check box to indicate that the asset is functioning, for example, maintenance work orders can be created for this asset. This check box changes when you activate or deactivate an asset from the Tools menu.
14. Indicate whether Asset Operational Logging is enabled for this asset. If you select the Operation Log Enabled check box, you can view all current and past asset operational information, such as Check Out, Check In, associated work requests and work orders. You can remove or add a child asset, remove a parent asset, activate or deactivate the asset, transfer the asset to another location, and receive or issue the asset into/from Inventory. By default, logging is turned off for an asset. See: Asset Operational Logging, page 21-8.
15. Within the Parent region, optionally select a parent Asset Number to establish asset hierarchy information. Work order costs roll up through the Parent/Child hierarchies defined, and can roll up to any level within an asset hierarchy. This enables you to review all cost associated with an asset or asset hierarchal view.

Note: When a child asset is transferred to another eAM organization, it is still included in the parent hierarchy. The organization that the asset currently resides in appears in parentheses. Transferring the asset does not remove the asset from the asset hierarchy. You must remove the asset manually, to remove the asset from its hierarchy.

16. The Checked Out check box indicates whether the current asset is checked in or out. You can check out an asset to view asset details, enter collection plan data, enter meter information, and optionally create a work request, within Maintenance Super User. This check box is protected against update. See: Asset Operational Logging, *Oracle Enterprise Asset Management User's Guide*.
17. Within the Location tab, the Subinventory and Locator fields are view-only, displaying the subinventory location of this asset within Inventory and its Locator segments. If this asset is received into Inventory, these fields are populated.
18. Optionally select a Location Code to specify a physical location for this asset. The Address field simultaneously populates with the selected Location Code's associated Address. The previously defined area is organization-specific and not

associated with a physical location.

If your asset does not reside in a subinventory, you can specify an external location for it. You can only select an external location that is defined as a HZ location. You may optionally define external locations with a location code.

Valid Location Codes are defined within Oracle Installed Base.

19. The Address defaults as the populated Location Code's associated address. You can optionally select a different address. If the current asset is in stores, the address of the Location's organization appears (See: Stores, page 26-1).
20. Optionally select a Production Organization. The list of values displays the production inventory organizations maintained by the current asset's organization. See: Enabling Organizations for Enterprise Asset Management, page 2-7 for information on designating eAM organizations to maintain equipment items for designated production organizations.
21. Select an Equipment Item. This is mandatory if you populated the Production Organization field. Items that were defined with an equipment template (See: Item Templates, *Oracle Inventory User's Guide*), or with the Equipment item attribute enabled (See: Physical Attributes, *Oracle Inventory User's Guide*), are available.
22. Enter an **Equipment Serial Number**. This is mandatory if you populated the Production Organization field. This is the specific name of the component within the Equipment Type, defined above, if an asset resides directly in the Production Organization, and its asset group is defined directly in the Production Organization as Equipment. You can view the Production Organization and the Asset Serial Number, but you cannot update them.
23. You can specify the geocode information with details of latitude, longitude and direction for the asset. This information is used to display the assets in the chosen map viewer.
24. Optionally enter the Number if Oracle Fixed Assets is installed. This represents a fixed Asset Number that belongs to a fixed asset category, associated with the asset.
25. The Property Management fields, Location Name and Location Code, default from a Property Manager export process (Export Locations to Enterprise Asset Management), if Oracle Property Management is installed. These fields are disabled. These values cannot be changed.

Note: Before the above information is passed from Property Manager into Enterprise Asset Management, Asset Groups need to first be established. See: Defining Asset Groups, page 2-58.

26. Optionally choose Location Details to view or update Property Manager field

information.

27. You can indicate if an asset is a positional asset or a lockout device.

Note: You can leave the field blank (no value) or indicate if the asset is a positional asset or a lockout device, but not both.

Click the Safety tab to enter values for the positional asset or to indicate if the asset will be associated with a lockout device used during isolation. See *Defining Positional Assets*, page 27-4.

28. Optionally click the Attributes button to enter attribute values for the asset (See: *Setting Up Attributes*, page 2-70).

Existing, enabled attribute groups appear (See: *Setting Up Attributes*, page 2-70). These attribute groups are optional. You do not need to enter values for all existing attribute groups. From this window, you cannot generate attribute groups.

Asset Attributes

The screenshot shows the 'Asset Attributes (EM1)' window. At the top, there are two rows of input fields: 'Asset Group' with 'Production Conveyor/Line' and 'Production Conveyors for assembly lines', and 'Asset Number' with 'Conveyor Line 1' and 'Assembly Conveyor Line'. Below these is a section titled 'Attribute Values'. Under this section, 'Warranty Data' is selected as the 'Attribute Group'. A smaller, overlapping window titled 'Asset Attributes' is open in front of the main window, showing a list of attributes for the 'Warranty Data' group: 'Warranty Type', 'Warranty Expiration Date', 'Mileage Limit', 'Coverage', and 'Installation Date'. Each attribute has a corresponding text input field. At the bottom of this smaller window are buttons for 'OK', 'Cancel', 'Clear', and 'Help'. At the bottom of the main window, there are four tabs: 'Attributes', 'Resource Usage', 'Meters', and 'Associate Activity'.

29. You can choose Resource Usage if the fields in the Production Equipment region are populated. This enables you to view production work orders using the equipment that corresponds with this asset number as a resource.

Resource Usage

Resource Usage

Production Equipment

Production Org

M1

Serial Number

VPAL0001

Item

Assembly Conveyor

Resources

Resource	Description	UOM	Resource Group	Department	Owning Department
VPAL	Vision Pad Assembly Line	HR		VISION PAD	VISION PAD
TS-RES2	RES-2	HRS		TS-DEPT2	TS-DEPT2

Work Order

Work Order	Scheduled Start Date	Scheduled Completion Date	Status	Entity Type

Ok

30. Optionally select Associate Activity to directly associate this Asset with an Activity. See: Activity Association Templates, page 2-67.

Activity Association

Asset Group: Production Conveyor/Lin (Production Conveyors for assembly lines)

Asset Number: Conveyor Line 1 (Assembly Conveyor Line)

Activity Association (EM1)

Main Activity

Activity	Description	Priority	Effective Dates		[]
			From	To	
INJ Molding PM	Injection Molding Machine Plat		21-SEP-2009		

Cancel Ok

31. Optionally enter file, URL, or text attachments to this asset by choosing the paperclip Attachments icon. You can then choose Document Catalog to add asset specific documents. See: Defining Asset Documents, page 2-73.
32. Save your work.

To copy assets from existing assets:

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

1. Navigate to the Define Asset Number window.
2. Select an Asset Group. This Asset Group is associated with this asset.
3. Enter an Asset Number if you do not have them automatically generated, or accept or modify the default, if you have automatic generation enabled (See: Defining eAM Parameters, page 2-11). After an asset has been saved, it cannot be deleted. The asset can be deactivated if there are no open work orders or work requests for the asset, and if the asset is not part of an asset hierarchy.

4. Optionally enter an Asset Description, up to 240 characters.
5. From the Tools menu, select *Copy Asset Number from*.
6. Select the desired Asset.
7. Optionally associate this Asset to an Asset Category. This is the Class and Subclass code, such as CRANE.OVERHEAD, or BUILDING.FLOOR. See: Setting Up Category Codes and Sets, page 2-55.
8. Select an owning Department for this asset. E-mail notifications, regarding Work Requests, are sent to the Primary Approver of the Work Request's associated asset's owning department (See: Defining Department Approvers, page 2-21).
9. Save your work.

To access failure analysis information:

You can access the Failure Set page to view failure tracking codes that are assigned to the current Asset Number.

1. From the Define Asset Number window, select Maintain Failure Set from the Tools menu. If the Asset Number does not have an associated Failure Set, this menu option is disabled. See: Defining Failure Codes and Sets, page 28-2 and Failure Analysis Overview, page 28-1.
2. Close the window.

To deactivate an asset:

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

Important: An asset cannot be updated unless it is in an Active state. Therefore, any simultaneous updates to the asset will reactivate the asset.

To activate an asset:

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

Defining Asset Routes

You might need to perform an activity on multiple asset numbers. To eliminate the possibility of creating multiple work orders for the same activity, you can define asset routes. You can define a Preventive Maintenance schedule for your asset route to specify when an activity should be scheduled for the asset route. You can define day interval rules for asset routes.

To define asset routes:

1. Navigate to the Define Asset Route window.

Define Asset Route

Define Asset Route (EM1)

Asset Number: Fork Lift Daily Maintenance
 Asset Group: Fork Lifts
 Asset Serial Number: Fork Lift Daily Maintenance
 Asset Category:
 Organization: EM1
 Asset Type: Capital [...]

Daily maint for all fork lifts / propane and electric

Asset Group: Fork Lift Asset Group

Main Location Others

Department: W-Maint
 Area:
 Criticality:
 WIP Accounting Class:
 Parent:
 Asset Type: Capital
 Asset Number:
 Asset Group:
 Area:
 Warranty Expiration:
 Checked Out:
☒ Maintainable
☒ Active
☐ Operation Log Enabled

Attributes Resource Usage Asset Route Associate Activity

2. Enter the name of the asset route in the Asset Number field.
3. Select an Asset Group.
4. The Asset Serial Number defaults to the asset number. You can optionally select the next serial number for the current organization.
 The Asset Serial Number might have a non-unique value across organizations, but the asset number must be globally unique, regardless of the defaulting value.
5. Optionally associate this asset route to an Asset Category. This is the Class and Subclass code, such as CRANE.OVERHEAD or BUILDING.FLOOR. See: Setting Up Category Codes and Sets, page 2-55.
6. Within the Main tab, optionally select an owning Department for this asset route. This represents the crew responsible for the asset. Notifications, regarding work requests, are sent to the Primary Approver of the work request's associated asset's current owning department (See: Defining Department Approvers, page 2-21 and Defining Asset Numbers, page 2-74).
7. Optionally select a Criticality code to indicate the importance of the asset route to the organization. This field is for information purposes.
8. Optionally select a WIP Accounting Class to identify the Expense cost elements

associated with the work performed, such as materials, labor, and resources.

9. Optionally enter the Area where this asset route resides. This is a user defined listing of logical areas of work. For example, North Plant, East Wing, or Area 1 (See: Setting Up Areas, page 2-16).
10. Indicate whether this asset route is maintainable. If the Maintainable check box is selected, you can create work requests and work orders for this asset route.
11. Optionally select the Active check box to indicate that the asset route is functioning. This check box change when you activate or deactivate an asset route from the Tools menu.
12. Choose Asset Route to display the Asset Route window.

Asset Route

The screenshot shows the 'Asset Route' window titled 'Asset List (EM1)'. It contains the following fields and table:

Asset Group: Fork Lifts
 Asset Number: Fork Lift Daily Maintenance
 Fork Lift Asset Group: Fork Lift Asset Group
 Daily maint for all fork lifts / propane and electric

Associated Asset Numbers

		Effective Dates		
Asset Group	Asset Number	From	To	[]
Fork Lifts	FL1010	16-OCT-2002		
Fork Lifts	FL1020	16-OCT-2002		
Fork Lifts	FL1030	16-OCT-2002		
Fork Lifts	FL1040	16-OCT-2002		
Fork Lifts	FL2010	16-OCT-2002		
Fork Lifts	FL2020	16-OCT-2002		
Fork Lifts	FL2030	16-OCT-2002		
Fork Lifts	FL2040	16-OCT-2002		

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

Note: Asset numbers can be associated with asset routes. An asset route cannot associate with another asset route.

Setting Up Asset Bills of Material

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

Note: Even if you are not using Project Manufacturing applications, Project Parameters are defined for your eAM enabled organization to successfully create Asset Groups. This is required because an Asset BOM is of type Model/Unit Effective and this BOM type is currently allowed if PJM organization parameters are set up for the eAM enabled organization to which the Asset Group has been assigned. To define Project Parameters, open the Project Parameters window using Project Manufacturing Super User responsibility and without entering any data in the window, save the record. If you plan to use Project Manufacturing, see: *Project Manufacturing Integration Setup*, page 2-193 for information on defining Project Parameters.

To set up an Asset BOM:

1. Navigate to the Bills of Material window.

Bills of Material

Bills of Material (EM1)

Item: Fork Lifts Fork Lift Asset Group UOM: Ea

Alternate: Revision: 0 Date: 21-SEP-2009 13:25:13

Display: Future and Current ☒ Implemented Only

[Main](#) [Date Effectivity](#) [Serial Effectivity](#) [ECO](#) [Component Details](#) [Material Control](#) [Order Management](#)

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

[Substitutes](#) [Designators](#) [Operations](#) [Bill Details](#) [Revision](#)

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

Bills of Material - Serial Effectivity

Bills of Material (EM1)

Item: Fork Lifts Fork Lift Asset Group UOM: Ea

Alternate: Revision: 0 Date: 21-SEP-2009 13:25:13

Display: Future and Current ☒ Implemented Only

Tabs: Main | Date Effectivity | **Serial Effectivity** | ECO | Component Details | Material Control | Order Management

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

Buttons: Substitutes | Designators | Operations | Bill Details | Revision

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

Asset numbers associated with the current Asset Group are available.

If the component is installed in all asset numbers within the asset group, enter 0 in the From field, and leave the To field blank.

8. Optionally select the Material Control tab, and enter a subinventory location or source locator for this asset BOM.

If the Auto Request Material option is selected at the BOM level, material allocation will be initiated when the work order is released, and the source subinventory and source locator values you enter will override these values in the Inventory sourcing rules. If the Auto Request Material option is not selected, you can specify a source subinventory and source locator for your material when you perform a material request or a One-Step Material Issue transaction.

Material Control

Item Seq	Operation Seq	Component	Supply Type	Subinventory	Locator
10	1	Motor - Electric Fork L	Push	FkltStore	
20	1	Motor - Propane Fork L	Push	FkltStore	
30	1	Battery - Electric Fork	Push	FkltStore	
40	1	Battery - Propane Fork	Push	FkltStore	
50	1	Fuel Tank - Propane F	Push	FkltStore	

9. Save your work.

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

Related Topics

Defining Activities, *Oracle Enterprise Asset Management User's Guide*

Using the Activity Workbench, *Oracle Enterprise Asset Management User's Guide*

Rebuildable/Activity Association, *Oracle Enterprise Asset Management User's Guide*

Using the Activity Workbench

You can use a central workbench to manage your organization's activity functions. Using the Activity Workbench, you can view, create (See: Defining Activities, page 2-61), query, and manage all of your activities. From this central workbench, you can view, create, and update maintenance routes, maintenance BOMs, Preventive Maintenance schedules, and suppressions associated with your activities. You can create various copy functions within a single activity, across multiple Activities, as well as between work orders and activities or asset activity associations. You can view or update Last Service for the asset activity association, as well as view cost estimates for the activity. These copy functions save time and standardize processes across your organization.

This section includes the following topics:

- Defining Activities, page 2-90
- Navigating the Activity Workbench, page 2-94
- Setting Up Maintenance Bills of Material, page 2-101
- Associating Asset Numbers with Activities, page 2-103
- Defining Maintenance Routes, page 2-106
- Creating Activity Templates, page 2-109

Defining Activities

There are three methods you can use to create an activity:

- Within the Master Activity (Master Item) window.
- From the Activity Workbench.
- Within a maintenance work order.

To set up activities using the Activity Workbench:

1. Navigate to the Activity Workbench window.
2. Click the **Launch** button.

Activity Association

Asset Type	Asset Group	Asset Number	Activity	Description
Capital	Fork Lifts	FL1010	Lubricate Fork Lift Mast	Lubricate Fork Lift Mast
Capital	Fork Lifts	FL1010	Change Fork Lift Battery	Change Fork Lift Battery

Buttons: Preventive Maintenance, Suppression, Last Service

Activity: Lubricate Fork Lift Mast, Description: Lubricate Fork Lift Mast

Buttons: New, Assign to Org., Routing, BOM, Cost Estimate

3. To create an activity, select New.

Create Activity

Activity Name: Overhaul
Description: Overhaul of fork lift
Template: @Activity

Activity Properties

Activity Type: Shutdown Type:
Activity Cause: Activity Source:
☐ Activity Notification

Copy Options

Copy From: Activity

Activity

Activity: Lubricate Fork Lift Mast
BOM: ☒
Routing: ☒
Association: All

Work Order

Work Order:
Operation: All
Material: All
Resource: All
Association: All

4. Enter an Activity Name.
5. Enter an Activity Description.

6. Choose an activity Template. This automatically links the properties associated with an activity. The @Activity template is created for you. You can create your own Activity Templates, as well.
7. Within the Activity Properties region, optionally select an Activity Type (See: Activity Types, page 2-31). The value defaults from the Template properties above.
8. Within the Activity Properties region, optionally select an Shutdown Type. The Shutdown Type is user defined, and indicates whether an activity shutdown is required. For example, the Shutdown Type can refer to whether the Asset Activity association shutdown is required before the activity is performed. The value defaults from the Template properties above. This field is for information purposes.
9. Within the Activity Properties region, optionally select an Activity Cause (See: Activity Causes, page 2-32). The value defaults from the Template properties above.
10. Within the Activity Properties region, optionally select an Activity Source (See: Activity Sources, page 2-33). The value defaults from the Template properties above.
11. The Activity Notification check box is informational until a future release.
12. You can optionally create an activity by copying it from another activity or a work order. Within the Copy Options region, select the entity to copy information from. Valid values are Activity and Work Order. If you select Activity, the values within the Activity region are relevant, and the values within the Work Order region are irrelevant. If you select Work Order, the values within the Work Order region are relevant, and the values within the Activity region are irrelevant.
13. Within the Activity region, if Activity is populated in the Copy From field, optionally select an Activity name. This is the activity from which you are copying.
14. Within the Activity region, if Activity is populated in the Copy From field, optionally select the BOM check box to indicate that the Maintenance Bill of Material, associated with the current activity within the Activity region, copies to the new Activity Name.

For example, in the screen shot, the Maintenance Bill of Material, associated with the 3000 Mile Truck Maint, copies to Oil Change.
15. Within the Activity region, if Activity is populated in the Copy From field, optionally select the Routing check box to indicate that the routings associated with the current activity within the Activity region copies to the new Activity Name.

For example, in the screen shot, routings that are associated with the 3000 Mile Truck Maint copy to Oil Change.
16. Within the Activity region, if Activity is populated in the Copy From field, select

All or None from the Association list of values.

- *All*: All asset and rebuildable associations related to the current activity within the Activity region copy to the new activity.
 - *None*: No asset and rebuildable associations related to the current activity within the Activity region copy to the new activity.
17. Within the Work Order region, if Work Order is populated in the Copy From field, select an existing maintenance work order.
 18. Within the Work Order region, if Work Order is populated in the Copy From field, select All or None from the Operation list of values.
 - *All*: All operations associated with the current work order, populated in the Work Order field, copy to the new activity.
 - *None*: No operations associated with the current work order, populated in the Work Order field, copy to the new activity.
 19. Within the Work Order region, if Work Order is populated in the Copy From field, select All, Issued, or None from the Material list of values.
 - *All*: All material associated with the current work order, populated in the Work Order field, copies to the new activity.
 - *Issued*: Material issued to the current work order, populated in the Work Order field, copies to the new activity.
 - *None*: No material associated with the current work order, populated in the Work Order field, copies to the new activity.
 20. Within the Work Order region, if Work Order is populated in the Copy From field, select All, Issued, or None from the Resource list of values.
 - *All*: All resources associated with the current work order copy to the new activity.
 - *Issued*: Resources issued to the current work order copy to the new activity.
 - *None*: No resources associated with the current work order copy to the new activity.
 21. Within the Work Order region, if Work Order is populated in the Copy From field, select None, Current, or All from the Association list of values.
 - *None*: No Assets and Rebuildables, associated with the current work order, associate with the new activity.

- *Current*: An Asset and/or Rebuildable, associated with the current work order, associates with the new activity.
- *All*: All Assets and/or Rebuildables, associated with the current work order's activity, associate with the new activity.

22. Save your work.

After saving, the new activity is automatically assigned to the current organization.

Navigating the Activity Workbench

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

To navigate the Activity Workbench:

1. Navigate to the Activity Workbench window.
2. Optionally narrow your data selection by selecting criteria within the Activity Workbench window.

If you make selections, you can view those selections after you launch the Activity Workbench.
3. Choose Launch.
4. Optionally select the Results (Capital) tab.
5. Optionally expand the Results (Capital) folder.
 - Optionally expand the All Assets folder to display all asset number, based on your chosen selection criteria.

You can select an asset and view related activity information within the corresponding Activity Associations window. Within the corresponding Activity Associations window, you can associate activities with the current asset.
 - Optionally expand the Assets with Activities folder to display all asset number that are currently associated with one or more activities, based on your chosen

selection criteria.

You can select an asset and view its related activity information within the corresponding Activity Associations window. Within the corresponding Activity Associations window, you can view, create, or update preventive maintenance schedule definitions, create or update Suppression definitions, view or update last service information, view the parts list, and view or update the maintenance routing.

You can also view Work Order Default information such as:

- Activity Cause: Defaults from the Activity definition, specifying what situation caused this work to generate. For example, Breakdown, Vandalism, Normal Wear, or Settings.
- Activity Type: Defaults from the Activity definition, indicating the type of maintenance activity to perform for this activity, and is used during job definition.

This code should remain generic, and should not describe the job in detail. For example, Inspection, Overhaul, Lubrication, Repair, Servicing, or Cleaning. Optionally, you can select an activity type.

- Tagging Required: Select this check box to indicate whether tag out procedures are required.

The area may need securing for operations required for carrying out a work order. Tags are generally printed and placed on an asset, warning the plant that the asset is shutdown, and should not be started. This check box helps the planner isolate those jobs that require a tagout. This is for informational purposes.

- Owning Department: Defaults from the asset number definition and indicates a planner or supervisor who is responsible for the activity or y or asset.
- Shutdown Type: This value defaults from the Master Activity information that was created within the Master Item window. This option indicates whether a shutdown is necessary to perform this maintenance activity, for example, Required or Not Required. This field is for informational purposes.
- WIP Accounting Class: Defaults from the eAM Parameters information for the current organization; you can update this value.
- Activity Source: This value defaults from the Master Activity information created in the Master Item window. Activity source codes are the reasons why activities are executed, for example, Warranty Compliance, OSHA

Compliance, or Military Specification Requirements.

- **Work Order Type:** Select a value to differentiate work orders. For example, Routine, and Rebuild. Maintenance management can use this information to sort and monitor work activity for reporting and budgeting.
- **Planner:** Select a planner to be assigned to the work order.
- **Firm:** Select to indicate the work order is to be firmed and planning and scheduling will not automatically adjust the schedule, regardless of material or resource availability.
- **Planned:** Select to indicate that this is a planned order.
- **Notification:** Select if a notification is to be generated.
- Optionally expand the Routes folder to display all asset routes that are currently associated with one or more activities, based on your chosen selection criteria.

You can select an asset route and view related activity information within the corresponding Activity Associations window.

6. Optionally select the Results (Rebuildable Inventory) tab.

7. Optionally expand the Results (Rebuildable Inventory) folder.

8. Optionally expand the All Rebuildables folder.

- Optionally expand the Serialized folder to display all Rebuildable Serial Numbers, based on your chosen selection criteria, within the Activity Workbench window.

You can select a Rebuildable Serial Number and view related activity information within the corresponding Activity Associations window. Within the corresponding Activity Associations window, you can associate activities to the current Rebuildable Serial Number.

- Optionally expand the Non-serialized folder to display all Non-serialized Rebuildables, based on your chosen selection criteria, within the Activity Workbench window.

You can select a Non-serialized Rebuildable and view related activity information within the corresponding Activity Associations window. Within the corresponding Activity Associations window, you can associate activities to the current Serialized Non-rebuildable.

9. Optionally select the Rebuildables with Activities folder.

- Optionally expand the Serialized with Activities folder to display all Rebuildable Serial Numbers that are currently associated with one or more activities, based on your chosen selection criteria, within the Activity Workbench window.

You can select a rebuildable serial number and view related activity information within the corresponding Activity Associations window. Within the corresponding Activity Associations window, you can create or update preventive maintenance schedule definitions, create or update Suppression definitions, view or update last service information, view the parts list, view or update the maintenance routing, and view cost estimations for a rebuildable serial number and activity combination.

- Optionally expand the Non-serialized with Activities folder to display all non-serialized rebuildables that are currently associated with one or more activities, based on your chosen selection criteria, within the Activity Workbench window.

You can select a non-serialized rebuildable and view related activity information within the corresponding Activity Associations window. Within the corresponding Activity Associations window, you can create or update preventive maintenance schedule definitions, create or update Suppression definitions, view or update last service information, view the parts list, view or update the maintenance routing, and view cost estimations for a non-serialized rebuildable and activity combination.

10. Optionally select the Results (Activities) tab.

11. Optionally expand the All Activities folder to display all valid activities, based on your chosen selection criteria, within the Activity Workbench window.

You can select an activity and view its related activity information within the corresponding Activity Associations window, if an association exists. You can associate an asset number with the current, selected activity using the corresponding Activity Associations window. You can select an activity within the Activity Workbench pane, and then view its related information within the corresponding Activity Associations window. For a selected activity, you can create a new activity, create or update its associated Maintenance Routing, create or update the associated maintenance BOM, and view cost estimations.

12. Optionally expand the Activities with Association folder to display all activities that are associated with an asset number, based on your chosen selection criteria, within the Activity Workbench window.

You can select an activity within the Activity Workbench pane, and then view its related information within the corresponding Activity Associations window. For a selected activity, you can create a new activity, create or update its associated maintenance routing, create or update the associated maintenance BOM, and view

cost estimations.

To create or update a PM schedule definition:

You can view, create or update a Preventive Maintenance (PM) Schedule definition for activity and asset number, and activity and asset route combinations.

1. Within the Activity Workbench pane, select any one of the three tabs: Results (Capital), Results (Rebuildable Inventory), or Results (Activities).
2. If you selected Results (Capital), expand either the Assets with Activities or Routes folders, then select an asset number or route, respectively.

You cannot create or update a PM Schedule definition for an asset number that is not associated with an activity.

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

You cannot create or update a PM Schedule definition for an asset number that is not associated with an activity.

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

3. Choose Preventive Maintenance.

The PM Schedules window displays all PM Schedule definitions for the current activity and asset number, or activity and asset route combination.

1. Optionally choose New to create a new PM Schedule definition.
 2. Optionally choose Last Service Information to create or update Last Service Information.
 3. Optionally choose Suppression to create or update a suppression definition, associated with the current activity and asset number, or activity and asset route combination.
 4. Optionally select a PM Schedule definition, and then choose Open to view its details.
4. Close the window.
 5. Save your work.

To create or update an activity suppression:

You can view, create, or update suppression definitions for activity and asset number,

or activity and asset route combinations.

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

You cannot create or update a suppression definition for a asset number that is not associated with an activity.

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

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

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

To view or update last service information:

You can view or update last service information for activity and asset number, or activity and asset route combinations.

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

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

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

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

Last Service Information

Asset Type: Capital

Asset Number: DTF35000 Delivery Errand Truck 35000

Asset Group: Vehicles Vehicle Asset Group

Activity: 30000 Mile TuneUp 30000 Mile Vehicle Maintenance

Last Service Dates

Actual Start Date: 04-DEC-2006 00:00:00 Actual End Date: 04-DEC-2006 00:00:00

Scheduled Start Date: 04-DEC-2006 00:00:00 Scheduled End Date: 04-DEC-2006 00:00:00

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

4. Save your work.

To view estimated cost information:

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

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

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

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

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

The screenshot shows a software window titled "Activity Cost". It contains two input fields: "Activity" and "Description", both containing the text "Lubricate Fork Lift Mast". Below these fields is a section titled "Estimated Activity Cost" which contains a table.

Cost Category	Total	Material	Labor	Equipment
Maintenance	27.08	2.08	25.00	0.00
Contract	0.00	0.00	0.00	0.00
Operations	0.00	0.00	0.00	0.00
Activity Total	27.08	2.08	25.00	0.00

Setting Up Maintenance Bills of Material

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

When a work order is created for an activity, the Maintenance BOM corresponding to the activity explodes to the work order all components specified in the maintenance BOM are copied to the work order as material requirements.

To set up a maintenance BOM:

1. Navigate to the Activity Workbench window.
2. Choose Launch.
3. Within the Activity Workbench pane, select the activity for which you wish to define the Bill of Material.
4. Choose BOM.

Bills of Material (EM1)

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

Alternate: | Revision: 0 | Date: 20-MAY-2011 15:10:42

Display: Future and Current | ☒ Implemented Only

Main | Date Effectivity | Unit Effectivity | ECO | Component Details | Material Control | Order Management

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

Substitutes | Designators | Operations | Bill Details | Revision

5. Select an activity from the Item field list of values.
6. Select the Main tab. The Item Sequence defaults.
7. Enter the Operation Sequence that this Component (material item necessary for the operation sequence, NOT rebuildable item) is needed for (See: Defining Maintenance Routes, page 2-106).
8. Enter necessary Components and their Quantities that are required to perform the activity. You can enter an unlimited number of inventory and non-inventory, direct items.

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

9. Optionally select the Auto Request Material check box to indicate that requisitions and purchase orders are created automatically, for the current component or Direct Item, when the work order is released.
10. Optionally select the Date Effectivity tab to specify effectivity dates per component.
11. Save your work.

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

For information on defining activities using the Activity Workbench, See: Defining Activities, page 2-61.

Associating Asset Numbers with Activities

After you have defined asset groups, asset numbers, and activities, you can associate the activities with assets and rebuildables. However, you can streamline the creation of activities and associations using an activity association template. Assets are associated with activities before entering the activity into a preventive maintenance schedule (See: Entering Preventive Maintenance Schedule Definitions, page 2-137.

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

- Defining Asset Groups, page 2-58
- Defining Asset Numbers, page 2-74
- Defining Rebuildable Serial Numbers, page 2-112
- Defining Activities, page 2-61
- Activity Association Templates, page 2-67

To associate asset numbers (capital or rebuildable inventory) with activities using the Activity Workbench:

1. Navigate to the Activity Workbench window.

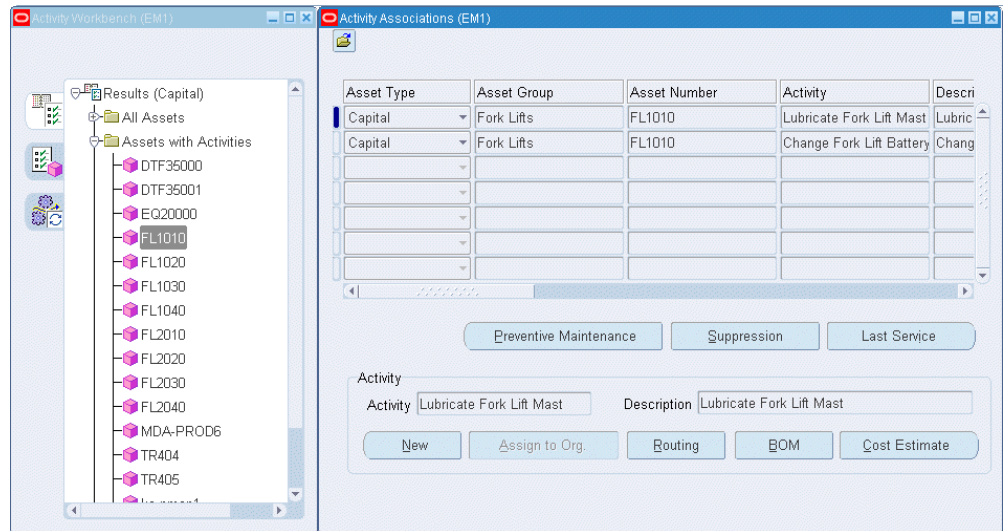
Activity Workbench

The screenshot shows the 'Activity Workbench (EM1)' window. It contains the following fields and controls:

- Asset Type:** A dropdown menu with 'Capital' selected.
- Asset Number:** A text input field.
- Asset Group:** A text input field.
- Area:** A text input field.
- Asset Category:** A text input field.
- Owning Department:** A text input field.
- Include Children:** A checkbox.
- Activity Section (enclosed in a box):**
 - Activity:** A text input field.
 - Activity Type:** A text input field.
 - Activity Source:** A text input field.
 - Shutdown Type:** A text input field.
 - Activity Cause:** A text input field.
- Effective From:** A date input field with '21-JAN-2007' entered.
- Effective To:** A date input field.
- Buttons:** 'New' and 'Launch' buttons at the bottom right.

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

Activity Workbench and Activity Associations



6. Depending on the Item Type chosen while performing step 2, select the corresponding tab within the Activity Workbench pane.
For example, if you selected an Item Type of Asset, select the Results (Assets) tab. If you selected an Item Type of Rebuildable, select the Results (Rebuildables) tab.
7. Expand the All Assets (within the Results (Assets) tab) or All Rebuildables (within the Results (Rebuildables) tab) folder.
If you specified an asset number while performing step 3, that asset number appears.
8. Select an asset number by highlighting it.
The Activity Associations window appears. If the asset number is already associated with one or more Activities, those rows display within the window.
9. Select the next available row and then select an Asset Group.
10. Select an asset number.
Asset numbers associated with the previously selected Asset Group are available. Asset numbers are always serial controlled. If you had selected a Non-serialized Rebuildable in the Asset Group field, then the Asset Number field is not required.
11. Select an Activity.
12. When an asset is transferred from one organization to another, its maintenance may be handled by a new eAM organization. Any activities that are assigned to the asset are visible in the Activity Workbench, within the new eAM organization. Activities

that are not currently assigned to the new organization are displayed in blue.

Choose **Assign to Org** to assign the selected activities to the new organization.

13. Save your work.

Defining Maintenance Routes

Operations are the instructions or tasks to perform a repair. Because each operation is associated with a department, each operation contains assigned resources, for example, trades people, outside service providers, and equipment (See: Defining Departments and Resources, page 2-17). A maintenance route is the set of operations or jobs necessary to perform an activity. When a work order is created for an activity, the maintenance route corresponding to the activity explodes to the work order (See: Defining Activities, page 2-61); all operations specified in the maintenance route are copied to the work order as its operations.

Maintenance routes are not asset routes. For information on asset routes, See: Defining Asset Routes, page 2-83.

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

To define a maintenance route:

1. Navigate to the Activity Workbench window.
2. Click the Launch button.
3. Within the Activity Workbench pane, select the Activity for which you wish to create the routing.
4. Click the **Routings** button.

Routings (EM1)

Item: Fork Lift Daily Maintena | All Fork Lift Daily Maintenance | UOM: Ea

Alternate: | Capable To Promise: ☐

Revision: 0 | Date: 20-MAY-2011 15:17:49 | []

Display: Future and Current | ☒ Implemented Only

Operations

Main | Date Effectivity | WIP | ECO | Description

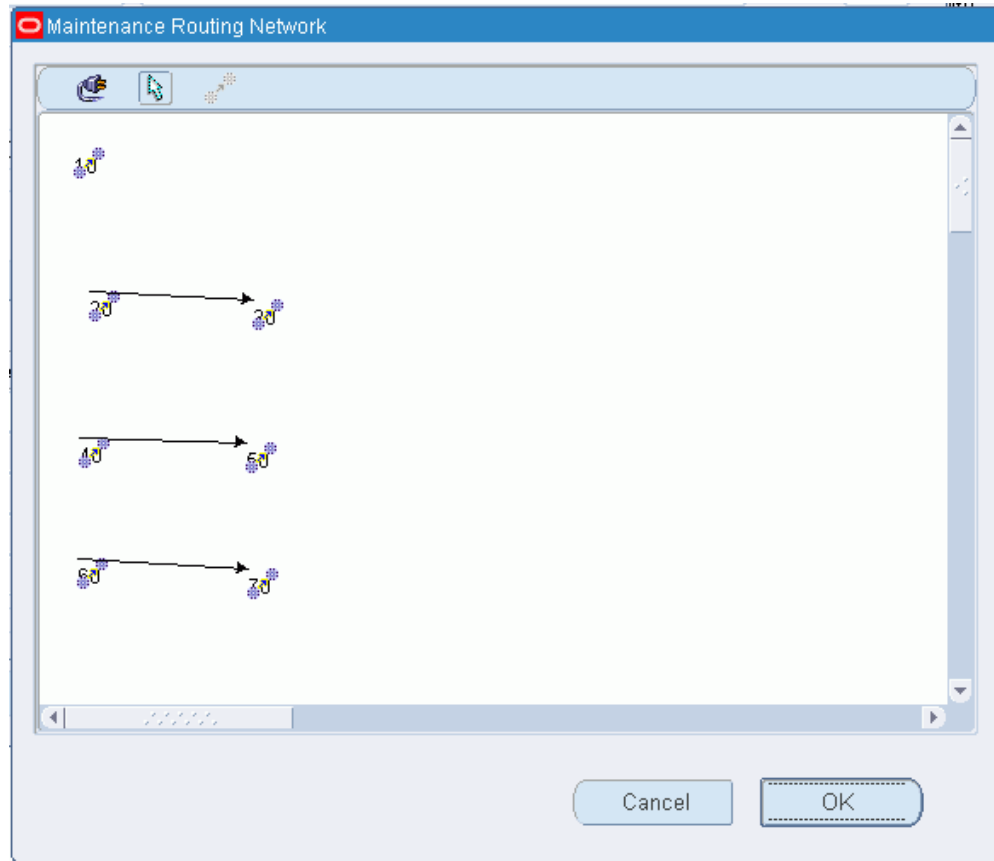
Seq	Code	Referenced	Department	Option Dependent	Lead Time %
10	F10	<input type="checkbox"/>	W-Maint	<input type="checkbox"/>	
20	F20	<input checked="" type="checkbox"/>	W-Maint	<input type="checkbox"/>	
30	F30	<input checked="" type="checkbox"/>	W-Maint	<input type="checkbox"/>	
40	F40	<input checked="" type="checkbox"/>	W-Maint	<input type="checkbox"/>	
50	F50	<input checked="" type="checkbox"/>	W-Maint	<input type="checkbox"/>	

Routing Details | Routing Network | Operation Resources | Operation Competencies

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

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

13. Optionally choose Routing Network to view the operation dependencies for the current asset route.



You can schedule operations to execute in parallel, sequence, or through dependent steps. In the screen shot above, for example, Operations 20, 30, 40, and 50 are dependent on Operation 10, since there is a line connecting the operations. These operations also run in parallel to each other. The operation numbers identify the sequence that they are performed (See: *Preparing Work Order Operations*, page 3-29).

14. Optionally select an operation, then choose Operation Resources to view the resources associated with the current department attached to this operation (See: *Defining Departments and Resources*, page 2-17). Optionally you can modify the resources listed (See: *Assigning Operation Resources*, *Oracle Bills of Material User's Guide*).

Operation Resources (EM1) - 10

Item: Fork Lift Daily Maintena
 Sequence: 10
 Alternate:
 Effective Date: 16-OCT-2002 00:00:00

Resources

Main | Scheduling | Costing

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

15. Save your work.

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

For information on defining Activities using the Activity Workbench, See: *Defining Activities*, page 2-61.

Creating Activity Templates

You can streamline the creation of activity associations using an Activity Association Template. For example, when you create an asset group, and then asset numbers within that group, you do not need to use the Association window to associate those asset numbers with an activity. If you create an Activity Association Template, the activity that you associate with the asset group for the current asset number automatically determines the activity that is associated with the current asset number.

You can also create an activity template during an asset activity association.

To create an activity template:

1. Navigate to the Activity Workbench page.
2. Click the Launch button.
3. Select the Results (Activities) tab.
4. Select the Activities with Associations directory.

Select the appropriate activity.

5. Select Yes from the Template Flag list of values to indicate that this activity and asset association is also an Activity Association Template.

If you select No, an asset and activity association is created.

6. For information on all remaining fields within the Activity Associations window, See: Associating Asset Numbers with Activities, page 2-103.
7. Save your work.

Related Topics

Defining Activities, page 2-90

Preventive Maintenance Setup, page 2-121

eAM Cost Estimation, page 6-2

Activity Association Templates, page 2-67

Rebuildable Item Setup

Rebuildable Item Setup tasks include:

- Defining Rebuildable Items, page 2-110
- Defining Rebuildable Serial Numbers, page 2-112
- Rebuildable Item/Activity Association, page 2-116
- Defining Rebuildable Bills of Material, page 2-118

Defining Rebuildable Items

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

To set up rebuild items:

1. Navigate to the Rebuild Items window.

Rebuild Items

The screenshot shows a window titled "Rebuild Items (EM1)". Inside, there are several input fields and a section for serial generation. The "Rebuild item" field contains "Fork Lift Battery". The "Description" field contains "Batteries used for electric Fork Lifts". The "Template" field is empty. To the right of the "Template" field is a small icon of a document with a plus sign. Below these fields is a section titled "Serial Generation". Inside this section, the "Generation" field is a dropdown menu set to "Predefined". The "Starting Prefix" field contains "Battery". The "Starting Number" field contains "1011".

2. Enter the name of the Rebuild Item.
3. Enter a Description for this Rebuild Item, up to 240 characters.
4. Select the @Rebuildable Template to quickly apply attribute values, and to ensure that the appropriate attributes are applied.

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

5. In the Serial Generation region, select Predefined for the Generation value.
6. Define a Starting Prefix and Starting Number for this Rebuild Item. If Serial Generation is set at Item Level for the Organization, the system defaults the prefix, along with the starting number sequence, when a new Serialized Rebuild is created for this Rebuild Item.
7. Save your work.

To access failure analysis information:

You can access the Failure Set page to view failure tracking codes that are assigned to the current Rebuild Item.

1. From the Rebuild Items window, select Maintain Failure Set from the Tools menu. If the Rebuild Item does not have an associated Failure Set, this menu option is disabled. See: Defining Failure Codes and Sets, page 28-2 and Failure Analysis

Overview, page 28-1.

2. Close the window.

To associate rebuildable items to multiple organizations:

1. From the Rebuild Items window, select Item Details from the Tools menu.
2. Select the Organization Assignment tab.
3. Enter additional organizations in the available table.
4. After saving your work, you can associate this Rebuildable Item with an Activity (See: Rebuildable Item/Activity Association, page 2-116).

Defining Rebuildable Serial Numbers

To set up rebuildable serial numbers individually:

1. Navigate to the Define Rebuildable Serial Number page.

Define Rebuildable Serial Number

2. Enter an Asset Number (Rebuildable Serial Number) if you do not have them automatically generated.

Accept or modify the default asset number, if you have automatic generation enabled (See: Defining eAM Parameters, page 2-11).

3. Select an Asset Group. This is the Asset Group (Rebuildable Item) you are associating with the Rebuildable Serial Number you are currently creating.

Note: After an Asset Group (Rebuildable Item) is associated with a Rebuildable Serial Number and then saved, you cannot change it.

4. The Asset Serial Number (Rebuildable Serial Number) defaults to the asset number. You can optionally select the next serial number for the current organization.

The Asset Serial Number might have a non-unique value across organizations, but the asset number must be globally unique, regardless of the defaulting value.

5. Optionally associate this Rebuildable Serial Number to an Asset Category. This is the Class and Subclass code, such as CRANE.OVERHEAD or BUILDING.FLOOR. See: Setting Up Category Codes and Sets, page 2-55.

6. Optionally enter a description for the Rebuildable Serial Number of up to 240

characters.

7. Within the Main tab, optionally select an owning Department for this Rebuildable Serial Number. This represents the crew responsible for the Rebuildable Serial Number. Notifications, regarding Work Requests, are sent to the Primary Approver of the Work Request's associated asset number's current owning department (See: Defining Department Approvers, page 2-21 and Defining Asset Numbers, page 2-74).
8. Optionally select a Criticality code to indicate the importance of the asset number to the organization. This field is for information purposes.
9. Optionally select a WIP Accounting Class to identify the Expense cost elements associated with the work performed, such as materials, labor, and resources.
10. Optionally enter the Area where this asset number resides. This is a user defined listing of logical areas of work. For example, North Plant, East Wing, or Area 1 (See: Setting Up Areas, page 2-16).
11. Indicate whether this asset is maintainable. If the Maintainable check box is selected, you can create work requests and work orders for this asset.

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

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

12. Optionally select the Active check box to indicate that the asset is functioning, for example, maintenance Work Orders can be created for this asset. This check box change when you activate or deactivate an asset from the Tools menu.
13. Indicate whether Asset Operational Logging is enabled for this asset. If you select the Operation Log Enabled check box, you can view all current and past asset operational information, such as Check Out, Check In, associated Work Requests and Work Orders. You can remove or add a child asset, remove a parent asset, activate or deactivate the asset, transfer the asset to another location, and receive or issue the asset into/from Inventory. By default, logging is turned off for an asset. See: Asset Operational Logging, page 21-8.
14. You can optionally associate the current Rebuildable Serial Number with a parent capital asset or parent rebuildable.
 1. Select an Asset Type. Valid values are Capital and Rebuildable Inventory.

2. If you selected a Capital Asset Type, optionally select a parent asset number. If you previously selected a Rebuildable Inventory Asset Type, optionally select a Rebuildable Serial Number from the asset number list of values.
 3. If you selected a Capital Asset Type, optionally select a parent Asset Group. If you previously selected a Rebuildable Inventory Asset Type, optionally select a Rebuildable Item from the Asset Group list of values.
15. The Checked Out check box indicates whether the current asset is checked in or out. You can check out an asset to view asset details, enter collection plan data, enter meter information, and optionally create a Work Request, within Maintenance Super User. This check box is protected against update. See: Asset Operational Logging, page 21-8.
 16. Within the Location tab, the Subinventory and Locator fields are view-only, displaying the subinventory location of this asset within Inventory and its Locator segments. If this asset is received into Inventory, these fields are populated.
 17. Optionally select a Location Code to specify a physical location for this asset. The Address field simultaneously populates with the selected Location Code's associated Address. The previously defined Area is organization-specific and not associated to a physical location.

Valid Location Codes are defined within Oracle Installed Base.
 18. The Address defaults as the populated Location Code's associated address. You can optionally select a different address. If the current asset is in stores, the address of the Location's organization appears (See: Stores, page 26-1).
 19. Optionally select a Production Organization. The list of values displays the production inventory organizations maintained by the current asset's organization. See: Enabling Organizations for Enterprise Asset Management, page 2-7 for information on designating eAM organizations to maintain equipment items for designated production organizations.
 20. Select an Equipment Item. This is mandatory if you populated the Production Organization field. Items that were defined with an equipment template (See: Item Templates, *Oracle Inventory User's Guide*), or with the Equipment item attribute enabled (See: Physical Attributes, *Oracle Inventory User's Guide*), are available.
 21. Enter an Equipment Serial Number. This is mandatory if you populated the Production Organization field. This is the specific name of the component within the Equipment Type, defined above.
 22. Select the Safety tab to enter safety information. See Defining Positional Assets, page 27-4..

23. Select the Others tab to optionally enter the Fixed Asset region information, if Oracle Fixed Assets is installed. This is Enterprise Asset Management's integration with Fixed Assets. Enter a Category, which is a grouping of fixed assets, defined within Oracle Fixed Assets. This category is tied to a set of books, and must be the same set of books that is assigned to the current Enterprise Asset Management organization. See: Setting Up Asset Categories, *Oracle Fixed Assets User's Guide*.
24. Optionally enter the Number if Oracle Fixed Assets is installed. This represents a fixed asset number that belongs to a fixed asset category, associated with the asset.
25. The Property Management fields, Location Name and Location Code, default from a Property Manager export process (Export Locations to Enterprise Asset Management), if Oracle Property Management is installed. These fields are disabled. These values cannot be changed.
26. Before the above information is passed from Property Manager into Enterprise Asset Management, asset groups (rebuildable items) need to first be established. See: Defining Rebuildable Items, page 2-110.
27. Optionally choose Location Details to view or update the Property Manager field information.
28. Optionally select Attributes to enter attribute values for the asset .

Existing, enabled attribute groups appear. These attribute groups are optional. You do not need to enter values for all existing attribute groups. From this window, you cannot generate attribute groups. (See: Setting Up Attributes, page 2-70).
29. Optionally choose Meters to associate the current rebuildable serial number to one or more meters.
30. Optionally choose Associate Activity to associate the current rebuildable serial number to an activity.

Note: To establish this Rebuildable Serial Number in Inventory, you must execute any receipt transaction, such as a Miscellaneous Receipt or a Purchase Order Receipt.
31. Save your work.

Rebuildable Item and Activity Association

After you have defined rebuildable items and activities, you can associate activities to the rebuildable items. For example, you may have a Rebuild Engine Activity, and an Engine Rebuildable Item. After you create a rebuild work order for the engine, the associated Rebuild Engine Activity attaches its associated maintenance BOM (material) and maintenance routing (resources) to the work order.

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

- Defining Rebuildable Items, page 2-110
- Defining Activities, page 2-61
- Rebuild Work Orders, page 3-13
- Defining Maintenance Routes, page 2-106
- Setting Up Maintenance Bills of Material, page 2-101

To associate rebuildable items with activities:

1. Navigate to the Activity Association window.

Activity Association

Activity Association (EM1)

Activity: Change Fork Lift Battery

Description: Change the battery in electric fork lifts

Associations

Main Work Order Defaults

Asset Type	Asset Group	Asset Number	Priority	From	To	Effective Dates
Capital	Fork Lifts	FL1010	Medium	31-OCT-2002		
Capital	Fork Lifts	FL1020		31-OCT-2002		
Capital	Fork Lifts	FL1030		31-OCT-2002		
Capital	Fork Lifts	FL1040		31-OCT-2002		

2. Select an Activity.
3. Within the Main tab, select Rebuildable from the Item Type list of values.

4. Select a Rebuildable Item from the Asset Group list of values.
5. If the Rebuildable Item is serial number controlled (See: Defining Rebuildable Items, page 2-110), select a Rebuildable Serial Number from the Asset Number list of values.
6. Optionally select a Priority Code.
This field is for informational purposes.
7. Optionally enter Effective Dates.
If the Effective From field is left blank, the system date defaults. If the Effective To field is left blank, it defaults as NULL.
8. Within the Activity tab, the Activity Cause defaults from the Activity definition, specifying what situation caused this work to be generated.
For example, Breakdown, Vandalism, Normal Wear, or Settings. Optionally you can select an Activity Cause.
9. The Activity Type defaults from the Activity definition (See: Defining Activities, *Oracle Enterprise Asset Management User's Guide*).
This code indicates the type of maintenance activity needed to perform for this Activity. It is used when defining a job or a standard job. It should remain generic, and should not describe the job in detail. For example, Inspection, Overhaul, Lubrication, Repair, Servicing or Cleaning. Optionally select an Activity Type.
10. Optionally select the Tagging Required check box to indicate whether tag out procedures are required.
11. The Owning Department field is used when associating asset numbers to activities (See: Activity Association Templates, page 2-67).
12. Save your work.

Defining Rebuildable Bills of Material

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

Note: If you are not using Project Manufacturing applications, Project Parameters are defined for your eAM enabled organization to successfully create Rebuildable Items. This is required because a

Rebuildable BOM is of type Model/Unit Effective and this BOM type is currently allowed if PJM organization parameters are set up for the eAM enabled organization to which the Rebuildable Item has been assigned. To define Project Parameters, open the Project Parameters window using Project Manufacturing Super User responsibility and without entering any data in the window, save the record. If you plan to use Project Manufacturing, see: Project Manufacturing Integration Setup, page 2-193 for information on defining Project Parameters.

To set up a rebuildable BOM:

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

Related Topics

Defining Items, *Oracle Inventory User's Guide*

Associating Asset Numbers with Activities, *Oracle Enterprise Asset Management User's Guide*

Defining Subinventories, *Oracle Inventory User's Guide*

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

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

Non-Stock Direct Item Setup

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

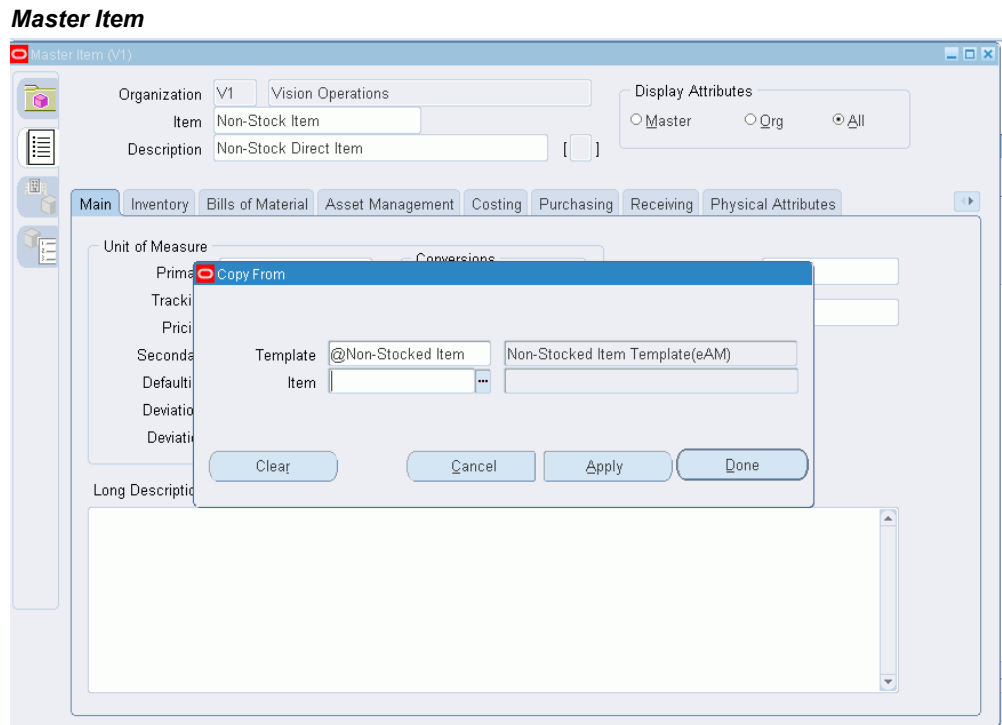
You can add only coded items (for example, Inventory Stockable and Non-Stockable-Direct items) to the Maintenance BOMs. (See: Defining Direct Item Material Requirements, page 3-42).

To set up Non-Stock Direct Items, access the Master Item window within Oracle Inventory, and apply the @Non Stocked Item template. See: Defining Items, *Oracle Inventory User's Guide*. Description Based Direct Items are not set up within Oracle Inventory.

If direct items exist on a BOM, they default as material requirements when creating a work order for that asset; however, you can add additional direct item material requirements to an existing work order.

To set up a Non-Stock Direct Item:

1. Navigate to the Master Item window.
2. Enter the non-stock direct Item name.
3. Enter a Description.
4. From the Tools menu, select Copy From.
5. Select the @Non-Stocked Item Template.
6. Choose Apply.
7. Choose Done.



8. Save your work.

The Stockable check box is clear, and the Purchased and Purchasable check boxes are selected.

Related Topics

Defining Rebuildable Bills of Material, page 2-118

Setting Up Maintenance Bills of Material, page 2-101

Setting Up Asset Bills of Material, page 2-86

Defining Items, *Oracle Inventory User's Guide*

Preventive Maintenance Setup

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

This section includes the following topics:

- Project and Task Setup, page 2-122

- Defining Meter Templates, page 2-122
- Defining Meters, page 2-125
- Defining Set Names, page 2-127
- Defining a Preventive Maintenance Template, page 2-129
- Entering Preventive Maintenance Schedule Definitions, page 2-137

Project and Task Setup

Work orders can be associated with a Project, Task or Seiban number at the time of implementing PM suggestions to work orders. The Forecast Work Order window can be configured.

Defining Meter Templates

There are two ways to create meters. You can create them within the Meter window, or create them first using the Meter Template window, and then next instantiating them when defining an asset. If you create Meters using the Meter window (See: Defining Meters, page 2-125), associate that meter definition with individual Asset Numbers manually. If you utilize the Meter Template definition functionality, you can associate that Meter Template with Asset Groups. After the association is created, when an Asset Number (Asset Numbers or Serialized Rebuilds) is created within that Asset Group (Asset Group or Rebuildable Item), the system automatically creates a new instance of the meter, associated with the specific Asset Number. This enables you to streamline your meter setup. However, the meters are not created retroactively; it applies to Asset Numbers created after the Meter Template was created.

Defining Meter Templates

1. Navigate to the Meter Template window.

Meter Template

The screenshot shows the 'Meter Template (EM1)' window. It contains two main tables. The top table lists meter templates with columns: Name, Description, Type, UOM, Value Change, and Init Re. The bottom table lists asset groups with columns: Item Type, Asset Group, and Description.

Name	Description	Type	UOM	Value Change	Init Re
OKS_TEMP1		Absolute	Ea	Fluctuating	
PMCount1154089895		Absolute	EA	Fluctuating	
Odometer Template	Odometer Template	Absolute	ML	Ascending	0

Item Type	Asset Group	Description
Capital	Lexus ES300	2002 Make Lexus ES300 Car Fleet Maint. Group

2. Enter a unique meter template Name.
3. Enter the template's Description.
4. Enter a Value or Change Reading value for new meter readings, depending on the meter type.

Note: If the meter is a Change type, the Value field indicates the difference between the last reading and the current reading. The Change value is used to calculate the Life To Date Reading, within the Latest tabbed region.

5. Optionally change the Date, if required.
6. Optionally enter an Initial Reading.

This is automatically used as the first meter reading entered, or each new instance of the meter that is created and associated with an Asset Number (or Serialized Rebuild) via the Meter Template.

7. If you select the Used in Scheduling check box, the meter is used in Preventive Maintenance Scheduling.

If there are any scheduling rules associated with this meter, you cannot clear this check box. If this is a fluctuating meter, this check box is disabled. If the Used in Scheduling check box is selected, the Usage Rate (per day) and Number of Past Reading fields are mandatory.

8. Optionally select the Required check box to indicate whether readings for the meter are required during work order completion, regardless of whether a work order was generated from Preventive Maintenance or if it was created manually.

You can select or clear this check mark at any time; it impacts only future meter readings. However, if the meter is a Primary Failure Meter for any current asset/meter association, you cannot clear the check box.

9. Enter a usage Rate (per day).

This field works in conjunction with the Number of Past Readings field to provide daily meter usage estimates, based on historical readings. It supplies the system benchmark data that is used to set the occurrence of scheduled PMs. Rate per day is referred to in the absence of a sufficient value in the Number of Past Readings field.

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

10. Enter a value for the Number of Past Readings.

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

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

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

11. Select the meter template effective dates.

If left blank, the meter is effective all of the time. You can disable a meter effective on a specific date by selecting a To date.

12. Save your work.

To associate meter templates with asset groups:

If you use the Meter Template definition functionality (See: Defining Meter Templates, page 2-122), you can associate that Meter Template with asset groups, within the same Meter Template window. After you create the association, when a new Asset Number (Asset Numbers or Rebuildable Serial Numbers) is created within that asset group (Asset Group or Rebuildable Item) a new instance of the corresponding meter is automatically created. This enables you to streamline your Meter setup.

1. Select an Item Type.

Valid values are Capital or Rebuildable.

2. Select an Asset Group.

If you previously selected Capital, Asset Groups are available for selection. If you previously selected Rebuildable, Rebuildable Items are available for selection.

3. Save your work.

After saving, each asset number defined as part of the current asset group is automatically associated with the meter template.

Defining Meters

Alternatively, you can create Meters using the Meter window. Manually associate the meter definition with individual Asset Numbers. If you utilize the Meter Template definition functionality, you can associate that Meter Template with Asset Groups (See: Defining Meter Templates, page 2-122).

To define a meter:

1. Navigate to the Meter page.

Meter

Meter (EM1)

Name	Type	UOM	Value Change	Initial Reading	Initial Reading Date	Used In Scheduling Required	Rate (per day)
LXES300 Odometer-5143	Absolute	MI	Ascending	0	04-NOV-2005 12:36	<input type="checkbox"/>	25
LXES300 Odometer-5144	Absolute	MI	Ascending	0	04-NOV-2005 12:48	<input checked="" type="checkbox"/>	25
						<input type="checkbox"/>	
						<input type="checkbox"/>	

Item Type	Asset Number	Asset Group	Description	Primary Failure Meter	Organization
Capital	LX0003	Lexus ES300			EM1

2. Enter a unique meter Name.
3. Enter a Description for this meter.
4. Optionally select a Source Meter from the list of values.

As the Source Meter's readings are updated, the associated target meter (current meter) is updated automatically. Companies can associate a Source Meter to an Asset Number/Meter association. The Source Meter reading subsequently feeds corresponding meters that are associated with assets within the Meter Hierarchy.

For example, some companies must track units, using a meter to a parent asset (truck). These units should then trickle down to all child components of that parent asset (transmission, tires, belts). Each child component has different meters to track the units and history on the individual components. If the transmission is replaced, the Rebuild Replacement process enables you to remove the replaced transmission from the meter hierarchy and add the new transmission to the hierarchy. From that

point, meter readings logged to the truck should also update the transmission's child meter with those units. Any time a reading is logged to the truck, it will update the transmission child meter with those units.

5. Select the meter Type of Absolute or Change.
6. Select a unit of measure (UOM), associated with this meter. After the meter is created, this field is disabled.
7. Select Ascending, Descending, or Fluctuating in the Value Change field.

A fluctuating meter reading is one that can go up and down, for example, a temperature gauge. As production units pass through meters, meter readings increment. Another example of an ascending meter is a car odometer. Some liquid dispensers start full and record decreasing readings as material is used.

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

After the meter is created, this field is disabled.

8. Enter an Initial Reading.

This value is automatically used as the first meter reading entered, or each new instance of the meter that is created and associated to a Asset Number via the Meter Template.
9. If you select the Used in Scheduling check box, the meter is used in Preventive Maintenance Scheduling.

If there are any scheduling rules associated with this meter, you cannot clear this check box. If this is a fluctuating meter, this check box is disabled. If the Used in Scheduling check box is selected, the Usage Rate (per day) and Use Past Reading fields become mandatory.
10. Optionally select the Required check box to indicate whether readings for the meter are required during work order completion, regardless of whether a work order was generated from Preventive Maintenance or if it was created manually.

You can select or clear this check mark at any time; it impacts only future meter readings. However, if the meter is a Primary Failure Meter for any current asset/meter association, you cannot clear the check box.
11. Enter a usage Rate (per day).

This field works in conjunction with the Number of Past Readings field to provide daily meter usage estimates, based on historical readings. It supplies the system benchmark data that is used to set the occurrence of scheduled PMs. Rate per day is referred to in the absence of a sufficient value in the Number of Past Readings field.

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

12. Enter a value for the Number of Past Readings.

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

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

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

13. Select the meter Effective Dates.

If left blank, the meter is effective all of the time, after it is created. If you select a future date, the meter is disabled until that date. You can disable a meter effective on a specific date by selecting a To date.

14. Save your work.

To associate meters with capital assets or serialized rebuilds:

Meter association creates the relationship between the meter definition and the capital asset number or Serialized Rebuild.

1. Select an Item Type of Capital, if you are going to associate the current meter with an asset number. Select Rebuildable if you are associating the current meter with a Serialized Rebuild.
2. Select an Asset Number (or Serialized Rebuild). The Asset Group (or Rebuildable Item) defaults.
3. Optionally select a Primary Failure Meter to indicate the default meter that is used for failure analysis. This meter's readings are used to calculate meter-based MTBF and MTTR. See: Failure Analysis Overview, *Oracle Enterprise Asset Management User's Guide*.

You can select a Primary Failure Meter for any meter with the Required check mark selected. Only one meter can be selected at a time, for an asset.

4. Save your work.

Defining Set Names

A PM schedule for an Activity and an Asset Number or Asset Group must uniquely belong to a Set Name. Multiple PM Schedules for the same Asset Number or Asset

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

PM schedules might contain assets that transferred from one organization to another. The asset's destination organization can update and use the PM schedules that are assigned to a global PM set. However, you can only view, within the destination organization, PM schedules that are assigned to the asset's originating organization's local PM sets.

Defining Set Names

1. Navigate to the Set Name window.

Set Name

Set Name (EM1)

Set Name	End Date	Description	Global	[]
MAIN			<input checked="" type="checkbox"/>	<input type="checkbox"/>
ka-set1		PM Set for Maint Assets	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ka-set2		Pm Set #002	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>

Templates Schedules Set Default

2. Enter the Set Name.
3. Optionally enter an End Date.

Every PM schedule that belongs to the Set Name must have its effective-to date before the End Date of the PM Schedule's Set Name. If you leave this field blank, the current Set Name does not expire.

4. Optionally enter a Description for this Set Name.

5. Optionally select the Global check box to indicate that the set is visible globally.

If this check box is clear, the set is confined to the current organization.

Note: You can change this setting from Global to local, if the set is not used in an PM schedules of another organization's assets.

6. Optionally choose Templates to add, change, delete, or view Preventive Maintenance Schedule Templates, associated with the current Set Name (See: Preventive Maintenance Schedule Templates).
7. Optionally choose Schedules to create PM Schedule Definitions, associated with the current Set Name (See: Defining a Preventive Maintenance Template, page 2-129).
8. Optionally choose Set Default to identify all schedules within this set as Default.
Default-identified PM schedules automatically generate work orders during the PM Scheduler process. PM schedules that are not identified as Default can generate work order suggestions during the PM Scheduler process. The generated suggestions cannot be converted into work orders. You can create an unlimited number of Set Names within this window.
9. Save your work.

Defining a Preventive Maintenance Template

An Activity and Asset Number combination can be associated with Runtime, Day Interval Rules, or a list of dates, defining when an Activity should be scheduled for an Asset, Serialized and Non-Serialized Rebuildables, or an Asset Route. Day Interval rules and List of Dates rules are supported for Non-Serialized Rebuildables and Asset Routes. The Preventive Maintenance (PM) Scheduler process creates suggested Work Order dates based on these rules. A planner can then view these forecasted Work Orders, and generate them as necessary.

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

Before a PM Template is created, the following prerequisites must exist:

- Meter Template Definition (See: Defining Meter Templates, *Oracle Enterprise Asset*

Management User's Guide)

A Meter Template definition is required if the PM Template is based on Runtime Rule

- Activity Definition (See: Defining Activities, *Oracle Enterprise Asset Management User's Guide*)
- Meter Template Association (See: Associating Meter Templates with Asset Groups, *Oracle Enterprise Asset Management User's Guide*)

A Meter Template Association is required if the PM Template is based on Runtime Rules.

- Activity Association Template (See: Activity Association Templates, *Oracle Enterprise Asset Management User's Guide*)

Creating Preventive Maintenance (PM) Templates

1. Navigate to the Find Preventive Maintenance Schedules window.

This window enables you to enter information to narrow your search for query mode.

Select Yes in the Next WO only field if you want the PM Scheduler to be able to create the next work order only if the previous work order has been completed for this work order completion date.

To define a new PM Template, select the **New** button.

2. Enter a PM Template name in the Schedule Name field.
3. Enter a Set Name. A PM schedule for an Activity and Asset Group must uniquely belong to a Set Name (See: Defining Set Names, page 2-127).

Each Set Name has an end date. The PM schedule that belongs to the Set Name must have its Effective To date before the end date of the PM Set Name. Before assigning a Set Name to a PM schedule, define Set Names within the Set Name Definition window. If you do not want to create Set Names, you can assign PM schedules to set, MAIN; it already exists.

PM schedules might contain assets that transferred from one organization to another. The asset's destination organization can update and use the PM schedules that are assigned to a global PM set. However, you can only view, within the destination organization, PM schedules that are assigned to the asset's originating organization's local PM sets. You can copy these PM schedules to a global, local set or to your organization's local set.

4. Select an Asset Type.

Valid values are Capital and Rebuildable Inventory. If Capital is selected, the Asset

Group fields refer to the asset group. If you select Rebuildable Inventory, the Asset Group fields refer to the Rebuildable Item.

5. Select an Asset Group.

6. Select a Schedule Type.

Valid values are Rule Based and List Dates. If you select Rule Based, the Day Interval Rules and Runtime Rules tabs are enabled to enter information. If you select List Dates, you can define information within the List Dates tab.

7. The Effective dates default from the current Activity association, if they exist. Optionally select or update the Effective From and Effective To dates.

8. Optionally enter a Lead Time In Days.

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

9. Optionally select a Work Order Status that best fits your business process.

When PM work orders are generated, (See: Generating Work Orders, page 4-6) they are created with this specified status. You can optionally update this status within the Maintenance Workbench (See: Using the Maintenance Workbench, page 3-69).

10. Optionally select Yes in the Next WO only field if you want to enable the scheduler to create the next work order only if the previous work order has been completed for the work order completion date.

11. Optionally select the Default check box to indicate that the current PM schedule definition generates Work Orders. If this check box is not selected, Work Order suggestions will not generate. You can have only one Default PM for an Asset Item/Activity combination.

12. Optionally select the Automatic Instantiation check box. If this check box is selected, a new instance of the current PM schedule template is created for each new Asset (Asset Number or Rebuildable Serial Number).

13. Optionally select the Reschedule Manual Work Orders check box. If this check box is selected, non-firm, unreleased manual work orders are considered during PM

scheduling.

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

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

If this check box is selected, PMs created as a copy of this PM Template generate Work Orders for the corresponding asset in the Maintenance Workbench (See: Using the Maintenance Workbench, page 3-69).

15. In the Scheduling Options region, indicate how the PM Scheduler process calculates work order dates.

The *Use* field works in conjunction with the *to suggest Next Service* field. The date field indicates the Last Service date

- *Actual Start Date to Start Date*: The PM Scheduler process uses the Last Service Actual Start Date, and calculates scheduled start dates.

This is a forward scheduling method.

- *Actual Start Date to End Date*: The PM Scheduler process uses the Last Service Actual Start Date, and calculates the scheduled end dates.

This is a backward scheduling method.

- *Actual End Date to Start Date*: The PM Scheduler process uses the Last Service Actual End Date, and calculates the scheduled start dates.

This is a forward scheduling method.

- *Actual End Date to End Date*: The PM Scheduler process uses the Last Service Actual End Date, and schedules the scheduled end dates.

This is a backward scheduling method.

- *Scheduled Start Date to Start Date*: The PM Scheduler process uses the Last Service Scheduled Start Date, and calculates scheduled start dates.

This is a forward scheduling method.

- *Scheduled Start Date to End Date:* The PM Scheduler process uses the Last Service Scheduled Start Date, and calculates the scheduled end dates.

This is a backward scheduling method.

- *Scheduled End Date to Start Date:* The PM Scheduler process uses the Last Service Scheduled End Date, and calculates the scheduled start dates.

This is a forward scheduling method.

- *Scheduled End Date to End Date:* The PM Scheduler process uses the Last Service Scheduled End Date, and schedules the scheduled end dates.

This is a backward scheduling method.

- *Base Date:* You must enter a date as the basis for the PM calculation.

As your intervals change, you might want to update the Base Date so that your PM work orders are generated at your choice intervals. It is recommended that you change the Base Date to the Last Service Date if your scheduling interval changes, to ensure that the new scheduling is impacted only from that point and forward. Actual and scheduled work order dates are not considered when you use the Base Date or Base Meter options.

- *Base Meter:* You must enter a meter, as well as the initial interval.

The PM engine uses that initial reading as the anchor for its calculation. Actual and scheduled work order dates are not considered when you use the Base Date or Base Meter options.

16. In the Multiple Rules region, indicate how the predicted due dates are determined for multiple rules.

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

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

Schedule Based On Example

Interval	Effective From	Effective To	Meter
100	0	10,000	Meter1

Interval	Effective From	Effective To	Meter
50	0	2,500	Meter2

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

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

17. In the Activity region, select one or multiple activities.

Activities associated with asset groups are eligible for use in a schedule template definition. A maintenance planner can create a single PM schedule for multiple activities on an asset template. You can list multiple activities to perform on an asset that share a common base interval of either a date, meter, or both. Each maintenance activity on the schedule generates work orders, based on a multiple of the base interval occurring. The group of maintenance activities on one PM schedule represents a cycle of activities. **Base Interval** refers to the minimum of a space of time (such as 90 days), or meter reading (such as 7,500 miles) between when PM activities included in one PM schedule should be performed. It can be considered a common denominator among the multiple activities included in one PM Schedule that share a common base interval. A **cycle** is a complete round of maintenance activities performed on an asset that share a common base interval of a meter or time period, or both, or a multiple of the shared intervals.

After the cycle of activities completes, the cycle restarts. For example, you can define a PM schedule for two activities that have a common Base Interval of 7,500 miles. The first activity is an oil change, and is scheduled every 7,500 miles. The second activity, a tune-up, is scheduled for every fourth interval or 30,000 miles. The work order for the oil change generates on each occurrence of the 7,500 mile interval and the work order for the tune-up generates on the fourth interval occurrence.

When an asset transfers to another organization, the schedule that is associated with the local PM Set is viewable within the new organization. For example, the PM Set Name, Local, is created in organization, EM1. A PM schedule is defined in EM1 for Asset Number, #1554877, and is associated with Local (Set Name). Asset Number #1554877 is transferred to another eAM-enabled organization, EM2. A planner in this new organization (EM2) can view the PM schedule that is associated with the Local PM set. However, it is view-only; it cannot be updated. The

associated Activity appears in blue, to indicate that the activity definition has not yet been assigned to EM2. In this scenario, to use the PM schedule, the planner must either assign the schedule's Activity to the current organization, EM2, or update the schedule's PM Set Name from Local to a global set or a local PM set that was defined in EM2.

Note: You can define an unlimited number of activities, however, it is recommended that you keep it simple.

18. Optionally indicate the Interval Multiple of the Base Interval.

This field works with the Repeat in Cycle field to determine how many intervals for an activity to repeat.

19. Optionally select the Repeat in Cycle value to determine if the activity interval repeats in the cycle.

If you select *Yes*, the Interval Multiple field determines how many times the activity interval repeats. If you select *No*, the activity is scheduled once for each cycle.

20. Optionally enter a Tolerance In Days to indicate a minimum interval in days that suggested work order dates are spaced from each other.

21. Within the Date Rules tab, optionally enter Effective From and To dates to specify the rule's expiration.

22. Enter a Base Interval In Days.

For example, if you enter the number three, a Work Order suggestion is created every three days. You can optionally create variable Date Rules. For example, you would like Work Order suggestions created every three days in January, and every four days in February. The window below illustrates this example:

23. Within the Meter Rules tab, optionally select a Meter Name to indicate that Preventive Maintenance scheduling is based on a meter rule.

If you have previously set up a Date Rule, you can base the scheduling on a Runtime Rule, as well. Meter Templates associated with this asset group (See: Associating Meter Templates with Asset Groups, page 2-124), and with the Used in Scheduling check box selected in the meter template definition are available.

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

Date Rule

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

Meter Rule

Field	Value
Last Service Reading	3000
Interval	1000
Latest Meter Reading	3100 (found within meter reading history)
Latest Meter Reading Date	January 1, 2002 (this can be found via meter reading history)
Usage Rate	25 miles per day (calculated, based on Linear Regression's Least Square formula. In a least-squares model, the best-fitting line for the observed data is calculated by minimizing the sum of the squares of the vertical deviations from each data point to the line. For example, if a point lies on the fitted line exactly, then its vertical deviation is zero.)

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

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

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

creation. The opposite is also true.

24. The Interval and UOM fields work together.

For example, for every 2000 miles, this Asset Number needs an oil change. The UOM defaults from the Meter Template definition of the current Meter Template. You can optionally create multiple Runtime Rules. For example, from zero to 10,000 miles, you would like your asset serviced every 3,000 miles. From 10,000 to 50,000 miles, you would like your asset serviced every 2,000 miles.

25. Optionally enter the Last Service Reading in the Last Service Information window.

This field is also automatically updated with the meter reading information recorded at work order completion (See: Work Order Completion, page 3-59).

Note: The Preventive Maintenance Scheduler (See: Generating Work Orders, page 4-6) automatically calculates the meter usage rate, based on historical data, which is then used to predict the next meter due date. Refer to the example below.

26. If you populated List Dates within the Schedule Type field, select the List Dates tab to define the specific due dates that work orders should transpire.

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

27. Save your work.

Entering Preventive Maintenance Schedule Definitions

Schedule definitions are implemented to create scheduled work orders, based on Day Interval Rules, or Runtime Rules. Schedules can also be based on a list of specific dates by using List Date rules. List Date rule based PM schedules cannot have Runtime or Day interval rules. Runtime or Day Interval Rule based PM schedules cannot have List Date rules. You can create a Preventive Maintenance Schedule Definition for an asset group (non-serialized rebuildable and activity combination, asset number/activity combination, or an asset route/activity combination.

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

- Meter Definition (See: Defining Meters, *Oracle Enterprise Asset Management User's Guide*)

A Meter definition is required if the PM schedule is based on Runtime Rules.

- Activity Definition (See: Defining Activities, *Oracle Enterprise Asset Management User's Guide*)
- Meter/Asset Association (See: Associating Meters with Asset Numbers, *Oracle Enterprise Asset Management User's Guide*)

A Meter/Asset Association is required if the PM schedule is based on Runtime Rules.
- Asset Group (Non-Serialized Rebuildable) or Asset Number/Activity Association (See: Associating Asset Numbers with Activities, *Oracle Enterprise Asset Management User's Guide*)

Defining Preventive Maintenance (PM) Schedules

1. Navigate to the Find Preventive Maintenance Schedules window.

This window enables you to enter information such as a Planner, to narrow your search for query mode.

Select Yes in the Next WO Only field if you want the PM Scheduler to be able to create the next work order only if the previous work order has been completed for this work order completion date.

To define a new schedule, click the **New** button.

Preventive Maintenance (Schedule Definition)

Preventive Maintenance (Schedule Definition)

Schedule Name: PM44 ☒ Default ☐ Reschedule Manual Work Orders ☐ Run To Failure

Set Name: MAIN

Asset Type: Capital

Asset Number: DTF35000

Asset Group: Vehicles

Schedule Type: Rule Based

Effective From: 12-NOV-2002

Effective To:

Lead Time In Days:

Work Order Status: Released

Generate Next WO: No

Intervals Per Cycle: 1 Current Cycle: 1 Current Interval Count: 0

Delivery Errand Truck 35000

Vehicle Asset Group

Scheduling Options

Use: Actual Start Date 04-DEC-2006 00:00:00

to suggest Next Service: Start Date

For Multiple Rules

Use date that comes: First

Activity	Interval Multiple	Repeat in Cycle	Tolerance in Days	Last	Last Date
30000 Mile TuneUp	1	No		<input checked="" type="checkbox"/>	04-DEC-2006 00:00:00
				<input type="checkbox"/>	
				<input type="checkbox"/>	

Last Service Info Suppression

Date Rules Meter Rules List Dates

Effective From	Effective To	Base Interval In Days	Cycle Interval In Days

2. Enter a Schedule Name.

Important: If your PM schedule requires more than one activity and if the activities use different cycles, we recommend that you create separate PM schedules.

3. Enter a Set Name.

A PM schedule for an activity and an asset number or asset group must uniquely belong to a Set Name (See: Defining Set Names, page 2-127). Every Set Name has an end date. Every PM schedule that belongs to the Set Name must have its Effective To date before the end date of the PM Set Name. Before assigning a Set Name to a PM schedule, define Set Names within the Set Name Definition window. If you do not want to create Set Names, you can assign PM schedules to set, MAIN; it already exists.

PM schedules might contain assets that transferred from one organization to another. The asset's destination organization can update and use the PM schedules that are assigned to a global PM set. However, you can only view, within the destination organization, PM schedules that are assigned to the asset's originating

organization's local PM sets. You can copy these PM schedules to a global, local set or to your organization's local set.

4. Select an Asset Type.

Valid values are Capital and Rebuildable Inventory. If Capital is selected, the Asset Number and Asset Group fields refer to the Asset Number and Asset Group, respectively. If Rebuildable Inventory is selected, the Asset Number and Asset Group fields refer to the Rebuildable Serial Number and Rebuildable Item, respectively. If a Non-Serialized Rebuildable Item is entered in the Asset Group field, the Asset Number field is not required.

5. Select an Asset Number.

Assets that are maintainable and associated with Activities are available. The Asset Group field populates with the Asset Group associated with the current Asset Number. If you wish to define a PM Schedule for a Non-serialized Rebuildable, enter the Asset Group; the Asset Number field does not apply.

For assets that transferred from one organization to another, PM schedules that are defined for assets within their originating organizations are also visible within their destination organizations.

6. Select a Schedule Type.

Valid values are Rule Based and List Dates. If you select Rule Based, the Day Interval Rules and Runtime Rules tabs are enabled to enter information. If you select List Dates, you can define information within the List Dates tab.

7. The Effective dates default from the current Asset activity association, if they exist. Optionally select or update the Effective From and Effective To dates.

8. Optionally enter a Lead Time In Days.

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

9. Optionally select Yes in the Generate Next WO field if you want to enable the scheduler to create the next work order only if the previous work order has been

completed for the work order completion date.

10. Optionally select a Work Order Status that best fits your business process.

When Preventive Maintenance work orders are generated, (See: Generating Work Orders, page 4-6) they are created with this specified status. You can optionally specify a different status for each PM schedule. You can also update this status, using the Maintenance Workbench (See: Using the Maintenance Workbench, page 3-69).

11. Optionally select the Default check box to indicate that the current PM schedule definition generates work orders.

If this check box is not selected, work order suggestions will not generate. You can have only one Default PM for an asset item and activity combination.

12. Optionally select the Reschedule Manual Work Orders check box.

If this check box is selected, non-firm, unreleased manual work orders are considered during PM scheduling.

13. Optionally select a Planner to assign to this work order.

14. If the Run To Failure check box is selected, the Preventive Maintenance Scheduler does not automatically schedule this Asset Number and activity association, although you can create manual work orders.

This is relevant for Asset Numbers that cost more to maintain than the Asset Number itself. You might also check this box for forecasting and budgeting reasons. For example, your asset is a conveyor belt. It is common in maintenance environments to let this asset wear out completely before replacing it. You estimated that the life of this asset is 18 months, and have set up a schedule for a replacement work order every 18 months. In reality, you found that the belts have worn out every 12 months, affecting your cost budget.

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

If this check box is selected, the work orders for this asset do not appear in the Maintenance Workbench at the time of PM Scheduling (See: Using the Maintenance Workbench, page 3-69).

15. For new PM schedule definitions, the default value for the Reviewer is based on the user login information, and the Review Date field defaults to the current system date.

If you are updating a PM schedule definition, the Reviewer field indicates the last reviewer of the PM Schedule, and the Review Date field indicates the date on which the last review occurred. When updating the schedule definition, the Reviewed

Date can be changed.

16. In the Scheduling Options region, indicate how the PM Scheduler process calculates work order dates (see PM Scheduling Options, page 2-132).
17. In the For Multiple Rules region, indicate how the predicted due dates are determined for multiple rules.
 - *First*: The due date is set to the first due date of all rules.
 - *Last*: The due date is set to the last due date of all rules.

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

Schedule Based On Example

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

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

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

18. Optionally enter a value for the **Intervals Per Cycle** field. This field represents the number of base intervals that comprise the complete cycle. For example, 12 monthly intervals would comprise a 1-year cycle, and four 7,500 miles base intervals would comprise a 30,000-mile cycle.

The system automatically updates these fields:

- **Current Cycle**: The current execution cycle of a Preventive Maintenance cycle for an asset. This field is automatically updated by the system when preventive maintenance work orders generated out of a given schedule are completed.
- **Current Interval Cycle**: The current execution interval within a current running cycle. This field is automatically updated by the system when preventive maintenance work orders generated out of a given schedule are completed. It is advisable not to change the current cycle and current interval count after initial

definition, unless really required to do so. These fields can be disabled for edit by users through function based menu exclusions.

19. Within the Activity region, select one or multiple Activities. Activities associated with Asset Numbers or Non-serialized Rebuilds are eligible for scheduling.

A Maintenance Planner can create a single PM schedule for multiple activities on an Asset. You can list multiple activities to perform on an asset that share a common base interval of either a date, meter, or both. Each maintenance activity on the schedule generates work orders, based on a multiple of the base interval occurring. The group of maintenance activities on one PM schedule represents a cycle of activities. After the cycle of activities completes, the cycle restarts. For example, you can define a PM schedule for two activities that have a common Base Interval of 7,500 miles. The first activity is an oil change, and is scheduled every 7,500 miles. The second activity, a tune-up, is scheduled for every fourth interval or 30,000 miles. The work order for the oil change generates on each occurrence of the 7,500 mile interval and the work order for the tune-up generates on the fourth interval occurrence.

When an asset transfers to another organization, the schedule that is associated with the local PM Set is viewable within the new organization. For example, the PM Set Name, Local, is created in organization, EM1. A PM schedule is defined in EM1 for Asset Number, #1554877, and is associated with Local (Set Name). Asset Number #1554877 is transferred to another eAM-enabled organization, EM2. A planner in this new organization (EM2) can view the PM schedule that is associated with the Local PM set. However, it is view-only; it cannot be updated. The associated activity appears in blue, to indicate that the activity definition has not yet been assigned to EM2. In this scenario, to use the PM schedule, the planner must either assign the schedule's activity to the current organization, EM2, or update the schedule's PM Set Name from Local to a global set or a local PM set that was defined in EM2.

Note: You can define an unlimited number of activities, however, it is recommended that you keep it simple.

20. Optionally indicate the Interval Multiple of the Base Interval. This field works with the Repeat in Cycle field to determine how many intervals for an activity to repeat.
21. Optionally select the Repeat in Cycle value to determine if the activity interval repeats in the cycle. If you select *Yes*, the Interval Multiple field determines how many times the activity interval repeats. If you select *No*, the activity is scheduled once for each cycle.
22. Optionally enter a Tolerance In Days to indicate a minimum interval in days that suggested work orders' dates are spaced from each other.
- 23.

Optionally choose Last Service Info to enter the last service information for the current asset number and activity association. Enter Last Service start and end dates. These dates are used by the Preventive Maintenance Scheduler as a starting point for calculating the next due date for a suggested work order. After the Preventive Maintenance Scheduler suggests a work order, and that work order is completed, this date resets to the completion date. Last service information is always regarding the asset number and activity association, and independent of the association's PM schedule definition.

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

Last Service Information

Last Service Information

Asset TypeCapital

Asset NumberDTF35000

Asset GroupVehicles

Activity30000 Mile TuneUp

Delivery Errand Truck 35000

Vehicle Asset Group

30000 Mile Vehicle Maintenance

Last Service Dates

Actual Start Date04-DEC-2006 00:00:00

Scheduled Start Date04-DEC-2006 00:00:00

Actual End Date04-DEC-2006 00:00:00

Scheduled End Date04-DEC-2006 00:00:00

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

24. Within the Date Rules tab, optionally enter Effective From and To dates to specify the rule's expiration.

This tab is enabled if Rule Based is populated in the Schedule Type field.

25. Enter a Base Interval In Days. For example, if you enter the number three, a work order suggestion is created every three days.

You can optionally create variable Date Rules. For example, you would like work order suggestions created every three days in January, and every four days in February.

Date Rules Example

26. Optionally within the Meter Rules tab, select a Meter Name to indicate that Preventive Maintenance scheduling is based on a Meter Rule.

If you have previously set up a Date Rule, you can base the scheduling on a Meter Rule, as well. Meters associated with this Asset Number (See: Associating Meters with Asset Numbers, page 2-127), and with the Used in Scheduling check box selected in the meter definition, are available.

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

Date Rule

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

Meter Rule

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

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

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

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

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

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

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

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

28. You cannot enter the Last Service Reading. This field is automatically updated with the meter reading information recorded at work order completion (See: Work Order Completion, page 3-59).

Note: The Preventive Maintenance Scheduler (See: Generating Work Orders, page 4-6) automatically calculates the meter usage

rate, based on historical data, which is then used to predict the next meter due date. Refer to the example below.

29. If you populated List Dates within the Schedule Type field, select the List Dates tab to define the specific due dates that work orders should transpire.

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

30. Save your work.

Multiple Activity PM Schedule Definition - Fixed Meter Example:

Parameters for Conveyor PM Schedule

- Inspection every 100 hours of operation
- Minor PM for every 200 hours of operation
- Major PM for every 400 hours of operation
- Scheduling Option: Base Meter

The following are the steps you will perform:

1. Enter the meter name and define the scheduling starting point to the right of the meter.

The system will define default values for the following:

- Intervals per Cycle
 - Current Cycle
 - Current Interval Count
2. Enter the required activities, taking the following into consideration:
 - The activity "Inspection" is scheduled after 100 hours of operation: (Interval Multiple (1) x Base Interval (100)).
 - The activity "Minor PM" is scheduled after 200 hours of operation.
 - The activity "Major PM" is scheduled after 400 hours of operation.
 - Repeat in Cycle determines if an activity can occur multiple times during a

cycle, in this example the Inspection can occur multiple times within the cycle, the Minor PM will not be planned at the 400 hour interval.

3. Enter the meter name with a base interval of 100.
4. Save your work.

Preventive Maintenance (Schedule Definition)

Schedule Name: Conveyor-10
Set Name: MAIN
Asset Type: Capital
Asset Number: Conveyor-10
Asset Group: Conveyor
Schedule Type: Rule Based
Effective From: 28-DEC-2008
Effective To:
Lead Time In Days:
Work Order Status: Released

☒ Default
☐ Reschedule Manual Work Orders
☐ Run To Failure

Conveyor-10
Conveyor

Scheduling Options
Use: Base Meter, Conveyor Hour Meter-411, 0
to suggest Next Service: Start Date
For Multiple Rules: Use date that comes: First

Intervals Per Cycle: 4, Current Cycle: 1, Current Interval Count: 2

Activity	Interval Multiple	Repeat in Cycle	Tolerance in Days	Last	Last Date
Inspection	1	Yes		<input type="checkbox"/>	29-DEC-2008 17:38:00
Minor PM	2	No		<input checked="" type="checkbox"/>	29-DEC-2008 17:38:30
Major PM	4	No		<input type="checkbox"/>	28-DEC-2008 16:27:56

Last Service Info, Suppression

Meter Rules

Meter	Usage Rate	UOM	Effective From	Effective To	Base Interval	Cycle Interval	Last Service Reading
Conveyor Hour M	1466.8401	HR			100	400	200

Analysis of Example

The program will update Current Cycle and Current Interval Count when PM work orders are completed. For example at 210 hours of operation, two Inspection work orders and one Minor PM work order have been generated and completed. The Current Interval Count has been updated to (2). The Current Interval Count provides a count within the Current Cycle, the Current Interval Count is updated to (1) with the start of each new cycle.

The Current Cycle provides a count of the number of times a PM Set (Inspection, Minor PM and Major PM) has been completed. In this example, the Current Cycle remains (1), the Current Cycle will be updated to (2) with the completion of the PM Set and the start of a new cycle.

When forecasting work orders for the next 30 days, note that the activity "Minor PM" is not included in the forecast but the activity "Inspection" is included, the "Repeat in Cycle" controls if an activity will occur within a Cycle. For the activity "Inspection" the Repeat in Cycle is "Yes", for the activity "Minor PM" the Repeat in Cycle is "No", the "

Minor PM" will be generated once per cycle.

Select	Action	Type	Asset Number	Activity	Suggested Start Date	Exp
<input type="checkbox"/>	Create	Forecasted	Conveyor-10	Inspection	28-DEC-2008 08:30:01	
<input type="checkbox"/>	Create	Forecasted	Conveyor-10	Major PM	26-JAN-2009 21:12:06	
<input type="checkbox"/>	Create	Forecasted	Conveyor-10	Inspection	26-JAN-2009 21:12:06	
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

To define a Preventive Maintenance schedule for an asset route:

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

1. Navigate to the Preventive Maintenance Schedules window.
2. Select Asset from the Item Type list of values.
3. Select an Asset Route from the Asset Number list of values.
4. See: Preventive Maintenance Scheduling, page 2-137, for instructions on the remaining fields.

Note: You can define Date Rules and List Dates for asset routes.
You cannot define Meter Rules.

To create a suppression activity:

You can suppress other activities with the current activity in the scheduling definition. You can enter suppression activities for an asset number and activity combination.

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

Change.

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

Suppression

The screenshot shows the 'Suppression (EM1)' window. At the top, there are input fields for 'Asset Type' (set to 'Capital'), 'Asset Number' (set to 'DTF35001'), 'Asset Group' (set to 'Vehicles'), and 'Activity' (set to 'Oil Change'). To the right of these fields are corresponding labels: 'Delivery / Erand Truck 35001', 'Vehicle Asset Group', and 'Vehicle Oil Change Activity'. Below these fields is a checked checkbox. The main part of the window is a table with two columns: 'Suppressed Activity' and 'Description'. The table contains several rows of suppressed activities, including '3000 Mile Maint', '15000 Mile Maint', 'TRUCK MAINT - 3000 MILE', and '5,000 Mile Service'. The last row has a description: 'Do not perform 5,000 Mile if 30,000 Mile Service'.

Suppressed Activity	Description
3000 Mile Maint	
3000 Mile Maint	
15000 Mile Maint	
TRUCK MAINT - 3000 MILE	
TRUCK MAINT - 3000 MILE	
TRUCK MAINT - 15000 MILE	
5,000 Mile Service	Do not perform 5,000 Mile if 30,000 Mile Service

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

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

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

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

Related Topics

Entering Meter Readings, *Oracle Enterprise Asset Management User's Guide*

eAM Planning and Scheduling

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

The process is as follows:

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

This section includes the following topics:

- eAM Planning, page 2-151
- eAM Scheduling, page 2-152

eAM Planning

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

- The master schedule
- Bills of material
- Scheduled receipts
- On-hand inventory balances
- Lead times

- Order modifiers

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

The following illustration depicts how eAM uses MRP.

eAM Material Requirements Planning



This section includes the following topics:

- Defining a Master Demand Schedule Name, page 2-153
- Defining a Material Requirements Plan Name, page 2-153
- Defining Plan Options, page 2-155

eAM Scheduling

Oracle Enterprise Asset Management (eAM) uses the Oracle Manufacturing Scheduling application to schedule work orders and operations. The scheduling process calculates work order and operations scheduled duration and dates, based on the forward or backward scheduling goal (See: Routine Work Orders, *Oracle Enterprise Asset Management User's Guide*), and Work in Process parameters. The concurrent program is triggered after a work order is released (See: eAM Work Order Statuses, page 3-23). The work order is automatically moved to a Pending Scheduling status, until the concurrent program finishes scheduling. At that time, the work order is moved back to a Released status.

The Scheduler Workbench enables a planner to graphically view and reschedule single work orders and operations. It provides you with a visual display of work orders. You can interactively reschedule work orders, operations, and resources.

Important: You have the eAM Scheduler (infinite scheduler) available to you; this scheduler is not constraint-based.

Note: Oracle eAM uses the Infinite Scheduler for automatic scheduling. The Infinite Scheduler considers only the calendar and shift setups for scheduling. It does not consider shift exceptions or take the resource loads and availability into consideration. The Resource Availability

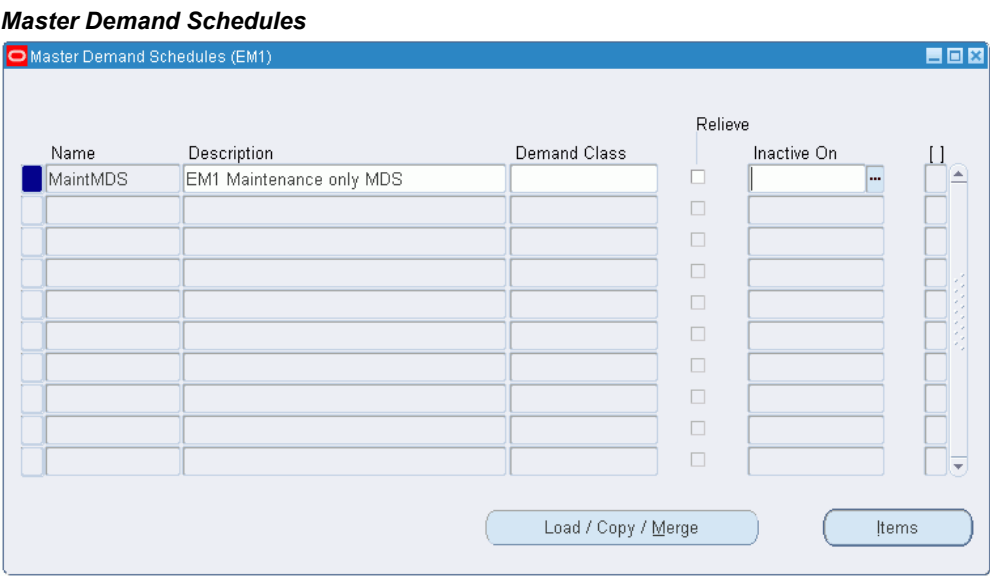
form is a view to display information on the availability and considers exceptions so that you can perform manual scheduling accordingly.

Defining a Master Demand Schedule Name

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

To define a Master Demand Schedule name:

- 1. Navigate to the MDS Names window.



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

Related Topics

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

Defining a Material Requirements Plan Name

The Master Demand Schedule names trigger the material requirements planning

process. A master demand schedule name must be created to perform material requirement planning for maintenance work orders.

To define a MRP name:

1. Navigate to the MRP Names window.

MRP Names

Name	Description	Feedback	Production	Inactive On
MaintMRP	Maintenance Only MRP	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	

Launch Options

2. Enter an alphanumeric Name to identify a unique material requirements.
3. Optionally enter a Description of the MRP name.
4. Optionally select the Feedback check box to monitor the quantity of the planned order that has been implemented as maintenance work orders, purchase orders, or purchase requisitions.
This provides the planner visibility of the plan's status at any point in time.
5. Optionally select the Production check box to enable a plan to automatically release planned orders.
6. Optionally enter an Inactive On date on which to disable the plan.
As of this date, you can no longer update the plan or use the plan name in the planning process. You can still view information and run reports for disabled names.
7. Save your work.

Related Topics

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

See: Auto-release Planned Orders, *Oracle Master Demand Scheduling/MRP and Oracle Supply Chain Planning User's Guide*

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

Defining Plan Options

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

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

To enter plan options:

1. Navigate to the Plan Options window.

Plan Options

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

All: For a master production schedule (MPS) plan, overwrite all entries and regenerate new MPS entries based on the source master demand schedule.

For an MRP, overwrite all MRP firm planned orders for MRP items. This option is displayed when you generate a plan for the first time.

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

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

6. Select the Append Planned Orders check box to append new planned orders.
For information regarding situations that cause new planned orders to append, see: *Reviewing or Adding Plan Options, Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide.*

7. Select the Net WIP check box to indicate that the planning process considers standard discrete jobs, nonstandard discrete jobs, or repetitive schedules when planning items during the last plan execution.
8. Select Net Reservations to indicate that the planning process considers stock designated for a specific work order when planning the items during the last execution of the plan.
9. Select Net Purchases to indicate that the planning process considers approved purchase requisitions when planning the items during the last execution of the plan.
10. Select Plan Capacity to indicate whether the planning process calculates safety stock for each item during the last plan execution.
 - Specify the Bill of Resource (for MPS plans) and optionally a Simulation Set.
See: Capacity Modifications and Simulation, *Oracle Capacity User's Guide* and Overview of Bills of Resources, *Oracle Capacity User's Guide*.
11. Select Pegging to calculate graphical pegging information.

The planning process then traces supply information for an item to its corresponding end demand details, which you then can view in a graphical display. See: Overview of Graphical Pegging, *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*.

 - If you are working in a project environment, set a Reservation Level and, Optionally a Hard Pegging Level. See: Reviewing or Adding Project MRP Plan Options, *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*.
12. Select a Material Scheduling Method:
 - *Operation Start Date*: Schedule material to arrive in Inventory for availability on the start date of a specific operation.
 - *Order Start Date*: Schedule material to arrive in Inventory for availability on maintenance Work Order start date.
13. Specify which Planned Items you want included.
 - *All planned items*: Include all planned items in the planning process.

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

- *Demand schedule items only*
- *Supply schedule items only*
- *Demand and supply schedule items*

14. Save your work.

Related Topics

Launching the Planning Process, page 5-3

Viewing Suggested Demand, *Oracle Enterprise Asset Management User's Guide*

Reviewing or Adding Supply Chain Plan Options, *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*

Quality Integration Setup

A maintenance work order goes through various steps in its lifecycle (See: eAM Work Order Statuses, page 3-23). One of the steps in the lifecycle is Completion. When completing a maintenance work order, if the Asset Number has associated, mandatory quality collection plans, you need to enter quality results for the work order. A list of quality collection plans associated with the completion transaction appears during the completion process.

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

Quality Setup tasks for Enterprise Asset Management include the following:

- Creating Collection Elements, page 2-158
- Creating eAM Quality Collection Plans, page 2-162
- Creating eAM Quality Collection Plans for a Supplier, page 2-166

Creating Collection Elements

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

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

To define collection elements:

1. Navigate to the Collection Elements window.

Collection Elements

The screenshot shows the 'Collection Elements (EM1)' window. At the top, the 'Collection Element' is 'Asset Serial Number' and the 'Element Type' is 'Reference Information'. The 'Enabled' checkbox is checked. Below this, the 'Label' section has a 'Prompt' of 'Asset Serial Number' and an empty 'Hint' field. The 'Data' section shows 'Data Type' as 'Character', 'Reporting Length' as '15', and 'Decimal Precision' as an empty field. The 'UOM' field is empty. The 'Default Value' field is empty. The 'SQL Validation Statement' field contains the text: 'SELECT serial_number, descriptive_text from (SELECT distinct msn. serial_number, msn.descriptive_text FROM mtl_serial_numbers msn,'. At the bottom, there are four buttons: 'Sequence', 'Spec Limits', 'Values', and 'Actions'.

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

Note: The following Collection Elements are included with Oracle Enterprise Asset Management; you do not need to define them: Asset Group, Asset Num, Asset Serial Number (the asset's

Inventory Serial Number), Activity, Maintenance Work Order, Maintenance Operation Sequence.

2. Select the Collection Element name.

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

3. Select the Enabled check box to enable the collection element. You can add enabled collection elements to collection plans.

4. Select its collection Element Type. See: Collection Element Types, *Oracle Quality User's Guide*.

5. Enter text for the data entry Prompt.

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

6. Optionally enter a Hint.

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

7. Select the collection element's Data Type.

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

Important: Oracle eAM Self-Service Applications do not support the use of sequence data type collection elements.

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

9. Enter the Reporting Length.

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

Results window.

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

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

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

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

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

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

13. Optionally enter the SQL Validation Statement.

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

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

```
SELECT machine_number, machine_description

FROM machine_numbers

WHERE NVL(disable_date, SYSDATE+1) > SYSDATE

AND organization_id=:parameter.org_id

ORDER BY custom_machine_number
```

Note: To constrain the SQL Statement to the current organization,

you can use the variable, ':parameter.org_id' for the current organization id. To constrain the SQL Statement to the current user's id, you can use the variable, ':parameter.user_id' for the current user's id.

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

Related Topics

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

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

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

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

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

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

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

Creating eAM Quality Collection Plans

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

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

You can attach illustrative or explanatory files to collection plans, in the form of text, images, word processing documents, spreadsheets, or video. Attachments are used to document instructions and corrective action procedures. They are viewed by operations personnel during quality data collection. See: Attachments for Collection Plans, Specifications, and Result Lines, *Oracle Quality User's Guide* and Viewing Attachments Associated with Quality Results, *Oracle Quality User's Guide*.

To review a collection plan:

1. Navigate to the Collection Plans window.

Collection Plans

Name	Seq	Prompt	Mandatory	Enabled	Read-Only	Displayed
Asset Group	10	Asset Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Asset Serial Number	20	Asset Serial Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Maintenance WorkOrder	30	Work Order	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
DriverFront Tread Depth mm	40	DSF Tread Depth mm	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
DriverRear Tread Depth mm	50	DSR Tread Depth mm	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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

2. Select a valid Collection Plan.

To create a new collection plan, See: Creating Collection Plans, *Oracle Quality User's Guide*.

3. Choose Transactions.

You can create collection plans that are specifically used to collect quality data during transactions performed in other applications (See: Collection Plans for Transactions, *Oracle Quality User's Guide*).

Collection Transactions

Transaction Description	Workbench Layout	Mandatory	Background	Enabled
EAM Work Order Completions (Oracle Enterprise Asset Manag	Vehicles	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
EAM Asset Query (Oracle Enterprise Asset Management)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EAM Asset Check In Transaction (Oracle Enterprise Asset Mar		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EAM Asset Check Out Transaction (Oracle Enterprise Asset M		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Trigger Name	Condition	From	To
Asset Group	equals (=)	Vehicles	
Asset Serial Number	equals (=)	DTF35000	
Asset Activity	equals (=)	Wheel Replacement	

4. Select EAM Work Order Completion or Asset Query from the Transaction Description list of values.
 - *EAM Asset Query*: Enables quality results collection for an asset, independent from any transaction on the asset.
 - *EAM Operation Completions*: Enables quality results collection for a work order's operation pertaining to operation completion or during operation completion (See: Operation Completion, page 3-57).
 - *EAM Work Order Completions*: Enables quality results collection for a work order pertaining to work order completion or during work order completion (See: Work Order Completion, page 3-59).
 - *EAM Asset Check In Transaction*: Enables you to record quality information, describing the condition of the asset, during a Check In procedure (See: Asset Tracking, page 21-8).
 - *EAM Asset Check Out Transaction*: Enables you to record quality information, describing the condition of the asset, during a Check Out procedure (See: Asset Tracking, page 21-8).
5. Optionally indicate whether this collection plan requires the entry of quality results at work order completion. If you select the Mandatory check box, you must save at least one quality data record before saving the work order completion transaction.

Note: eAM supports Quality collection during operation

completion transactions, as well as Standalone Asset Query. Valid Transaction Description values are EAM Operation Completions and EAM Asset Query, respectively.

6. Optionally select the Background check box.

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

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

Without invoking the Enter Quality Results window, background data collection is initiated when you save the work order completion transaction.

The system then finds, selects, and initiates the appropriate collection plan or plans.

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

Several collection plans can collect data in the background during the same transaction.

When this is the case, the results for context elements on all of these collection plans are automatically saved when the parent transaction is saved.

7. Select the Enabled check box.

8. Optionally select a Trigger Name.

Valid trigger values are Activity, Asset Group, Asset Number, Asset Serial Number, and Maintenance Work Order. Triggers are restrictions that you define for this collection plan. In the above example, work orders for the JP1 asset require the entry of quality results for the collection plan.

Note: If a trigger is not defined, then all work orders will require quality collection results; the collection plan is applicable to all assets.

9. If you selected a Trigger Name, select a Condition.

10. Select a From value.

For example, if you selected Asset Group as the Trigger Name, Asset Groups are available. Optionally you can enter a To value to create a range condition. For example, if the trigger is work order, you might enter a range of work order numbers.

11. Save your work.

Related Topics

Adding Collection Plan Attachments, page 13-3

Triggering a Work Request, page 13-4

Collection Plans for Transactions, *Oracle Quality User's Guide*

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

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

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

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

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

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

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

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

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

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

Creating eAM Quality Collection Plans for a Supplier

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

To create and eAM quality collection plan for a supplier:

1. Navigate to the Collection Plans window.

Collection Plans

The screenshot shows the 'Collection Plans (EM1)' window. At the top, the 'Collection Plan' is 'FORK LIFT FAILURE ANALYSIS'. The 'Description' is 'Fork Lift Failure Analysis'. The 'Effective' date range is '13-NOV-2002' to '01-DEC-2006'. The 'Plan Type' is 'Failure', and the 'Failure Analysis' checkbox is checked. There is an unchecked checkbox for 'Display Multiple Rows in Workbench'. The 'Record Option' is a dropdown menu. There are buttons for 'Views...', 'Copy Elements...', 'Transactions', 'Specifications...', 'Enable Deferred Signature', 'Values', and 'Actions'.

Quality Collection Elements

Name	Seq	Prompt	Mandatory	Enabled	Read-Only	Displayed	
Fork Lift Failure	10	Failure	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Fork Lift Failure Cause	20	Cause	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Fork Lift Failure Remedy	30	Remedy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Fork Lift Failure Comment	40	Comment	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Asset Serial Number	50	Asset Serial Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

2. Select a valid Collection Plan.

To create a new collection plan, See: Creating Collection Plans, *Oracle Quality User's Guide*.

3. Choose Transactions.

You can create collection plans that are specifically used to collect quality data during transactions performed in other applications (See: Collection Plans for Transactions, *Oracle Quality User's Guide*).

Collection Transactions

Transaction Description	Workbench Layout	Mandatory	Background	Enabled
EAM Asset Check In Transaction (Oracle Enterprise Asset M...		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EAM Asset Check Out Transaction (Oracle Enterprise Asset M...		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Trigger Name	Condition	From	To

4. Select EAM Operation Completions from the Transaction Description list of values.
5. Optionally select the Mandatory check box to indicate that this collection plan requires the entry of quality results at Operation completion.

If this check box is selected, the supplier must enter quality data before completing the Outside Services operation.
6. Save your work.

Related Topics

Creating eAM Quality Collection Plans, page 2-162

Adding Collection Plan Attachments, page 13-3

Triggering a Work Request, page 13-4

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

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

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

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

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

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

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

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

Outside Processing Integration Setup

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

Outside Service Processing provides the functionality to create items that are contractor services, such as landscaping, include these items on a work order, and execute the related purchasing transactions as the work order is released. By creating a contract service as an Outside Service Processing item, the purchasing requisition is created when the work order is Released. The additional purchasing transaction, including the creation of the purchase order, the approval, and invoicing process, are then managed by Purchasing. This optional process ensures that the actual charges are applied to the work order. The supplier accesses the purchase order and maintenance work order via iSupplier Portal. Within iSupplier Portal, the supplier can view all open and closed outside service operations and their associated maintenance work orders. The supplier can enter mandatory collection plan results, before completing the outside operation (See: Oracle iSupplier Portal, *Oracle iSupplier Portal User's Guide*).

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

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

- Setting Up Outside Service Processing, page 2-169
- Setting Up Direct Items, page 2-178

Setting Up Outside Service Processing

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

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

To set up purchasing information:

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

The screenshot shows a web application window titled "Financials Options (Enterprise Asset Management, Vision Operations)". The "Operating Unit" is set to "Vision Operations". The "Supplier - Purchasing" tab is selected, showing a form with the following fields:

- ☐ RFQ Only Site
- Ship-To Location: M1- Seattle Mfg
- Bill-To Location: V1- New York City
- Inventory Organization: V1 - Vision Operations (highlighted in yellow)
- Ship Via:
- FOB: Vendor's responsibility ceases upon transfer to c:
- Freight Terms: Due

3. The options you define in this region, except for Inventory organization, are used as default values for the Purchasing region of the Suppliers window (See: Suppliers, *Oracle Payables User's Guide*).

The supplier values default to new supplier sites for the supplier, which default to new purchasing documents for the supplier site.

4. Select Ship-To and Bill-To Locations.

These are the names of the ship-to/bill-to location for the system default values. If the name you want is not available, use the Location window to select a new location (See: Setting Up Locations, *Using Oracle HRMS - The Fundamentals*).

5. Select an Inventory Organization.

You can associate each of your purchasing operating units with one inventory item master organization. Your eAM Organization (See: Enabling Organizations for Enterprise Asset Management, page 2-7) should point to this item master. When you associate your purchasing operating unit with an inventory organization, items you define in this organization become available in Purchasing. You can choose an inventory organization that uses the same set of books as your Purchasing operating unit. Do not change the inventory organization after you have already assigned on to Purchasing.

6. Optionally select a Ship Via code.

This is the freight carrier you use with suppliers. If the type of freight carrier you want is not available, use the Freight Carriers window to define a new shipping method. The value you enter here is the value in the Description field of the Freight Carriers window in Purchasing.

7. Select a FOB.

If the type of FOB you want is not available, use the Oracle Purchasing Lookups window to define a new FOB.

8. Select a Freight Terms code.

The freight terms for a supplier identify whether you or your supplier pays for freight charges on goods you receive. You can define new freight terms in the Oracle Purchasing Lookups window.

9. Save your work.

To set up outside services as items:

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

1. Navigate to the Master Item window.

Master Item

Master Item (V1)

Organization: V1 Vision Operations

Item: TM Rebuild

Description: Truck Motor Rebuild Services

Display Attributes: Master (selected), Org, All

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

Unit of Measure

Primary: Each

Tracking: Primary

Pricing: Primary

Secondary:

Defaulting:

Deviation Factor +: 0

Deviation Factor -: 0

Conversions

Standard (radio button)

Item specific (radio button)

Both (radio button, selected)

User Item Type: Outside Processing

Item Status: Active

Long Description

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

13. Save your work.
14. Select the Organization Assignment tab on the left side of the window, then assign this item to the eAM organization.
15. Save your work.

To link outside service items to resources:

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

1. Navigate to the Resources page.

Resources

Resources (EM1)

Resource **TMREBUILD** Inactive On

Description **Truck Motor Rebuild - Outside Services**

Type **Miscellaneous** UOM **Ea**

Charge Type **PO Move** Basis **Item**

Expenditure Type

Supply Subinventory Supply Locator

☒ Outside Processing

Item **TM Rebuild**

Truck Motor Rebuild Services

☒ Costed

Activity ☐ Standard Rate

Absorption Account **01-000-2215-0000-000**

Variance Account **01-520-5210-0000-000**

Billing

Item

Skills

Competence

Skill Level

Qualification

☐ Batchable

Minimum Batch Capacity

Maximum Batch Capacity

Batch Capacity UOM

Batching Window

UOM

2. Select a unit of measure (UOM).
This value is the default unit of measure for all transactions, for the current resource.
3. Verify that the Enabled check box is enabled for outside processing.
4. Enter the outside services Item that was entered in Inventory and associate it with

the eAM resource.

5. Select the Costed check box to include this outside resource in your work order cost.

When you define a resource with a charge type of PO Receipt, Cost Management automatically defaults Outside Processing as the cost element.

6. Enter an Absorption Account.

You must define an absorption account for each outside resource. The absorption account defaults from the organization's receiving account, which is debited when an outside processing item is received and is subsequently credited when the item is delivered to eAM. The debit goes to the outside processing account associated with the accounting class of the work order when the item is delivered to eAM.

7. Optionally enter a Variance Account.

You must define a purchase price variance account for each outside resource you define. This account defaults from the organization's purchase price variance account. If you select the Standard Rate check box while performing the next step, the Variance Account is mandatory.

8. Optionally select the Standard Rate check box to charge the standard, non-purchase order amount to the work order.

Clear the Standard Rate check box to charge the work order with the actual purchase order amount.

1. If you selected the Standard Rate check box, choose Rates to enter your standard rates.

Resource Costs

Cost Type	Description	Resource Unit Cost
Frozen	Frozen Standard Cost Type	1.50000
Pending	Pending Standard Cost Type	1.50000

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

To link the outside service resource to a department:

1. Navigate to the Departments window.

Departments

Departments (EM1)

Department	F-Maint
Description	Fleet Services Maintenance
Cost Category	Maintenance
Class	Maint Dept
Location	EM1 - Seattle
Project Expenditure Org	Seattle Manufacturing Maintenance Organization
Inactive On	

[]

Rates Resources

2. Select the Department to associate with the outside service resource.

3. Select a Cost Category for this department.

If this is left blank, then the costs related to this department are charged, based on the eAM parameter settings (See: Defining eAM Parameters, page 2-11).

4. Select a valid Location. This is mandatory.

5. Choose Resources.

Department Resources

Resources (EM1) - F-Maint

Owned

Main Planning

Resource	Description	Available 24 Hours	Share	UOM	Units	Check CTP	Group	Schedule by Instance
ATTK	Automotive Tool	<input type="checkbox"/>	<input type="checkbox"/>	HR	3	<input type="checkbox"/>		<input checked="" type="checkbox"/>
Mechanic1	Fleet Services Me	<input type="checkbox"/>	<input type="checkbox"/>	HR	3	<input type="checkbox"/>		<input type="checkbox"/>
TMREBUILD	Truck Motor Rebu	<input type="checkbox"/>	<input type="checkbox"/>	Ea	1	<input type="checkbox"/>		<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		<input type="checkbox"/>

Instances Tolerance Fences Shifts

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

6. Select the outside service Resource.
7. Optionally indicate whether this resource is Available 24 Hours a day.
You cannot assign shifts to a resource that is available 24 hours a day.
8. Optionally indicate whether this department can share this resource and capacity with other departments.
9. Enter the number of capacity Units (resource units) available for this department.
10. Save your work.

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

To define WIP parameters:

1. Navigate to the Work in Process Parameters page.

Work in Process Parameters

Work in Process Parameters (007)

Discrete Repetitive Move Tran... Backflush ... Intraoperati... Outside Pr... Scheduling Mobile Serial Other

Component ATP Rule LSCRULE1

Default Overcompletion Tolerance % 10

Default Pick Slip Grouping Rule Cluster Picking

☒ Default Plan Tasks

2. Select the Outside Processing tab.
3. Select a value for Requisition Creation Time.
 - *At Job/Schedule Release* - This enables automatic creation of a purchase order requisition, for contractor services, when the work order is Released.
 - *Manual* - Choose Manual to manually create requisitions.
With this selection, requisitions are not automatically created.
 - *At Operation* - Oracle recommends that you do not select At Operation.
Within eAM, At Operation is equivalent to selecting Manual.
4. Save your work.

Related Topics

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

Setting Up Direct Items

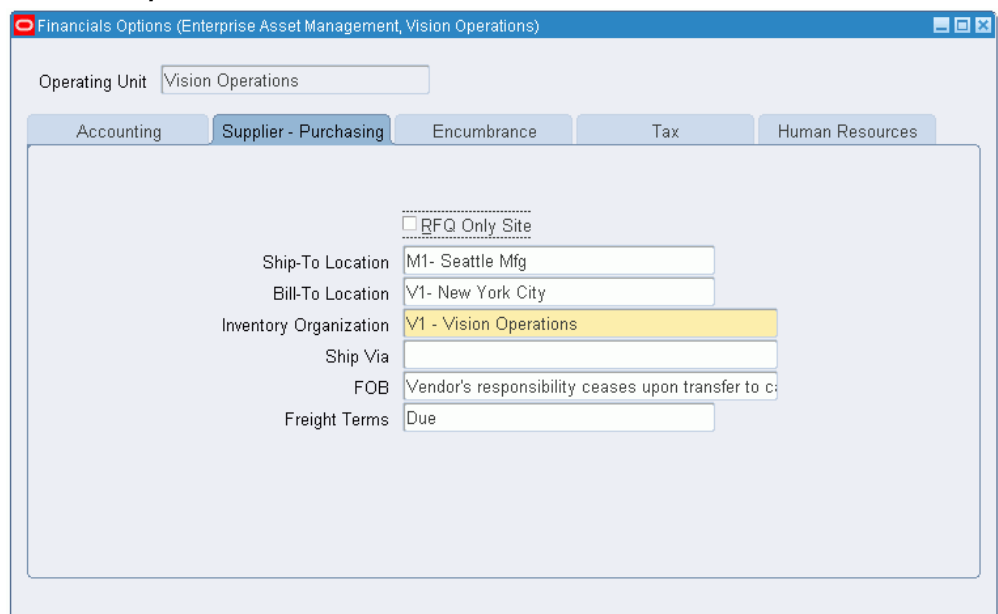
You can add direct items to a maintenance BOM (See: Setting Up Maintenance Bills of Material, page 2-101). When the maintenance BOM is associated with a work order, you

can add more direct items to its material requirements list before it is released (See: Defining Inventory Material Requirements, page 3-36). The system automatically creates requisitions and purchase orders (if the Auto Request Material check box is selected within the maintenance BOM), for the associated direct items, when the work order is released for execution. The supplier can view the maintenance work order detail information within Work Order Details page through the iSupplier Portal.

To set up purchasing information:

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

Financials Options



Financials Options (Enterprise Asset Management, Vision Operations)

Operating Unit: Vision Operations

Accounting | **Supplier - Purchasing** | Encumbrance | Tax | Human Resources

☐ RFQ Only Site

Ship-To Location: M1- Seattle Mfg

Bill-To Location: V1- New York City

Inventory Organization: **V1 - Vision Operations**

Ship Via:

FOB: Vendor's responsibility ceases upon transfer to c

Freight Terms: Due

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

The supplier values default to new supplier sites for the supplier, which default to new purchasing documents for the supplier site.

3. Select Ship-To and Bill-To Locations.

These are the names of the ship-to and bill-to location for the system default values. If the name you want is not available, use the Location window to select a new location (See: Setting Up Locations, *Using Oracle HRMS - The Fundamentals*).

4. Select an Inventory Organization.

You can associate each of your purchasing operating units with one inventory item master organization. Your eAM Organization (See: Enabling Organizations for Enterprise Asset Management, page 2-7) should point to this item master. When you associate your purchasing operating unit with an inventory organization, items you define in this organization become available in Purchasing. You can choose an inventory organization that uses the same set of books as your Purchasing operating unit. Do not change the inventory organization after you have already assigned it within Purchasing.

5. Optionally select a Ship Via code.

This is the freight carrier you use with suppliers. If the type of freight carrier you want is not available, use the Freight Carriers window to define a new shipping method. This value is used as the default value for the Description field in the Freight Carriers window in Purchasing.

6. Select a FOB.

If the type of FOB you want is not available, use the Oracle Purchasing Lookups window to define a new FOB.

7. Select a Freight Terms code.

The freight terms for a supplier identify whether you or your supplier pays for freight charges on goods you receive. You can define new freight terms in the Oracle Purchasing Lookups window.

8. Save your work.

Related Topics

Non-Stock Direct Item Setup, page 2-119

Setting Up Asset Bills of Material, page 2-86

Setting Up Maintenance Bills of Material, page 2-101

Defining Rebuildable Bills of Material, page 2-118

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

iSupplier Portal User's Guide

Cost Management Integration Setup

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

All work is captured and retained by Enterprise Asset Management. You can reference

work that has been completed to review operations, resources, and costs. This information can help you understand the scope of work and the process by which it is completed.

This section includes the following topics:

- eAM Costing Methods and Mappings, page 2-181
- Setting Up Cost Categories, page 2-183
- Setting Up Purchase Order Category Associations for Direct Items, page 2-185
- Setting Up eAM Cost Management, page 2-186
- Setting Up Zero Cost Rebuild Item Issue, page 2-188

eAM Costing Methods and Mappings

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

- Material
- Material Overhead
- Resource
- Resource Overhead
- Outside Processing

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

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

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

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

Material charges are classified as Material cost elements. Resource charge of type

person is classified as a Labor cost element. Resource charge of type machine is classified as Equipment cost element. All other resource types are classified by the default cost element in the eAM Parameters (See: Defining eAM Parameters, page 2-11).

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

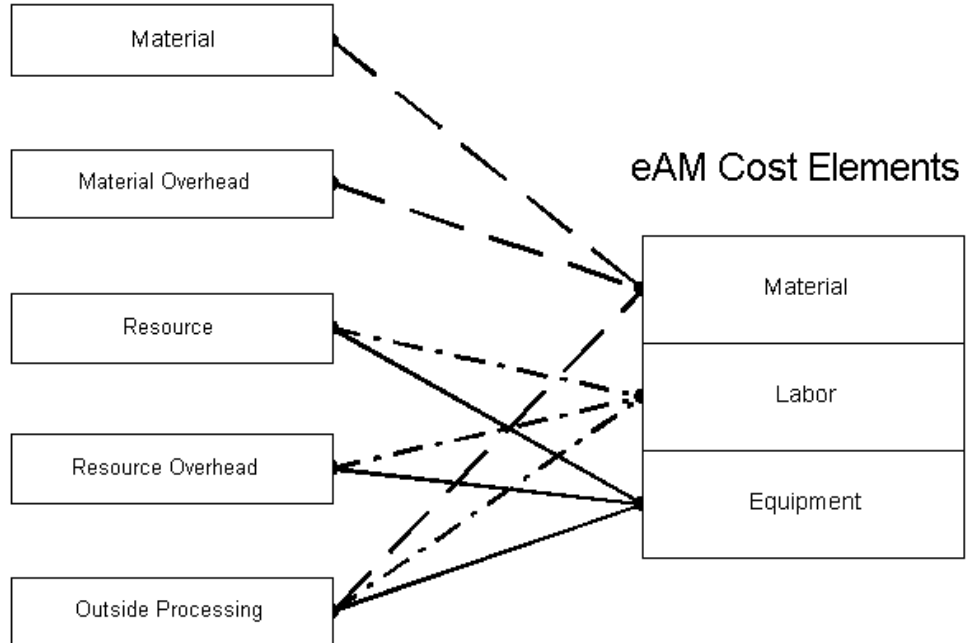
eAM Mappings

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

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

Cost Element Mappings

Cost Management Cost Elements



Setting Up Cost Categories

Cost category codes are used as the default for departments that do not have a cost category defined. Department costs are then posted to the appropriate cost elements. Values include Maintenance, Operations, Contract, and any other values that you might have added within this extensible lookup table. See: Overview of eAM Cost Management, *Oracle Enterprise Asset Management User's Guide*.

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

To define additional cost categories:

1. Navigate to the Oracle Manufacturing Lookups window.

Cost Category Lookups

Manufacturing Lookups

Type: BOM_EAM_COST_CATEGORY
Meaning: BOM_EAM_COST_CATEGORY
Application: Bills of Material
Description: Enterprise Asset Management Cost Category

Access Level
☐ User
☒ Extensible
☐ System

Code	Meaning	Description	Tag	Effective Dates		Enabled
				From	To	
1	Maintenance	Maintenance				<input checked="" type="checkbox"/>
2	Operations	Operations				<input checked="" type="checkbox"/>
3	Contract	Contract				<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

2. Select BOM_EAM_COST_CATEGORY from the Type list of values.

3. Enter a numeric value in the Code field.

Oracle recommends that you enter values in increments of 10, enabling you to easily add codes later.

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

4. Enter the Meaning of the code, for example, High.

5. Enter a Description for the code.

6. Optionally enter a Tag to categorize lookup values. This field is informational.

7. The Effective From Date defaults as the system date, but you can update this.
Optionally enter a Effective To Date to indicate an expiration date for the code.

8. Select the Enabled check box to enable this code for Enterprise Asset Management.

9. Save your work.

Setting Up Purchase Order Category Associations for Direct Items

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

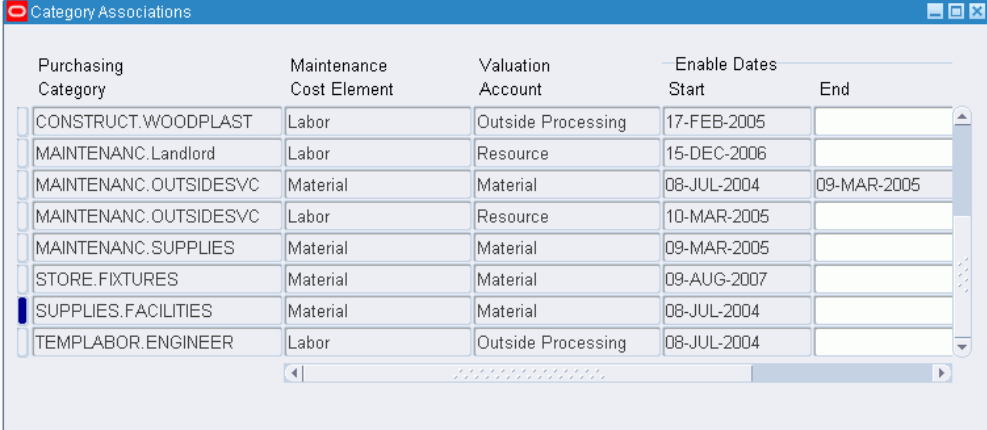
Direct items may be Non-Stock or Description-based. Non-Stock Direct Items are defined within Oracle Inventory (See: Non-Stock Direct Item Setup, *Oracle Enterprise Asset Management User's Guide*), and the Purchasing Category for this type of direct item defaults from the Purchasing category set's item assignments.

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

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

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

Category Associations



Purchasing Category	Maintenance Cost Element	Valuation Account	Enable Dates Start	End
CONSTRUCT.WOODPLAST	Labor	Outside Processing	17-FEB-2005	
MAINTENANC.Landlord	Labor	Resource	15-DEC-2006	
MAINTENANC.OUTSIDESVC	Material	Material	08-JUL-2004	09-MAR-2005
MAINTENANC.OUTSIDESVC	Labor	Resource	10-MAR-2005	
MAINTENANC.SUPPLIES	Material	Material	09-MAR-2005	
STORE.FIXTURES	Material	Material	09-AUG-2007	
SUPPLIES.FACILITIES	Material	Material	08-JUL-2004	
TEMLABOR.ENGINEER	Labor	Outside Processing	08-JUL-2004	

3. Select a Purchasing Category.
See: Defining Category Sets, *Oracle Inventory User's Guide*.
4. Select a Maintenance Cost Element.
5. Select a Valuation Account.

If the Maintenance Cost Element is Material, you can choose the Material Valuation Account. If the Maintenance Cost Element is Labor or Equipment, you can select the Resource or Outside Processing Valuation Accounts.

6. Select a Start Date.

7. Optionally select an End Date.

A Purchasing Category may have one existing association at a time. If you want to assign a different association for a category, select an End Date.

8. Select a Direct Item Expenditure Type if your organization uses Oracle Projects.

This is a required step.

9. Save your work.

Related Topics

Defining Items, *Oracle Inventory User's Guide*

Defining Categories, *Oracle Inventory User's Guide*

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

Setting Up eAM Cost Management

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

1. Define a default cost element.
2. Define a default cost category.

Follow these steps to define these key setups.

1. Define a default cost element (Material, Labor, or Equipment) when setting up the eAM parameters. See: Defining eAM Parameters, page 2-11. This is used when no predefined mapping exists to the cost elements in eAM. For example, department overheads are not linked to a particular eAM cost element for cost analysis. Therefore, the default cost element carries the cost for analysis. Also, outside processing types of Currency, Amount, and Miscellaneous are not linked to a particular eAM cost element. When one of these types is used in outside processing, the costs are allocated to the default cost element (See: eAM Costing Methods and Mappings, page 2-181).
2. Define a default cost category when setting up the eAM Parameters. This defaulted

cost category is used if there is no cost category defined for the departments.

To define a default cost element and cost category:

1. Navigate to the Enterprise Asset Management Parameters page.

Enterprise Asset Management Parameters

Enterprise Asset Management Parameters (EM1)

Asset Number Defaults

☒ Asset Number Auto Generation

Event Log Controls

Cost Defaults

Cost Element: Equipment

Cost Category: Maintenance

Preventive Maintenance

☐ Implement From Horizon Start Date

Work Request

☒ Auto Approve

☒ Extended Log

☐ Default Asset from Employee Location

☒ Asset Number Mandatory

Work Order Defaults

WIP Accounting Class: MaintWAC

Maintenance Wip Accounting Class

Work Order Prefix: WO

Default Department

☐ Enable Workflow for Workorders

☒ Invoice Billable Items Only

☒ Enable Material Issue Requests

☒ Auto Firm on Release

☒ Value Rebuildables At Zero Cost

☐ Auto Firm On Create

Account Defaults

Maintenance Offset: 01-520-7530-0000-000

2. In the Cost Defaults region, select an eAM Cost Element to indicate how to capture cost overheads, and any miscellaneous resource costs.

Values are Equipment, Labor, and Material.

3. Select a Cost Category to use as the default for departments that do not have a cost category defined.

Department costs are then posted to the appropriate cost classification.

To define a cost category by department:

1. Navigate to the Departments page.

Departments

The screenshot shows a web form titled "Departments (EM1)". The form has the following fields and values:

Field	Value
Department	F-Maint
Description	Fleet Services Maintenance
Cost Category	Maintenance
Class	Maint Dept
Location	EM1 - Seattle
Project Expenditure Org	
Inactive On	

At the bottom right of the form, there are two buttons: "Rates" and "Resources".

2. Select a Cost Category.

Note: It is not required to provide a cost category for a department (crew). However, if you do not provide a cost category for a department (crew), costs for that crew are allocated to the defaulted cost category specified in the eAM parameters (See: Defining eAM Parameters, page 2-11). Each time costs for that element are charged to a Work Order, this default cost category is used for reporting and analysis.

Related Topics

Defining Departments and Resources, page 2-17

eAM Cost Estimation, page 6-2

Viewing Cost Information, page 6-4

Transferring Invoice Variances, page 6-17

Setting Up Zero Cost Rebuild Item Issue

Oracle Enterprise Asset Management work order costing supports both WIP component issues and the return of rebuildables from and to expense subinventories at their current or zero cost. You can issue rebuildable components from the Expense Subinventory to the maintenance work order at zero cost and/or return rebuildable

components to the Expense Subinventory at zero cost.

Enterprise Asset Management parameters determine organization level defaults for individual transactions. Set up work order default information to establish how rebuildables are valued in the current organization.

To set up zero cost rebuild item issue:

1. Navigate to the Enterprise Asset Management Parameters page.

Enterprise Asset Management Parameters

Enterprise Asset Management Parameters (EM1)

Asset Number Defaults

☒ Asset Number Auto Generation

Event Log Controls

Cost Defaults

Cost Element **Equipment** Cost Category **Maintenance**

Preventive Maintenance

☐ Implement From Horizon Start Date

Work Request

☒ Auto Approve ☒ Extended Log

☐ Default Asset from Employee Location ☒ Asset Number Mandatory

Work Order Defaults

WIP Accounting Class **MaintWAC** Maintenance Wip Accounting Class

Work Order Prefix **WO**

Default Department

☐ Enable Workflow for Workorders ☒ Invoice Billable Items Only

☒ Enable Material Issue Requests ☒ Auto Firm on Release

☒ Value Rebuildables At Zero Cost ☐ Auto Firm On Create

Account Defaults

Maintenance Offset **01-520-7530-0000-000**

2. Within the Work Order Defaults region, select the Value Rebuildables at Zero Cost to indicate that rebuildable components charge at zero cost.
3. Save your work.

Related Topics

Defining eAM Parameters, page 2-11

Process and Discrete Manufacturing Integration Setup

Oracle Enterprise Asset Management integrates with Process and Discrete Manufacturing, enabling your maintenance environment to identify eAM asset relationships with production equipment. This feature associates assets to the production equipment located in a discrete or process manufacturing organization. After establishing, you can view the resource usage (maintenance work orders, batches, or FPOs) originating from production, associated with a maintainable asset. In discrete manufacturing organizations, you can view maintenance equipment downtime requirements and their affect on capacity during production planning and scheduling.

This section includes the following topics:

- Organization Setup, page 2-190
- Associating Assets with Production Equipment, page 2-191

Organization Setup

To integrate eAM with process or discrete manufacturing, determine which process or discrete manufacturing organization is associated with your eAM organization.

Process Manufacturing organizations are never the same as eAM organizations; they are mutually exclusive. Although it is possible, Oracle does not recommend commingling eAM and discrete manufacturing organizations. They should have separate organization codes.

To associate a process or discrete manufacturing organization with an eAM organization:

1. Navigate to the Organization Parameters page, and select a valid process enabled or discrete manufacturing organization from the Organization Code list of values.

Organization Parameters

Organization Parameters (EM1)

Inventory Parameters | Costing Information | Revision, Lot, Serial And LPN | ATP, Pick, Item-Sourcing

Organization Code: EM1

Item Master Organization: Vision Operations

Calendar: Vision01

Demand Class:

Move Order Timeout Period: Days

Move Order Timeout Action: Approve automatically

Locator Control: Determined at Subinventory level

Default On-Hand Material Status:

☐ Enforce Locator Alias Uniqueness

☒ Quality Skipping Inspection Control

☒ Allow Negative Balances

☐ Auto Delete Allocations at Move Order Cancel

Enabled Products & Features

☐ Manufacturing Partner Organization

☐ Process Manufacturing Enabled

☐ WQS Enabled

☒ EAM Enabled

☐ WMS Enabled

☐ LCM Enabled

EAM Organization: EM1 Seattle Maintenance

Capacity

Load Weight: UOM:

Volume: UOM:

2. Enter an EAM organization to associate with the current organization code.
This eAM organization is now linked to the organization code you selected.

Related Topics

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

Associating Assets with Production Equipment

You can link an asset to production equipment defined within a process or discrete organization, as well as asset equipment defined within an eAM organization. This relationship is defined while defining or updating assets within eAM.

To associate an asset with production equipment:

1. Navigate to the Define Asset Number page.

Define Asset Number

The screenshot shows the 'Define Asset Number' form with the following fields and values:

- Asset Number: MDE-PO-100
- Asset Group: MDE-POS-ASSET
- Asset Serial Number: MDE-PO-100
- Asset Category: (empty)
- Organization: EM1
- Asset Type: Capital
- Owning Department: W-Maint
- Criticality: (empty)
- WIP Accounting Class: (empty)
- Area: (empty)
- Maintainable: ☒
- Active: ☒
- Operation Log Enabled: ☐
- Warranty Expiration: (empty)
- Checked Out: ☐
- Parent Asset Type: Capital
- Parent Asset Number: (empty)
- Parent Asset Group: (empty)

At the bottom, there are buttons for Attributes, Resource Usage, Meters, and Associate Activity.

2. Select an Asset Number that you want to link to production equipment.

3. In the Production tab, select a valid Production Organization.

The list of values displays those process and discrete organizations that have the current eAM organization selected as their maintenance organization (See: Organization Setup, page 2-190).

4. Select an Equipment Item.

This is mandatory if you populated the Production Organization field. Items that were defined with an equipment template (See: Item Templates, *Oracle Inventory User's Guide*), or with the Equipment item attribute enabled (See: Physical Attributes, *Oracle Inventory User's Guide*), are available.

5. Enter an Equipment Serial Number. This is mandatory if you populated the Production Organization field. This is the specific name of the component within the Equipment Type, defined above.

Related Topics

Defining Asset Numbers, page 2-74

Viewing Resource Usage, page 10-2

Encumbrance Accounting

Enterprise Asset Management enables you to use encumbrance accounting for purchase requisitions and purchase orders associated with work orders with a destination type of shop floor.

Prerequisites

You must perform the following setup tasks before you can use encumbrance accounting:

1. Ensure that your eAM organization is associated with an operating unit that allows encumbrance accounting.
2. Select the **Reverse Encumbrance** option on the Organization Parameters - Costing Information tab.
3. Include a budget account in the maintenance WIP accounting class for encumbrance accounting.

Related Topics

See Encumbrance Accounting, page 2-193

Project Manufacturing Integration Setup

Enterprise Asset Management supports a variety of ways to define work breakdown structures. The methods include, using third party project management systems (with on-line integration), project templates, Seiban number wizard, copy, and manual entry. Work breakdown structures are commonly needed for program management. To support financial project management and reporting, the combination of Oracle Projects and Oracle Project Manufacturing enables budgeting, project costing and tracking, project billing, project revenue recognition, project cash forecasting, and project cost collection, including multi-currency and tax regulations.

To support project supply chain management and execution, Project Manufacturing provides functionality for project sales management, project advanced supply chain planning, project procurement, project execution, and project quality management.

The following diagram illustrates the eAM Project Manufacturing process. First, a maintenance Work Order is linked to a project or task. If a requisition or purchase order is created for that Work Order, the commitments for the Work Order's associated project or task are updated. The Project Cost Collector process (See: Project Cost Collector, *Oracle Cost Management User's Guide*) then passes the costs to the Work Order's associated project WIP accounting class accounts, rather than the WIP accounting class associated with the eAM asset or eAM organization.

Resources and Material charge against a Work Order. The Work Order is associated with a Project. The charges are transferred to the Project expenditures via the Cost Collector process.

eAM Project Manufacturing



This section includes the following topics:

- Project Definition, page 2-194

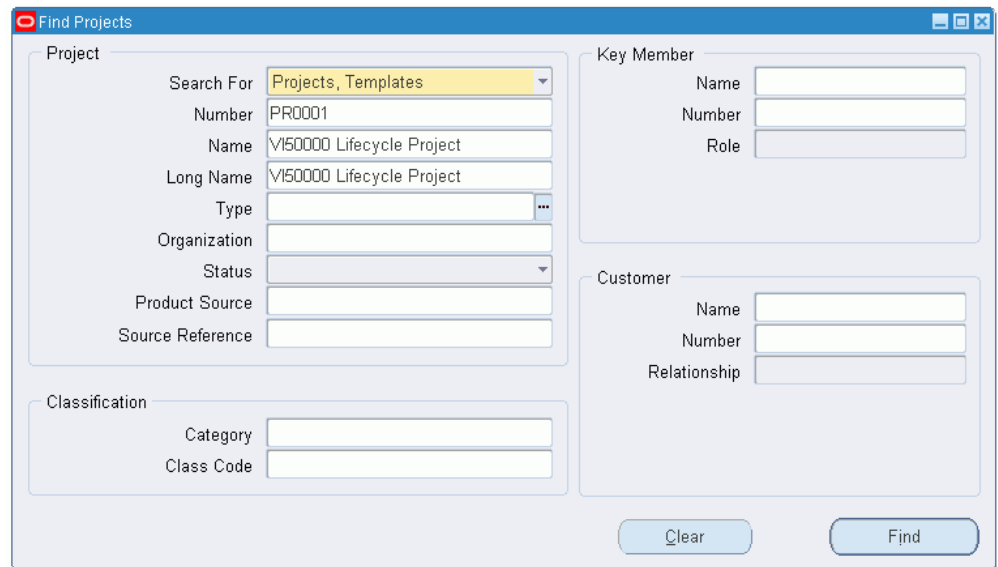
Project Definition

You can inquire on an existing, or copy a new project from a template or existing project. To create a new project, See: Project Definition (Assigning Project Parameters), *Oracle Project Manufacturing User's Guide*. Associate this project number with a planning group, a cost group, and a default WIP accounting class.

To inquire on an existing project:

1. Navigate to the Find Projects page.

Find Projects



The **Find Projects** dialog box is used to search for projects. It features several input fields and buttons. The **Project** section includes a **Search For** dropdown menu (set to **Projects, Templates**), and text boxes for **Number** (PR0001), **Name** (V150000 Lifecycle Project), **Long Name** (V150000 Lifecycle Project), **Type** (with a dropdown arrow), **Organization**, **Status** (with a dropdown arrow), **Product Source**, and **Source Reference**. The **Classification** section has **Category** and **Class Code** text boxes. The **Key Member** section has **Name**, **Number**, and **Role** text boxes. The **Customer** section has **Name**, **Number**, and **Relationship** text boxes. At the bottom right are **Clear** and **Find** buttons.

Project	
Search For	Projects, Templates
Number	PR0001
Name	V150000 Lifecycle Project
Long Name	V150000 Lifecycle Project
Type	
Organization	
Status	
Product Source	
Source Reference	

Classification	
Category	
Class Code	

Key Member	
Name	
Number	
Role	

Customer	
Name	
Number	
Relationship	

Clear Find

2. Select a project Number.
3. Choose Find.
4. Choose Open.

Projects, Templates

The screenshot shows the 'Projects, Templates' window with the following data:

Field	Value
Operating Unit	Vision Operations
Number	PR0001
Name	V150000 Lifecycle Project
Type	Product Development
Organization	Vision Operations
Long Name	V150000 Lifecycle Project
Trans Duration	31-MAR-2005 -
Status	Approved
Description	Motherboard V150000 Development Lifecyc
Workflow in Process	<input type="checkbox"/>
Template	<input type="checkbox"/>
Public Sector	<input type="checkbox"/>

Options:

Option Name	Selected
Structures	<input checked="" type="checkbox"/>
Tasks	<input type="checkbox"/>
Workplan Information	<input type="checkbox"/>
Classifications	<input type="checkbox"/>
Customers and Contacts	<input type="checkbox"/>
Currency	<input type="checkbox"/>
Cross Charge	<input type="checkbox"/>
Budgetary Control	<input type="checkbox"/>

Buttons: Change Status, Detail

5. Optionally you can view detailed task information by choosing Detail (See: Viewing Project Details, *Oracle Project Manufacturing User's Guide*).

To assign project parameters:

1. Navigate to the Project Parameters page.

Project Parameters

Project Parameters

Project Number PR0001 Project Name V150000 Lifecycle Project

Planning Group

General Invoice Transfer Task AutoAssignment Other

Default WIP Classes

Organization	Planning Group	Cost Group	Standard	Maintena
Vision Project Mfg				

WIP Classes by Task

2. Select a valid Project Number.
3. Optionally select a Planning Group.
4. Select a Cost Group.

If the current organization has selected Average as its primary costing method in the Organization Parameters window, the Cost Group field is required. The list of values includes the Common Cost Group and the user defined cost groups. The list of user defined cost groups includes those cost groups with valid accounts and with Project selected in the Cost Group window (See: Project Cost Groups, *Oracle Cost Management User's Guide*). You must assign the project to its own Cost Group to keep weighted average costing at the project level.

Associate a Maintenance type WIP Accounting Class to this Cost Group. See: Project Cost Groups, *Oracle Cost Management User's Guide*.

5. Optionally assign a Maintenance WIP Accounting Class to the current project.
You can select any Maintenance type WIP Accounting Class that is associated with the selected Cost Group.
6. Optionally select the name of the Planning Group with which you want to associate your project.

If you plan material requirements by a group of projects, rather than by each

individual project, you need to define a planning group and to assign all the projects to this planning group. If you plan material requirements by a single project, you do not need to associate the project with any planning group (See: *Defining Planning Group Lookups, Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*).

7. Select the Other tab.
8. Select Maintenance from the Direct Item Expenditure Type list of values.
This expenditure type enables the Cost Collector process to pass costs for direct items to project maintenance work orders. This is a required step.
9. Save your work.

Related Topics

Associating a Work Order with a Project, page 11-6
Creating Purchase Orders from Requisitions, page 11-7
Updating the Commitments for a Project, page 11-15
Viewing Commitments, page 11-16
Project Definition, *Oracle Project Manufacturing User's Guide*
Assigning Project Parameters, *Oracle Project Manufacturing User's Guide*
Project Cost Groups, *Oracle Cost Management User's Guide*
Defining Project Cost Groups, *Oracle Cost Management User's Guide*
WIP Accounting Classes, *Oracle Work in Process User's Guide*
Project Manufacturing Parameters, *Oracle Project Manufacturing User's Guide*

Property Manager Integration Setup

The eAM and Property Manager integration enables eAM assets to correspond with locations defined in Property Manager. The information transferred from Property Manager are the three-level land or building hierarchies, and the associated Location Codes within Property Manager. eAM also provides user-defined Area codes, enabling you to logically sort assets by where they are physically located. However, Area codes in eAM do not equal locations in Property Manager. See: *Setting Up Areas*, page 2-16.

This section includes the following topics:

- Setting Up eAM Prerequisites, page 2-199
- Executing the Export Process, *Oracle Enterprise Asset Management Implementation Guide*

- Executing the Asset Number Interface, *Oracle Enterprise Asset Management Implementation Guide*

Setting Up eAM Prerequisites

The following must be defined within eAM before the Export Locations to Enterprise Asset Management concurrent request process can export locations into eAM:

- Asset Group (See: Defining Asset Groups, *Oracle Enterprise Asset Management Implementation Guide*)
- Organization (See: Organization Setup, *Oracle Enterprise Asset Management Implementation Guide*)
- Owning Department (See: Defining Departments and Resources, *Oracle Enterprise Asset Management Implementation Guide*)

Executing the Export Process

Locations from Property Manager are always exported as a hierarchy. The first time that you execute the process, the starting node of the hierarchy is specified as the top level of building or land hierarchies. Thereafter, any level within the building or land hierarchy is specified.

After the process has executed, any changes within Property Manager's building or land hierarchies are automatically changed within eAM's corresponding asset hierarchies.

The Export Locations to Enterprise Asset Management process executes from the Property Manager responsibility. This process can execute in both create and update modes.

To execute the Export Locations to Enterprise Asset Management process:

1. Navigate to the Submit Request page.

Submit Request

Submit Request

Run this Request... Copy...

Name: Export Locations to Enterprise Asset Management

Operating Unit: Vision Operations

Parameters

Batch Name

Location Code Low

Location Code High

Location Type

Default Organization

Default Asset Group Item

Default Owning Department

Maintainable

OK Cancel Clear Help

2. Select Export Locations to Enterprise Asset Management.
3. Enter the following parameters:
 - *Batch Name*: The Batch Name identifies each export process by name.
 - *Location Code Low*: This code, defined in Property Manager, is the starting node of the building or land hierarchies. This code reflects the Enterprise Asset Management Asset, and is normally entered into one Enterprise Asset Management Asset Group per transfer.
 - *Location Code High*: This code, defined in Property Manager, is the ending node of the building or land hierarchies. This code reflects the Enterprise Asset Management Asset, and is entered into one eAM Asset Group per transfer.
 - *Default Organization*: Select the eAM enabled organization. This code is defined within eAM. See: *Organization Setup, Oracle Enterprise Asset Management Implementation Guide*.
 - *Default Asset Group Item*: Select the Asset Group (defined within eAM). The eAM assets are created in this Asset Group. See: *Defining Asset Groups, Oracle Enterprise Asset Management Implementation Guide*.
 - *Owning Default Owning Department*: This is the designated maintenance department to associate with the exported asset/location within eAM.
 - *Maintainable*: Select whether the asset/location is maintainable within eAM.

4. Choose OK.
5. Choose Submit.

Related Topics

Property Manager Integration, page 9-2

Submitting a Request, *Oracle Applications User's Guide*

Executing the Asset Number Interface

Locations are set up in Property and are exported to Enterprise Asset Management (eAM) with a two-step process. This allows you the opportunity to modify data before it is exported to eAM. First, push the location records from Property Management to eAM (See: Executing the Export Process). After submission of the concurrent process, the Property Management Location information are entered into the EAM Asset Interface table and are accessed via the Pending Asset Number window within eAM. You can update all relevant information, including Asset Group, Asset Number, Owning Department, and WIP Accounting Class, for this information, before submitting the interface process.

To view pending asset numbers:

1. Navigate to the Pending Asset Number page.

Pending Asset Number

Asset Group	Serial Number	Asset Number	Supplier Warranty Expiration Date
AM-AG1	VOS1-SFL-OP	VOS1-SFL-OP	
AM-AG1	VOS1-SFL-HA	VOS1-SFL-HA	
AM-AG1	HQ	HQ	
AM-AG1	HQ-1	HQ-1	
AM-AG1	HQ-1-1000	HQ-1-1000	
AM-AG1	HQ-1-1001	HQ-1-1001	
AM-AG1	HQ-1-1002	HQ-1-1002	
AM-AG1	HQ-1-1003	HQ-1-1003	
AM-AG1	HQ-1-1004	HQ-1-1004	
AM-AG1	HQ-1-1005	HQ-1-1005	
AM-AG1	WL	WL	
AM-AG1	WL-1	WL-1	

Submit

2. Update the information, as necessary.
3. Choose Submit to update your changes.

Related Topics

Executing the Export Process, *Oracle Enterprise Asset Management Implementation Guide*

Service Integration Setup

Use service requests to report and request maintenance service for unplanned maintenance demand on internal assets and rebuildable items. Service requests that are classified as type Maintenance are used to identify requests for eAM maintenance. For example, when an employee notices that a printer is broken, the employee can create a service request, even though a technician is scheduled to regularly check the printer monthly. You can create both service and work requests for capital assets and rebuildables, simultaneously, within one eAM organization.

If a valid asset or rebuildable serial number is entered on the service request, the owning department for the serial number defaults. (See: Defining Asset Numbers, *Oracle Enterprise Asset Management Implementation Guide*), and the service request is visible within the eAM Maintenance Workbench. The Owning Department can then approve the service request and create a work order, or reject the service request and notify the service request owner to cancel it. However, customers or employees who report problems are often not aware of the asset or rebuildable's serial number requiring maintenance. In this situation, a default department is used as the Owning

Department. You may customize an eAM Workflow process to identify appropriate default owning departments and department approvers. Within Oracle Service, an agent can create a request for maintenance, provide a problem summary, and provide any additional information, such as an incident address or notes.

A planner creates a work order and then releases it to execute. The planner can choose to create one or multiple work orders for a single service request. When a work order is complete, the service request owner updates the service request status to Closed.

A support agent can view all work order information for each work order created for a service request. You can create eAM work orders for Service and/or Work Requests, or associate requests to existing work orders.

You can customize a workflow process that creates notifications to eAM personnel that indicate service requests requiring work and approval.

Note: Oracle Service must be installed to utilize service request functionality.

This section includes the following topics:

- Creating Maintenance Service Request Types, page 2-203
- Enabling Service Requests for Assets and Rebuildables, page 2-204
- Enabling eAM Specific Fields, *Oracle Enterprise Asset Management Implementation Guide*

Creating Maintenance Service Request Types

Within Oracle Service, create at least one Maintenance Service Request Type. You can define multiple Service Request Types, if necessary.

To create a Maintenance service request type:

1. Navigate to the Service Request Type window.

Service Request Types

Type	Business Process	Status Group Name	Start Date	End Date	Asset Maintenance	Complex Maintenance	Image File Name
KBSRType	Customer Support	KBGrp			<input type="checkbox"/>	<input type="checkbox"/>	
Maintenance Request	Customer Support	Maintenance Reques	14-JUL-2004		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Network Service Request	Field Service		01-JAN-1952		<input type="checkbox"/>	<input type="checkbox"/>	
Patient Related	Customer Support	Patient Related	01-JAN-2003		<input type="checkbox"/>	<input type="checkbox"/>	
Pilot Log	Customer Support		05-MAY-2005		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Pothole Repair	Customer Support		04-JUL-2003		<input type="checkbox"/>	<input type="checkbox"/>	CS_Pothole.jpg
Preventive Maintenance	Field Service	Field Service	11-JUN-2003		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Preventive Maintenance Report	Field Service	Field Service	11-JUN-2003		<input type="checkbox"/>	<input type="checkbox"/>	

Description:

Workflow:

☐ Auto Launch Workflow
 ☐ Abort Workflow on Final Status without Warning
 ☐ Web Entry
 ☐ Detail ERES Record

2. Enter the name of the Service Request Type.
3. Select Customer Support, from the Business Process list of values.
4. Optionally select effective dates for this request type.
5. Select the Asset Maintenance check box to indicate that this Service Request Type is of type Maintenance (viewable in eAM). Maintenance Type Service Requests are viewable in eAM.
6. Save your work.

Enabling Service Requests for Assets and Rebuildables

To set up Service Request functionality for Asset and Rebuildable Serial Numbers, enable Asset Groups and Rebuildable Items for Service Requests, respectively.

To enable Service Requests for asset groups and rebuildable items:

1. Navigate to the Master Item window.

Master Item

Master Item (V1)

Organization: V1 Vision Operations

Item: 75100027

Description: Motor

Display Attributes: Master Org All

Recei... Physi... Gener... MPS/M... Lead ... Work ... Order... Invoi... Service Web O...

Service

Service Request: Enabled

☐ Enable Contract Coverage

☐ Enable Defect Tracking

☐ Enable Provisioning

Installed Base

☐ Track in Installed Base

☐ Create Fixed Asset

Instance Class:

Service Contracts

Contract Item Type:

Duration:

Duration Period:

Template:

Starting Delay (Days):

Debrief and Charges

Recovered Part Disposition:

☐ Enable Service Billing

Billing Type:

2. Select an Asset Group or Rebuildable Item.
3. Select the Service tab.
4. Select Enabled, from the Service Request list of values.
5. Save your work.

Enabling eAM Specific Fields

The Service Request page enables a customer support agent to view pertinent information for an entered service request, such as associated work orders and their statuses. It is necessary to have this important information visible at all times within the Service Request page. You can customize which fields and records appear (See: Customizing the Presentation of Data in a Folder, *Oracle Applications User's Guide*).

Use Oracle's folders functionality to ensure that key eAM-specific fields are visible for maintenance service requests. By default, eAM specific fields are hidden. This folders feature provides you a user-defined display of retrieved information, such as:

- Columns displayed
- Width of columns displayed
- Sequence of columns

- Prompts associated with columns
- Sequence of records

You can prevent users from creating or modifying folders with profile option, FLEXVIEW: ALLOW_CUSTOMIZATION.

To display eAM-specific fields in the Service Request page:

1. Navigate to the Service Request page.

Service Request

Service Request (69492 - Noise and vibration out of norm) - Asia/Tokyo

Log and Notes Profile...

Contact Type: **Employee** Customer Type: **Organization** Category: **av-ag1** Number: **69492**

First: **MS. Rachel** Name: **Business World -** Item: **av-ag1** Reported: **03-MAR-2004 07:3**

Last: **Abbott** Number: **18057** Desc: **Asset Group #1** Type: **eAM Customer Re**

Email: **rabbott@visionhr.** Account: Revision: Status: **Open**

Number: **159** Email: Instance: Severity: **High**

Relationship: Phone: Serial: **av-an1** Group: **Test1**

Phone: Phone Type: Tag: Owner: **Madhavan, M**

Subject Workbench Contacts / ... Tasks Interactions Related Obj... Service Hist... Charges Work Orders Maintenance... Custom1 Custom2

Work Order	Status	Department	Maintained Asset Number	Asset Group	Asset Type	Asset Activity	Priority	Firm
W096728	Cancelled	Dep10	av-an20	av-ag1	Capital	av-act1	High	<input checked="" type="checkbox"/>
								<input type="checkbox"/>
								<input type="checkbox"/>
								<input type="checkbox"/>

2. From the Folder menu, select an existing, or create a new, Folder definition.
3. Save your work.

Related Topics

Customizing the Presentation of Data in a Folder, *Oracle Applications User's Guide*

Oracle Applications 12 Workflow

Oracle Time and Labor Integration Setup

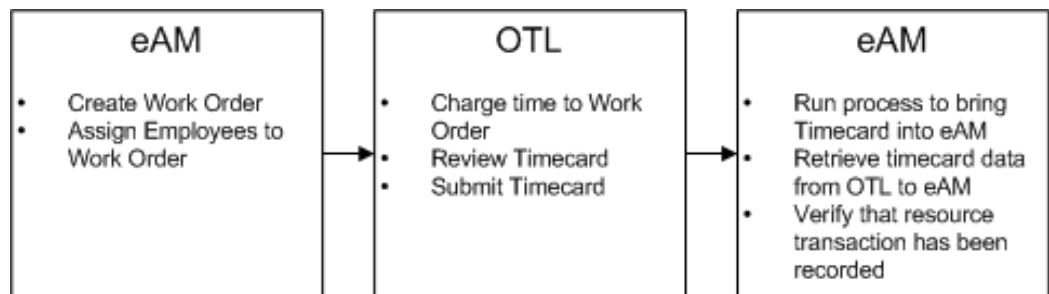
Oracle Time and Labor (OTL) is the repository in which time is entered by employees working in a particular organization. Employees working on Oracle Enterprise Asset Management (eAM) work orders enter their time using OTL Self-Service. Information

collected is stored in OTL Time Store, and is composed of a series of business rules and processes. eAM extracts information from the Time Store and charges eAM work orders for the time spent by employees that work on them.

There are multiple steps within the integration flow. First, timecard information is entered for a specific Work Order, within Oracle Time Store (a piece of Oracle Time and Labor). That information is then extracted from Oracle Time Store to Oracle Enterprise Asset Management. This extraction dynamically creates a resource transaction within Oracle Enterprise Asset Management. Finally, the Cost Manager process is executed. This process charges the resource transaction. After this process executes, you can view the actual costs for the period that you charged, within the Work Order.

The process is as follows:

OTL Process Flow



This section contains the following topics:

- Setting Up Overview, page 2-207

Setting Up Overview

There are two required setup procedures for this integration. The first is to establish employees needing to use this functionality as Persons within Oracle Human Resources (See: *Oracle Human Resources User's Guide*). After established, those Persons are assigned to respective Users, within Enterprise Asset Management. The second setup procedure consists of creating Preference Values, and then linking those values to eligibility criteria.

This section contains the following topics:

- Defining Persons as Users, page 2-207
- Creating Eligibility Criteria, page 2-208

Defining Persons as Users

Establish employees needing to use this functionality as Persons within Oracle Human Resources (See: *Oracle Human Resources User's Guide*). After established, those Persons

must be assigned to respective Users, within Oracle Enterprise Asset Management (eAM).

To define Persons as Users within eAM:

1. Navigate to the Users window.

Users

Responsibility	Application	Description	Security Group	From	To

2. Enter a User Name.
3. Select the Person that was created in Oracle Human Resources.
4. Enter a Password.
5. Within the Responsibilities tab, select the appropriate Responsibilities to assign to this User.

The responsibilities, US OTL Administrator and Self Service Time and Expenses, are seeded but the Administrator must manually assign them to the person/user.
6. Save your work.

Creating Eligibility Criteria

You must create Preference Values, and then link those values to eligibility criteria.

Note: Preferences are seeded, but the preferences must be assigned to the user.

To create eligibility criteria:

1. Navigate to the Preferences page.

Preferences

Preferences Eligibility Criteria People

Preference Tree

- Change And Late Audit (Cla)
- Default Preferences
 - Self-Service
 - Time Store
 - Timekeeper
- Default Preferences - Eam
 - Eam Application Sets
 - Eam Approval Periods
 - Eam Approval Styles
 - Eam Evaluate Rules
 - Eam Retrieval Rules Groups
- Default Preferences - Projects
- Exempt
- Vhs Biweekly

Name in Tree
EAM Self-Service Timecard

Preference
Self-Service timecard, review and confirmation layout pages

Preference Values
EAM Timecard Layout.EAM Review Layout

☐ Editable by user? ☐ .Displayed to user?

Rules

Rule Name	Link by	Linked to	Precedence

2. Select the Preference Tree node, then choose New.
3. Enter the name of your tree.
4. Select the *Self-Service timecard, review and confirmation layout pages* Preference.
5. Within the OTL Preferences window, select EAM Timecard Layout from the Timecard Layout list of values.

OTL Preferences

OTL Preferences

Timecard Layout	EAM Timecard Layout
Review Layout	EAM Review Layout
Confirmation Layout	EAM Confirmation Layout
Detail Layout	
Export Layout	
Audit Layout	

OK Cancel Clear Help

6. Select EAM Review Layout from the Review Layout list of values.
7. Select EAM Confirmation Layout from the Confirmation Layout list of values.
8. Choose OK.
9. Save your work.

After saved, you have created a new node on the Preference Tree. Expand this new node, and select Eam Self-Service Timecard.

Preferences

Preferences

Eligibility Criteria

People

Preference Tree

- Change And Late Audit (Cla)
- Default Preferences
- Default Preferences - Earn
- Default Preferences - Projects
- Exempt
- Vhs Biweekly
- EAM Self-Service Timecard
 - Change And Late Audit (Cla)
 - Default Preferences
 - Default Preferences - Earn
 - Default Preferences - Projects
 - EAM Self-Service Timecard**
 - Exempt
 - Vhs Biweekly

Name in Tree
EAM Self-Service Timecard

Preference
Self-Service timecard, review and confirmation layout pages

Preference Values
EAM Timecard Layout.EAM Review Layout

☐ Editable by user? ☐ .Displayed to user?

Rules

Rule Name	Link by	Linked to	Precedence

10. To create eligibility criteria for timecard entry, select the Eligibility Criteria tab.

11. Enter the Name of the rule.

You can have one rule for everyone, or multiple rules to create different eligibility criteria for different groups.

12. Select EAM Self-Service Timecard from the Name of Branch list of values.

13. Select Person, Organization, or All People from the Link by list of values.

If you are creating one rule for all users, select All People.

14. Enter a Precedence value.

Values are all positive numbers. If you have multiple rules, the rule with the highest precedence is displayed first, and so on. For example, an employee can view the time card with a rule precedence value of 95, versus the timecard with a rule precedence value of 94.

15. Save your work.

Related Topics

Time and Expenses, page 12-2

Work Order Billing Setup

While maintaining an asset or servicing a customer request, you can bill a third party customer for the work that they performed. The cost of the work performed is based on the material and resource requirements (bill of material) of the work order, or the cost of the activity associated with the work order.

This section includes the following topics:

- Setting Up Parameters, page 2-212
- Setting Up Item Costs and Prices, page 2-212
- Service Attribute Setup, page 2-216
- Setting Up Billable Material, page 2-217
- Setting Up a Billable Resource, page 2-218
- Setting Up a Billable Activity, page 2-220

Setting Up Item Costs and Prices

The Billing Basis is either Cost Plus or Price List. The Billing Basis affects your item setup procedures. If you want the flexibility of using both billing basis types for an item, you need to set up both costs and prices for that item. An item is an Activity, Material, or Resource.

This section includes the following topics:

- Setting up Costs for the Cost Plus Billing Basis, page 2-213
- Setting up Prices for the Price List Billing Basis, page 2-215

Setting Up Parameters

You can optionally create the ability to change the billable material on a Work Order at the time a bill is created.

To enable the change of billable material functionality:

1. Navigate to the Enterprise Asset Management Parameters window.

Enterprise Asset Management Parameters

Enterprise Asset Management Parameters (EM1)

Asset Number Defaults

☒ Asset Number Auto Generation

Event Log Controls

Cost Defaults

Cost Element: Equipment

Cost Category: Maintenance

Preventive Maintenance

☐ Implement From Horizon Start Date

Work Request

☒ Auto Approve

☒ Extended Log

☐ Default Asset from Employee Location

☒ Asset Number Mandatory

Work Order Defaults

WIP Accounting Class: MaintWAC

Work Order Prefix: WO

Default Department:

☐ Enable Workflow for Workorders

☒ Invoice Billable Items Only

☒ Enable Material Issue Requests

☒ Auto Firm on Release

☒ Value Rebuildables At Zero Cost

☐ Auto Firm On Create

Account Defaults

Maintenance Offset: 01-520-7530-0000-000

2. Optionally select the Invoice Billable Items Only check box. If selected, you can change the billable material at the time the bill is created.

If selected, this check box indicates that you want to invoice only billable items. Billable items are those that have a populated value within the Billing Type field, within the Service Tab, of the Master Item window. Billing Type is relevant only if you have this check box selected. Also, selecting this check box means that you can choose a different item to bill. See: *Service Attribute Setup, Oracle Enterprise Asset Management Implementation Guide*.

3. Save your work.

Setting Up Costs for the Cost Plus Billing Basis

The cost plus method utilizes costs associated with an item. The item should have a cost

defined for it. First, you need to ensure that the appropriate item attributes are set up correctly for the item.

To set up an item's attributes:

1. Navigate to the Master Item page.

Master Item

Master Item (V1)

Organization V1 Vision Operations

Item AS18947

Description Sentinel Deluxe Desktop []

Display Attributes
☐ Master ☐ Org ☒ All

Main Inventory Bills of Material Asset Management **Costing** Purchasing Receiving Physical Attributes

☒ Costing Enabled
☒ Inventory Asset Value
☒ Include In Rollup

Cost of Goods Sold Account 01-510-5110-0000-000

Standard Lot Size

2. Optionally select the Costing Enabled check box to report, value, and account for any item costs.

You must select this check box if you are using the Cost Plus Billing method.

3. Optionally select the Inventory Asset Value check box.

You must select this check box if you are using the Cost Plus Billing method.

4. Save your work.

To set up costs for an item:

1. Navigate to the Item Costs Summary page.
2. Choose Costs.
3. Enter cost information for your item.

4. Save your work.

Related Topics

Costing Attribute Group, *Oracle Inventory User's Guide*

Defining Item Costs, *Oracle Cost Management User's Guide*

Setting Up Prices for the Price List Billing Basis

The Price List method uses a specified price list. The specified item should have at least one entry in the price list. You must begin by setting up the appropriate item attributes.

To set up an item's attributes:

1. Navigate to the Master Item window.

Master Item

Master Item (V1)

Organization: **V1 Vision Operations**

Item: **av-bill-resitem**

Description: **EAM Billable Resource Item** [...]

Display Attributes: ☒ Master ☐ Org ☐ All

Recei... Physi... Gener... MPS/M... Lead ... Work ... Order... Invoi... Service Web O...

☒ Customer Ordered
☐ Internal Ordered (G)
☐ Pick Components
☐ Assemble to Order (Q)
☐ Ship Model Complete (X)
☒ Returnable (Y)
☐ RMA Inspection Required (Z)
☐ Financing Allowed

☒ Customer Orders Enabled
☐ Internal Orders Enabled (J)
Check ATP: **None**
ATP Rule:
ATP Components: **None**
Picking Rule:
Default Shipping Organization:
Default SO Source Type: **Internal**
Shipping SubInventory:

☒ Shippable
☒ OE Transactable (K)

Tolerances

Over Shipment: Over Return:
Under Shipment: Under Return:

2. Optionally select the Customer Ordered check box to create a price within the price list.

You must select this check box if you are using the Price List billing method.

3. Save your work.

To set up prices for an item:

1. Navigate to the Advanced Pricing - Price Lists window.

Advanced Pricing - Price Lists

2. Enter price information for your item.

The same item can repeat multiple times in the price list, with varying values for Start Date, End Date, and Precedence. For example, it is invalid to have overlapping date ranges, if the Precedence is the same.

3. Save your work.

Related Topics

Order Entry Attribute Group, *Oracle Inventory User's Guide*

Service Attribute Setup

Set the Billing Type for each item that you want billable. The Billing Type field within the Master Item window must be populated if you have selected the Invoice Billable Items Only check box, within the Enterprise Asset Management Parameters window. See: Setting Up Parameters, *Oracle Enterprise Asset Management User's Guide*.

To set up the Billing Type attribute:

1. Navigate to the Master Item window.
2. Select the Service tab.
3. Optionally select a Billing Type of Expense, Labor, or Material. This field must be populated if you have selected the Invoice Billable Items Only check box, within the Enterprise Asset Management Parameters window. See: Setting Up Parameters, *Oracle Enterprise Asset Management User's Guide*.
4. Save your work.

Setting Up Billable Material

To create billable material:

1. Set specific attributes within the Master Item window.
2. Assign the resource item to your organization.
3. Decide whether you are pricing this item using the Cost Plus or Price List method, or both, and perform the additional setup for those methods (See: Setting Up Item Costs and Prices, *Oracle Enterprise Asset Management User's Guide*)
4. Define costs and prices for your item.

To set up billable material:

1. Navigate to the Master Item window.
2. Select the Invoicing tab.
3. Optionally select the Invoiceable Item check box to indicate that the current material item can invoice.

You can select this attribute at the Master Organization level.

4. Optionally select the Invoice Enabled check box to indicate that invoices are enabled for the current material item.

Note: For the current material item, you need to ensure the Billing Type is populated with Material, within the Service tab. See: Service Attribute Setup, *Oracle Enterprise Asset Management User's Guide*.

5. Assign the current item to your organization.
6. Save your work.

Setting Up a Billable Resource

To create a billable resource:

1. Create a resource item by setting specific attributes within the Master Item page.
2. Assign the resource item to your organization.
3. Decide whether you are pricing this item using the Cost Plus or Price List method, or both, and perform the additional setup for those methods (See: Setting Up Item Costs and Prices, *Oracle Enterprise Asset Management User's Guide*).
4. Define a resource and associate the resource item to the resource.
5. Assign the resource to a department.

To set up a billable resource:

1. Navigate to the Master Item page.

Master Item

Master Item (V1)

Organization: V1 Vision Operations

Item: av-bill-resitem

Description: EAM Billable Resource Item

Display Attributes: Master (selected), Org, All

Recei... Physi... Gener... MPS/M... Lead ... Work ... Order... Invoi... Service Web O...

☒ Invoiceable Item

☒ Invoice Enabled

Accounting Rule: []

Invoicing Rule: []

Tax Code: []

Sales Account: 01-510-4110-0000-000

Payment Terms: []

2. Select the Invoicing tab.
3. Optionally select the Invoiceable Item check box to indicate that the current resource item can invoice.
You can select this attribute at the Master Organization level.
4. Optionally select the Invoice Enabled check box to indicate that invoices are enabled for the current resource item.

Note: For the current resource item, you need to ensure the Billing Type is populated with Labor, within the Service tab. See: Service Attribute Setup, *Oracle Enterprise Asset Management User's Guide*.

5. Assign the current item to your organization.
6. Save your work and close the window.
7. Navigate to the Resources window.

Resources

Resource **Fork Lift Mechanic** Inactive On

Description **Fork Lift Mechanic**

Type **Person** UOM **HR**

Charge Type **Manual** Basis **Item**

Expenditure Type

Supply Subinventory Supply Locator

☐ Outside Processing

Item

☒ Costed

Activity ☒ Standard Rate

Absorption Account **01-000-5810-0000-000**

Variance Account **01-000-5360-0000-000**

Overheads Rates

Billing

Item **av-bill-resitem**

EAM Billable Resource Item

Skills

Competence

Skill Level

Qualification

☐ Batchable

Minimum Batch Capacity Batching Window

Maximum Batch Capacity UOM

Batch Capacity UOM

Employees Equipment Setups

8. Enter the name of the Resource within the Resource field.
9. Within the Billing region, select the resource item you created within the Master Item window to ensure that the resource is available for billing.

Note: Rates defined in the Resources window are not used for billing. For billing rates for the resource item, See: Setting Up Item Costs and Prices, *Oracle Enterprise Asset Management User's Guide*.

10. Save your work.
11. Assign the current resource to a department. See: Defining Departments and Resources, *Oracle Enterprise Asset Management User's Guide*.
12. Save your work.

Setting Up a Billable Activity

To create a billable activity, first set specific attributes within the Master Item window. Next, decide whether you are pricing this item using the Cost Plus or Price List method,

or both, and perform the additional setup for those methods (See: Setting Up Item Costs and Prices, *Oracle Enterprise Asset Management User's Guide*). Finally, associate the activity to the asset group or asset number that is used to create the work order.

To set up a billable activity:

1. Navigate to the Master Item window.
2. Select the Invoicing tab.
3. Optionally select the Invoiceable Item check box to indicate that the current activity item can be invoiced. You can select this attribute at the Master Organization level.
4. Optionally select the Invoice Enabled check box to indicate that invoices are enabled for the current activity item.
5. Assign the current item to your organization.
6. Save your work.

Related Topics

Initiating Billing, *Oracle Enterprise Asset Management User's Guide*

Part 3

Enterprise Asset Management User

The Enterprise Asset Management User is anyone in an organization who may access eAM. This might include an employee who uses work requests to report problems, a plant manager who accesses eAM to review high cost assets and their work history, as well as a Maintenance User, such as a technician who accesses the Maintenance User Workbench to review daily work assignments.

This part contains the following chapters:

- Chapter 3, "eAM Work Management", page 3-1
- Chapter 4, "Preventive Maintenance", page 4-1
- Chapter 5, "eAM Planning and Scheduling", page 5-1
- Chapter 6, "eAM Cost Management", page 6-1
- Chapter 7, "Direct Item Procurement for eAM Work Orders", page 7-1
- Chapter 8, "Contractor Services", page 8-1
- Chapter 9, "eAM Property Manager", page 9-1
- Chapter 10, "Process and Discrete Manufacturing Integration", page 10-1
- Chapter 11, "eAM Project Manufacturing", page 11-1
- Chapter 12, "Integration with Oracle Time and Labor", page 12-1
- Chapter 13, "eAM Quality", page 13-1
- Chapter 14, "Work Order Billing", page 14-1
- Chapter 15, "Oracle Service Integration", page 15-1
- Chapter 16, "Secure Enterprise Search for Asset Lifecycle Management", page 16-1

eAM Work Management

This chapter covers the following topics:

- Overview eAM Work Management
- eAM Work Orders
- Routine Work Orders
- Using Encumbrance Accounting with Maintenance Work Orders
- Express Work Orders
- Preventive Maintenance Work Orders
- Rebuild Work Orders
- Easy Work Orders
- eAM Work Order Statuses
- Defining Work Order Documents
- eAM Operations and Tasks
- Defining Asset Shutdown Statuses
- Preparing Work Order Operations
- Viewing Work Order Operations
- Defining Material Requirements
- Defining Direct Item Material Requirements
- Viewing Material Requirements
- Defining Resource Requirements
- Viewing Resource Requirements
- Work Order Relationships
- Parent-Child Relationship
- End to Start Dependency

- Cost Relationships
- Follow-up Work Relationship
- eAM Work Order Transactions
- Operation Completion
- Work Order Completion
- Rebuild Work Order Completion
- Transacting Material
- Viewing Resources Transactions
- Closing Work Orders
- eAM Work Order Planning
- Using the Maintenance Workbench
- Capitalizing Work Orders

Overview eAM Work Management

The work order is the foundation for all maintenance organizations. Work orders define the resources and items that are needed to conduct work. They can automatically generate through the use of Preventive Maintenance Schedules, the issue of an inventoried rebuildable, breach of quality results, or manually generated as a routine work order. These work orders are then reviewed and shared with Operations to produce an estimated schedule.

Oracle Enterprise Asset Management integrates with Oracle Quality. Use Quality collection plans to predefine required feedback information that must be entered into Oracle Enterprise Asset Management, upon a work order's completion. For example, data to collect may include inspection points for asset number and downtime variables. If a variance is recorded to the quality plan, a work request or work order is created. You can define quality collection plans directly on the work order, or define them as attributes of an activity to ultimately default into future work orders that are generated for specific asset number and activity combinations.

For each work order, the estimated costs aggregate, from the associated BOM and resources, to develop a costing profile for the current work order. You can use Costing Profiles for future Budgeting and Forecasting.

For each work order, the actual costs aggregate during the work order's lifecycle. These costs roll up, based on the hierarchy of the current work order's associated asset number. View these actual costs by period at a transaction level or at a summary level. Costs can roll up, based on the hierarchy of work orders. You can view the costs (both actual and estimates) by period, at a transaction or summary level.

This chapter is divided into the following sections:

- eAM Work Orders, page 3-3
- eAM Operations and Tasks, page 3-27
- Work Order Relationships, page 3-50
- eAM Work Order Transactions, page 3-56
- eAM Work Order Planning, page 3-68

eAM Work Orders

Oracle Enterprise Asset Management work orders are created for assets and rebuildable inventory items. They are defined manually, or generated automatically based on a scheduled activity. If you attach an activity to a manually created work order (normally the role of a Planner), the work order inherits the activity's attributes, such as the maintenance BOM, maintenance route (operations), attachments, quality plans, cost information, and scheduling rules. When preplanned work orders are created for assets, the activity information associated with the work order's current asset number automatically attaches material and resource requirement information to the work order.

This section includes the following topics:

- Routine Work Orders, page 3-3
- Using Encumbrance Accounting with Maintenance Work Orders, page 3-12
- Express Work Orders, page 3-12
- Preventive Maintenance Work Orders, page 3-12
- Rebuild Work Orders, page 3-13
- Easy Work Orders, page 3-22
- eAM Work Order Statuses, page 3-23
- Defining Work Order Documents, page 3-26

Routine Work Orders

Routine work orders are normally created by a planner from the Maintenance Workbench (See: Using the Maintenance Workbench, page 3-69), and are also created using a menu option. Material and resource planning (See: Overview of Planning and Scheduling, page 5-1) is used at each status of the routine work order (See: eAM Work Order Statuses, page 3-23).

To manually create a work order:

1. Navigate to the Find Work Orders window (Work Orders > Work Orders).

Note: This function is available for those users with responsibilities and roles that include function, EAM_WO_DETAILS_MODE, with their associated menu. Otherwise, you can only view work orders, and cannot update associated asset hierarchy, work order hierarchy, material, resource, operation, cost, collection plan results, work request, and attachment information. See: *Implementing Function Security, Oracle Applications System Administrator's Guide - Security*.

2. Choose New.

Work Order

Work Order (EM1)

Work Order	WO207620	15000 Miles Scheduled Maintenance
Asset Number	LX0002	
Asset Group	Lexus ES300	
Asset Activity	15000 Miles Lexus Service	
Class	MaintWAC	
Status	Draft	
<input type="checkbox"/> Pending		
Parent Work Order		
Relationship Type		

Scheduled Dates	
Start Date	11-AUG-2006 02:43:17
Completion Date	
Duration(hours)	

Actual Dates	
Start Date	
Completion Date	

Main Activity Project Rebuild Request Approval History

Department	Lexus Shop	<input type="checkbox"/> Firm	<input type="checkbox"/> Notification Required
Priority		<input type="checkbox"/> Tagout Required	<input type="checkbox"/> Planned
Work Order Type		<input checked="" type="checkbox"/> Enable Material Issue Requests	
Shutdown Type	Required	PM Suggested Start Date	
Warranty Status		PM Suggested End Date	
Failure Information		<input checked="" type="checkbox"/> Failure Entry Required	
Failure	Mechanical	Failure Date	10-AUG-2006
Cause	Lub System Failure	Comments	
Resolution	Auto-Lub Correction		
Material Shortage			
Material Shortage		As Of Date	
<input type="button" value="Check Shortage"/>			

Operations Materials Resources Relationships Asset Route Costs

The header information displays general information about the asset number and the type of work required.

3. The Work Order number is assigned, but you can update it.
4. Enter an asset number requiring maintenance. The asset group defaults (See:

Defining Asset Numbers, page 2-74).

5. Select an Asset Activity. Only asset activities associated with this asset number are available.

Note: If this work order was previously created, you can add an asset activity, as long as the work order is at an Unreleased or Draft status, or an asset activity was not previously defined. If any tasks, material, or resource requirements exist, these must be deleted before adding an asset activity to an existing work order.

After selecting an asset activity, the associated maintenance BOM (material) (See: Setting Up Maintenance Bills of Material, page 2-101) and maintenance route (resources), associated with the activity (See: Defining Maintenance Routes, page 2-106), attach to the work order. After an asset activity is saved to a work order, you can no longer change or delete it.

6. Enter a Class code to represent the charge (expense) accounts associated with the asset number. This defaults from the asset number, but you can update it.

Select a maintenance WIP Accounting Class that contains an encumbrance account if want to use encumbrance accounting.

7. Enter the Status. For example, Unreleased, Released, On Hold, and Draft. Certain transactions update this status automatically, including Work Order Completion, for example (See: eAM Work Order Statuses, page 3-23).
8. The Pending check box value determines whether the work order has reached the status above or is still pending, due to workflow. This value is set by the Work Order Workflow Approval process. If the check box is clear, the Status reflects the current state. If the check box is selected, the Status reflects a desired target state that is not yet reached due to pending activity, such as a workflow approval that is still in progress.
9. If this is a child work order in a work order network and Parent Child is populated in the Relationship Type field, the parent work order is populated in this field.
10. The Relationship Type field indicates the type of Relationship associated with the work order. Valid relationships are Parent Child, End to Start Dependency, Cost, and Follow-up Work. Manage complex maintenance jobs through these four types of work order relationships. See: Work Order Relationships, page 3-50.
 - *Parent Child:* This relationship enables a network of work orders, which includes one top level work order that defines the time line of all its children work orders. The start and end dates of the children work orders are within the start and end dates of the parent work order. A child work order can be parent to another work order. One parent can have multiple children, but one child

can have a single parent. There can be an infinite number of parent-child work order levels, within the Parent-Child relationship.

- *End to Start Dependency:* You can create work orders with scheduling dependency relationships (including child sibling work orders). For example, one work order's scheduled start date is dependent on another work order's completion. With this relationship, the next work order cannot start until the prior work order is completed.
 - *Cost:* You can roll the child work order costs into the parent work order, for reporting purposes. You can base the cost roll up, within a hierarchy, on scheduling relationships. Scheduling relationships are not required to roll up costs within a hierarchy. You can create a cost reporting hierarchy that is different from the scheduling hierarchy.
 - *Follow-up Work:* You can create a work order for the current capital asset number or Rebuildable Item, while executing work for the asset on another work order. For example, a second problem with the asset is discovered while executing a work order. A follow-up work order, associated with the original work order, is created for the issue. This is independent of scheduling or cost relationships.
11. In the Scheduled Dates region, enter the work order's scheduled Start date if it is based on a forward schedule. The scheduling process uses this date as a starting point to calculate the scheduled end date and duration for allocated resources and material. If the material/resources are not available by this date, the scheduling process moves the start date forward.
 12. Enter a scheduled Completion date for backward scheduling. This date indicates the requested end by date for the work. The scheduling process uses this date as a starting point to calculate the scheduled start date and duration for allocated resources and material. If the material and resources are not available by that date, the scheduling process moves the start date backwards to ensure completion by the required end date.

Note: Actual dates are entered at operation and work order completion. Scheduled dates are calculated by the Enterprise Asset Management scheduler if you have Oracle Manufacturing Scheduling enabled (See: Overview of Setting Up, *Oracle Manufacturing Scheduling User's Guide*). Otherwise, the EAM scheduler calculates the dates.

See eAM Scheduling, page 2-152 for more information.

13. Within the Main tab, the Department value defaults from the selected asset number. (See: Defining Asset Numbers, page 2-74). This indicates the persons or department

responsible for this asset number.

You can change the department at the operation level if no transactions have been recorded for the work order.

14. Optionally select a Planner for this work order.
15. Optionally select a Priority, such as High, Medium, or Low.
16. Optionally select a Work Order Type. Work order types enable you to differentiate work orders, for example, Routine, Preventive, Rebuild, Emergency, or Facilities. Maintenance management can use this information to sort and monitor work activities for reporting and budgeting. Work order types are referenced in the work order. For information on how to create valid values within the available list of values, See: Work Order Types, page 2-53.
17. The Shutdown Type defaults from the activity. This helps the planner group work orders that may require shutdowns, so that they are planned together.
18. If the Firm check box is selected, planning and scheduling does not automatically adjust the schedule, regardless of material or resource availability Overview of eAM Planning and Scheduling, page 5-1. This check box defaults as selected or cleared, depending on the Auto Firm on Release and Auto Firm on Create check box settings, established in the Enterprise Asset Management Parameters setup for the current organization (See: Defining eAM Parameters, page 2-11). This defaults after the work order is Released, if you select the Auto Firm on Release check box, and defaults immediately if you selected the Auto Firm on Create check box.

If the check box is selected, the end date is calculated, based on the work order duration. The scheduler automatically calculates the duration based on the operations (resource duration setup) on the work order. You can update this check box for work orders at Draft, Released, Unreleased, On-Hold, or Cancel statuses (See: eAM Work Order Statuses, page 3-23).

If the Firm check box is selected, you can still manually reschedule a resource on the work order, thereby updating the dates on its corresponding operation and work order.
19. Optionally select the Notification Required check box.
20. Optionally select the Tagout Required check box to indicate that the Area must be secured for operations required to execute this work order. Tags are generally printed and placed on an asset, warning the plant that it is shutdown and should not be started. This check box helps the planner isolate those jobs that require a tagout.

Select the paperclip Attachments icon to attach relevant tagout documents. You can attach URL, file, or text attachments. See: Defining Work Order Documents, page 3-26.

21. The Planned check box is selected if the current work order was created from forecasted work orders (See: Preventive Maintenance Work Orders, page 3-12).
22. Optionally select the Enable Material Issue Requests check box to enable eAM to manage material availability for the current work order. Material is physically available to a work order via the material request and verification process. This check box is selected by default if it is selected on the eAM Parameters window.
23. The Construction Estimate field will display if the work order was created by using the Construction Estimate Workbench. The field is display only.
24. Optionally enter Failure Information (See: Failure Analysis Overview, page 28-1). The Failure Information region appears if the *Failure Code Required* value is set to *Yes*, within the Failure Set definition (See: Defining Failure Codes and Sets, page 28-2).

If the Failure Entry Required check box is selected, Failure Code entry is mandatory during work order completion.

25. The Material Shortage region enables you to view material availability. This region populates, after you have saved the work order.

The Material Shortage field displays whether there is a shortage of the material (at that moment in time) that is needed to complete the work order's operations. This status helps you to determine when to start work. For example, if there is a material shortage, you typically would not start work. The process that populates this field considers both stocked and direct items. For stocked items, the Work Order Material Shortage process determines whether all of the inventoried material within the work order's associated BOM is available to transact (ATP is not considered). For direct items, the Work Order Material Shortage process determines if all of the direct items that are included within the work order's associated BOM are received into Inventory. This process should be set to automatically execute periodically, but you can execute it from the menu at any time.

You can choose Check Shortage to view the shortage details.

26. Select the Activity tab to select alternate, predefined BOMs and Routings. See: Setting Up Maintenance Bills of Material, page 2-101 and Defining Maintenance Routes, page 2-106.

After the alternate BOM and Routing are selected, the system uses the associated items and assigns the associated resources needed to execute the work order.
27. Optionally select an Activity Type. This code indicates the type of maintenance for this activity and is used when defining a job or a standard job, for example, Inspection, Overhaul, Lubrication, Repair, Servicing, or Cleaning. This value defaults from the activity (See: Defining Activities, page 2-61).
28. Optionally select an Activity Cause to specify what situation caused this work to

generate, for example, Breakdown, Vandalism, Normal Wear, or Settings. This value defaults from the activity.

29. Optionally select an Activity Source to specify reasons that activities require execution, for example, Warranty Compliance, OSHA Compliance, or Military Specification Requirements.

This value defaults from the activity.

30. Optionally select the Project tab. This tab is enabled only if Project Manufacturing is installed and enabled.

1. Optionally select a Project.

2. Optionally select a Task.

31. You can select the Rebuild tab if this work order is created for a rebuildable item. See: Rebuild Work Orders, page 3-13.

32. Optionally select the Request tab to display service and work requests associated with this work order.

You can add service or work requests to a work order by selecting a service request or request number, respectively. Only work requests at an Awaiting Work Order status and Maintenance Type service requests at an Open status are available for association. You may associate multiple work requests to a single work order, but only one work order can associate with a service request. You can associate a service request to multiple work orders. You can dissociate a work request from a work order.

If you want to view a work request attachment, highlight the work request and then select View, Attachments. If there are any attachments associated with the work request, you will be able to view them.

Request Attachments

Attachments [View](#)

Attachments

Creation Information

Created By

Phone Number

Contact Preference

Descriptive Information

PreviousNext

Title	Type	Details	Update	Delete
WR Attachment1	File	SCM.gui		
WR Attachment2-updated1	Web Page	http://www.oracle.com		

PreviousNext

To delete a work request:

1. Highlight the work request.

2. Choose Delete.

33. Optionally select the Approval History tab to view the work order's approval history. A work order might require approvals or notifications at different stages of its lifecycle. For example, organizations typically want an approval process in place before a work order is released. Workflow automates this process. You can initiate Workflow to generate notifications, approvals, transactions, and update a work order status. You can enable Workflow for Work Orders within the eAM Parameters (See: Defining eAM Parameters, page 2-11). You can set up Business Events and Event Subscriptions (or use seeded events and subscriptions) within Oracle Workflow to indicate what events trigger Workflow. Seeded events that you can enable to trigger Workflow are Work Order creation, Work Order release approval, Work Order completion, Work Order status change, Operation completion. See: Setting Up Oracle Workflow, *Oracle Workflow User's Guide*, Setting Up the Business Event System, *Oracle Workflow User's Guide*, and Defining Work Order Statuses, page 3-23).

34. Optionally choose Operations to prepare necessary operations. These operations default from the maintenance route (See: Defining Maintenance Routes, page 2-106) associated with the current activity, but you can update and add to them (See: Preparing Work Order Operations, page 3-29).

You can change the operations if no transactions have been recorded for the work order.

35. Optionally choose Materials to view or add items from the associated asset number's items list (See: Setting Up Maintenance Bills of Material, page 2-101 and Defining Material Requirements, page 3-36). From the Material Requirements window, you can optionally choose Select Materials to add materials from this Asset BOM to the material requirements for the current work order.

36. Optionally choose Resources to view, add, or update the resources assigned to each operation. See: Defining Resource Requirements, page 3-45.

You can change the resources for this work order at the operation level if no transactions have been recorded for the work order.

37. Optionally choose Relationships to manage work order schedules and view work order details. See: Work Order Relationships, page 3-50.

38. Optionally choose Asset Route to view the asset route associated with the current work order's asset group. You may need to perform one activity on multiple asset numbers. To eliminate the possibility of creating multiple work orders for the same activity, you can define asset routes. See: Defining Asset Routes, page 2-83.

You can choose Asset Route if an asset route is associated with the current asset number.

39. Optionally choose Costs to view the costs of work orders falling in the specific accounting periods, specified in the Accounting Information by Period region. Accounting Periods are defined within Oracle General Ledger. See: *Defining Period Types, Oracle General Ledger User's Guide* and *Defining Calendars, Oracle General Ledger User's Guide*.
1. Optionally select a work order, then choose Value Summary to view a summary of the actual, estimated, and variance costs for labor hours, equipment hours, and material against the current work order.
 - *Actual Costs*: This is the accumulation of all costs for material and resource transactions for the asset number's associated maintenance work orders, based on a specified period.
 - *Estimates*: A BOM (material parts list) and routing (resources) can associate with a work order. When you select the Estimates tab, the estimated costs of all material and resources associated with a work order appear, enabling you to budget costs.
 - *Variances*: The difference between the actual costs recorded and estimated costs.
 - *Material*: All material and material overhead transaction costs.
 - *Labor*: All employee resource and resource overhead transaction costs.
 - *Equipment*: All material resource and resource overhead transaction costs.
 2. Optionally choose Details to view actual, estimated, and variance costs for labor hours, equipment hours, and material for specific operations of the current work order.
40. Optionally select a work order, then choose Value Summary to view a summary of the actual, estimated, and variance costs for labor hours, equipment hours, and material against the current work order.
41. Save your work.
- After saving a work order, you can optionally attach its associated asset's attachments: (M) Tools > Copy Asset Attachments.

Related Topics

Defining Asset Documents, page 2-73

Overview of eAM Cost Management, page 6-1

Failure Analysis Overview, page 28-1

Using Encumbrance Accounting with Maintenance Work Orders

You must specify an encumbrance account for the WIP Accounting Class used for maintenance (shop floor) work orders.

To define a WIP Accounting Class to use encumbrance accounting:

1. Navigate to the WIP Accounting Class window (Enterprise Asset Management > WIP Accounting Classes).
2. Define all the required fields on the page.
See Defining WIP Accounting Classes, *Oracle Work in Process User's Guide*).
3. Select the Encumbrance Accounting field, and enter the encumbrance account to be used to capture the expenses.
4. Save your work.

Express Work Orders

You can use the new express work order feature to capture work that has been completed. These types of work orders are also known as 'emergency work orders.'

You can create a new work order, charge time to it and complete it at the same time.

Related Topics

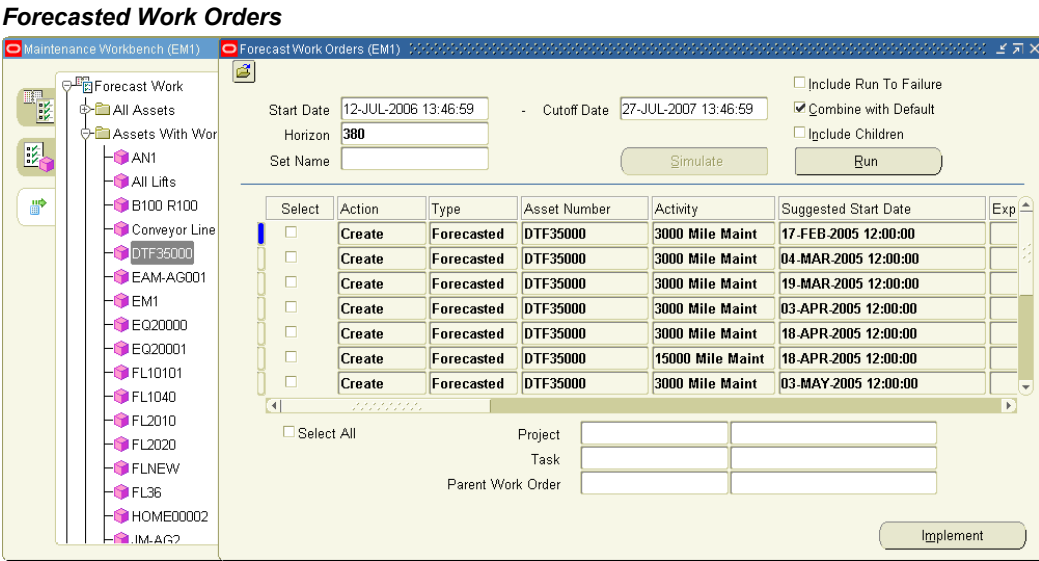
Creating Express Work Orders, page 21-44

Preventive Maintenance Work Orders

Oracle Enterprise Asset Management enables you to generate work orders automatically based on meter readings, runtime intervals, and calendar days. Preventive maintenance activities reduce the probability of failure or degradation of the assets' physical conditions. These activities are executed periodically, by usage, or based on the condition of an asset number (asset or rebuildable serial number). Meters are entered to measure any asset number that needs to be measured and periodically serviced, based on the measurement. For example, a pipe may start out at 12 millimeters, but when it wears to only four millimeters, it needs to be replaced (See: Meters, page 2-125).

Scheduling definitions are defined to create forecasted, scheduled work orders, based on meter readings. You can create a Preventive Maintenance scheduling definition (See: Preventive Maintenance Scheduling, page 2-137) for an asset number or rebuildable item and activity combination (See: Associating Asset Numbers with Activities, page 2-

103), or an asset route (See: Defining Asset Routes, page 2-83). After you have defined Preventive Maintenance scheduling definitions, the Preventive Maintenance scheduler process may execute. You can view these forecasted work orders using the Maintenance Workbench (See: Using the Maintenance Workbench, page 3-69). You can execute the Generate Preventive Maintenance Work Orders process. When this process executes, work orders are created with a status of Unreleased. (See: Generating Work Orders, page 4-6). You can choose the Implement button to change the status of the Unreleased work orders to Released work orders.



Related Topics

Preventive Maintenance Overview, page 4-1

Rebuild Work Orders

Rebuild work orders are created as child work orders.

For example, a work order was issued for the inspection of a pump. During the pump inspection, you found that the motor, one of the components of the pump, is problematic. You have two options: You can repair and then reinstall this motor (rebuildable item), or you can replace the rebuildable item by issuing a new motor rebuildable item from inventory. If you choose to perform a material issue from inventory, the old motor rebuildable item attaches to the work order, automatically creating the child, the rebuild work order number associated to the parent work order. In this case, the asset number genealogy would automatically update to identify this new item number. See: Overview of Inventory Transactions, *Oracle Inventory User's Guide*.

If you choose to repair and then reinstall the problematic motor rebuildable item, you

can manually create the child rebuild work order for the old motor (rebuildable item).

The instructions below show you the option of creating a rebuild work order without issuing any new material. The rebuildable item is replaced back into the asset (motor placed back into the pump, for example), and does not go to a subinventory when the work order is completed. In this case, the asset number genealogy is not updated.

To create rebuild work orders:

1. Navigate to the Rebuild Work Orders window (Work Orders > Rebuildable Work Orders).

Note: This function is available for those users with responsibilities and roles that include function, EAM_WO_DETAILS_MODE, with their associated menu. Otherwise, you can only view work orders, and cannot update associated asset hierarchy, work order hierarchy, material, resource, operation, cost, collection plan results, work request, and attachment information. See: *Implementing Function Security, Oracle Applications System Administrator's Guide - Security.*

2. Choose New.

Rebuild Work Order

Rebuild Work Order (EM1)

Work Order: WO220179
 Asset Number: LXENG0001
 Rebuild Item: Lexus ES Engine
 Rebuild Activity: Multimeter Calibration
 Class: MaintWAC
 Status: Draft
☐ Pending
 Parent Work Order: WO192903
 Relationship Type: Parent Child

MDA Multimeter Calibration Activity
 Lexus ES Engine
 Scheduled Dates
 Start Date: 01-SEP-2006 00:17:55
 Completion Date:
 Duration(hours):

Actual Dates
 Start Date:
 Completion Date:

Main Activity Project **Rebuild** Request Approval History

Rebuild Source: WO192903
 Charge Asset: LX0002
 Charge Asset Group: Lexus ES300

Operations Materials Resources Relationships Asset Route Costs

The header information displays general information about the rebuildable item and the type of work required.

3. A work order number is assigned, but you can update it.
4. Optionally enter a Description for this work order, up to 240 characters.
5. Optionally select an Asset Number (serial number) from the list of values (See: Defining Rebuildable Items, page 2-110 and Generating Serial Numbers, *Oracle Inventory User's Guide*).
6. Enter or select a Rebuild Item requiring maintenance.
7. Optionally select a Rebuild Activity. Only activities associated with this Rebuildable Item are available (See: Rebuildable Item/Activity Association, page 2-116). If an activity does not exist, you can add operations, and material/resource requirements to this work order manually. See: Defining Material Requirements, page 3-36, Defining Resource Requirements, page 3-45, and Preparing Work Order Operations, page 3-29. If an activity does exist, you can update the material and resources by choosing the Materials or Resources buttons from this window or by utilizing the Maintenance Workbench (See: Using the Maintenance Workbench, page 3-69).

8. Enter a Class code. This represents the charge (expense) accounts associated with the asset number. This defaults from the asset number (See: Defining Asset Numbers, page 2-74) and can be updated.
9. Enter the Status. For example, Unreleased, Released, On Hold, and Draft. Certain transactions update this status automatically, including Work Order Completion, for example (See: eAM Work Order Statuses, page 3-23).
10. The Pending check box value determines whether the work order has reached the status above or is still pending, due to workflow. If the check box is clear, the Status reflects the current state. If the check box is selected, the Status reflects a desired target state that is not yet reached due to pending activity, such as a workflow approval that is still in progress.
11. If this is a child work order in a work order network and Parent Child is populated in the Relationship Type field, the Parent work order is populated in this field.

This field is also populated if you selected a Rebuild Source work order, within the Rebuild tab.
12. The Relationship Type field indicates the type of Relationship associated with the work order. Valid relationships are Parent Child, End to Start Dependency, Cost, and Follow-up Work. Manage complex maintenance jobs through these four types of work order relationships. See: Work Order Relationships, page 3-50.
 - *Parent Child*: This relationship enables a network of work orders, which includes one top level work order that defines the time line of all its child work orders. The start and end dates of the child work orders are within the start and end dates of the parent work order. A child work order can be parent to another work order. One parent can have multiple children, but one child can have a single parent.
 - *End to Start Dependency*: You can create work orders with scheduling dependency relationships (including child sibling work orders). For example, one work order's scheduled start date is dependent on another work order's completion. With this relationship, the next work order cannot be created until the prior work order, for the current asset, is completed.
 - *Cost*: You can roll the child work order costs into the parent work order, for reporting purposes. You can base the cost roll up, within a hierarchy, on scheduling relationships. Scheduling relationships are not required to roll up costs within a hierarchy. You can create a cost reporting hierarchy that is different from the scheduling hierarchy.
 - *Follow-up Work*: You can create a work order for the current capital asset number or Rebuildable Item, while executing work for the asset on another work order. For example, a second problem with the asset is discovered while

executing a work order. A follow-up work order, associated with the original work order, is created for the issue. This is independent of scheduling or cost relationships.

13. In the Scheduled Dates region, enter the work order's scheduled Start date if it is based on a forward schedule. The scheduling process uses this date as a starting point to calculate the scheduled end date and duration for allocated resources and material. If the material/resources are not available by this date, the scheduling process moves the start date forward (See: eAM Scheduling, page 2-152).

Note: Actual dates are entered at operation and work order completion. Scheduled dates are calculated by the Enterprise Asset Management scheduler if you have Oracle Manufacturing Scheduling enabled (See: Overview of Setting Up, *Oracle Manufacturing Scheduling User's Guide*). Otherwise, the EAM scheduler calculates the dates.

14. Enter a scheduled Completion date for backward scheduling. This date indicates the requested end by date for the work. The scheduling process uses this date as a starting point to calculate the scheduled start date and duration for allocated resources and material. If the material and resources are not available by that date, the scheduling process moves the start date backwards to ensure completion by the required end date (See: eAM Scheduling, page 2-152).

Note: Actual dates are entered at operation and work order completion. Scheduled dates are calculated by the Enterprise Asset Management scheduler if you have Oracle Manufacturing Scheduling enabled (See: Overview of Setting Up, *Oracle Manufacturing Scheduling User's Guide*). Otherwise, the EAM scheduler calculates the dates.

15. Within the Main tab, the Department defaults from the selected asset number (See: Defining Asset Numbers, page 2-74). This indicates the persons or department responsible for this asset number.
16. Optionally select a Priority. For example, High, Medium, or Low.
17. Optionally select a Work Order Type. Work order types enable you to differentiate work orders, for example, Routine, Preventive, Emergency, or Facilities. Maintenance management can use this information to sort and monitor work activity for reporting and budgeting. Work Order Types are referenced in the work order. For information on how to create valid values within the available list of values, See: Work Order Types, page 2-53.

18. The Shutdown Type defaults from the Rebuild Activity. This helps the planner group work orders that may require shutdowns, so that they are planned together.
19. If the Firm check box is selected, planning and scheduling does not adjust the schedule, regardless of material or resource availability (See: Overview of Planning and Scheduling). This check box defaults as selected or cleared, depending on the Auto Firm on Release and Auto Firm on Create check box settings, established in the Enterprise Asset Management Parameters setup for the current organization (See: Defining eAM Parameters, page 2-11). This defaults after the work order is Released, if you select the Auto Firm on Release check box, and defaults immediately if you selected the Auto Firm on Create check box.

If the check box is selected, the end date is calculated, based on the work order duration. The scheduler automatically calculates the duration based on the operations (resource duration setup) on the work order. You can update this check box for work orders at Draft, Released, Unreleased, On-Hold, or Cancel statuses (See: eAM Work Order Statuses, page 3-23).

If the Firm check box is selected, you can still manually reschedule a resource on the work order, thereby updating the dates on its corresponding operation and work order.

20. Optionally select the Notification Required check box.
21. Optionally select the Tagout Required check box to indicate that the Area needs to be secured for operations required to execute this work order. Tags are generally printed and placed on an asset, warning the plant that it is shutdown and should not be started. This check box helps the planner isolate those jobs that require a tagout.
 - Select the paperclip Attachments icon to attach relevant tagout documents. You can attach URL, file, or text attachments. See: Defining Work Order Documents, page 3-26.
22. The Planned check box is selected if the current work order was created from forecasted work orders (See: Preventive Maintenance Work Orders, page 3-12).
23. Optionally select the Enable Material Issue Requests check box to enable eAM to manage material availability for the current work order. Material is physically available to a work order via the material request and verification process.
24. Optionally enter Failure Information (See: Failure Analysis Overview, page 28-1). The Failure Information region appears if the *Failure Code Required* value is set to *Yes*, within the Failure Set definition (See: Defining Failure Codes and Sets, page 28-2).

If the Failure Entry Required check box is selected, Failure Code entry is mandatory during work order completion.

25. The Material Shortage region enables you to view material availability. This region populates, after you have saved the work order.

The Material Shortage field displays whether there is a shortage of the material (at that moment in time) that is needed to complete the work order's operations. This status helps you to determine when to start work. For example, if there is a material shortage, you typically would not start work. The process that populates this field considers both stocked and direct items. For stocked items, the Work Order Material Shortage process determines whether all of the inventoried material within the work order's associated BOM is available to transact (ATP is not considered). For direct items, the work order Material Shortage process determines if all of the direct items that are included within the work order's associated BOM are received into Inventory. This process should be set to automatically execute periodically, but you can execute it from the menu at any time.

You can choose Check Shortage to view the shortage details.

26. Optionally select the Activity tab to select alternate, predefined BOMs and Routings. See: Setting Up Maintenance Bills of Material, page 2-101 and Defining Maintenance Routes, page 2-106.

After the alternate BOM and Routing are selected, the system uses the associated items and assigns the associated resources needed to execute the work order.

1. Optionally select an Activity Type. This code indicates the type of maintenance for this activity and is used when defining a job or a standard job, for example, Inspection, Overhaul, Lubrication, Repair, Servicing, or Cleaning. This value defaults from the activity (See: Defining Activities, page 2-61).
 2. Optionally select an Activity Cause to specify what situation caused this work to generate, for example, Breakdown, Vandalism, Normal Wear, or Settings. This value defaults from the activity (See: Defining Activities, page 2-61).
 3. Optionally select an Activity Source to specify reasons activities need execution, for example, Warranty Compliance, OSHA Compliance, or Military Specification Requirements. This value defaults from the activity (See: Defining Activities, page 2-61).
27. Optionally select the Project tab. This tab is enabled if Project Manufacturing is installed and enabled.
 1. Optionally select a Project.
 2. Optionally select a Task.
 28. You can select the Rebuild tab to select a *Rebuild Source* work order. This work order is the parent to the current child work order. The *Charge Asset* field is populated with the parent work order's associated asset.

29. Optionally select the Request tab to display service and work requests associated with this work order. You can add service or work requests to a work order by selecting a service request or request number. Work requests at an Awaiting Work Order status and Maintenance Type service requests are available for association. You may associate multiple work requests to a single work order, but one work order can associate with a service request. You can associate a service request to multiple work orders. You can dissociate a work request from a work order.
 1. Highlight the Work Request.
 2. Choose Delete.
30. Optionally select the Approval History tab to view the work order's approval history. A work order might require approvals or notifications at different stages of its lifecycle. For example, organizations typically want an approval process in place before a work order is released. Workflow automates this process. You can initiate Workflow to generate notifications, approvals, transactions, and update a work order status. You can enable the Workflow for Work Orders option within the eAM Parameters (See: Defining eAM Parameters, page 2-11). You can set up Business Events and Event Subscriptions (or use seeded events and subscriptions) within Oracle Workflow to indicate what events trigger Workflow. Seeded events that you can enable to trigger Workflow are: Work Order creation, Work Order release approval, Work Order completion, Work Order status change, Operation completion. See: Setting Up Oracle Workflow, *Oracle Workflow User's Guide*, Setting Up the Business Event System, *Oracle Workflow User's Guide*, and Defining Work Order Statuses, page 3-23).
31. Optionally choose Operations to prepare necessary operations. These operations default from the maintenance route (See: Defining Maintenance Routes, page 2-106) associated with the current activity, but you can add or update them (See: Preparing Work Order Operations, page 3-29).
32. Optionally choose Materials to view, add, or update the associated asset number's items list (See: Setting Up Maintenance Bills of Material, page 2-101 and Defining Material Requirements, page 3-36). From the Material Requirements window, you can optionally choose Select Materials to add Materials from the Asset BOM to the material requirements for the current work order.
33. Optionally choose Resources to view, add, or update the resources assigned to each operation. See: Defining Resource Requirements, page 3-45.
34. Optionally choose Relationships to manage work order schedules and view work order details. This button is enabled if a Relationship Type was previously selected. See: Work Order Relationships, page 3-50
35. Optionally choose Asset Route to view the Asset Route associated with the current work order's Asset Group. You might need to perform one activity on multiple

asset numbers. To eliminate the possibility of creating multiple work orders for the same activity, you can define Asset Routes. See: *Defining Asset Routes*, page 2-83.

You can choose Asset Route if an Asset Route is associated with the current asset number.

36. Optionally choose Costs to view the costs of work orders falling in the specific accounting periods, specified in the Accounting Information by Period region. Accounting Periods are defined within Oracle General Ledger. See: *Defining Period Types*, *Oracle General Ledger User's Guide* and *Defining Calendars*, *Oracle General Ledger User's Guide*.
1. Optionally select a work order, then choose Value Summary to view a summary of the actual, estimated, and variance costs for labor hours, equipment hours, and material against the current work order.

Maintenance Work Order Value Summary

Maintenance Work Order Value Summary (EM1) - WO220268

Period From: 01-AUG-2006 Period To: 31-AUG-2006 Refresh

Asset Group		Completion Date	01-SEP-2006 01:08:22	
Asset Number		Work Order Status	Draft	
Asset Activity	Multimeter Calibration	Parent Work Order	WO192903	
Rebuild Item	Lexus ES Engine	Estimation Status	Complete	
Rebuild Serial Number	LXENG0001	Last Estimate Id	-1	
Owning Department	Lexus Shop	Last Estimate Date	01-SEP-2006 01:09:21	

Actual Costs Estimates Variances

Cost Category	Total	Material	Labor	Equipment
Job Total				

Details

- *Actual Costs:* This is the accumulation of all costs for material and resource transactions for the asset number's associated maintenance work orders, based on a specified period.
- *Estimates:* A BOM (material parts list) and routing (resources) can associate with a work order. When you select the Estimates tab, the estimated costs of all material and resources associated with a work order appear, enabling you to budget costs.

- *Variances*: The difference between the actual costs recorded and estimated costs.
 - *Material*: All material and material overhead transaction costs.
 - *Labor*: All employee resource and resource overhead transaction costs.
 - *Equipment*: All material resource and resource overhead transaction costs.
2. Optionally choose Details to view actual, estimated, and variance costs for labor hours, equipment hours, and material for specific operations of the current work order.
37. Save your work.
- After saving a work order, you can optionally attach its associated asset's attachments: (M) Tools > Copy Asset Attachments

Note: A requirement for rebuild work orders that are created automatically via a material transaction is that the completion subinventory must be an expense subinventory (See: Subinventory General Ledger Account Fields, *Oracle Inventory User's Guide* and Work Order Completion, page 3-59).

Note: A rebuild work order's owning department defaults from the owning department of its parent work order. This is viewable when you select the Main tab.

Related Topics

Defining Asset Documents, page 2-73

Overview of eAM Cost Management, page 6-1

Failure Analysis Overview, page 28-1

Easy Work Orders

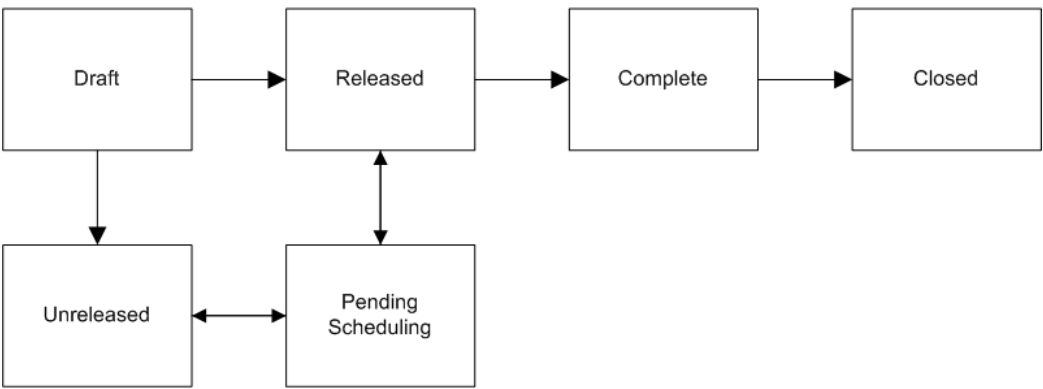
Easy work orders are unplanned work orders, and enable you to avoid operation and resource planning. An activity does not default into the work order, based on the asset number and activity association as with planned work orders, however, you can add an activity to an easy work order. These work orders are only created in Maintenance User. Work orders can be created at any status, such as Released (See: eAM Work Order Statuses, page 3-23), enabling you to execute the work order by requesting material

and charging labor.

eAM Work Order Statuses

An Enterprise Asset Management work order may progress through several statuses, throughout its lifecycle duration. The diagram below illustrates how Enterprise Asset Management work orders might start at a Draft status, then move to Released, Complete, and finally Closed. These statuses can vary, depending on the type of work order that is created. For example, express work orders are created in a Released status, bypassing the Draft status.

eAM Work Order Lifecycle



Status	Description
Draft	Infinite resource capacity scheduling of work orders at a Draft status may take place. You cannot charge labor, or request material for work orders at this status.

Status	Description
Released	<p>After a work order is Released, you can execute a work order. You can charge labor, request material, and scheduling for this work order takes place (See: eAM Scheduling, page 2-152) to create the scheduled start or end date. You can release a work order from the Work Orders window (See: Routine Work Orders, page 3-3), and the Maintenance Workbench (See: Using the Maintenance Workbench, page 3-69).</p> <p>If you create a work order with a future date and then release it, the release date is the system date. If you create a work order with a date in the past and then release it, the release date is the scheduled start date, since you can post transactions during any time after the scheduled start date (even if it is in past). The release date has a direct relationship with costing, and transactions for a work order cannot be posted before its release date. The release date might appear different from the start date, because of time zone conversions.</p>
Unreleased	<p>You can move an Enterprise Asset Management work order in Draft or Released status to Unreleased. Scheduling can take place for these work orders (See: eAM Scheduling, page 2-152) but you cannot charge labor or request material. An Unreleased work order cannot be changed to a Draft status.</p>
Pending Scheduling	<p>If the Scheduler is enabled, the work order status changes to Pending Scheduling, if a status of Released is chosen. After the Scheduler process finishes running, the status changes back to Released.</p>

Status	Description
Complete	<p>A Complete status for an Enterprise Asset Management work order does not require any completed operations. When a work order is completed, you can still charge labor. You can uncomplete a work order; this transitions it to a Released status. Uncompletion is performed within the work order complete/uncomplete pages in the Maintenance Super User responsibility (See Work Order Completion, page 3-59. You can close and uncomplete work orders with this status.</p>
Complete - No Charges	<p>A Complete - No Charges status for an Enterprise Asset Management work order does not require any completed operations. You cannot charge labor at this status</p> <p>You cannot update associated asset hierarchy, work order hierarchy, material, resource, operation, cost, collection plan results, work request, and attachment information on a work order that is at a Complete - No Charges status. You can close and uncomplete work orders with this status.</p>
Closed	<p>You cannot charge any accounts after an Enterprise Asset Management work order is closed. You can close and uncomplete work orders with this status. If a work order was at a Complete status at the time of closing it, you can uncomplete the work order to bring it back to a Complete status. For all other statuses during work order closing, the work order is transitioned to same status it had while closing. See: Closing Work Orders, page 3-65.</p> <p>You cannot update associated asset hierarchy, work order hierarchy, material, resource, operation, cost, collection plan results, work request, and attachment information on a work order that is at a Closed status.</p>

Status	Description
On-Hold	Enterprise Asset Management work orders at Released and Unreleased statuses can be put on hold. You cannot charge labor or request material for a work order at this status.
Cancel	<p>You can cancel an Enterprise Asset Management work order at any status in its lifecycle.</p> <p>You cannot update associated asset hierarchy, work order hierarchy, material, resource, operation, cost, collection plan results, work request, and attachment information on a work order that is at a Cancel status.</p>

Defining Work Order Documents

You can attach existing documents to a work order, and create text to associate with a work order. You can attach text and files, such as spreadsheets, graphics, and OLE objects.

To define work order documents:

1. Navigate to the EAM Work Order Documents window.

EAM Work Order Documents

The screenshot shows the 'EAM Work Order Documents' form. The 'Category' dropdown is set to 'Maintenance Job Attachn'. The 'Description' field is empty. In the 'Source' section, 'Data Type' is 'File' and the 'File' field is empty. The 'Usage' section has three radio buttons: 'Standard' (selected), 'Template', and 'One-Time'. The 'Security' section has 'Type' set to 'Organization' and 'Owner' set to 'EAM'. The 'Effective Dates' section has 'From' and 'To' fields. The 'Magnification' field is set to '100%'. There is a 'Share' checkbox. At the bottom, there is an 'Open Document...' button and a scrollbar.

2. Select a Data Type.

Related Topics

Working With Attachments, *Oracle Applications User's Guide*

eAM Operations and Tasks

Operations on a work order are the instructions or tasks to perform a repair. These operations are assigned resources, for example, trades people, outside service providers, and equipment.

This section includes the following topics:

- Defining Asset Shutdown Statuses, page 3-28
- Preparing Work Order Operations, page 3-29
- Viewing Work Order Operations, page 3-35
- Defining Inventory Material Requirements, page 3-36
- Defining Direct Item Material Requirements, page 3-42

- Viewing Material Requirements, page 3-44
- Defining Resource Requirements, page 3-45
- Viewing Resource Requirements, page 3-49

Defining Asset Shutdown Statuses

Shutdown of an asset is sometimes necessary to perform a maintenance activity. You can create new shutdown information associated with an asset, or view existing shutdown history information already recorded to an asset. Shutdown information consists of start and end dates, work order numbers requiring maintenance on the asset, and specific operation sequences. While completing a work order to its operations, you can view asset shutdown information in the Asset Status window.

All shutdown information entered within the Asset Status window is for information purposes only.

To view and define shutdown information for an asset:

1. Navigate to the Asset Status window.

Asset Status

The screenshot shows the 'Asset Status (EAM)' window. It has a search section at the top with fields for 'Asset Number' (JP-AN1), 'Asset Group' (av-ag1), 'Start Date', and 'End Date'. There are also empty fields for 'Work Order' and 'Op Seq'. A 'Find' button is on the right. Below this is a 'Shutdown Details' section with a table. The table has columns for 'Start Date', 'End Date', 'Work Order', 'Op Seq', and 'Shutdown Descripti'. The first row is highlighted in yellow and contains the dates '17-NOV-2004 00:00:00' and '27-NOV-2004 00:00:00'. The rest of the table is empty.

Start Date	End Date	Work Order	Op Seq	Shutdown Descripti
17-NOV-2004 00:00:00	27-NOV-2004 00:00:00			

2. Select an Asset Number, and click the **Find** button.

All shutdown information for the current asset appears in the Shutdown Details region.

3. Select a Start date to add new shutdown information for the current asset.
4. Select an End Date.
5. Optionally associate the shutdown information to a specific work order requiring maintenance on the current asset.
Only work orders created for the current asset are available.
6. Optionally associate shutdown information to the operation level of a work order by choosing a specific operation sequence.
7. Optionally enter a shutdown description.
8. Save your work.

Preparing Work Order Operations

Operations (also known as tasks) are the instructions to perform maintenance activities. Each operation is assigned to a department (See: Defining Departments and Resources,

page 2-17), associated with assigned resources (trades people, outside service providers, and equipment). When you create a work order for an asset number, you can attach the asset number's associated activities and related maintenance route to work order. (See: Defining Maintenance Routes, page 2-106) and BOM. The maintenance route is comprised of operations necessary to complete the activity. You can view and update these operations from the work order.

To prepare operations:

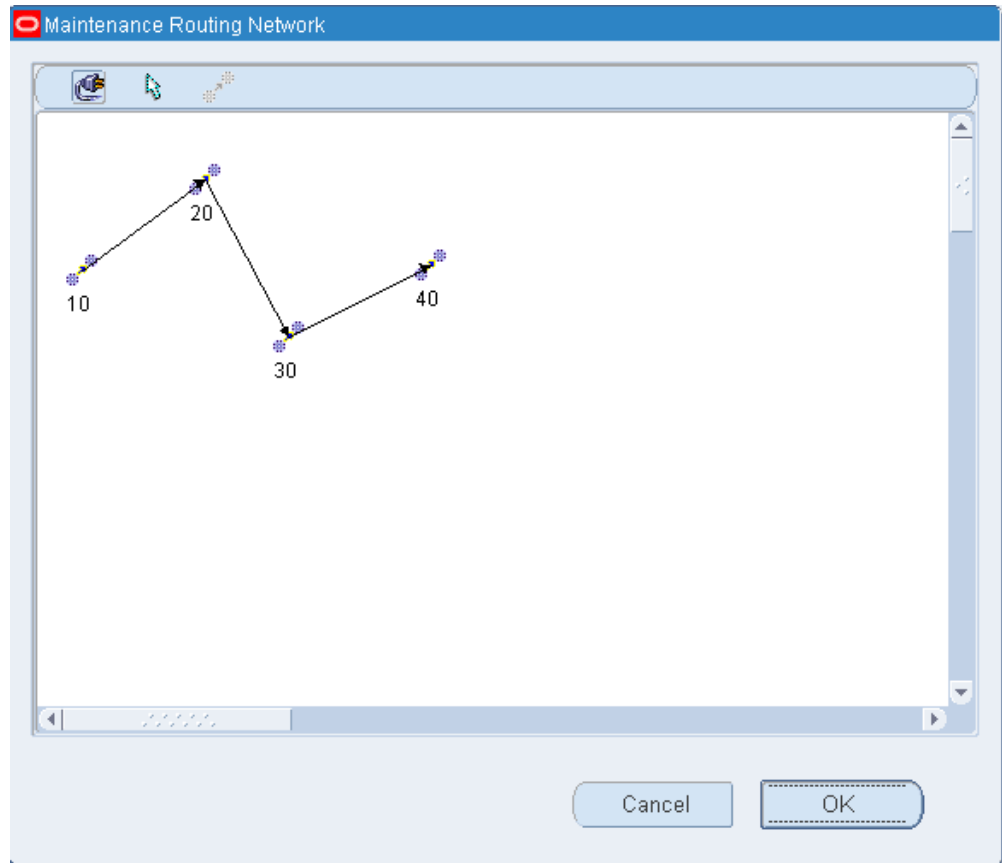
1. Navigate to the Select work order window (work order Details > Operations).

Note: This function is available for those users with responsibilities and roles that include function, EAM_WO_DETAILS_MODE, with their associated menu. Otherwise, you can only view work orders, and cannot update associated asset hierarchy, work order hierarchy, material, resource, operation, cost, collection plan results, work request, and attachment information. See: *Implementing Function Security, Oracle Applications System Administrator's Guide - Security.*

2. Select a work order.
3. Click the **Continue** button.

Operations can be scheduled to run in parallel, sequence, or through dependent steps. In the screen shot below, for example, Operation 20 is dependent on Operation 10, since there is a line connecting the operations; Operation 20 cannot be performed until Operation 10 is complete. Operations 30 and 40 run in parallel to each other. Operation 40 is independent; it can be performed at any time.

Operations



4. Choose the Operation icon, then click the header to display the New Operation window.
 1. Optionally enter or update an operation sequence, or let it generate for you, according to your profile setup (See: Item and Operation Sequence, *Oracle Bills of Material User's Guide*). Operations are generally assigned in increments of ten, enabling you to insert additional steps.
 2. Optionally enter a Description for this operation.
 3. Optionally to copy or reference standard operations into a routing, select an Operation Code. If you use a standard operation code, the operation information for that code is copied into the current operation. You can then update that information (See: Creating a Standard Operation, *Oracle Bills of Material User's Guide*).
 4. Select an Assigned Department.

The assigned department identifies the role responsible for performing the task.

5. Select a scheduled Start Date for this operation to base on a forward schedule.

The Enterprise Asset Management scheduling process uses the scheduled start date as a starting point to calculate the duration of the operation, based on the resources and material. If the material and resources are not available by this date, the scheduling process moves the start date of the work order forward. The planning process uses the scheduled start date to recommend creation of purchase orders for the material (See: Overview of Planning and Scheduling, page 5-1).

6. Select a scheduled Completion date for this operation to base on a backward schedule.

The Enterprise Asset Management scheduling process uses the scheduled end date as a starting point to calculate the duration of the operation, based on the resources and material. If the material and resources are not available by this date, the scheduling process moves the completion date of the work order backward. The planning process uses the scheduled completion date to recommend creation of purchase orders for the material (See: Overview of Planning and Scheduling, page 5-1).

Note: Actual dates are entered at operation and work order completion. Scheduled dates are calculated by the Enterprise Asset Management scheduler if you have Oracle Manufacturing Scheduling enabled (See: Overview of Setting Up, *Oracle Manufacturing Scheduling User's Guide*). Otherwise, the WIP scheduler calculates the dates.

7. Optionally select a Shutdown Type to help the planner group work orders that may require shutdowns.

When the work orders are grouped, they are planned together.

8. Click the **OK** button to return to the Operations window.

The operations entered in the previous window appear at the bottom of this window. Scroll over to the far right field.

The Duration identifies the duration of the operation and is measured in hours. You can manually enter this, or let it calculate as the difference between the estimated Start Date and estimated End Date.

5. After all necessary operations are entered, you can create dependencies as necessary.

Optionally choose the Connect icon to connect dependent operations. After chosen, you can draw a line between dependent operations.

You might need to move operations around. Optionally choose the Drag icon to

move an operation.

6. Optionally choose Dependencies to set dependencies between operations.
For example, Operation 30 is dependent on Operation 10 completing.

Dependent Operations

Dependent Operations (EAM) - WO100229, 10

Prior Operations

Prior Operation	Description	Completed	Department	Scheduled Start Date	Scheduled Completion Date
		<input type="checkbox"/>			
		<input type="checkbox"/>			
		<input type="checkbox"/>			

Next Operations

Next Operation	Description	Completed	Department	Scheduled Start Date	Scheduled Completion Date
		<input type="checkbox"/>			
		<input type="checkbox"/>			
		<input type="checkbox"/>			

7. Optionally choose Materials to view or update the associated items list for the current operation (See: Setting Up Maintenance Bills of Material, page 2-101 and Defining Inventory Material Requirements, page 3-36).

Material Requirements

Material Requirements (EAM) - WO100229, 10

Inventory Items

Main

Quantities

Supply

Comment

ATP

	Material	Op	Department	Date Required	Material Description	
<input type="checkbox"/>		10				
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

Select All

Check ATP

Select Materials

Direct Item

Cgpy To Asset

Create Direct Items

Op	Item Type	Item	Description	UOM	Required Qty	Purchasing Category	Need By Date	Sum
10	Non Stock	Dry Wall S	Dry Wall Serv	Ea	12	MISC.MISC	09-APR-2004	
10	Non Stock	Dry Wall S	Dry Wall Serv	Ea	12	MISC.MISC	09-APR-2004	

- 8. Optionally choose Resources to view or update the resources assigned to the current operation.

1. Within the Select Work Order window, select a work order.
2. Choose Continue.

View Operations

Operation	Operation Code	Assigned Department	Completed	Description	Shutdown Type	Scheduled Start Date
10	Dep1	<input checked="" type="checkbox"/>	Default Operation for Work Order		31-MAR-2004 11	
		<input type="checkbox"/>				
		<input type="checkbox"/>				
		<input type="checkbox"/>				
		<input type="checkbox"/>				

Dependencies Materials Resources

2. Choose Dependencies to view operation dependency information.
3. Choose Materials to view material requirements. See: Defining Material Requirements, page 3-36.
4. Choose Resources to view resource assignment. See: Defining Resource Requirements, page 3-45.

Related Topics

Preparing Work Order Operations, page 3-29

Defining Material Requirements

When entering a work order for an asset number, the activity associated to the asset number attaches the required material and resources to complete its operations. However, you can update, add, view, and delete material requirements for a specific work order.

You can also specify a source subinventory and source locator at the BOM level or the work order material requirement level. If the Auto Request Material option is selected

at the BOM level, material allocation will be initiated when the work order is released, and the source subinventory and source locator values you enter will override these values in the Inventory sourcing rules. If the Auto Request Material option is not selected, you can specify a source subinventory and source locator for your material when you perform a material request or a One-Step Material Issue.

To define work order material requirements:

1. Navigate to the Select Work Order page (Work Order Details > Material Requirements).

Note: This function is available for those users with responsibilities and roles that include function, EAM_WO_DETAILS_MODE, with their associated menu. Otherwise, you can only view work orders, and cannot update associated asset hierarchy, work order hierarchy, material, resource, operation, cost, collection plan results, work request, and attachment information. See: *Implementing Function Security, Oracle Applications System Administrator's Guide - Security*.

2. Select a work order.
3. Click the **Continue** button.

Material Requirements

Material Requirements (EM1) - 207566

Inventory Items

Main Quantities Supply Comment ATP

	Material	Op	Department	Date Required	Material Description	Plai	
<input type="checkbox"/>	Fork Lift Battery	10	W-Maint	07-DEC-2005 00:00	Batteries used for electric Fork Lift	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Shop Rags	10	W-Maint	07-DEC-2005 00:00	Shop Rags for Clean up	<input checked="" type="checkbox"/>	
<input type="checkbox"/>						<input type="checkbox"/>	
<input type="checkbox"/>						<input type="checkbox"/>	
<input type="checkbox"/>						<input type="checkbox"/>	

Select All Check ATP Select Materials Direct Item Copy To Asset

Create Direct Items

	Op	Item Type	Line Type	Item	Description	UCM	Required Qty	Purchasing Category	Need By Date
<input type="checkbox"/>			Quantity				1		
<input type="checkbox"/>									
<input type="checkbox"/>									

Select All Select Direct Items Copy To Asset

- Optionally, within the Inventory Items region, you can view or update the item list associated with the asset number. (See: Setting Up Asset Bills of Material, page 2-86) by placing your cursor in the Material field or by choosing Select Materials. When you choose Select Materials, the current asset numbers associated Asset Bill of Material items are available to be added to the required material for the current work order.

Select Materials

Select Materials (EM1) - 207566

Asset Number: FL1040 Fork Lift 1040
Asset Group: Fork Lifts To Operation:

	Material Description	UOM	Quantity	Supply Type	
<input type="checkbox"/>	Motor - Electric For	Electric Fork Lift Motor	Ea	1	Push
<input type="checkbox"/>	Battery - Electric F	Power Battery For Electric Fork	Ea	1	Push
<input type="checkbox"/>	Trans Electric Fork	Transmission / Drive Train Electr	Ea	1	Push
<input type="checkbox"/>	Oil Filter Electric	Oil Filter Electric Fork Lifts	Ea	1	Push
<input type="checkbox"/>	Mast	All Lift Masts for All Fork Lifts	Ea	1	Push
<input type="checkbox"/>	Rear Wheels - Elec	Rear Wheels Electric Fork Lifts	Ea	2	Push
<input type="checkbox"/>	Front Wheels - Ele	Front Wheels Electric Fork Lifts	Ea	2	Push
<input type="checkbox"/>	Forks	Forks for all Fork Lifts	Ea	1	Push
<input type="checkbox"/>	Fork Lift Lubrication	Lubrication for Masts	Ea	1	Push
<input type="checkbox"/>					

Select All OK Cancel

5. Optionally select the Main tab to change operation sequence and the date required.

Note: If you are accessing the Select Materials page via the Operations page, you cannot change operation information. If you are accessing the Select Materials page using the Work Order page, you can change operation information.

6. Optionally select the Quantities tab to update the quantities Required.
7. Optionally select the Supply tab to select a supply Type. You can optionally specify a value for the Source Subinventory and Source Locator fields.

Supply

Material Requirements (EM1) - 207566

Inventory Items

Main Quantities **Supply** Comment ATP

	Material	Type	Subinventory	Locator	MRP Net
<input type="checkbox"/>	Fork Lift Battery	Push	Bat Rchrg		<input checked="" type="checkbox"/>
<input type="checkbox"/>	Shop Rags	Push	FkflStore		<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input type="checkbox"/>
<input type="checkbox"/>					<input type="checkbox"/>
<input type="checkbox"/>					<input type="checkbox"/>

Select All Check ATP Select Materials Direct Item Copy To Asset

Create Direct Items

	Op	Item Type	Line Type	Item	Description	UOM	Required Qty	Purchasing Category	Need By Date
<input type="checkbox"/>			Quantity				1		
<input type="checkbox"/>									
<input type="checkbox"/>									

Select All Select Direct Items Copy To Asset

8. Optionally select the Comment tab to enter information for the current Material.
9. Optionally choose the ATP tab to define available to promise information for the current material. If you select the ATP Allowed check box, available to promise information can be calculated for the current material.
10. Optionally choose Check ATP to check available to promise information for the selected material.

ATP Results

Org	Item/Resource	Type	UOM	Required Quantity	Required Date	Available Quantity	Projected Transactable

11. Optionally choose Direct Item to create requisitions for direct items, and add them to your items list. Oracle Self Service Purchasing defaults the Work Order Number and Operation Number, as well as the class code information for correct expensing. Direct Items are one time, non-inventoried items that are purchased directly from the supplier. After you choose Direct Item, the current Work Order and operation reference values are passed to the requisition created. If the Work Order is project related, the project and task information is captured in the purchase requisition (See: Overview of Direct Item Procurement for eAM Work Orders, page 5-1). You can exit Self Service Purchasing and return to the Material Requirements page by choosing Return To Portal.

Upon re-inquiry of this Work Order, the Direct Items region reflects any requisition and purchase order details.

Note: You must have Oracle Self Service Purchasing installed for this functionality. You can purchase direct items from a Requisition or Purchase Order page if you have Oracle Purchasing installed (See: Entering Purchase Orders for Direct Items, page 7-19).

Note: You can procure direct items to Work Orders at Released statuses.

12. Choose Copy to Asset to dynamically update the BOM associated to the asset group

with any items list changes (See: Setting Up Asset Bills of Material, page 2-86).

13. Save your work.

Note: You can view Work Order material requirements in a view-only mode. See: Viewing Material Requirements, page 3-44.

Related Topics

Viewing ATP Information, *Oracle Inventory User's Guide*

Defining Direct Item Material Requirements

Direct items represent items with infrequent use or criticality; they are not included in the internal catalog as stocked items. These items are considered as "one off", bought directly from a vendor for a specific work order and operation. These items are delivered directly to the shop floor for maintenance work order execution.

To set up non-stock direct items, access the Master Item window within Oracle Inventory, and set up the item with the Stockable check box cleared. See: Defining Items, *Oracle Inventory User's Guide*. Description-based direct items are not set up within Oracle Inventory.

You can add non-stock based direct items to asset, maintenance, and rebuildable BOMs. You can add non-stock and description-based direct items directly to the material requirements for an existing work order.

If direct items exist on an activity BOM, they appear as default material requirements when creating a work order for that activity. However, you can add additional direct item material requirements to an existing work order.

Setting Up Asset Bills of Material, page 2-86

Setting Up Maintenance Bills of Material, page 2-101

Defining Rebuildable Bills of Material, page 2-118

To add direct item material requirements:

1. Navigate to the Select Work Order window.
2. Choose a work order.
3. Choose Continue.

Material Requirements

Material Requirements (EAM) - WO100229, 10

Inventory Items

Main Quantities Supply Comment ATP

	Material	Op	Department	Date Required	Material Description
<input type="checkbox"/>		10			
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Select All Check ATP Select Materials Direct Item Copy To Asset

Create Direct Items

	Op	Item Type	Item	Description	UOM	Required Qty	Purchasing Category	Need By Date	Supp
<input type="checkbox"/>	10	Non Stock	Dry Wall S	Dry Wall Serv	Ea	12	MISC.MISC	09-APR-2004	
<input type="checkbox"/>	10	Non Stock	Dry Wall S	Dry Wall Serv	Ea	12	MISC.MISC	09-APR-2004	
<input type="checkbox"/>									

4. Within the Create Direct Items region, select an Operation.
5. Select an Item Type.
 - *Description Based Item*: This direct item type is not stored in Oracle Inventory.
 - *Non Stock Item*: This direct item type is stored in Oracle Inventory. Its Master Item record's Stockable check box is cleared.
6. If you selected a Non Stock Item Type, select an Item.
This field is disabled if a Description Based Item Type was previously selected.
7. Enter a Description, if you previously selected a Description Based Item Type.
8. Select a UOM. If you previously selected a Non Stock Item Type, this value defaults from the Master Item.
9. Select a Purchasing Category. See: Setting Up Purchase Order Category Associations for Direct Items, page 2-185.
10. Enter a Need By Date; the system date defaults.
11. Save your work.

Viewing Material Requirements

When you enter a work order for an asset number, the activity associated with the work order attaches the required material (See: Setting Up Maintenance Bills of Material, page 2-101) and resources to complete its operations. You can view material requirements for a specific work order.

To view work order material requirements:

1. Navigate to the View Material Requirements window.
 1. From the Select Work Order window, select a work order.
 2. Click the **Continue** button.

View Material Requirements

View Material Requirements (EMI) - EM181738

Inventory Items

Main Quantities Supply Comment ATP

Material	Op	Department	Date Required	Material Description	Plan	MRP Net
<input type="checkbox"/> Fork Lift Battery	10	W-Maint	01-NOV-2002 00:1	Batteries used for electric Fork Lift	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Shop Rags	10	W-Maint	01-NOV-2002 00:1	Shop Rags for Clean up	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>					<input type="checkbox"/>	<input type="checkbox"/>

Select All Check ATP Select Materials Direct Item Copy To Asset

Create Direct Items

Op	Item Type	Line Type	Item	Description	UOM	Required Qty	Purchasing Category	Need By Date
<input type="checkbox"/>								
<input type="checkbox"/>								
<input type="checkbox"/>								

Select All Select Direct Items Copy To Asset

2. In the Inventory Items region, you can view inventoried items on this work order's required items.

You can view them by warehouse, and at the subinventory level.

1. In the Main tab, you can view operation sequence and the Date Required.
2. In the Quantities tab, you can view the quantities Required.
3. In the Supply tab, you can view supply Type information, such as material, subinventory and source locator, if applicable.

Supply

Material	Type	Subinventory	Locator	MRP Net
<input type="checkbox"/> Fork Lift Battery	Push	Bat Rchrg		<input checked="" type="checkbox"/>
<input type="checkbox"/> Shop Rags	Push	FkltStore		<input checked="" type="checkbox"/>
<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>				<input type="checkbox"/>
<input type="checkbox"/>				<input type="checkbox"/>

Select All Check ATP Select Materials Direct Item Copy To Asset

4. In the Comment tab, you can view comment information.
5. In the ATP tab, you can view defined available to promise information.

Related Topics

Defining Material Requirements, page 3-36

Defining Subinventories, *Oracle Inventory User's Guide*

Defining Resource Requirements

You can view, update, add, or delete resource requirements for a work order. Resources are used to perform a task for a maintenance operation. A resource is an employee, piece of equipment, or contractor service, used to perform an operation. A resource and usage rate for all scheduled activities is required in a routing.

Contractor services are defined as work services provided by an organization or person who is not an employee of your company. Contractors are paid for their work, based on an agreed upon contract or agreement. For example, within maintenance work environments, it is often important to include landscaping services within a work order. It is also important to relate the purchasing transactions, such as the requisition and purchase order to the work order. In order for this to execute, the appropriate steps are completed in Purchasing and Enterprise Asset Management.

When defining departments, available resources are assigned in each department and the shifts that each resource is available. For each operation defined, you specify a department and list of resources and usages. An operation can use any resource that is available in the department, but not all resources are assigned to the department. An operation can use resources that are owned or borrowed from other departments. (See: Defining Departments and Resources, page 2-17).

To define resource requirements:

1. Navigate to the Select Work Order window (Work Order Details > Resource Requirements).

Note: This function is available for those users with responsibilities and roles that include function, EAM_WO_DETAILS_MODE, with their associated menu. Otherwise, you can only view work orders, and cannot update associated asset hierarchy, work order hierarchy, material, resource, operation, cost, collection plan results, work request, and attachment information. See: *Implementing Function Security, Oracle Applications System Administrator's Guide - Security*.

2. Choose a Work Order.
3. Choose Continue.

The resources that appear on the following Resources window are assigned to the department, and assigned to the current operation of the routing. See: *Defining Departments and Resources*, page 2-17.

Resources (EM1)

Main Quantities Scheduling Costing

Usage Rate or Amount

Operation	Res Seq	Department	Resource	UOM	Basis	Value	Inverse
10	10	F-Maint	Mechanic1	HR	Item	.25	4

Instances

- Note:** If you access the Resources window via the Operations window, you cannot change operation information. If you access the Resources window via the Work Order window, you can change operation information.

5. Enter a Resource Sequence. You can have multiple resources for an operation.
6. Select a Resource.
7. In the Main tab, the UOM defaults based on the Resource definition. See: Defining Departments and Resources, page 2-17. You can update this if the BOM: Update Resource UOM profile option is set to Yes.

8. Select a Basis to charge and schedule the resource. This defaults based on the Resource definition. See: *Defining a Resource, Oracle Bills of Material User's Guide*.

- *Item*: Charge and schedule the resource where the resource usage quantity is the amount required per assembly unit you make.
- *Lot*: Charge and schedule the resource where the resource usage quantity is the amount required per job or schedule.

If you select Lot, the Basis will be based on the *resource item* when the work order is created.

9. Enter the Usage Rate or Amount Value for the resource. You can post usage time for employees, equipment, and miscellaneous material.
10. Select the Quantities tab. You can view the Required quantity of this resource to use. This information defaults from the Usage Rate/Amount information. You can also view the Applied amount or rate of the resource already used. The Open amount or rate identifies the amount of the resource left to use (the difference between the Required and Applied).
11. Select the Scheduling tab. This information defaults from the current operation's setup. See: Preparing Work Order Operations, page 3-29.
Select Yes in the Scheduled field to indicate that this resource can be scheduled.
12. Select the Costing tab. You can view and update this resource's costing information.
 1. Select a Charge Type.
 - *Manual*: You can manually enter the cost.
 - *PO receipt*: The cost defaults as the cost on the purchase order receipt.
 2. The Department defaults as the area the current resource is assigned to. See: Defining Departments and Resources, page 2-17.
13. Optionally choose Instances to view or update a list of specific people or equipment assigned to this resource. The Person tab displays persons grouped in specific roles. The Equipment tab displays similar types of equipment grouped by resource. You can define specific machines to any of your machine type resources and you can define specific employees to any of your labor type resources. When a resource has instances defined, you can view the resource load and capacity in the Scheduler Workbench (See: Using the Scheduler Workbench, page 5-7).

For example, you can define all machines belonging to the resource, GRINDERS. An individual grinder machine can then be a specific resource requirement and scheduled, and can have its own unique capacity definition.

This information defaults from your current resource definition. You can add people (including contingent workers) and equipment that are associated with the current resource.

See: Defining a Resource, *Oracle Bills of Material User's Guide*.

14. Save your work.

Related Topics

Defining a Resource, *Oracle Bills of Material User's Guide*

Viewing Resource Requirements

You can view resource requirements for a work order. Resources define the time an assembly spends at an operation and the cost you incur for the operation. A resource is an employee, piece of equipment, or contractor service used to perform an operation. A resource and usage rate for all scheduled activities are required in a routing.

To view resource requirements:

1. Navigate to the View Resource Requirements window.
2. From the Select Work Order window, select a work order.
3. Choose Continue.

View Resource Requirements (EAM) - W0137234

Main Quantities Scheduling Costing

Operation	Res Seq	Resource	UOM	Basis	Usage Rate or Amount	
					Value	Inverse
10	1	Res2M	HR	Item	10	.1
10	2	Res2P	HR	Item	15	.066667

Instances

- ## Related Topics

Defining Departments and Resources, page 2-17

Defining a Resource, *Oracle Bills of Material User's Guide*

Work Order Relationships

This section includes the following topics:

- 3-50 Oracle Enterprise Asset Management User's Guide

- Parent-Child Relationship, page 3-51
- End to Start Dependency, page 3-53
- Cost Relationship, page 3-53
- Follow-up Work Relationship, page 3-55

Work Order Relationship Definition

Work orders for different assets may associate to each other in a hierarchy. Valid relationships are Parent Child, End to Start Dependency, Cost, and Follow-up Work. Manage complex maintenance jobs through these four types of work order relationships. See: Routine Work Orders, page 3-3. A Gantt chart enables you to manage work by displaying work order schedules and a summary of work order details. The Gantt Chart's drag and drop functionality enables you to manage schedules with ease.

Parent-Child Relationship

The Parent-Child Relationship enables a network of work orders, which includes one top level work order that defines the time line of all its child work orders. The start and end dates of the child work orders are within the start and end dates of the parent work order. The parent work order dates are scheduled, while its child work orders automatically schedule, as well. A child work order can be a parent to another work order. One parent can have multiple children, but one child can have only a single parent. You can have an infinite number of parent-child work order levels.

To create parent work orders:

1. Navigate to the Work Orders page (Maintenance Super User: Work Orders tab).
2. Query a work order (See: Viewing Work Orders, page 21-48).
3. Click the work order and select the Work Relationships sub-tab. This page graphically displays the work order's schedule. The tab enables you to view the scheduling relationships for the work order in a graphical format and lists the work order's possible relationships.

Work Relationships

Operations Materials Operation Quality Plans Requests **Work Relationships** Approval History Preventive Maintenance Failure Information

Personalize "Work Relationships"

Personalize Gantt: (RelationshipsGanttRN)

Select Work Order: Update Dependencies

[Expand All](#) | [Collapse All](#)

July

W

WO254905

WO254906

Personalize Stack Layout: (HideStackLayout)

Personalize "Relationships"

Work Order	Description	Relation	Relation Status	Asset Type	Asset Group	Asset Number
WO254906		Scheduling Child	Valid	Capital	Fork Lifts	FL1020

[Return To Work Orders: All](#)

- Select the work order for which you want to define a child work order, and click Update Work Hierarchy.

Use the Update Work Hierarchy page to add a child work order.

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All | Requests | Crew Schedule | Mass Time Entry

Work Orders: All > Work Order: WO246618 >

Current Organization : EM1

Update Work Hierarchy

Select Work Order: Create Child Work Order

[Expand All](#) | [Collapse All](#)

Select Focus Work Order	Description	Asset Number	Status	Scheduled Start Date	Scheduled Completion Date	Duration (hours)	Firm	Scheduling Relationship Status	Shift Dates	Remove
<input type="radio"/> WO245618	Change the battery in electric fork lifts	FL1010	Released	29-Jan-2	30-Jan-2	33.2	Yes			<input type="button" value="Remove"/>
<input type="radio"/> WO245619	Emission Inspection	FL1010	Released	29-Jan-2	29-Jan-2	0	Yes	Valid		<input type="button" value="Remove"/>

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- In the Select Work Order field, depending on your requirement, select to create a new child work order or add an existing work order as a child.
- Enter details of the new child order you want to create, or add the existing work order that you are adding as a child.
- Click the **Apply** button.

A confirmation message displays that the work order has been added as a scheduling child.

End to Start Dependency

You can create work orders with scheduling dependency relationships (including child sibling work orders). For example, one work order's scheduled start date is dependent on another work order's completion. With this relationship, the next work order cannot start until the prior work order is completed. Note that to create an end to start dependency between two work orders, they should be siblings sharing a common parent.

To create End to Start dependencies:

1. Navigate to the Work Orders page (Maintenance Super User >Work Orders).
2. Query a work order. (See: Viewing Work Orders, page 21-48).
3. Click the work order and select the Work Relationships sub-tab.
4. Select a work order and in the Select Work Order field, and choose the option to Update Dependencies.
5. In the Work Order Dependencies page, click the **Add Dependencies** button.

Select a work order in the Dependent Work Order field. In the Dependency Type field, select Prior or Next.

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All Requests Crew Schedule Mass Time Entry

Work Orders: All > Work Order: W0246618 > Current Organization : EM1

Work Order Dependencies: W0246618

Work Order: W0246618
Asset Number: FL1010
Scheduled Start Date: 29-Jan-2009 00:00:00

Description: Change the battery in electric fork lifts
Asset Group: Fork Lifts
Scheduled Completion Date: 30-Jan-2009 09:12:00

Dependent Work Order	Dependency Type	Start Date	End Date	Schedule Status	Remove
<input type="text"/>	<input type="text"/>				<input type="checkbox"/>

Add Dependencies

Cancel Apply

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6. Click the **Apply** button.

Cost Relationships

You can optionally roll a child work order's costs into the parent work order for reporting purposes. You can perform cost roll ups on ad hoc work orders because the cost roll up is independent of scheduling relationships. You can base the cost roll up, within a hierarchy, on scheduling relationships, as well. Scheduling relationships are not required to roll up costs within a hierarchy. You may create a cost reporting

hierarchy that is different than the scheduling hierarchy.

To create work order costing relationships:

1. Navigate to the Work Orders page (Maintenance Super User > Work Orders).
2. Query a work order (See: Viewing Work Orders, page 21-48).
3. Click the work order and select the Work Relationships sub-tab.
4. To view the cost roll up of a child work order, click View Costs.

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Work Orders: All > Work Order: WO246618 > Current Organization : EM1

Work Order Costs

* Indicates required field

Work Order: WO246618 Include Child Work Order: Yes

Period From: Period To:

Go Clear

Select Object: Estimate Export

Select All Select None Expand All Collapse All

Select Focus	Work Order	Asset Number	Asset Group	Asset Type	Actual Total Cost (USD)	Estimated Total Cost (USD)	Variance Total Cost (USD)	Cumulative Actual Cost (USD)	Cumulative Estimated Cost (USD)	Cumulative Variance Cost (USD)	Estimation Status
<input type="checkbox"/>	WO246618	FL1010	Fork Lifts Capital		0.00	85.15	85.15	0.00	85.15	85.15	Complete
<input type="checkbox"/>	WO246619	FL1010	Fork Lifts Capital		0.00	0.00	0.00	0.00	0.00	0.00	Complete

Return To Work Order: WO246618

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5. Click the Update Alternate Cost Hierarchy to create a cost reporting hierarchy . You can create new work orders or add existing work orders.

Alternatively, to establish a cost reporting hierarchy by importing the parent-child work order hierarchy, click the **Import Work Hierarchy** button.

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All Requests Crew Schedule Mass Time Entry

Work Orders: All > Work Order: WO246618 > Current Organization : EM1

Update Alternate Cost Hierarchy

Select Work Order: Create Child Work Order Go

Expand All Collapse All

Select Focus	Work Order	Description	Asset Number	Status	Scheduled Start Date	Scheduled Completion Date	Remove
<input type="radio"/>	WO246618	Change the battery in electric fork lifts	FL1010	Released	29-Jan-2009 00:00:00	30-Jan-2009 09:12:00	
<input type="radio"/>	WO246619	Emission Inspection	FL1010	Released	29-Jan-2009 00:00:00	29-Jan-2009 00:00:00	

Return To Work Order: WO246618

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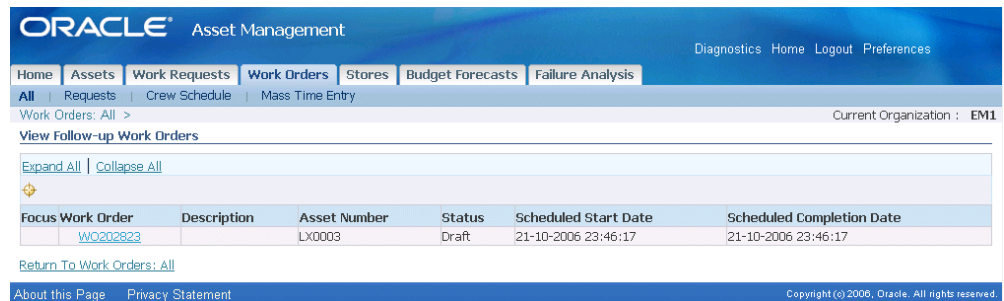
6. A confirmation message displays and the work order is added as a cost child.

Follow-up Work Relationship

You can create a work order for a capital Asset Number or Rebuildable Item, while executing work for the asset on another work order. For example, a second problem with an asset is discovered while executing a work order. A follow-up work order, associated with the original work order, is created for the issue. This is independent of scheduling or cost relationships.

To create and view follow-up work orders:

1. Navigate to the Work Orders tab (Maintenance Super User > Work Orders).
2. Query a work order (See: Viewing Work Orders, page 21-48).
3. Select View Follow-up Work Orders from the Select Work Order list of values.
4. Choose Go.



The screenshot displays the Oracle Asset Management interface. The top navigation bar includes links for Home, Assets, Work Requests, Work Orders, Stores, Budget Forecasts, and Failure Analysis. The 'Work Orders' tab is selected. Below the navigation bar, there are links for 'Expand All' and 'Collapse All'. A table titled 'View Follow-up Work Orders' contains one row of data. The table has columns for Focus Work Order, Description, Asset Number, Status, Scheduled Start Date, and Scheduled Completion Date. The data row shows a Focus Work Order of 'WO202823', an Asset Number of 'LX0003', and a Status of 'Draft'. The scheduled start and completion dates are both '21-10-2006 23:46:17'. At the bottom of the table, there is a link 'Return To Work Orders: All'.

Focus Work Order	Description	Asset Number	Status	Scheduled Start Date	Scheduled Completion Date
WO202823		LX0003	Draft	21-10-2006 23:46:17	21-10-2006 23:46:17

5. Select a value in the Select Work Order field list of values to create a follow-up work order.
6. Click Go.
7. Use the Create Follow-Up Work Order page to enter details of the follow-up work order that you are creating.

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Work Orders: All > Maintenance Organization : EM1

Create Follow-up Work Order

* Indicates required field
Time = hours

Originating Work Order **W0246727**
Status **Released**
Relationship Type **Followup Work**
* Work Order **W0246734**
Asset Number
Asset Number is mandatory for Assets and Serialized Rebuilds
* Asset Group
* Wip Accounting Class **MaintWAC**
Scheduled Start Date **16-Feb-2009 01:50:00**
(example 16-Feb-2009 01:50:59)
Scheduled Completion Date **16-Feb-2009 01:50:00**
Duration **0**
Request Number

Scheduled Start Date **13-Feb-2009 07:00:00**
Scheduled Completion Date **20-Feb-2009 11:00:00**
Scheduled Duration **172**

Description
Department
Department Description
Asset Activity
Firm **No**
Status **Draft**
Work Order Type
Shutdown Type
Priority

Cancel Save Apply

Additional Details
Failure Information
Operation Requirements
Material Requirements

8. Click Apply.

A confirmation message displays that a follow-up work order has been created.

Related Topics

eAM Scheduling, page 2-152

eAM Work Order Transactions

There are two types of Enterprise Asset Management work order transactions: material and resource. A material transaction is used when you issue material from inventory to a work order. A resource transaction is used when you charge resources (for example labor, or equipment) to a work order.

This section includes the following topics:

- Operation Completion, page 3-57
- Work Order Completion, page 3-59
- Rebuild Work Order Completion, page 3-61
- Transacting Material, page 3-63
- Viewing Resource Transactions, page 3-64
- Closing Work Orders, page 3-65

Operation Completion

Operations are the instructions or tasks to perform a repair. Every operation is assigned to a department (See: Defining Departments and Resources, page 2-17), associated with assigned resources (trades people, contractor services, and equipment). When you enter a Work Order for an Asset Number, the Asset Number's associated activity (See: Associating Asset Numbers with Activities, page 2-103) attaches to the work order, delivering its related maintenance route (See: Defining Maintenance Routes, page 2-106) and BOM. The maintenance route is comprised of operations necessary to complete the activity. You can Complete and Uncomplete operations. After an operation is complete, you can perform an Operation Uncompletion. If an operation is dependent upon another operation, you cannot uncomplete that operation's dependency if the current operation is complete. For example, operation 20 is dependent on operation 10 completing. You cannot uncomplete operation 10 after operation 20 has been completed.

You can complete or uncomplete an operation using the Maintenance Super User responsibility.

To complete an operation:

1. Navigate to the Maintenance Super User responsibility.
2. Select the Work Order tab.
3. Query work orders and select a work order from the list.
4. Select an Operation and choose Complete/Uncomplete. This is the operation you wish to complete.

Operations

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Work Orders: All > Work Order: W0102907 > Current Organization : EM1

Complete Operation Cancel Apply

Work Order W0102907 Asset Type Capital
 Asset Number DTF35000 Asset Group Vehicles
 Operation 1 Description Check Oil Filter Seal
 Assigned Department F-Maint Assigned Employees 0

Enter completion information and hit 'Apply' to complete the operation.

Completion Details
 Indicates required data

Transaction Type Complete Operation

* Actual Start Date and Time 08-Apr-2004 09:06:00
 (example 07-Sep-2006 10:32:21)

* Actual Duration (hours) 0

Actual End Date and Time 08-Apr-2004 09:06:00

Shutdown Start Date and Time 08-Apr-2004 09:06:00

* Shutdown Duration (hours) 0

Reconciliation Code

Reference

Attachments None Add

Quality Plans

Plan Name	Description	Mandatory	Results Entered	Enter Quality Results	View Quality Results	Quality Plan Attachments
SA OP COMP PLAN1						

Prior Operations

5. Enter the Actual Start Date and Time of transaction; the system date appears as default values.
6. Enter Actual Duration (hours) information.
7. The Actual End Date defaults as the current system date. You cannot change this value.
8. Optionally enter a Reconciliation Code.
 This is a description of why you are completing this operation. For example, Operation Completed or Operation Partially Completed.
9. Click the **Apply** button.

To uncomplete an operation:

1. Navigate to Maintenance Super User responsibility.
2. Select the Work Order tab.
3. Query work orders and select a work order from the list.
4. Select an Operation and choose Complete/Uncomplete. If the operation was

previously completed, then you can Uncomplete the operation.

5. Click the **Apply** button to uncomplete the operation.

Related Topics

Preparing Work Order Operations, page 3-29

Defining Maintenance Routes, page 2-106

Operation Completion Moves, *Oracle Work in Process User's Guide*

Work Order Completion

Oracle eAM work orders are created against assets. They are defined manually, or generated automatically based on a scheduled activity. If you attach a manually created work order to an activity (normally the role of a planner), the work order inherits the activity's attributes, such as the asset BOM, asset route (operations), attachments, quality plans, cost information, and scheduling rules.

The operations within a work order do not need to be complete to complete a work order. However, the date you complete a work order must be greater than (later) or equal to the end date of the operation that has the latest end date. Likewise, the date you start a work order must be earlier than or equal to the start date of the operation with the earliest start date. You can uncomplete a Complete, Complete - No Charges, Cancelled, Pending - Close or Failed - Close work order. If you uncomplete a work order with a status of Complete or Complete - No Charges, transitions to a Complete status; for all other statuses, the work order transitions to the status it had when closed. See: eAM Work Order Statuses, page 3-23).

For planned work orders, the default work order completion date value is the scheduled completion date.

However, the profile option, EAM: Actual Work Completion Date Preference, can be set to use the system date as the default work order completion date. See EAM Profile Options in the *Oracle Enterprise Asset Management Implementation Guide*.

Planners or crew supervisors can complete or uncomplete work orders, using the Maintenance Workbench (Using the Maintenance Workbench, page 3-69), from the Enterprise Asset Management responsibility, or by accessing the Work Order Completion menu option. After completing a work order, the completion transaction record is created with an electronic signature (User Name). During completion, a record is created with this signature for any mandatory collection plan results or mandatory meter readings.

To complete a work order:

1. Navigate to the Work Order Completion window (Maintenance Super User or Maintenance User Workbench: Work Orders tab or Enterprise Asset Management:

Work Order Planning > Maintenance Workbench).

2. Select a work order.
3. Select the Complete Work Order value in the Select Work Order drop-down.
4. Optionally enter a Reconciliation Code.

This is a simple description of why you are completing this work order. For example, Work Order Completed or Work Order Partially Completed.

5. Optionally enter Actual Duration (hours) information.

You must enter two values within this region: Actual Duration and Actual Start Date and Time. The value that you do not enter is automatically calculated.

Actual Duration identifies the total elapsed time of the work order. It is automatically calculated as the difference between the Scheduled Start Date and Scheduled End Date.

6. The Meters region enables you to enter readings for meters associated with this Asset Number. Readings for meters defined as mandatory must be entered. You can optionally enter non-mandatory readings.

At work order completion, meter readings are mandatory for work orders generated by the Preventive Maintenance scheduling engine. After a work order is completed, meter readings are required for all runtime interval meters associated with the Asset Number in the Preventive Maintenance scheduling definition. See: Preventive Maintenance Scheduling, page 2-137. If there is a meter associated with this Asset Number, you are prompted to enter a Current Reading or a Reading Change. If you enter a Current Reading, the Reading Change defaults. If you enter a Reading Change, the Current Reading defaults. See: Entering Meter Readings, page 4-3.

- Select the Reset check box to indicate if you would like to Reset the Current Reading to zero.

7. Oracle Quality collection plans associated with the current work order's asset number and requiring completion appear in the Quality Plans region. When the collection plan was created, it was specified if the collection plan required completion. Also, during the Enterprise Asset Management collection plan creation process, triggers might have been specified to make only certain assets eligible for the collection plan. See: Quality Setup, page 2-158.

Required fields are dependent on the Collection Plan's collection element specifications. See: Quality Setup, page 2-158.

8. Choose Apply to save your work.

To uncomplete a work order:

1. Navigate to the Work Order Completion window.
2. Select a completed work order.
3. Select the Complete Work Order value in the Select Work Order drop-down to uncomplete this work order.
4. Optionally enter a Reconciliation Code. This is a simple description of why you are uncompleting this work order.
5. Optionally enter an Actual Duration or Actual Start Date and Time. Actual Duration identifies the total elapsed time of the work order. It is automatically calculated as the difference between the Estimated Start Date and Estimated End Date. Changing the times and duration affects resource usage for employees and equipment.
6. Choose Apply to save your work.

Related Topics

Entering Meter Readings, page 4-3

Rebuild Work Order Completion

There are two ways to create rebuild work orders. In the scenario that a new rebuildable item is issued from inventory to be placed into the asset, a rebuild work order creates for the rebuildable item that was taken out with a need for repair, given the required information was entered into the material transaction (See: Transacting Material, page 3-63). This child work order of the parent work order can complete, independent of the parent work order. However, if the rebuildable item needing repair is removed from the asset, repaired, then reinstalled, that manually created child, rebuild work order must first be completed before the parent work order can complete. In this scenario, first complete all rebuild or child work orders (See: Rebuild Work Orders, page 3-13) before you can complete a parent work order (See: Work Order Completion, page 3-59). The operations within a work order do not need to be complete in order to complete a work order. However, the date you complete a work order must be greater than (later) or equal to the end date of the operation that has the latest end date. Likewise, the date you start a work order must be earlier than or equal to the start date of the operation with the earliest start date. You can uncomplete a work order after it is completed, transcending it to a Released status (See: eAM Work Order Statuses, page 3-23).

Planners or Crew Supervisors can complete or uncomplete work orders using the Maintenance workbench (See: Using the Maintenance Workbench, page 3-69), or by accessing the Rebuildable Work Order Completion menu option. After completing a

work order, the completion transaction record is created with your electronic signature (User Name). A record is created with this signature, during completion, for any mandatory collection plan results or mandatory meter readings, as well.

To complete a rebuild work order:

1. Navigate to the Rebuild Completion window (Maintenance Super User or Maintenance User Workbench: Work Orders tab, or Enterprise Asset Management: Work Order Planning > Maintenance Workbench).
2. Query and select a rebuild work order.
3. Select the Complete Work Order in the Select Work Order drop-down.

Rebuild Work Order Completion

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All Requests Crew Schedule Mass Time Entry

Current Organization : EM1

Complete Rebuild Work Order: Recharge1

Cancel Apply

Work Order: Recharge1
Asset Type: Rebuildable Inventory
Asset Group: Fork Lift Battery
Status: Released

Description: Recharge Fork Lift Battery
Asset Number: Battery1002
Department: W-Maint

Enter Completion information and meter readings and hit the 'Apply' button to complete the Rebuild Work Order.

Completion Details

* Indicates required data

Transaction Type: Complete Job

* Completion Status: Complete

* Actual Start Date and Time: 15-01-2003 22:34:00
(example 21-10-2006 04:26:18)

* Actual Duration (hours): 1.1

Actual End Date and Time: 15-01-2003 23:40:00

* Shutdown Start Date and Time: 15-01-2003 22:34:00

* Shutdown Duration (hours): 1.1

Reconciliation Code

Completion Subinventory

Completion Locator

Completion Lot

Quality Plans

Plan Name	Description	Mandatory	Results Entered	Enter Quality Results	View Quality Results	Quality Plan Attachments
No results found.						

Meters

4. Select a rebuild work order.
Only rebuild work orders are available.
5. Optionally enter a Reconciliation Code.
This is a description of why you are completing this work order. For example, Work Order Completed or Work Order Partially Completed.
6. Enter an actual Duration and Actual Start Date and Time.

Actual Duration identifies the total elapsed time of the work order. It automatically calculates as the difference between the Scheduled Start Date and Scheduled End Date. Changing the times and duration affects resource usage for employees and equipment.

7. If the rebuild work order is generated from a material issue or is a standalone rebuild work order for a Rebuildable Item's serial number that resides out of inventory, then enter the Completion Location information.
 1. Enter the Completion Subinventory. For rebuild work orders that are created from a material transaction, this must be an expense subinventory.
 2. If the rebuildable item is locator controlled, enter a Completion Locator. See: Inventory Attribute Group, *Oracle Inventory User's Guide*.
 3. If the rebuildable item is lot controlled, enter a Completion Lot. See: Inventory Attribute Group, *Oracle Inventory User's Guide*.
8. Choose Apply to save your work.

To uncomplete a rebuild work order:

1. Navigate to the Rebuild Completion window.
2. Select a completed rebuild work order.
3. Select the Complete Work Order from the Select Work Order drop-down to uncomplete the work order.
4. Optionally enter a Reconciliation Code.

This is a description of why you are uncompleting this work order.
5. Choose Apply to save your work.

Related Topics

Defining Subinventories, *Oracle Inventory User's Guide*

Transacting Material

You might need to issue a rebuildable item or asset from inventory to a maintenance work order. For example, a work order was issued for the inspection of a pump. During the pump inspection, you found that the motor, one of the components of the pump, is problematic. You can replace the rebuildable item by issuing a new motor rebuildable item from inventory. If you choose to perform a material issue from inventory, the old motor rebuildable item attaches to the work order, automatically creating the child,

rebuild work order number associated to the parent work order. In this case, the Asset Number genealogy automatically updates to identify this new item number. See: Overview of Inventory Transactions, *Oracle Inventory User's Guide*.

You can execute a material issue transaction from the Stores tab page, within Maintenance Super User (See: Stores, page 21-83).

Related Topics

Issuing and Returning Specific Components, *Oracle Work in Process User's Guide*

Viewing Resources Transactions

Resource transactions define the time an assembly spends at an operation and the cost you incur for an operation. There are two types of resources: person and machine. You can transact both person and machine resources. A resource is an employee, piece of equipment, or contractor service, used to perform an operation. You can charge resources to a specific work order. You can view all transactions that have charged against a specific resource.

To view completed resource transactions:

1. Navigate to the Find Resource Transactions window.

You can narrow your selection of transactions by any field within this window. For example, you can view all resource transaction information charged during a specific period, or view all transaction information transpired for a specific work order number.

The concurrent process will also consider the OTL dates for the time entries if they fall within closed accounting periods.

2. Choose Find.

View Resource Transactions

Transaction	Date	Work Order	Asset Number	Asset Group	Rebuild Item
<input type="checkbox"/>	15-DEC-2006 11:19:07	WO243860	DTF35001	Vehicles	
<input type="checkbox"/>	15-DEC-2006 11:18:32	WO243859	DTF35000	Vehicles	
<input type="checkbox"/>	15-DEC-2006 11:17:23	WO243864	FL1030	Fork Lifts	
<input type="checkbox"/>	15-DEC-2006 11:17:06	WO243865	FL1040	Fork Lifts	
<input type="checkbox"/>	15-DEC-2006 11:16:53	WO243863	FL1020	Fork Lifts	
<input type="checkbox"/>	15-DEC-2006 11:15:24	RWO98002			Fork L
<input checked="" type="checkbox"/>	15-DEC-2006 11:15:07	RWO98003			Fork L
<input type="checkbox"/>	15-DEC-2006 11:14:54	RWO98001			Fork L

Transaction Date: 15-DEC-2006 11:15:07 Work Order: RWO98003
Asset Number: Rebuild Item: Fork Lift Battery

Distributions

3. Select the Job or Schedule Header tab to view resource transaction information specific to a work order.
4. Select the Operation, Quantities tab to view resource transaction information specific to a work order operation.
5. Select the Resource Information to view resource transaction information specific to a resource.

Closing Work Orders

You can close a maintenance work order if it has a status of Cancelled, Complete, Complete - No Charges, Pending - Close, or Failed - Close. (See: eAM Work Order Statuses, page 3-23). You can close one or many work orders at once. After a work order or a period is closed, cost variances are posted to the asset's WIP accounting class code accounts, if the work order is associated with an asset route. Variances are posted to the WIP account for every asset within the asset route when the work order is released. These accounts are charged, even if one or more assets on the asset route move between organizations before the work order is closed.

Note: If you want to update the quality results for a work order with a status of Closed, you must unclosed the work order.

If a work order was at a Complete status at the time of closing it, you can unclose the work order to transition it to a Complete status. For all other statuses during the closing of a work order, unclosing the work order transitions to same status it had when closed.

To close a work order:

1. Navigate to the Find Work Orders window.
2. Select a Work Order. You can optionally enter other data selection information.
3. Choose Find. The Close Work Order window appears.

Close Work Order

Close Work Order (EM1)

Work Order: WO220767
 Asset Number: DTF35000
 Asset Group: Vehicles
 Asset Activity: 15000 Mile Maint
 Class: MaintWAC
 Status: Released
☐ Pending
 Parent Work Order:
 Relationship Type:

15000 Mile Truck Maintenance
 Delivery Erand Truck 35000
 Scheduled Dates
 Start Date: 04-SEP-2006 19:30:00
 Completion Date: 04-SEP-2006 21:39:36
 Duration(hours):
 Actual Dates
 Start Date:
 Completion Date:

Main Activity Project Rebuild Request Approval History

Department: F-Maint
 Priority:
 Work Order Type: Preventive
 Shutdown Type: Required
 Warranty Status:
 Failure Information
 Failure:
 Cause:
 Resolution:
 Material Shortage
 Material Shortage: Yes As Of Date: 03-SEP-2006 05:11:44 **Check Shortage**

☒ Firm ☐ Tagout Required ☐ Notification Required ☐ Planned
☒ Enable Material Issue Requests
 PM Suggested Start Date: PM Suggested End Date:
☐ Failure Entry Required
 Failure Date: Comments:

Operations Materials Resources Relationships Asset Route Costs

4. From the Tools menu, select Close Work Orders.
 The Close EAM Work Orders window appears.

Close EAM Work Orders

Report Type

- ☒ Summary
- ☐ Detail Using Planned Start Quantity
- ☐ Detail Using Actual Completion Quantity
- ☐ No Report

Actual Close Date 03-SEP-2006 06:55

Submission Date 03-SEP-2006 06:55:04

OK Cancel

5. Select a Report Type.

Your selection determines the type of information presented on the report that is produced by the concurrent process (Close Discrete Jobs) closing the work order. The report presents project information, work orders closed, status information, and quantity information.

6. Select an Actual Close Date.

This date must be greater than or equal to the system date.

7. Select a Submission Date.

This date must be greater than or equal to the system date.

8. Choose OK.

To uncloset a work order:

1. Navigate to the Find Work Orders window.

2. Select a closed work order.

You can optionally enter other data selection information.

3. Click the **Find** button.

The Close Work Order window appears.

4. From the Tools menu, select Unclose Work Orders.

5. Save your work.

To close a rebuild work order:

1. Navigate to the Find Rebuild Work Orders window.
2. Select a work order.
Only rebuild work orders are available.
3. Choose Find. The Close Rebuild Work Order window appears.
4. From the Tools menu, select Close Rebuild Work Orders.
The Close EAM Work Orders window appears.
5. In the Report Type region, select a report type. Your selection determines the type of information presented on the report that is produced by the concurrent process (Close Discrete Jobs) closing the work order. The report presents project information, the work orders closed, status information, as well as quantity information.
6. Select an Actual Close Date. This date must be greater than or equal to the system date.
7. Select a Submission Date. This date must be greater than or equal to the system date.
8. Choose OK.
9. Select a closed rebuild work order from the list of values.
10. Click the **Find** button.
The Close Rebuild Work Order window appears.
11. From the Tools menu, select Unclose Rebuild Jobs.
12. Save your work.

Related Topics

Closing Discrete Jobs Using Submit Requests, *Oracle Work in Process User's Guide*

eAM Work Order Planning

A planner performs several functions, including purchasing required material for work orders, approving work requests, creating work orders, releasing work orders, and

completing work orders. This section includes the following topics:

- Using the Maintenance Workbench, page 3-69

Using the Maintenance Workbench

Using the Maintenance Workbench, a planner can mass release and mass complete work orders. You can set the EAM: Mass Complete work orders at system date profile option to perform a mass completion for work orders with past and future scheduled completion dates, with a default value of the System Date using the Maintenance Workbench. See *Profile Options, Oracle Enterprise Asset Management Implementation Guide*.

You cannot complete mass work orders that have mandatory meter readings and mandatory quality plans associated with a work order (See: Work Order Completion, page 3-59). A planner can also procure direct items (See: Overview of Direct Item Procurement for eAM Work Orders, page 5-1) for work orders, without having to leave the Maintenance Workbench. You can generate work orders from suggested work orders, manage work order required material, resources, and update work order operations as necessary.

You can forecast multiple assets at once. You can select multiple assets to forecast, and then execute the forecast. After execution, you can create a work order, associate the work order with a project and task for capital expenditures, and associate the work order with a parent work order. This is useful for shutdowns. When an organization knows that they will be shutting down a portion of their plant or facility, they can add the preventive maintenance work orders to the shutdown and using Oracle Projects, capitalize the costs into fixed assets.

To use the Maintenance Workbench:

1. Navigate to the Maintenance Workbench page (Enterprise Asset Management > Work Order Planning > Maintenance Workbench).
2. You can narrow your data selection using any of the fields available. For example:
 - **Asset Owning Department:** Use this field to filter results based on forecasts.
 - **Owning Department:** Use this field to filter results based on work orders.

Maintenance Workbench (EM1)

Asset Number	<input type="text"/>	<input type="checkbox"/> Rebuildable	Rebuild Number	<input type="text"/>
Asset Group	<input type="text"/>		Rebuild Item	<input type="text"/>
Asset Category	<input type="text"/>			
Owning Department	<input type="text"/>	<input type="checkbox"/> Include Asset Children	<input type="checkbox"/> Transferred Assets	
Area	<input type="text"/>	<input type="checkbox"/> Include Work Requests	Date To <input type="text"/>	
Date From	<input type="text"/>			
Set Name	<input type="text"/>			

Work Order

Work Order	<input type="text"/>	Project	<input type="text"/>
Owning Department	<input type="text"/>	Planned	<input type="text"/>
Priority	<input type="text"/>	Tagout Required	<input type="text"/>
Shutdown Type	<input type="text"/>	Material Shortage	<input type="text"/>
Planner	<input type="text"/>		

Status

☐ All Pending

☒ Specific

<input checked="" type="checkbox"/>	Unreleased	<input type="text"/>
<input checked="" type="checkbox"/>	Awaiting Scheduling	<input type="text"/>
<input checked="" type="checkbox"/>	Released	<input type="text"/>
<input checked="" type="checkbox"/>	V-RELEASE	<input type="text"/>
<input type="checkbox"/>	Complete	<input type="text"/>

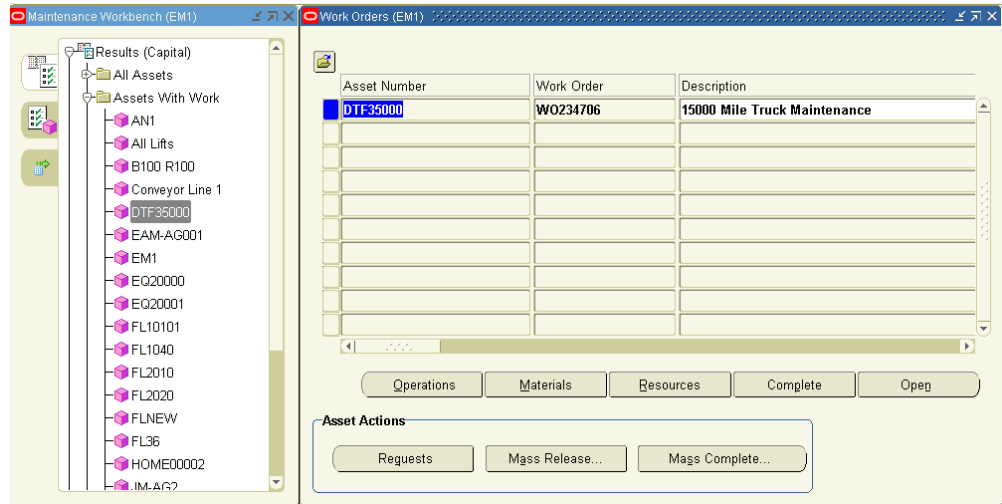
☐ Operation

Assigned Department	<input type="text"/>	Shutdown Type	<input type="text"/>
Resource	<input type="text"/>		

Launch

3. Choose Launch.

Maintenance Workbench



4. Optionally in the Maintenance Workbench pane, select the Results (Capital) tab, Results (Rebuildable Inventory) tab, or the Forecast Work tab.

Selecting the Results (Capital) tab displays asset number information (See: Defining Asset Numbers, page 2-74) in a tree structure format. If you expand the Results (Capital) branch, the tree details asset number information into three lower branches, including All Assets, Assets With Work, and Routes.

- *All Assets*: All assets, associated with the data selection entered in Step 2, appear under the expanded All Assets branch.
- *Assets With Work*: All assets with work orders (See: eAM Work Orders, page 3-3), associated with the data selection entered in Step 2, appear under the expanded Assets With Work branch.
- *Routes*: All assets with an associated asset route (See: Defining Asset Routes, page 2-83), associated with the data selection entered in Step 2, appear under the expanded Routes branch.

Selecting the Results (Rebuildable Inventory) tab displays rebuildable item information (See: Defining Rebuildable Items, page 2-110) in a tree structure format. If you expand the Results (Rebuildable Inventory) branch, the tree details rebuildable item information into three lower branches, including All Rebuildables, Rebuildables with Work Orders, and Instance Numbers.

- *All Rebuildables*: All rebuildables, associated with a rebuild work order, appear.
- *Rebuildables with Work Orders*: All rebuildable items with work orders (See: eAM Work Orders, page 3-3), associated with the data selection entered in Step 2,

appear.

- *Instance Numbers:* All Instance Numbers appear.

Selecting the Forecast Work tab displays the Forecast Work Orders window, associated with asset number information in the Maintenance Workbench pane. You can forecast and/or implement for multiple assets at once. If you expand the Forecast Work branch, the tree details asset number information into three lower branches, including All Assets, Assets With Work, and Routes.

- *All Assets:* All assets, associated with the data selection entered in Step 2, appear under the expanded All Assets branch.
- *Assets With Work:* All assets with work orders (See: eAM Work Orders, page 3-3), associated with the data selection entered in Step 2, appear under the expanded Assets With Work branch.
- *Routes:* All assets with an associated asset route (See: Defining Asset Routes, page 2-83), associated with the data selection entered in Step 2, appear under the expanded Routes branch.

Forecasted Work Orders

Select	Action	Type	Asset Number	Activity	Suggested Start Date	Exp
<input type="checkbox"/>	Create	Forecasted	DTF35000	3000 Mile Maint	17-FEB-2005 12:00:00	
<input type="checkbox"/>	Create	Forecasted	DTF35000	3000 Mile Maint	04-MAR-2005 12:00:00	
<input type="checkbox"/>	Create	Forecasted	DTF35000	3000 Mile Maint	19-MAR-2005 12:00:00	
<input type="checkbox"/>	Create	Forecasted	DTF35000	3000 Mile Maint	03-APR-2005 12:00:00	
<input type="checkbox"/>	Create	Forecasted	DTF35000	3000 Mile Maint	18-APR-2005 12:00:00	
<input type="checkbox"/>	Create	Forecasted	DTF35000	15000 Mile Maint	18-APR-2005 12:00:00	
<input type="checkbox"/>	Create	Forecasted	DTF35000	3000 Mile Maint	03-MAY-2005 12:00:00	

1. Enter a Cutoff Date to indicate how far out you would like the work orders to be created from the suggested dates.

The Horizon defaults as the difference between the Start Date and Cutoff Date.

2. Optionally select a Set Name.

If a Set Name (See: Defining Set Names, page 2-127) is entered, the Simulate and Run buttons are enabled. If you select Simulate, then you cannot

implement work orders. If Run is selected, you can implement work orders only for forecasted suggestions from default. The Default check box is selected in the Preventive Maintenance (PM) Schedule definition. See: *Entering Preventive Maintenance Schedule Definitions*, page 2-137) PM Schedules in the current PM Set; default PM Schedules are chosen from that PM set for work order generation.

3. Optionally select the Include Run To Failure check box to indicate that the scheduling process should include suggested Work Orders for Run To Life asset number and activity associations.

If this check box is cleared, manual work orders can be created. Run To Life items are typically items that cost more to maintain than the item itself. For more information on Run To Life items, See: *Preventive Maintenance Scheduling*, page 2-137.

4. Choose Run to generate work order suggestions for the specified date period.

The Expected Start Date is calculated if you are using backward scheduling, and the Expected End Date is calculated if you are using forward scheduling (See: *Information on the Rescheduling Point region in Preventive Maintenance Scheduling*, page 2-137).

5. Optionally choose Implement to release the selected (indicated by the check box on the left side of the window) forecasted work orders.

The work orders are created at the status specified in the Preventive Maintenance Schedule definition. (See: *eAM Work Order Statuses*, page 3-23 and *Preventive Maintenance Scheduling*, page 2-137).

Note: You can Forecast Work for assets, but not rebuildable items.

5. If you selected the Results (Capital) or Results (Rebuildable Inventory) tab, you can optionally, choose Operations to view the tasks associated with a specific work order.

You can view and update the material and resources associated with a specific operation (See: *eAM Operations and Tasks*, page 3-27).

6. Optionally choose Materials to view and update the material requirements associated with a selected work order (See: *Defining a Material Requirements Plan Name*, page 2-153).

1. Optionally you can view or update the current work order's associated asset number's items list by choosing Select Materials. The current asset number's associated Asset BOM items are available to add to the required material. See: *Setting Up Asset Bills of Material*, page 2-86.

2. Optionally choose Direct Item to select direct items from supplier catalogs, create requisitions, and add them to your items list.

Direct Items are one time non-inventoried items that are purchased directly from a supplier. Oracle Self Service Purchasing defaults the work order number and operation number, as well as the class code information for correct expensing. After you choose Direct Item, the current work order and operation reference values are passed to the requisition created using Self Service Purchasing. If the work order is project related, then the project and task information is captured in the purchase requisition (See: Overview of Direct Item Procurement for eAM Work Orders, page 5-1). You can exit Self Service Purchasing and return to the Maintenance Workbench by selecting Return To Portal.

Note: Upon re-inquiry of this work order, the Direct Items region reflects any Requisition and Purchase Order details.

Note: You must have Oracle Self Service Purchasing installed for this functionality. You can purchase direct items from a Requisition or Purchase Order window if you have Oracle Purchasing installed (See: Entering Purchase Orders for Direct Items, page 7-19).

3. Choose Copy to Asset to dynamically update the BOM associated to the Asset Group with any items list changes (See: Setting Up Asset Bills of Material, page 2-86).
7. Optionally choose Resources to view, update, add, or delete resource requirements for a selected work order (See: Defining Resource Requirements, page 3-45).
 - Optionally choose Instances to view or update a list of specific people or equipment assigned to this resource. The Person tab displays persons grouped in specific roles. The Equipment tab displays similar types of equipment grouped by resource. You can define specific machines to any of your machine type resources and you can define specific employees to any of your labor type resources. When a resource has instances defined, you can view the resource capacity and load in the Scheduling Workbench (See: Using the Scheduler Workbench, page 5-7).

For example, you can define all machines belonging to the resource, GRINDERS. An individual grinder machine can then be a specific resource requirement and scheduled, and can have a unique capacity definition.

This information defaults from your current resource definition. You can only add persons and equipment that are associated with the current resource.

Mass Complete

Work Order	Asset Number	Description	Start Date	End Date	Activity
<input checked="" type="checkbox"/> GB_F	FL10101		22-JUN-2006 07:00	22-JUN-2006 08:00	
<input checked="" type="checkbox"/> GB_WO_2	FL10101		22-JUN-2006 04:06	22-JUN-2006 04:06	
<input checked="" type="checkbox"/> GB_WO_3	FL10101		22-JUN-2006 07:00	22-JUN-2006 08:00	
<input checked="" type="checkbox"/> WO235310	FL10101		10-JUL-2006 03:31	10-JUL-2006 03:31	
<input checked="" type="checkbox"/> GB_WO_5	FL10101		22-JUN-2006 04:23	22-JUN-2006 04:23	
<input checked="" type="checkbox"/> GB_WO_APP	FL10101		04-JUL-2006 23:05	04-JUL-2006 23:05	
<input checked="" type="checkbox"/> GB_WO_BG	FL10101		05-JUL-2006 07:00	07-JUL-2006 13:00	
<input checked="" type="checkbox"/> GB_WO_4	FL10101		22-JUN-2006 04:19	22-JUN-2006 04:19	
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

13. Save your work.

Related Topics

Defining a Resource, *Oracle Bills of Material User's Guide*

Capitalizing Work Orders

You can capitalize part or all of the costs incurred, while maintaining an asset. The asset's book value and useful life increment with the additional value, within Oracle Fixed Assets. Accountants analyze the maintenance cost history to decide which costs to capitalize. You can identify the work orders that increase an asset's value. You can capitalize only the costs of work orders at the *Complete - No Charges* or *Closed* statuses.

When defining a maintained asset number, you can optionally enter Fixed Asset information to associate a Fixed Asset Category and Fixed Asset number with the maintained asset number, if Oracle Fixed Assets is installed. See: Defining Asset Numbers, page 2-74.

To capitalize work order costs:

1. Navigate to the Find Work Orders window (Billing and Capitalization > Work Order Capitalization).
2. Query one or more work orders to capitalize.
 1. You can narrow your search criteria, using the fields at the top of the window.

For example, you can enter a specific work order, asset number, or specify if you want to display only work orders at a Closed status.

2. Optionally choose **Clear** to reset the search criteria to the default search criteria (all fields are cleared and the Closed and Complete - No Charges **Status** check boxes are selected).
 3. Choose **Find**. The Work Orders region displays queried work orders, dependent on your search criteria.
3. Select a work order.

You can search using a number of search parameters such as Work Order and construction Estimate Number. If you search by estimate number, the values available for selection are only the construction estimates that have work orders created for them.

Find Work Orders

Find Work Orders (EM1)

Work Order: V-FA1-WO1
Estimate Number: V-FA1
Asset Group: V-FA1
Asset Number: V-FA1/001
Asset Activity:
Start Date:
Completion Date:
Owning Department:
Project:
Task:

Work Request:
Status:
☒ Closed
☒ Complete - No Charges
☒ V-COMP-NO CHANGE
☐ Previously Billed
Reference Invoice:
☐ Internal Customer
Customer:
Clear Find

Work Order	Estimate Number	Asset Group	Asset Activity	Status	Project	Task
V-FA1-WO1	V-FA1	V-FA1		Complete - No C		

Capitalize Work Order View Past Details

4. Click the **Capitalize Work Order** button.

This button is enabled for only those work orders that have amounts available to capitalize.

Work Order Capitalization

Work Order Capitalization (EM1) - KC_WO13

☐ Internal Customer

Customer:
 Bill To:

Billing Basis:
 Price List:
 Cost Type:
 Capitalization %:
 Project:
 Task:

Organization Currency:
 Billing Currency:

Currency Conversion
 Type:
 Date:

Fixed Asset
 Category:
 Number:

Capitalization

Op Sequence	Item/Resource	Type	UOM	Applied Quantity	Previous Capitalized Quantity	Capitalization %	Calculated Amount	Previous Capitalized Amount
<input checked="" type="checkbox"/> 10	KC_COMP	Material	Ea	3	1	10	20.00	100.00
<input type="checkbox"/> 20	KC_OSPRES	Resource	HR	10	0	10	0.00	0.00
<input type="checkbox"/>								
<input type="checkbox"/>								
<input type="checkbox"/>								
<input type="checkbox"/>								
<input type="checkbox"/>								

Calculated Total: Offset Account: Comments:

5. Enter a **Capitalization %**.

The costs associated with the selected items and resources within the Capitalization region are capitalized by this percentage.

6. After selecting items or resources to capitalize within the Capitalization region, choose **Calculate Amounts** to view the projected amount to capitalize, based on what you had entered within the Capitalization % field.

The asset's book value and useful life will increment with this additional value within Fixed Assets.

7. Optionally change the defaulted **Offset Account**. Capitalized maintenance costs are credited to their associated maintenance expense accounts, while this Offset Account is debited by the same amount within Fixed Assets.

Maintenance expenses that are capitalized are considered capital asset value and not maintenance expenses, within the General Ledger.

8. The **Comment** field contains the work order number, Asset, and Asset Description, concatenated together.

9. Choose **Initiate Capitalization** to execute a concurrent process that capitalizes the current work order's maintained asset's associated Fixed Asset with the calculated amounts.

- Optionally choose **View Past Details** to view all past capitalization transactions for the maintained asset's associated Fixed Asset.

View Past Details

The screenshot shows a window titled "View Past Details" with a sub-header "Capitalization Details". It contains a table with the following columns: Fixed Asset, Book, Capitalization Date, Item/Resource, Qty, Capitalization Cost, Mass Additions Id, and Comments. The table lists four transactions for Fixed Asset 102543, all from OPS CORP. The transactions are dated 28-SEP-2006, 21-SEP-2006, 14-OCT-2006, and 21-SEP-2006, with resources KC_RES, KC_COMP, KC_COMP, and KC_RES respectively. The quantities are 10, 1, 2, and 7. The capitalization costs are 400, 100, 20, and 70. The mass additions IDs are 233876, 229876, 239876, and 228878. The comments are KC_WO13:EM1:KC_DEP:, KC_WO13:EM1:KC_DEP:Alex-cs, KC_WO13:EM1:KC_DEP:, and KC_WO13:EM1:KC_DEP:Alex-c. A "Total Cost" row at the bottom shows a total of 590. A "Close" button is located at the bottom right.

Fixed Asset	Book	Capitalization Date	Item/Resource	Qty	Capitalization Cost	Mass Additions Id	Comments
102543	OPS CORP	28-SEP-2006 12	KC_RES	10	400	233876	KC_WO13:EM1:KC_DEP:
102543	OPS CORP	21-SEP-2006 07	KC_COMP	1	100	229876	KC_WO13:EM1:KC_DEP:Alex-cs
102543	OPS CORP	14-OCT-2006 12	KC_COMP	2	20	239876	KC_WO13:EM1:KC_DEP:
102543	OPS CORP	21-SEP-2006 04	KC_RES	7	70	228878	KC_WO13:EM1:KC_DEP:Alex-c
Total Cost					590		

- Click the **Close** button.
- Close the windows.

Preventive Maintenance

This chapter covers the following topics:

- Introduction
- Preventive Maintenance Overview
- Meters
- Entering Meter Readings
- Preventive Maintenance Scheduling
- Generating Work Orders

Introduction

This chapter discusses how work orders are created automatically using preventive maintenance schedules. The following topics are necessary when setting up preventive maintenance:

- Preventive Maintenance Overview, page 4-1
- Meters, page 4-2
- Preventive Maintenance Scheduling, page 4-6

Preventive Maintenance Overview

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

To set up this scenario:

1. Define your car's odometer as a meter.

2. Associate that meter to an asset (your car), using the Asset Meter Association window.
3. Associate the Maintenance Activity (oil change) that should occur, based on the meters you defined.

This is performed using Preventive Maintenance Scheduling.

Preventive Maintenance includes the following topics:

- Meters, page 4-2
- Project and Task Setup, page 2-122
- Defining Meter Templates, page 2-122
- Defining Meters, page 2-125
- Associating Meter Templates with Asset Groups, page 2-124
- Associating Meters with Asset Numbers, page 2-127
- Entering Meter Readings, page 4-3
- Preventive Maintenance Scheduling, page 2-129
- Defining Set Names, page 2-127
- Defining a Preventive Maintenance Template, page 2-129
- Entering Preventive Maintenance Schedule Definitions, page 2-137
- Generating Work Orders, page 4-6

Meters

Meters are defined and associated with asset numbers to measure an asset or rebuildable item's usage, examples include odometers or counters. Meters are used in Preventive Maintenance Scheduling to schedule and generate PM work orders.

Meter related tasks include the following topics:

- Project and Task Setup, page 2-122
- Defining Meter Templates, page 2-122
- Defining Meters, page 2-125
- Associating Meter Templates with Asset Groups, page 2-124

- Associating Meters with Asset Numbers, page 2-127
- Entering Meter Readings, page 4-3

Entering Meter Readings

After a work order is completed, meter readings are required for all meters, associated with the work order's current asset number, that appear in the Runtime Interval rules in the Preventive Maintenance Scheduling Definition window (See: Entering Preventive Maintenance Schedule Definitions, page 2-137 and Work Order Completion, page 3-59). You can enter standalone meter readings at any time.

Note: To enable the Preventive Maintenance Scheduler process, an initial meter reading needs to have already been entered. This might have been performed by entering an initial reading during the Meter's definition.

The Meter Reading window invokes with a **Disable** button based on the Disable Meter Reading function security setting. If you do not have access to the function security, eAM Disable Meter Reading, then the **Disable** button does not display and you cannot disable a meter reading.

To enter mass meter readings:

1. Navigate to the Mass Meter Readings page (Maintenance Super User > Assets > Mass Meter Readings).

Mass Meter Readings

ORACLE Asset Management

Diagnostics Home Logout Preferences Personalize Page

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis

Capital Rebuildable Inventory Mass Meter Readings Maintenance Organization EM1

Mass Meter Readings

Cancel Apply

Search

Meter Name Asset Number DTF35000

Meter Readings		Source	
Details	History	Reading Type	New Readings
Meter Name	Meter Name	Value	Last Reading
		Direction UOM Date	Value Date
Hide DTF35000 Odometer	View DTF35000 Odometer	Absolute	Ascending Mile 28-Aug-2006 03:29:46
			130200 28-Aug-2006 01:31:23

New Readings

Comments

Meter Property Value				Target Meters			
Name	Type	UOM	Property Value	Name	UOM	Factor	Last Reading
No search conducted.				No search conducted.			

Reset

☐ Include Target Reset

Reset Reading

Reset Comment

Add 5 Rows

Cancel Apply

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis Diagnostics Home Logout Preferences Personalize Page

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2. Optionally enter a meter name, and then click the **Go** button.
3. Optionally enter an asset number and then click the **Go** button.
All meters that are associated with this asset appear (See: Associating Meters with Asset Numbers, page 2-127).
4. Enter a Value or Change Reading value for new meter readings, depending on the meter type.

Note: If the meter is a Change type, the Value field indicates the difference between the last reading and the current reading. The Change value is used to calculate the Life To Date Reading, within the Latest tabbed region.

5. Optionally change the Date, if required.
6. Optionally enter any necessary Comments.
7. Optionally enter Reset information.
 1. If you enter a Reset Reading value, you are resetting the source meter to this value.

For example, if a motor must be replaced, you can reset the meter reading value of the pump, associated with the motor.

Companies can associate a Source Meter to an asset number and meter association. The Source Meter reading subsequently feeds corresponding meters that are associated with assets within the Meter Hierarchy (See: Defining Meters, page 2-125 for more information on meter hierarchies).

2. Optionally select the Include Target Reset check box to reset the current asset's target meter to the source meter's Reset Reading.
3. Optionally enter a Reset Comment.

Note: You cannot reset past meter readings if a meter reading is entered after the reading date.

8. Choose Apply to save your work.
9. Optionally select the History icon to view all meter readings for the selected meter and current asset number.

This helps you to make logical decisions when entering and updating meter readings. For example, you can view the last meter reading, enabling you to make a logical choice when entering the next meter reading.

1. The Life To Date field displays the accumulated meter readings, which is usually the same as the current meter reading.

The current meter reading and Life To Date values are different if you have previously entered a Reset Reading. For example, before the reset, both the current meter reading and the Life To Date value were 17,000. You then reset the meter to 3,000. The Life To Date value continues to increase from 17,000, while the current meter reading increases from 3,000. The system uses the Life To Date meter reading to calculate the Usage Rate and includes the initial reading.

2. Optionally select the Disable icon to disable a past meter reading for the current Reading.

If meter readings are entered before resetting the meter, you cannot disable those meter readings. The most current reading before the meter is reset cannot be disabled, unless the meter reset reading entry is disabled.

Note: Preventive Maintenance Scheduling does not use any disabled information. After a meter reading is disabled, you cannot re-enable it

Preventive Maintenance Scheduling

eAM enables you to generate work orders automatically using a preventive maintenance schedule, based on Runtime Rules, Day Interval Rules, and List Dates. For example, a forklift might need servicing after 100 motor running hours, or 90 days, whichever comes first. Meters are used to keep track of asset usage.

Preventive Maintenance Scheduling tasks include the following topics:

- Defining Set Names, page 2-127
- Defining a Preventive Maintenance Template, page 2-129
- Entering Preventive Maintenance Schedule Definitions, page 2-137
- Generating Work Orders, page 4-6

Generating Work Orders

After you have established PM scheduling definitions, you can generate work orders. There are two ways to generate work orders. You can execute the Generate Preventive Maintenance Work Orders process, or you can implement forecasted work orders from the Maintenance Workbench.

When executing the Generate Preventive Maintenance Work Orders process, the program creates suggested work orders, based on the date or meter rules that are associated with the scheduling definitions that you defined. See: Entering Preventive Maintenance Schedule Definitions, page 2-137. You should schedule this process to periodically execute, automatically. You can execute this program manually at any time, by accessing the menu option.

If you selected the PM Work Order Prefix option on the Enterprise Asset Management EAM Parameters page, the system will generate PM work orders beginning the specific work order prefix. When the Work Order Business Object API is called, the system will incorporate the prefix into the work order name. This enables the system to differentiate PM work orders from manual work orders.

Use the Maintenance Workbench if you want to review and create PM work orders. You can launch the Preventive Maintenance Scheduler to implement forecasted work orders. See: Using the Maintenance Workbench, page 3-69.

The following are instructions to invoke the process from the menu:

To generate work orders:

1. Navigate to the Generate Preventive Work Orders page.

Generate Preventive Maintenance Work Orders (EM1)

Run this Request...

Name: **Generate Preventive Maintenance Work Orders**

Operating Unit:

Parameters:

Language: **American English**

Language Settings... Debug Options

At these Times...

Run the Job: **As Soon as Possible**

Schedule...

Upon Completion...

☒ Save all Output Files

Layout:

Notify:

Print to: **noprint**

Options...

Help (C) Submit Cancel

2. In the Parameters page, select a Start Date.
3. Select a Cut Off Date.
4. To further narrow down the data selection, you can optionally enter any of the following parameters:
 - Area - location where your assets reside.
 - Asset Category - the Class and Subclass code, such as CRANE.OVERHEAD or BUILDING.FLOOR
 - Owning Department
 - Asset Type - Capital and Rebuildable Inventory
 - Asset Group - if you previously selected an Asset Type
 - Asset Number - if you previously selected an Asset Type
 - Set Name - PM set used to implement work orders that are forecasted against default Preventive Maintenance Schedules in this set. If a Set Name is specified, you will only select PM schedules for PM Set for work order generation.
 - Project

- Task - if you previously selected a project
 - Parent Work Order
 - Planner - select if you want to generate PM work orders for specific planners
5. Click the **OK** button, and the system displays the Generate Preventive Maintenance Work Orders page.
 6. Click the **Submit** button.

Related Topics

Submitting a Request, *Oracle Applications User's Guide*

eAM Planning and Scheduling

This chapter covers the following topics:

- Introduction
- Overview of eAM Planning and Scheduling
- eAM Planning
- Launching the Planning Process
- Viewing Suggested Demand
- eAM Scheduling
- Using the Scheduler Workbench

Introduction

Oracle Enterprise Asset Management utilizes Oracle Manufacturing Scheduling and Oracle Material Requirements Planning to ensure cost savings and work management efficiencies, by generating predictive work activities. These work activities use a planning process to balance the work load for resource management. This chapter contains the following topics:

- Overview of eAM Planning and Scheduling, page 5-1
- eAM Planning, page 2-151
- eAM Scheduling, page 2-152

Overview of eAM Planning and Scheduling

Oracle Enterprise Asset Management utilizes Work Orders to create demand for asset maintenance. Work Order operations are completed using the Work Orders' associated material and resource requirements (See: Overview eAM Work Management, page 3-2). Cost savings and work management efficiencies are achieved by generating future,

planned work activities, and then using a planning process to balance the work load for resource management.

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

This section includes the following topics:

- eAM Planning, page 2-151
- eAM Scheduling, page 2-152

eAM Planning

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

- Master schedule
- Bills of material
- Scheduled receipts
- On-hand inventory balances
- Lead times
- Order modifiers

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

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

eAM Material Requirements Planning



eAM Planning includes the following topics:

- Defining a Master Demand Schedule Name, page 2-153
- Defining a Material Requirements Plan Name, page 2-153
- Defining Plan Options, page 2-155
- Launching the Planning Process, page 5-3
- Viewing Suggested Demand, page 5-5

Launching the Planning Process

Launch the planning process for a material requirements plan (MRP) from a master demand schedule to generate planning recommendations for all planned items. You can launch the planning process for a material requirements plan (MRP) or a master production schedule (MPS). The planning process involves three phases for defining the MRP or MPS. The process uses the input from a master demand schedule or master production schedule to determine the quantities and timing of the items to purchase.

To launch the planning process:

1. Navigate to the Launch MRP window.

Launch MRP

Run this Request...

Name: **Launch Planning Processes**

Parameters:

Language: **American English**

Parameters

Plan Name:

Launch Snapshot:

Launch Planner:

Anchor Date: **19-JUL-2004** 19-JUL-04

Plan Horizon: **22-JAN-2006** 22-JAN-06

OK Cancel Clear Help

2. Enter the following parameters:

Plan Name: Select the MRP Plan Name to launch.

Launch Snapshot: Valid values are Yes and No. Select Yes to launch the Snapshot.

Launch Planner: You must launch the planner if you selected Yes to launch the Snapshot.

Anchor Date: Enter an Anchor Date, earlier or equal to the current date, that acts as a start date for repetitive planning periods.

Plan Horizon: Enter a date, greater than the current date, up to which the planning process creates an MRP or MPS. The default horizon is the current date plus the number of offset months set in the profile, MRP: Cutoff Date Offset Months (See: Implementing Profile Option Summary, *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*).

3. Choose OK.
4. Choose Submit.

Related Topics

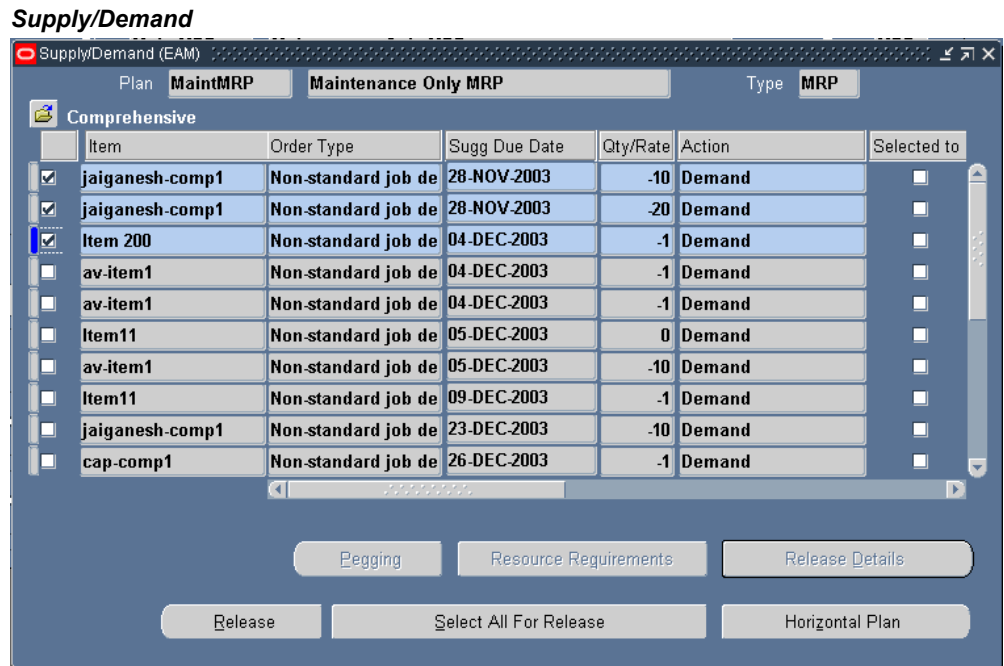
Submitting a Request, *Oracle Applications User's Guide*

Viewing Suggested Demand

After the MRP is launched, you can view the purchase requisition suggestions created by the launched MRP plan.

To view suggested purchase requisitions:

1. Navigate to the Supply/Demand window.



2. Review the supply/demand details. See: Supply and Demand Fields, *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*.

To view the horizontal plan:

You can view bucketed horizontal planning information, based on your selected display preferences. MRP provides two ways of viewing this information: snapshot and current. Snapshot information is the information produced by your original planning execution. Current information includes all modifications after the planning execution.

1. Navigate to the Supply/Demand window.
2. Choose Horizontal Plan.

Horizontal Material Plan

Item	Type	19-JUL-2004	26-JUL-2004	02-AUG-2004
<input type="checkbox"/> Item 200	Sales orders	0	0	
<input type="checkbox"/>	Forecast	0	0	
<input type="checkbox"/>	Dependent demand	14	0	
<input type="checkbox"/>	Gross requirements	14	0	
<input type="checkbox"/>	WIP+	0	0	
<input type="checkbox"/>	Purchase orders	0	0	
<input type="checkbox"/>	Requisitions	0	0	
<input type="checkbox"/>	Total supply	14	0	
<input type="checkbox"/>	Beginning on hand	0	0	
<input type="checkbox"/>	Projected available balance	0	0	

3. Indicate if you would like to view Snapshot or Current information.

Related Topics

Reviewing Supply and Demand, *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*

Reviewing the Horizontal Plan, *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*

eAM Scheduling

Oracle Enterprise Asset Management (eAM) shares the Scheduler Workbench, used in Oracle Manufacturing, to schedule work orders and operations.

The Scheduler Workbench enables a planner to graphically view and reschedule work orders. It provides you with a visual display of work orders, operations, and resources. You can interactively reschedule work orders, operations, and resources by dragging and dropping them at a new date and time. Any sequencing requirements defined for the Work Order are displayed and maintained during scheduling changes. Resource availability and requirements display so that you can graphically view the impact of scheduling changes.

Important: You have the Infinite Scheduler available to you; this

scheduler is not constraint-based.

The scheduling process calculates the work order and operation scheduled durations and dates, based on the forward or backward scheduling goal (See: Routine Work Orders, page 3-3), and Work in Process parameters. The concurrent program is triggered after a work order is released (See: eAM Work Order Statuses, page 3-23). The work order automatically transitions to a Pending Scheduling status, until the concurrent program finishes scheduling. At that time, the work order transitions back to a Released status.

Note: Oracle eAM uses the Infinite Scheduler for automatic scheduling. The Infinite Scheduler considers only the calendar setup and will not consider further finite exceptions. It does not consider shift exceptions or take the resource loads and availability into consideration. The Resource Availability form is a view to display information on the availability and considers exceptions so that you can perform manual scheduling accordingly.

This section includes the following topics:

- Defining Scheduling Rules for Work Order Relationships (Setting Up chapter)
- Using the Scheduler Workbench, page 5-7

Using the Scheduler Workbench

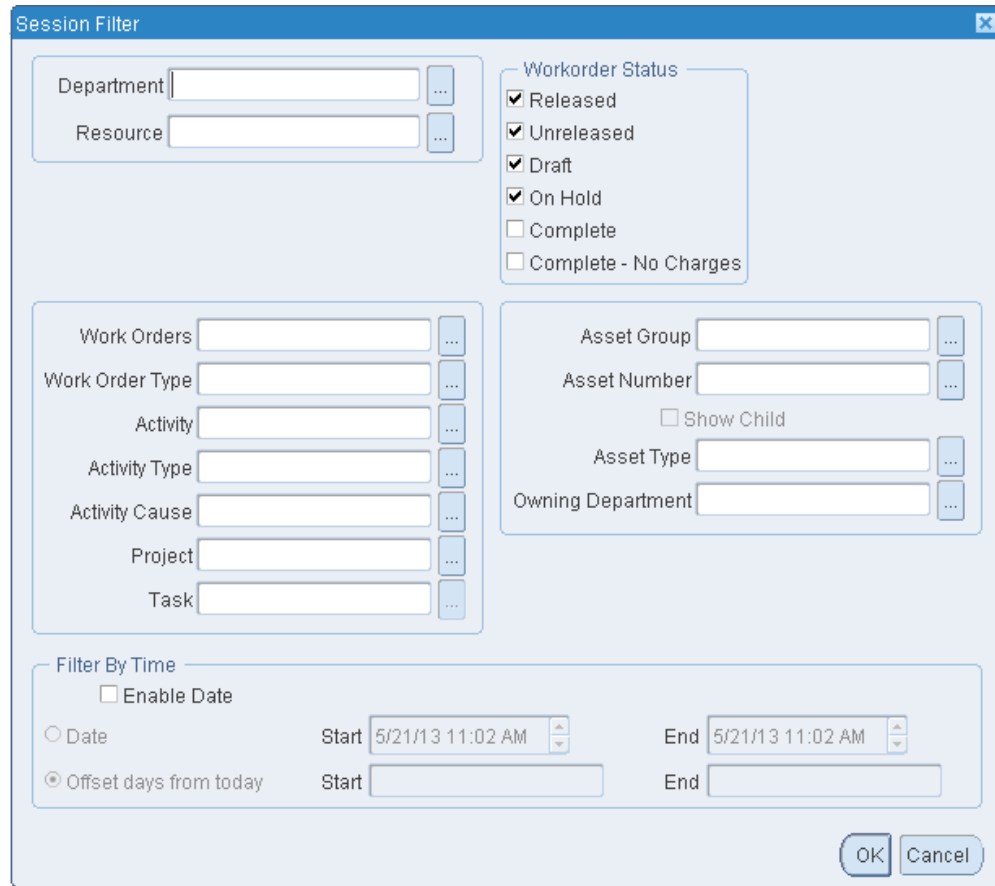
Use the Scheduler Workbench to select specific work orders, expand, and collapse work orders and operations, using a tree hierarchy structure. A Gantt Chart graphically displays both firmed and unfirmed work orders (See: Routine Work Orders, page 3-3). You can view and update start and end dates for each resource.

In automatic mode, the Scheduler process creates start and end times for operations and resources. By default, you are in manual mode.

To use the Scheduler Workbench:

1. Navigate to the Scheduler Workbench.
2. Choose Filter to limit the information displayed such as restricting the results based on the assigned planner. You can display information by Department, Resource, Asset Information, filter by time, or a combination of this information. You can view information for work orders at Released, On Hold, Unreleased, Cancelled, and Complete statuses.

Filter



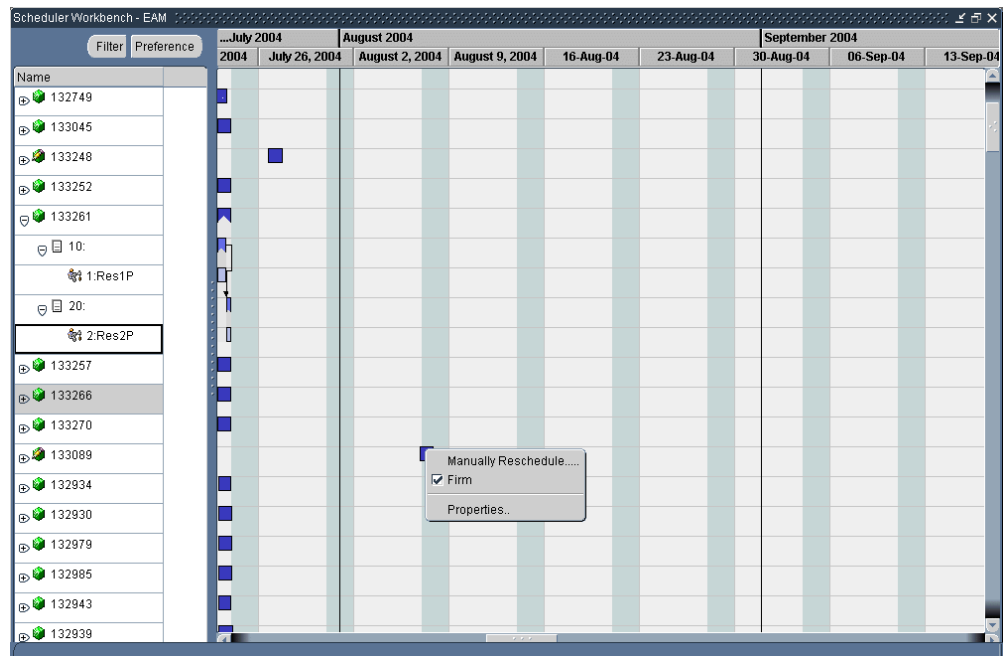
The **Session Filter** dialog box is used to filter work orders based on various criteria. It includes the following sections:

- Department and Resource:** Two text input fields with dropdown arrows.
- Workorder Status:** A list of checkboxes for ☒ Released, ☒ Unreleased, ☒ Draft, ☒ On Hold, ☐ Complete, and ☐ Complete - No Charges.
- Work Orders:** A list of text input fields with dropdown arrows for Work Orders, Work Order Type, Activity, Activity Type, Activity Cause, Project, and Task.
- Asset Information:** Text input fields with dropdown arrows for Asset Group, Asset Number, Asset Type, and Owning Department. A ☐ Show Child checkbox is also present.
- Filter By Time:** A section with an ☐ Enable Date checkbox. Below it, two radio buttons allow filtering by ☐ Date or ☒ Offset days from today. Each radio button has corresponding Start and End date/time input fields.
- Buttons:** OK and Cancel buttons at the bottom right.

3. Choose OK to filter information entered (See: Filtering Jobs, *Oracle Manufacturing Scheduling User's Guide*).

Work orders appear on the left side of the window, with their associated operations' resources, in a tree hierarchy format. On the right, bars spanning between calendar days represent associated schedules for the current operation resources. If dependent operations exist, you can see dependency links; the Scheduler process considers these dependencies. You can drag and drop the bars between different calendar days to dynamically adjust schedules.

Scheduler Workbench



4. Optionally firm or unfirm Work Orders by selecting Create/Modify Work Orders from the Tools menu. The Find Work Orders window appears (See: Routine Work Orders, page 3-3). You can also right click on a schedule, symbolized by a bar.
 - You can view resource load versus capacity, using the Scheduler Workbench. For information on viewing work order properties, operation properties, and resource properties, See: Viewing a Property Window, *Oracle Manufacturing Scheduling User's Guide*.
 - For information on displaying resources and resource load versus capacity, See: Showing Select Resources and Resource Load Versus Capacity Panes, *Oracle Manufacturing Scheduling User's Guide*.
 - Normally, Work Order rescheduling takes place within the Work Order window, but you can also reschedule them within the Gantt Chart. For information on how to reschedule Work Orders, operations, and resources within the Gantt Chart, See: Rescheduling Jobs, Operations, and Resources in the Gantt Chart, *Oracle Manufacturing Scheduling User' Guide*.

Related Topics

Overview of Workbench, *Oracle Manufacturing Scheduling User's Guide*

Launching the Workbench, *Oracle Manufacturing Scheduling User's Guide*

eAM Cost Management

This chapter covers the following topics:

- Introduction
- Overview of eAM Cost Management
- eAM Cost Estimation
- Viewing Cost Information
- Asset Cost Rollup
- Parent-Child Hierarchy Cost Rollup
- Alternate Cost Hierarchy Rollup
- Transferring Invoice Variances to Maintenance Work Orders
- Viewing Simulated Transfer Details
- Transferring Invoice Variances

Introduction

Costs generate as maintenance work is executed and completed. These costs roll up through the Parent/Child hierarchies defined within eAM. This chapter contains the following topics:

- Overview of eAM Cost Management, page 6-1
- Transferring Invoice Variances to Maintenance Work Orders, page 6-17

Overview of eAM Cost Management

Costs generate as maintenance work is executed and completed. These costs roll up through the Parent/Child hierarchies, defined within Enterprise Asset Management, and can roll up to any level within an asset hierarchy. Labor, Material, and Equipment

charges further classify into several maintenance cost categories.

Enterprise Asset Management captures and retains all work. You can reference completed work to review operations, resources, and costs. This information provides the scope of work and the process by which it is completed.

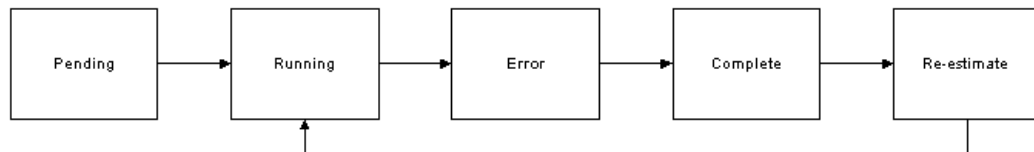
Managing costs in eAM includes the following topics:

- eAM Costing Methods and Mappings, page 2-181
- Setting Up Cost Categories, page 2-183
- Setting Up eAM Cost Management, page 2-186
- eAM Cost Estimation, page 6-2
- Viewing Cost Information, page 6-4
- Asset Cost Rollup, page 6-12
- Parent-Child Hierarchy Cost Rollup, page 6-14
- Alternate Cost Hierarchy Rollup, page 6-16

eAM Cost Estimation

Estimating the costs of maintenance Work Orders is often necessary for planning and assessing purposes. The Work Order Cost Estimate Processor estimates the costs of all materials and resources exploded or entered on a maintenance Work Order, enabling you to plan and assess your costs. A Work Order's estimated and actual costs might differ because all materials or resources, associated with a Work Order, might not actually be used when the Work Order executes. For example, a required material was not issued to the maintenance Work Order.

Cost Estimation Lifecycle



The Work Order Cost Estimate Processor can continually execute or launch manually via a concurrent request. Work Orders have one of the following Estimation Statuses:

- *Pending* - The Work Order is waiting to be selected by the Work Order Cost Estimate Processor.

- *Running* - The Work Order Cost Estimate Processor is currently estimating the costs of the Work Order.
- *Error* - The Work Order Cost Estimate Processor attempted to estimate the Work Order's costs, but there was an error.
- *Complete* - Work Order Cost Estimate Processor successfully completed estimating the Work Order's costs.
- *Re-estimate* - The Work Order is waiting to be picked up by the Work Order Cost Estimate Processor, for re-estimation. In this case, the Work Order was estimated at least once.
- *Running and Re-estimate* - Changes were made to a Work Order's requirements, while the Work Order Cost Estimate Processor was executing. These Work Orders are then re-estimated by the Work Order Cost Estimate Processor.

To view the status of the Work Order Cost Estimation process:

1. Navigate to the Maintenance Work Orders window.

Maintenance Work Orders

The screenshot shows the 'Maintenance Work Orders (EM1)' window. It features a table with columns: Select & Estimate, Work Order, Estimation Status, Asset Activity, Asset Group, Asset Number, Rebuild Item, and Rebuild Asset Number. The first row shows a work order with ID 204212, status 'Complete', activity '30000 Mile Maint', group 'Vehicles', and number 'DTF35000'. Below the table are several filter fields: Description (30000 Mile Truck Maintenance), Class (MaintWAC), Department (F-Maint), Status (Released), From Period (11/01/2005), and To Period (09/30/2006). There are also buttons for 'Select All', 'Re-estimate Work Order', and 'Value Summary'.

Select & Estimate	Work Order	Estimation Status	Asset Activity	Asset Group	Asset Number	Rebuild Item	Rebuild Asset Number
<input checked="" type="checkbox"/>	204212	Complete	30000 Mile Maint	Vehicles	DTF35000		
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

Description: 30000 Mile Truck Maintenance
 Class: MaintWAC
 Department: F-Maint
 Status: Released
 From Period: 11/01/2005
 To Period: 09/30/2006

Buttons: Select All, Re-estimate Work Order, Value Summary

2. Select the Work Orders to estimate/re-estimate by selecting the individual Select & Estimate check boxes. You can choose Select All to automatically select all Work Orders listed for re-estimation.
3. Choose Re-estimate Work Order to estimate/re-estimate all selected Work Orders. The Estimation Status field displays the status of the Work Order Cost Estimation

process.

Related Topics

Viewing Cost Information, page 6-4

Viewing Cost Information

You can view the Material, Labor, and Equipment costs of Asset Numbers, Activities, and Work Orders. You can see detailed or summarized views of actual, estimated, or variance cost information. When viewing the parent Asset Number, you can view just the parent Asset Number's costs or the costs of the parent and child Asset Numbers that are rolled up to the Parent level.

Within both the forms application and Maintenance User profile, different costs are viewable. In the forms application, you can view Work Order and Activity costs. In the Maintenance User profile, you can view Work Order and Asset Number costs.

For assets that transferred from one organization to another, each organization can view only the Work Order costs on those assets that were incurred by itself.

To view cost information within the forms application:

1. Navigate to the Work Order window. Find a Work Order to view costs for.

Work Order

Work Order (EM1)

Work Order	204247	3000 Mile Truck Maintenance
Asset Number	DTF35000	Delivery Erand Truck 35000
Asset Group	Vehicles	
Asset Activity	3000 Mile Maint	
Class	MaintWAC	
Status	Released	
	<input type="checkbox"/> Pending	
Parent Work Order		
Relationship Type		

Scheduled Dates

Start Date	06/27/2006 12:00:00
Completion Date	06/27/2006 13:57:36
Duration(hours)	1.96

Actual Dates

Start Date	
Completion Date	

Main Activity Project Rebuild Request Approval History

Department	F-Maint	<input checked="" type="checkbox"/> Firm	<input type="checkbox"/> Notification Required
Priority		<input type="checkbox"/> Tagout Required	<input checked="" type="checkbox"/> Planned
Work Order Type		<input checked="" type="checkbox"/> Enable Material Issue Requests	
Shutdown Type	Required	PM Suggested Start Date	06/27/2006 12:00:00
Warranty Status		PM Suggested End Date	
Failure Information		<input type="checkbox"/> Failure Entry Required	
Failure		Failure Date	
Cause		Comments	
Resolution			
Material Shortage			
Material Shortage	No	As Of Date	09/01/2006 16:15:08
			Check Shortage

Operations Materials Resources Relationships Asset Route Costs

2. Choose Costs.

Maintenance Work Orders

The screenshot shows the 'Maintenance Work Orders (EM1)' window. It features a table with the following columns: 'Select & Estimate' (checkboxes), 'Work Order', 'Estimation Status', 'Asset Activity', 'Asset Group', 'Asset Number', 'Rebuild Item', and 'Rebuild Asset Number'. The first row is populated with: 204247, Complete, 3000 Mile Maint, Vehicles, DTF35000, and empty cells for Rebuild Item and Rebuild Asset Number. Below the table, there are input fields for 'Description' (3000 Mile Truck Maintenance), 'Class' (MaintWAC), 'Department' (F-Maint), and 'Status' (Released). To the right of these fields are two buttons: 'Select All' and 'Re-estimate Work Order'. At the bottom, there is a section titled 'Accounting Information by Period' with 'From Period' (06/01/2006) and 'To Period' (09/30/2006) fields, and a 'Value Summary' button.

Select & Estimate	Work Order	Estimation Status	Asset Activity	Asset Group	Asset Number	Rebuild Item	Rebuild Asset Number
<input checked="" type="checkbox"/>	204247	Complete	3000 Mile Maint	Vehicles	DTF35000		
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

Description: 3000 Mile Truck Maintenance
 Class: MaintWAC
 Department: F-Maint
 Status: Released

Buttons: Select All, Re-estimate Work Order

Accounting Information by Period
 From Period: 06/01/2006 To Period: 09/30/2006
 Value Summary

3. Optionally re-estimate selected Work Orders' costs by choosing Re-estimate Work Order. After chosen, the Work Order Cost Estimation process executes to re-estimate the costs for all selected Work Orders. See: eAM Cost Estimation, page 6-2. You can optionally first choose Select All to automatically select all Work Orders to re-estimate.
4. In the Accounting Information By Period region, choose the dates that identify the accounting period you want to view.
5. Choose Value Summary.

Maintenance Work Order Value Summary

Period From: 06/01/2006 Period To: 09/30/2006 Refresh

Asset Group	Vehicles	Completion Date	06/27/2006 13:57:36
Asset Number	DTF35000	Work Order Status	Released
Asset Activity	3000 Mile Maint	Parent Work Order	
Rebuild Item		Estimation Status	Complete
Rebuild Serial Number		Last Estimate Id	-1
Owning Department	F-Maint	Last Estimate Date	09/01/2006 16:15:19

Actual Costs Estimates Variances

Cost Category	Total	Material	Labor	Equipment
Maintenance	50.76	19.26	26.50	5.00
Job Total	50.76	19.26	26.50	5.00

Details

- You can view total Material, Labor, and Equipment costs for the cost categories associated with the current Work Order. You can view totals for actual, estimated, or variance costs, depending on the tab you select.

Actual Costs: The Actual Costs tab displays the current Work Order's accumulation of material and resource transaction costs, based on the specified period(s).

Note: The Cost Manager process executes to provide updated, actual cost information.

Estimated Costs: The Estimates tab displays the current Work Order's material and resource requirements' estimated costs. The Work Order Cost Estimate Processor executes to provide updated, estimated cost information. You can also manually launch this process via a concurrent request. See: Viewing Cost Information, page 6-4

Variance Costs: The Variances tab displays the difference between the actual costs and estimated costs.

- For the selected cost category, choose Details to view the Material, Labor, and Equipment costs for individual operations on the current Work Order's routing. You can view totals for actual, estimated, or variance costs, depending on the tab you select.

Note: To see if there are any changes to the selected Work Order's costs, choose Refresh. For example, if the Work Order's Estimation Status is Reestimate, choosing Refresh indicates if the Work Order Cost Estimate Processor has picked up the Work Order and re-estimated the costs. If, after choosing Refresh, the Estimation Status is changed to Complete, the maintenance Work Order has the latest estimation costs.

Costs Details By Operation

Cost Details By Operation (EM1) - 204247, Maintenance

Asset Group	Vehicles	Estimation Status	Complete
Asset Number	DTF35000	Completion Date	06/27/2006 13:57:36
Asset Activity	3000 Mile Maint	Owning Department	F-Maint
Rebuild Item		Work Order Status	Released
Rebuild Serial Number		Parent Work Order	
Period From	06/01/2006	Period To	09/30/2006

Actual Costs **Estimates** Variances

Department Code	Operation Sequence Number	Total	Material	Labor	Equipment
F-Maint	50	5.00	0.00	5.00	0.00
F-Maint	90	0.25	0.00	0.25	0.00
F-Maint	60	0.25	0.00	0.25	0.00
F-Maint	110	0.25	0.00	0.25	0.00
F-Maint	130	2.50	0.00	2.50	0.00
F-Maint	80	0.25	0.00	0.25	0.00
F-Maint	120	0.25	0.00	0.25	0.00
F-Maint	30	5.00	0.00	5.00	0.00
Total		50.76	19.26	26.50	5.00

Detailed Estimates Distributions

- Choose Distributions to view the specific accounts charged for an individual operation.

WIP Transactions Distributions

WIP Transaction Distributions (EM1) - 204247, 10

Account Location Currency Transaction Work Order Details Comments

Transaction Date	Account	Transaction Value	Item / Sub Element	Revision	Transaction Type

Work Order Item/Sub Element UOM

Asset Group Revision Quantity

Asset Number Basis Unit Cost

Account Value

9. Return to the Cost Details by Operation Window. Choose Detailed Estimates to display the details of the Work Order's required material and resources, and any direct items associated with the Work Order.

Estimated Cost Details

Estimated Cost Details (EM1) - 204247, 50

- Material Cost

Item	Required Quantity	Item Unit Cost	Total Item Cost

- Resource Cost

Resource	Usage	UOM	Resource Rate	Overhead Cost	Total Resource Cost
Mechanic1	0.20	HR	25.00	0.00	5.00

- Direct Item Cost

Item Name	Item Description	Item Unit Cost	Quantity	Requisition Number	PO Number	Total Item Cost

- Total Estimated Cost

Total Estimated Cost 5.00

To view cost information within Maintenance Super User:

1. Navigate to the Asset Numbers page, and query an Asset Number. See: Obtaining Asset Number Information, page 21-4.
2. Select the Asset Number, and then choose Costs.

Costs Page

Warning
Low-level logging is currently enabled. Your application will not perform as well while low-level logging is on.

Asset Costs: DTF35000

Asset Number: DTF35000
Description: Delivery Eand Truck 35000
Asset Group: Vehicles

Cost View Options
Indicates required data

View: Actual Costs
Period From: Q1-00
Include Child Assets: ☐
Go

View Cost By: Period
Period To:
Go

Actual Costs

Period	Material (USD)	Labor (USD)	Equipment (USD)	Total (USD)
Nov-02	90.10	245.00	2,550.00	2,885.10
Apr-04	16.34	31.25	0.00	47.59
Mar-05	0.00	18.75	0.00	18.75

Cost Summary

Total Material Cost (USD)	106.44
Total Labor Cost (USD)	295.00
Total Equipment Cost (USD)	2,550.00
Total Asset Maintenance Cost (USD)	2,951.44

[Return To Search](#)

3. In the Cost View Options region, you can narrow your selection criteria.

1. From the View drop down list, select the type of cost information to view. Valid values are Actual Costs, Estimated Costs, Variance Costs, and Cost Summary.

Actual Costs: The Actual Cost option displays the selected Asset Number's actual costs, by period, of the material and resource transactions.

Note: The Cost Manager process executes to provide updated, actual cost information.

Estimated Costs: The Estimated Costs option displays the estimated costs, by period, of the required material and resources associated with the selected Asset Number.

Note: The Work Order Cost Estimate Processor executes to provide updated, estimated cost information. You can also execute the Work Order Cost Estimate Processor manually via a concurrent request.

Variance Costs: The Variance Cost option displays the difference between the actual and estimated costs within a period.

Cost Summary: The Cost Summary option displays a summary of the actual, estimated, and variance cost information, associated with the Asset Number, for the specified period(s).

2. From the View Cost By drop down list, select how you would like to view your cost information. Valid values are Period and Cost Category.
 - If you select Cost Category, you can view cost information by the cost categories.
 - If you select Period, you can view cost information by periods. Optionally enter the Period From and Period To. Accounting Periods are defined within Oracle Inventory (See: Maintaining Accounting Periods, *Oracle Inventory User's Guide*).
4. Select the Include Child Assets check box to view the rolled up costs for the current Asset Number and its children. See: Defining Asset Numbers, page 2-74 to review how Asset Number hierarchies are created.
5. Choose Go to view cost element information. The information is broken down into the three cost elements: Material, Equipment, and Labor.
6. Optionally choose Export to save or export your cost information to a spreadsheet.

Related Topics

Overview of Cost Management, *Oracle Cost Management User's Guide*

Submitting a Request, *Oracle Applications User's Guide*

Asset Cost Rollup

You can optionally roll a child asset's costs into its parent asset, for reporting purposes.

To view an asset hierarchy cost rollup:

1. Navigate to the Asset Numbers page.
2. Query an Asset.

Asset Numbers

ORACLE Asset Management

Diagnostics Home Logout Preferences Personalize Page

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis

Capital Rebuildable Inventory Mass Meter Readings

Maintenance Organization EM1

Asset Numbers

Text Search Save Search

Simple Search

Note that the search is case insensitive

Asset Number: DTF35000

Category:

Asset Route: No

Go Clear

Advanced Search

Select Asset Number: View Work Requests View Work Orders View Asset Operational Log Go Export

Select	Asset Number	Description	Asset Group	Category	Area	Owning Department	Criticality	Check In	Check Out
<input checked="" type="radio"/>	DTF35000	Delivery Erand Truck 35000	Vehicles	Vehicle.Trucks	Fleet Garage	F-Maint	Normal		

Text Search Save Search

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis Diagnostics Home Logout Preferences Personalize Page

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3. Select the Asset to view its details.
4. Select Costs from the View drop down list, and then choose Go.

Asset Details

ORACLE Asset Management

Diagnostics Home Logout Preferences Personalize Page

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis

Capital Rebuildable Inventory Mass Meter Readings

Assets: Capital > Current Organization : EM1

Asset Costs: DTF35000

Asset Number: DTF35000 Asset Group: Vehicles

Description: Delivery Erand Truck 35000

Cost View Options

* Indicates required data

* View: Actual Costs

Period From: Sep-01

☐ Include Child Assets

Go

* View Cost By: Period

Period To:

Go

Actual Costs

Export Work Order Cost Details

Period	Material (USD)	Labor (USD)	Equipment (USD)	Total (USD)
Nov-02	90.10	245.00	2,550.00	2,885.10
Apr-04	16.34	31.25	0.00	47.59
Mar-05	0.00	18.75	0.00	18.75

Cost Summary

Total Material Cost (USD) 106.44

Total Labor Cost (USD) 295.00

Total Equipment Cost (USD) 2,550.00

Total Asset Maintenance Cost (USD) 2,951.44

Return To Search

View: Work Requests Go

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis Diagnostics Home Logout Preferences Personalize Page

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5. Select the Include Child Assets check box to roll the costs of the current asset's child assets.
6. Choose Go.

Parent-Child Hierarchy Cost Rollup

You can optionally roll a child Work Order's costs into the parent Work Order, for reporting purposes.

To view a parent-child hierarchy cost rollup:

1. Navigate to the Work Orders page.
2. Query a Work Order.
3. Select the Work Order to view its details.

Work Orders

ORACLE Asset Management

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Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis

All Requests Crew Schedule Mass Time Entry

Work Orders: All > Organization: EM1

Work Order: WO102907

Update Work Order Check Material Shortage Re-Estimate View Costs

Work Order	WO102907	Description	Leaking Oil
Department	F-Maint	Scheduled Start Date	08-Apr-2004 21:36:00
Asset Activity	Complete	Scheduled Completion Date	08-Apr-2004 21:37:00
Status	Complete	Duration(hours)	0.017
System Status	Complete	Enable Material Issue Request	Yes
Project		Task	
Material Shortage		Work Order Type	Reactive
Warranty Status		Firm	Yes
Activity Type	Service	Activity Cause	Breakdown
Activity Source	Routine	Work Order Attachments	None Add

Asset Details

Asset Number	DTF35000
Asset Group	Vehicles
Area	Fleet Garage
Department	F-Maint
Organization	EM1
Location	3455 108th Ave
Parent Asset	Delivery Trucks

Operations Materials Quality Plans Requests **Work Relationships** Approval History Preventive Maintenance Failure Information

Select Work Order: Update Dependencies Go | Update Work Hierarchy Update Alternate Cost Hierarchy View Cost

Expand All Collapse All

Select Focus Work Order

April	T
WO102907	

View All Relationships

Work Order	Description	Relation	Relation Status	Asset Type	Asset Group	Asset Number
No results found.						

Return To Work Orders: All Update Work Order Check Material Shortage Re-Estimate View Costs

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis Home Logout Preferences Personalize Page Diagnostics

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4. Select the Work Relationships tab to view all relationships, related to the current Work Order, in the View All Relationships region. See: Work Order Relationships, page 3-50.
5. Choose View Cost.

Work Order Costs

ORACLE Asset Management

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Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis

All Requests Crew Schedule Mass Time Entry

Work Orders: All > Work Order: WO102907 > Current Organization : EM1

Work Order Costs

* Indicates required field

* Work Order: WO102907 Include Child Work Order: Yes

Period From: Period To:

Go Clear

Select Object: Re-estimate Export

Select All Select None Expand All Collapse All

Select Focus	Work Order	Asset Number	Asset Group	Asset Type	Actual Total Cost (USD)	Estimated Total Cost (USD)	Variance Total Cost (USD)	Cumulative Actual Cost (USD)	Cumulative Estimated Cost (USD)	Cumulative Variance Cost (USD)	Estimation Status
<input type="checkbox"/>	WO102907	DTF35000	Vehicles	Capital	47.59	16.84	<30.75>	47.59	16.84	<30.75>	Complete

[Return To Work Order: WO102907](#)

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis Home Logout Preferences Personalize Page Diagnostics

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6. Select Yes from the Include Child Work Order list of values to view costs for all children rolled up to the current Work Order.
7. Choose Go.

Alternate Cost Hierarchy Rollup

You can view parent-child Work Order hierarchy costs, rolled up to the parent level. You might want to view costs for Work Orders outside of the hierarchy network.

To view an alternate hierarchy cost rollup:

1. Navigate to the Work Orders page.
2. Query a Work Order.
3. Select the Work Order to view its details.
4. Select the Work Relationships sub-tab to view all relationships, related to the current Work Order, in the View All Relationships region. See: Work Order Relationships, page 3-50.

Work Orders

ORACLE Asset Management

Home Logout Preferences Personalize Page Diagnostics

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis

All Requests Crew Schedule Mass Time Entry

Work Orders: All > Organization: EM1

Work Order: WO102907

Update Work Order Check Material Shortage Re-Estimate View Costs

Work Order: WO102907 Description: Leaking Oil
 Department: F-Maint Scheduled Start Date: 08-Apr-2004 21:36:00
 Asset Activity: Complete Scheduled Completion Date: 08-Apr-2004 21:37:00
 Status: Complete Duration(hours): 0.017
 System Status: Complete Enable Material Issue Request: Yes
 Project: Task: Reactive
 Material Shortage: Work Order Type: Yes
 Warranty Status: Firm: Yes
 Activity Type: Service Activity Cause: Breakdown
 Activity Source: Routin Work Order Attachments: None Add

Asset Details
 Asset Number: QTF35000
 Asset Group: Vehicles
 Area: Fleet Garage
 Department: F-Maint
 Organization: EM1
 Location: 3455 108th Ave
 Parent Asset: Delivery Trucks

Operations Materials Quality Plans Requests Work Relationships Approval History Preventive Maintenance Failure Information

Select Work Order: Update Dependencies Go | Update Work Hierarchy Update Alternate Cost Hierarchy View Cost

Expand All Collapse All

Select Focus Work Order April T
 WO102907

View All Relationships

Work Order	Description	Relation	Relation Status	Asset Type	Asset Group	Asset Number
No results found.						

Return To Work Orders: All Update Work Order Check Material Shortage Re-Estimate View Costs

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis Home Logout Preferences Personalize Page Diagnostics

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5. Choose Update Alternate Cost Hierarchy to view Work Order costs outside of the hierarchy network.
6. Choose Import Work Hierarchy.
7. Select the Work Order.
8. Select View Cost from the *Select Work Order*: list of values.
9. Choose Go.

Transferring Invoice Variances to Maintenance Work Orders

You can transfer variances, between purchase order price and invoice price, to a maintenance Work Order, from your user-defined adjustment account. This process (Transfer Shop Floor Invoice Variance) is available for both direct items and outside services and enables you to value your maintenance costs at the actual costs.

Transferring invoice variance tasks include the following:

- Viewing Simulated Transfer Details, page 6-18
- Transferring Invoice Variances, page 6-18

Related Topics

Overview of Direct Item Procurement for eAM Work Orders, page 5-1

Overview of eAM Contractor Services, page 8-1

Defining WIP Accounting Classes, *Oracle Work in Process User's Guide*

Viewing Simulated Transfer Details

You can generate the Simulate Transfer Shop Floor Invoice Variance report to display the details of each invoice variance and a summary total of the variance amount that may transfer. The report format is similar to the Shop Floor Invoice Variance Report. View this report to determine if you want to execute the variance transfer. Complete this task before you execute the Shop Floor Invoice Variance Report.

Related Topics

Simulate Transfer Shop Floor Invoice Variance, page 29-16

Transferring Invoice Variances

The Transfer Shop Floor Invoice Variance process transfers the invoice variance from your specific adjustment account (See: Defining WIP Accounting Classes, *Oracle Work in Process User's Guide*) to the maintenance Work Orders. This process generates account distribution entries that add the invoice variance amount back to the maintenance Work Order WIP accounts. This transfer executes for one organization, and one adjustment account at a time. For each execution, the process creates a unique batch number.

When the process completes successfully, you can generate the Shop Floor Invoice Variance Report to view your transfer details (See: Shop Floor Invoice Variance Report, page 29-18). Each execution completed by the transfer process is identified by a batch id number, generated by the process itself.

The accounting distribution created by the process is as follows:

Account Distributions Generated

Account	Debit	Credit
WIP accounting class valuation accounts	XXX	-
Invoice variance adjustment account	-	XXX

To execute the Transfer Shop Floor Invoice Variance process:

1. Navigate to the Shop Floor Invoice Variance window.
2. Select Transfer Shop Floor Invoice Variance from the Name list of values.

Report Parameters

- **Transfer Description**

Optionally enter a description for the invoice transfer.

- **Specific Work Order**

Optionally view the variance transfer details for a Specific Work Order.

Maintenance Work Orders with statuses of Cancelled, Closed, and Complete - No Charges are not available.

- **IPV Item Type**

You can transfer invoice variances for:

- *Direct Shop Floor Delivery items only*
- *Outside Processing and Direct Shop Floor Delivery items*
- *Outside Processing items only*

- **Item Range**

If you chose *Outside Processing items only* as the value for the IPV Item Type parameter, you can specify an item range for your transfer.

- **Specific Item**

If you chose *Outside Processing items only* as the value for the IPV Item Type parameter, you can specify an item for your transfer.

- **Category Set**

If you chose *Outside Processing items only* as the value for the IPV Item Type parameter, you can specify a Category Set for your transfer.

- **Specific Category**

If you previously selected *Outside Processing items only* as the value for the IPV Item Type parameter and a value in the Category Set parameter, you can specify a specific category from the previously selected category set.

- **Specific Project**

You can choose to transfer invoice variances for items associated to a specific

project.

- **Adjustment Account**

You can enter an adjustment account from which the invoice variance is transferred.

- **Invoice Cutoff Date**

Enter a date. Approved and posted invoices through this date are included in your transfer.

3. Choose OK.

4. Choose Submit.

Related Topics

Submitting a Request, *Oracle Applications User's Guide*

Direct Item Procurement for eAM Work Orders

This chapter covers the following topics:

- Introduction
- Overview of Direct Item Procurement for eAM Work Orders
- Enabling Direct Item Procurement
- Automatically Creating Requisitions for Direct Items
- Manually Entering Requisitions for Direct Items
- Creating Purchase Orders from Requisitions
- Manually Entering Purchase Orders for Direct Items
- eAM Direct Procurement Accounting

Introduction

Enterprise Asset Management (eAM) Direct Item Procurement enables you to order items directly to your maintenance organization. This chapter contains the following topics:

- Overview of Direct Item Procurement for eAM Work Orders, page 5-1
- Enabling Direct Item Procurement, page 7-3
- Automatically Creating Requisitions for Direct Items, page 7-4
- Manually Entering Requisitions for Direct Items, page 7-11
- Creating Purchase Orders from Requisitions, page 7-16
- Manually Entering Purchase Orders for Direct Items, page 7-19

- eAM Direct Procurement Accounting, page 7-23

Overview of Direct Item Procurement for eAM Work Orders

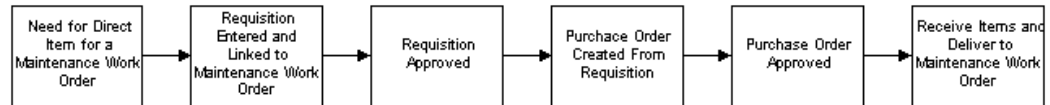
One of the most important features included in Enterprise Asset Management (eAM) is Work Management (See: Overview of eAM Work Management, page 3-2). Work Management enables you to create Work Requests when an asset is problematic. After the Work Request is approved, a Work Request can associate with a Work Order. A Work Order includes a listing of all maintenance activities are performed on an asset. Material requirements for a Work Order (See: Defining Material Requirements, page 3-36) may include stocked, non-stocked direct items, services, and direct items (description-based items). Stocked items are those that are either used frequently, or the criticality of short lead time to obtain replacement parts mandates that they be stocked in inventory. Non-stock direct items can be included in the internal catalog, but the decision is made to not maintain an inventory balance. These items are not transactable, not stockable, but you can procure them. Direct items are either non-stock or description-based. Non-Stock Direct Items can represent items that are not stocked in inventory, or services that need to be purchased from a supplier. Non-Stock Direct Items are not stocked in inventory but are defined in the Item Master as an inventory item, purchaseable, and purchase but not stockable (See: Inventory Attribute Group, *Oracle Inventory User's Guide*). Direct Items are contrived as "one-off", bought directly from a vendor for a specific Work Order and Operation. They are delivered directly to the Shop Floor from maintenance Work Order execution. You can add Planned Direct Items to a Work Order's Bill of Material (BOM) or an Activity BOM. Planned Direct Items must first be created in the Item Master as Non-Stockable and Purchasable inventory items (See: Non-Stock Direct Item Setup, page 2-119). A purchase requisition is optionally automatically created for these items, when the Work Order is released.

If you have Oracle iProcurement installed, all item types may be included in your internal catalog. A planner can procure Direct Items from the Maintenance Workbench (See: Using the Maintenance Workbench, page 3-69). Purchase requisitions and purchase orders of such items capture the Work Order for which they are required. If the Work Order is project related, then the project and task information is captured in the purchase requisition. You can procure Non-Stock and Description-based Direct Items, without accessing iProcurement, as well.

The following diagram illustrates the integration between Enterprise Asset Management and Procurement. First, a maintenance Work Order is created. If the Asset and/or Maintenance BOM that is associated with the asset includes Direct Items, those Direct Items are automatically part of the Work Order's material requirements. You can also manually add Direct Items (Non-Stock, Description-based, and Services) to a Work Order. When the Work Order is released, a purchasing requisition is created for the Direct Items that are included in the material requirements and that have the Auto Request Material check box selected. This check box setting defaults from the Asset and/or Maintenance BOM setup, but you can update it on the Work Order. The requisition is linked to the Work Order, and then approved. A purchase order is created

from the requisition, and then approved. You can create a purchase order manually, without first creating a requisition. In both cases, the purchase order needs approval. The items are received using a standard receipt routing, and delivered to the maintenance Work Order. The cost on the Work Order records as the actual purchase order price.

Direct Item Procurement for eAM Work Orders Process



This section includes the following topics:

- Enabling Direct Item Procurement, page 7-3
- Automatically Creating Requisitions for Direct Items, page 7-4
- Manually Entering Requisitions for Direct Items, page 7-11
- Creating Purchase Orders from Requisitions, page 7-16
- Manually Entering Purchase Orders for Direct Items, page 7-19
- eAM Direct Procurement Accounting, page 7-23

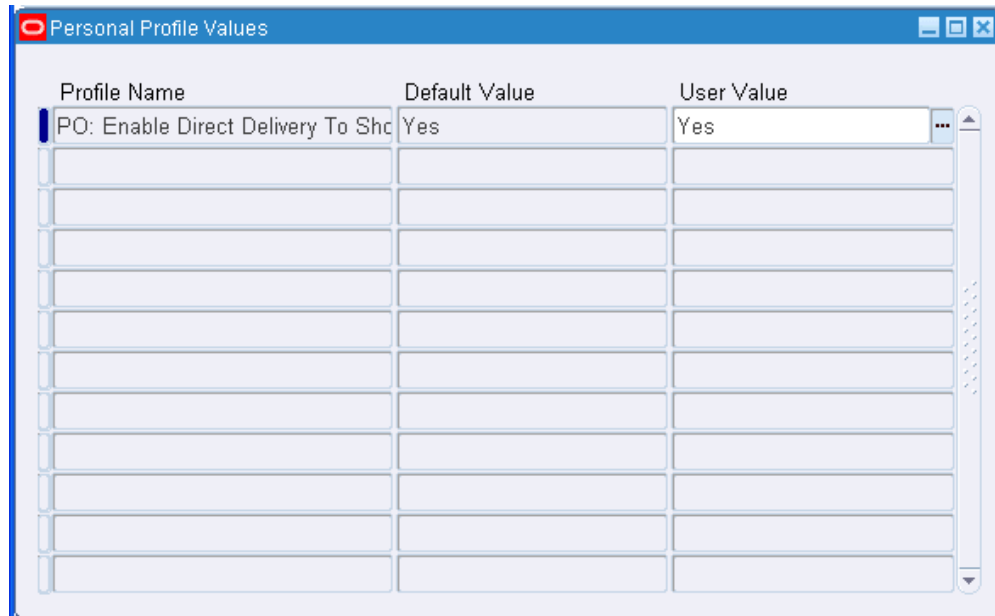
Enabling Direct Item Procurement

To enable direct item (both supplier catalog and non-catalog items) procurement for eAM Work Orders directly from an eAM Work Order, set the *PO: Enable Direct Delivery To Shop Floor* profile option to Yes. When this value is set to Yes, you can create an eAM-related requisition or purchase order. You can enter eAM specific information, such as Work Order and operation reference numbers, as well as identify a requisition line as having a Shop Floor destination. Requisitions are created automatically for Direct Items (Non-Stock and Description-based), after a Work Order with those Direct Items on its material requirements listing is released.

To enable direct item procurement:

1. Navigate to the Personal Profile Values window.

Personal Profile Values



Profile Name	Default Value	User Value
PO: Enable Direct Delivery To Shop Floor	Yes	Yes

2. Select *PO: Enable Direct Delivery To Shop Floor* from the Profile Name list of values.
3. Select Yes from the Default Value list of values.
4. Save your work.

Related Topics

Purchasing Profile Options, *Oracle Purchasing User's Guide*

Automatically Creating Requisitions for Direct Items

First, a maintenance work order is created. If the asset or maintenance BOM that is associated with the work order's asset includes direct items, those direct items are automatically part of the work order's material requirements. You can also manually add direct items (Non-Stock and Description-based) to a work order. When the work order is released, a purchasing requisition is created for the direct item that is included in the material requirements and that have the Auto Request Material check box selected. This check box setting defaults from the asset or maintenance BOM setup, but you can update it on the work order. The requisition is linked to the work order, and then approved. A purchase order is created from the requisition, and then approved. You can also create a purchase order manually, without first creating a requisition. In both cases, the purchase order needs approval.

Important: You cannot automatically create one requisition for multiple direct items on a work order. If a work order includes multiple direct items, you must manually create the requisition. You must clear the Auto Request Material check box on the Maintenance BOM or the work order direct item line.

To automatically create requisitions:

1. Navigate to the Work Orders window.

2. Choose New.

The header information displays general information about the Asset Number and the type of work required.

3. The work order number is assigned, but you can update it.

4. Enter an Asset Number requiring maintenance. The Asset Group defaults (See: Defining Asset Numbers, page 2-74).

5. Select an Asset Activity. Asset activities associated with this asset number are available.

Note: If this work order was previously created, you can add an asset activity, as long as the work order is at an Unreleased or Draft status, or an asset activity was not previously defined. If any tasks, material, or resource requirements exist, these must be deleted before adding an asset activity to a pre-existing work order.

After selecting an asset activity, the associated maintenance BOM (material) (See: Setting Up Maintenance Bills of Material, page 2-101) and maintenance route (resources), associated with the activity (See: Defining Maintenance Routes, page 2-106), attach to the work order. After an asset activity is saved to a work order, you can no longer change or delete it.

6. Enter a Class code to represent the charge (expense) accounts associated with the Asset Number. This defaults from the Asset Number (See: Defining Asset Numbers, page 2-74); you can update it.
7. Enter the Status. For example, Unreleased, Released, On Hold, and Draft. Certain transactions update this status automatically, including Work Order Completion, for example (See: eAM Work Order Statuses, page 3-23).
8. If this is a child work order in a work order network and Parent Child is populated in the Relationship Type field, the parent work order is populated in this field.

9. In the Scheduled Dates region, enter the work order's scheduled Start date if it is based on a forward schedule. The scheduling process uses this date as a starting point to calculate the scheduled end date and duration for allocated resources and material. If the material/resources are not available by this date, the scheduling process moves the start date forward (See: eAM Scheduling, page 2-152).
10. Enter a scheduled Completion date for backward scheduling. This date indicates the requested end by date for the work. The scheduling process uses this date as a starting point to calculate the scheduled start date and duration for allocated resources and material. If the material and resources are not available by that date, the scheduling process moves the start date backwards to ensure completion by the required end date (See: eAM Scheduling, page 2-152).
11. Within the Main tab, the Department defaults from the selected Asset Number (See: Defining Asset Numbers, page 2-74). This indicates the persons or department responsible for this Asset Number.
12. Optionally select a Priority. For example, High, Medium, or Low.
13. Optionally select a Work Order Type. Work order types enable you to differentiate work orders, for example, Routine, Preventive, Rebuild, Emergency, or Facilities. Maintenance management can use this information to sort and monitor work activities for reporting and budgeting. Work order types are referenced in the work order. For information on how to create valid values, See: Work Order Types, page 2-53.
14. The Shutdown Type defaults from the activity. This helps the planner group work orders that may require shutdowns, so that they are planned together.
15. If the Firm check box is selected, planning and scheduling does not adjust the schedule, regardless of material or resource availability (See: Overview of Planning and Scheduling). This check box defaults as selected or cleared, depending on the Auto Firm On Release check box setting, established in the Enterprise Asset Management Parameters setup for the current organization (See: Defining eAM Parameters, page 2-11). This defaults after the work order is released.

If the check box is selected, the end date is calculated, based on the work order duration. The scheduler automatically calculates the duration based on the operations (resource duration setup) on the work order. You can update this check box for Work Orders at Draft, Released, Unreleased, On-Hold, or Cancel statuses (See: eAM Work Order Statuses, page 3-23).
16. Optionally select the Notification Required check box.
17. Optionally select the Tagout Required check box to indicate that the area needs to be secured for operations required to execute this work order. Tags are generally printed and placed on an asset, warning the plant that it is shutdown and should

not be started. This check box helps the planner isolate those jobs that require a tagout.

To store tagout documents using the Attachments feature

18. Select the paperclip Attachments icon to attach relevant tagout documents. You can attach URL, file, or text attachments. See: Defining Work Order Documents, page 3-26.
19. The Planned check box is selected if the current work order was created from forecasted work orders (See: Preventive Maintenance Work Orders, page 3-12).
20. Optionally select the Enable Material Issue Requests check box to enable eAM to manage material availability for the current work order. Material is physically available to a work order via the material request and verification process. This check box is selected by default if it is selected on the eAM Parameters window. This check box is disabled when the work order is at a Released status.
21. Optionally select the Activity tab.
 1. Optionally select an Activity Type. This code indicates the type of maintenance for this Activity and is used when defining a job or a standard job, for example, Inspection, Overhaul, Lubrication, Repair, Servicing, or Cleaning. This value defaults from the Activity (See: Defining Activities, page 2-90).
 2. Optionally select an Activity Cause to specify what situation caused this work to generate, for example, Breakdown, Vandalism, Normal Wear, or Settings. This value defaults from the Activity (See: Defining Activities, page 2-90).
 3. Optionally select an Activity Source to specify reasons Activities need execution, for example, Warranty Compliance, OSHA Compliance, or Military Specification Requirements. This value defaults from the Activity (See: Defining Activities, page 2-90).
22. Optionally select the Project tab. This tab is enabled if Project Manufacturing is installed and enabled.
 1. Optionally select a Project.
 2. Optionally select a Task.
23. You can select the Rebuild tab if this work order is created for a rebuildable item. See: Rebuild Work Orders, page 3-13.
24. Optionally select the Maintenance Request tab to display service and work requests associated with this work order. You can add service and work requests to a work order by selecting a service request or request number, respectively. Work requests

at an Awaiting Work Order status and Maintenance Type Service Requests at an Open status are available for association. You may associate multiple work requests to a single work order, and one work order can associate with a service request. You can associate a service request to multiple work orders. You can dissociate a work and service request from a work order.

25. Select the Bill, Routing tab to select alternate, predefined BOMs and Routings. See: Setting Up Maintenance Bills of Material, page 2-101 and Defining Maintenance Routes, page 2-106.

After the alternate BOM and routing are selected, the system uses the associated items and assigns the associated resources needed to execute the work order.

26. Optionally choose Operations to prepare necessary operations. These operations default from the maintenance route (See: Defining Maintenance Routes, page 2-106) associated with the current Activity, but you can update and add to them (See: Preparing Work Order Operations, page 3-29).
27. Optionally choose Materials to view or update the material requirements for this purchase order (See: Defining Material Requirements, page 3-36). When this work order is Released, purchase orders or requisitions are created for the material requirements' Direct Items if the Auto Request Material check box is selected (viewed by scrolling right). These items defaulted from the Maintenance BOM; they are referenced in the Direct Items region. The Supplier and Price information was established within the Bills of Material window when adding the direct items to the asset or maintenance BOMs. This information defaults into the work order.

Material Requirements

Material Requirements (EM1) - WO220767

Inventory Items

Main Quantities Supply Comment ATP

Material	Op	Department	Date Required	Material Description	Plan
<input type="checkbox"/> 10-40W Oil	10	F-Maint	04-SEP-2006 19:	10-40W Car / Truck Motor Oil	<input checked="" type="checkbox"/>
<input type="checkbox"/> Air Filter	10	F-Maint	04-SEP-2006 19:	Air Filter for Vehicle	<input checked="" type="checkbox"/>
<input type="checkbox"/> Fuel Filter	10	F-Maint	04-SEP-2006 19:	Fuel Filter for Vehicle	<input checked="" type="checkbox"/>
<input type="checkbox"/> Oil Filter	10	F-Maint	04-SEP-2006 19:	Oil Filter for Vehicles	<input checked="" type="checkbox"/>
<input type="checkbox"/> Shop Rags	10	F-Maint	04-SEP-2006 19:	Shop Rags for Clean up	<input checked="" type="checkbox"/>

Select All Check ATP Select Materials Direct Item Copy To Asset

Create Direct Items

Op	Item Type	Line Type	Item	Description	UOM	Required Qty	Purchasing Category	Need By Date
<input type="checkbox"/> 50	Non Stock	Quantity	EAM Item 1	EAM Non Stoc	Ea	1	MISC.MISC	04-SEP-20
<input type="checkbox"/>								
<input type="checkbox"/>								

Select All (B) Select Direct Items Copy To Asset

28. Optionally choose Resources to view, add, or update the resources assigned to each operation. See: Defining Resource Requirements, page 3-45.
29. Optionally choose Relationships to manage work order schedules and view work order details. See: Work Order Relationships, page 3-50.
30. Optionally choose Asset Route to view the asset route associated with the current work order's asset group. You might need to perform one activity on multiple asset numbers. To eliminate the possibility of creating multiple work orders for the same activity, you can define asset routes. See: Defining Asset Routes, page 2-83.
You can choose Asset Route if an Asset Route is associated with the current Asset Number.
31. Optionally choose Costs to view the costs of work orders falling in the specific accounting periods, specified in the Accounting Information by Period region. Accounting Periods are defined within Oracle General Ledger. See: Defining Period Types, *Oracle General Ledger User's Guide* and Defining Calendars, *Oracle General Ledger User's Guide*.
 1. Optionally select a work order, then choose Value Summary to view a summary of the actual, estimated, and variance costs for labor hours, equipment hours, and material against the current work order.
 - *Actual Costs*: This is the accumulation of all costs for material and resource

transactions for the asset number's associated maintenance work orders, based on a specified period.

- *Estimates:* A BOM (material parts list) and routing (resources) can associate with a work order. When you select the Estimates tab, the estimated costs of all material and resources associated with a work order appear, enabling you to budget costs. Direct Items that are included in the material requirements are considered.
 - *Variances:* The difference between the actual costs recorded and estimated costs.
 - *Material:* All material and material overhead transaction costs.
 - *Labor:* All employee resource and resource overhead transaction costs.
 - *Equipment:* All material resource and resource overhead transaction costs.
2. Optionally choose Details to view actual, estimated, and variance costs for labor hours, equipment hours, and material for specific operations of the current work order.

32. Save your work.

To view the purchasing requisition created:

1. Navigate to the Find Requisitions window (Purchasing > Requisitions > Requisition Summary).
2. Select the maintenance Work Order number from the Reference Num list of values.
3. Choose Find. The maintenance work order appears. The Source reads EAM.

[illegible]

Note: You can also create requisitions automatically using the web-based user interface, See: Work Orders, page 21-36.

Manually Entering Requisitions for Direct Items

You can manually create requisitions for Direct Items within iProcurement or Purchasing. If you have Oracle iProcurement installed, you can access supplier catalog items directly from an eAM Work Order. If you create a requisition within iProcurement, the Work Order and operation information generates as you proceed to checkout. You can access a link to Direct Items using the Maintenance Workbench (See: Using the Maintenance Workbench, page 3-69), or within the Work Order window. You can procure Non-Stock and Description-based Direct Items, without accessing iProcurement, as well. You can also create requisitions using the web-based user interface. See: Work Orders, page 21-36.

Important: You cannot automatically create one requisition for multiple direct items on a work order. If a work order includes multiple direct items, you must manually create the requisition.

To enter requisitions for direct items using Oracle iProcurement:

1. Navigate to the Work Orders window.
2. Select a Work Order number (See: eAM Work Order Statuses, page 3-23).

- Choose Materials to view or update the material requirements for this purchase order (See: Defining Material Requirements, page 3-36). After purchase orders or requisitions related to Direct Items are created for this Work Order, they are referenced in the Direct Items region.

Note: Purchase orders and requisitions are not referenced within the forms application. You can reference them using the Maintenance Super User responsibility. See: Work Orders, page 21-36.

Material Requirements

Material Requirements (EM1) - WO220767

Inventory Items ☒

Main Quantities Supply Comment ATP

	Material	Op	Department	Date Required	Material Description	Plan
<input type="checkbox"/>	10-40W Oil	10	F-Maint	04-SEP-2006 19:	10-40W Car / Truck Motor Oil	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Air Filter	10	F-Maint	04-SEP-2006 19:	Air Filter for Vehicle	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Fuel Filter	10	F-Maint	04-SEP-2006 19:	Fuel Filter for Vehicle	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Oil Filter	10	F-Maint	04-SEP-2006 19:	Oil Filter for Vehicles	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Shop Rags	10	F-Maint	04-SEP-2006 19:	Shop Rags for Clean up	<input checked="" type="checkbox"/>

Select All Check ATP Select Materials Direct Item Copy To Asset

Create Direct Items

	Op	Item Type	Line Type	Item	Description	UOM	Required Qty	Purchasing Category	Need By Date
<input type="checkbox"/>	50	Non Stock	Quantity	EAM Item 1	EAM Non Stoc	Ea	1	MISC.MISC	04-SEP-20
<input type="checkbox"/>									
<input type="checkbox"/>									

Select All (B) Select Direct Items Copy To Asset

- Choose Direct Item to purchase items directly from supplier and non-supplier catalogs, using Oracle iProcurement, or enter the direct items to purchase within the Create Direct Items region (See: Defining Direct Item Material Requirements, page 3-42).

ORACLE

Shopping Cart Close Window Preferences Help Personalize Page Diagnostics

Shop Requisitions Contractors

Stores Shopping Lists Non-Catalog Request Contractor Request

Search Main Store Go Advanced Search

Stores

[Main Store](#)
Your one-stop shop for anything and everything

My Requisitions

Full List

Requisition	Description	Total (USD)	Status	Copy	Change
18277		0.00	Approved		
18276		11,078.60	Approved		
18275		11,078.60	Approved		
18274		15.00	Approved		
18273		10.00	Approved		

My Notifications

Full List

Type	From	Subject	Sent
SFM Standard		Controller services are not running	03-Sep-2006
SFM Standard		Controller services are not running	03-Sep-2006
SFM Standard		Controller services are not running	03-Sep-2006
PO Requisition Approval	Smith, Jonathan	Purchase Requisition 18277 has been approved	03-Sep-2006
SFM Standard		Controller services are not running	03-Sep-2006

TIP Vacation Rules - Redirect or auto-respond to notifications.

Shop Requisitions Contractors Shopping Cart Close Window Preferences Help Personalize Page Diagnostics

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All procured Non-Stock, Service, and/or Description-based requisition numbers appear in the My Requisitions region.

- Buy necessary items and check out. These items are automatically associated with your Work Order.
- Save your work.

To manually enter requisitions for direct items via Oracle Purchasing:

In addition to procuring Direct Items directly from a Work Order (See: Defining Direct Item Material Requirements, page 3-42), you can access Direct Item procurement functionality using Purchasing. This functionality is available if you have Enterprise Asset Management installed.

You can enter a requisition within both the forms application and Maintenance User. When entering a requisition within the forms application, this is performed directly within the Requisitions window, and not from the eAM Work Order, as in Maintenance User. See: Work Orders, page 21-36

- Navigate to the Requisitions window (Purchasing > Requisitions > Requisitions).

Requisitions

Requisitions - [New]

Operating Unit: Vision Operations

Number: Type: Purchase Requi

Description: Status: Incomplete

Preparer: Smith, Mr. Jonathan

Total: USD 25.00

[]

Lines | Source Details | Details | Currency

Num	Type	Item	Rev	Category	Description	UOM	C
1	Goods			060.42	Oil Filter	EA	1

Destination Type: Shop Floor

Requester: Smith, Mr. Jonathan

Organization: EAM-M1

Location: EAM Location2

Subinventory:

Source: Supplier

Supplier:

Site:

Contact:

Phone:

Outside Services | Catalog... | Distributions | Approve...

2. Optionally enter a requisition Description.
3. Select the Lines tab.
4. Select Goods or Services from the item Type list of values.
5. Optionally select an Item to purchase. Items that are defined in Inventory, with the Stockable check box cleared, are available for selection. See: Inventory Attribute Group, *Oracle Inventory User's Guide*
6. Select the purchasing Category of the item you want to purchase. See: Defining Categories, *Oracle Inventory User's Guide*. You can specify labor or equipment, as well as material accounts, to charge on a Work Order by assigning the category to the requisition line. This enables you to bypass the outside processing setup if the outside resource service is a one-time situation. The purchase order can include several cost elements.
7. Enter the item's Description. This description should be meaningful because it is used to procure the item. If this item is not inventoried, this is how an internal person understands what item you are attempting to procure.
8. Select a UOM. The unit of measure qualifies the quantity you enter on the purchase order line. When you choose a line type, its default unit of measure populates this

field. If you choose an item, its default unit of measure overwrites the line type default. You can change the UOM until the item is received, billed, or encumbered.

9. Enter a Quantity to purchase.
10. Select a Need-By date.
11. Select Shop Floor from the Destination Type list of values, for all direct item and non-stock item, eAM related requisitions. You can select a destination type of Shop Floor for all purchasable items that are not selected as Stockable in the Item Master (See: Defining Items, *Oracle Inventory User's Guide*).

When you select a destination type of Shop Floor, eAM recognizes this as a requirement to deliver the direct item to the maintenance Work Order.

12. The Destination Organization list of values displays those organizations where the item is non-stockable, if the Destination Type is Shop Floor.

Note: For information on all remaining fields on this window, See: Entering Requisition Lines, *Oracle Purchasing User's Guide*.

13. Choose Outside Services. You can access this window from the Requisition, Purchase Order, and Release windows. This is enabled if the Destination Type previously specified is Shop Floor.

Outside Services

The screenshot shows a window titled "Outside Processing (1) - Line 1". It contains the following fields and controls:

- Job: WO220767 (with a dropdown arrow)
- Line: (empty text box)
- Assembly: (empty text box)
- Operation group:
 - Sequence: (empty text box)
 - Code: (empty text box)
 - Department: (empty text box)
- Resource group:
 - Sequence: (empty text box)
 - UOM: (empty text box)
 - Resource Qty: (empty text box)
- Unit Type: (empty text box)
- Assembly Qty: (empty text box)
- Buttons: Done, Cancel

14. Select a Work Order from the Job list of values. Released maintenance Work Orders are available. After you select a Work Order, any eAM project and task information associated with the Work Order is copied to the corresponding Project and Task fields, within the Project tab in the requisitions or purchase order Distributions

window.

15. Select an Operation Sequence. The purchased material is associated with this operation on the current Work Order. Purchasing displays the operation Code and the Department.
16. Choose Done.

Note: For information on all remaining fields on the Outside Processing window, See: Entering Outside Processing Information, *Oracle Purchasing User's Guide*.

17. Save your work.
18. The requisition needs approval (See: Creating Process Definitions in Oracle Workflow Builder, *Oracle Workflow Guide*). After the requisition is approved, it appears on the eAM Work Order and is viewed in Purchasing.

Related Topics

Entering Requisition Headers, *Oracle Purchasing User's Guide*

Entering Requisition Lines, *Oracle Purchasing User's Guide*

Entering Requisition Distributions, *Oracle Purchasing User's Guide*

Creating Purchase Orders from Requisitions

After a requisition is created and approved, you can execute an AutoCreate process to create purchase orders.

To create purchase orders:

1. Navigate to the Find Requisition Lines window (Purchasing > AutoCreate).

Find Requisition Lines

Find Requisition Lines

Operating Unit: Vision Operations

Approved: Yes

Requisition: 18277

Emergency PO Number:

Supplier Sourcing:

Supplier:

Document Type:

☐ Global

☐ VMI Only

☐ Shgw External Locations

Ship-To:

Buyer: Smith, Mr. Jonathan

Requester:

Preparer:

Supplier List:

Supplier Site:

Document:

Negotiation Number:

Minimum Amount:

Currency:

Rate Type:

Line Status

Item, Rev:

Job:

Category:

Description:

Line Type:

Clear Find

2. Enter the Requisition number. This requisition is created into a purchase order.
3. Choose Find.
4. Choose Automatic.

New Document

Global Agreement

Document

Release

Supplier Automotive Supplier #1

Purchasing Org Vision Operations

RFQ Type

Release Date

Supplier Site DETROIT

Supplier List Name

Currency

Source Default

Requisition

Currency USD

Rate Date 02-SEP-2006

Line

Rate Type

Rate

Create Cancel

5. Select a Supplier.
6. Choose Create, and then make a note of the purchase order number created.
7. Verify that the item is of Type Goods.
8. Choose Shipments.
9. Choose Receiving Controls.
10. Select a Receipt Routing. This is the receipt routing to which you are assigning the procured items: Direct Delivery, Standard Receipt, or Inspection Required. See: Receiving Controls, Options, and Profiles, *Oracle Purchasing User's Guide*.
11. Choose OK.
12. From the Shipments window, choose Distributions. Verify that the destination Type field is populated with Shop Floor, and the Subinventory is blank.
13. Choose Outside Services. Verify the Job and Operation Sequence.

Note: For information on all remaining fields within the Outside Processing window, See: Entering Outside Processing Information, See: Entering Outside Processing Information, *Oracle Purchasing User's Guide*.

14. Choose Done.
15. Save your work.
16. Choose Approve.
17. Within the Approve Document window, choose OK. After the purchase order is approved, the purchase order is received within Purchasing.

Related Topics

Entering Purchase Order Distributions, *Oracle Purchasing User's Guide*

Manually Entering Purchase Orders for Direct Items

You can create purchase orders for direct items within Purchasing.

You must manually create requisitions or purchase orders for work orders that require multiple direct items.

To enter purchase orders for direct items via Oracle Purchasing:

1. Navigate to the Purchase Orders window.

Purchase Orders

Purchase Orders - [New]

Operating Unit: Vision Operations Created: 03-SEP-2006 06:18:52

PO, Rev: 0 Type: Standard Purchase Order P-Card:

Supplier: Automotive Supplier #1 Site: DETROIT Contact:

Ship-To: M2- Boston Bill-To: V1- New York City Currency: USD

Buyer: Smith, Mr. Jonathan Status: Incomplete Total: 25.00

Description:

Lines Price Reference Reference Documents More Agreement Temporary Labor

Num	Type	Item	Rev	Job	Category	Description	UOM	Quantity	Price
1	Goods	---			060.42	Oil Filter	EA	1	25

Item: Oil Filter

Catalog... Currency... Terms Shipments Approve...

2. If you did not choose automatic purchase order generation in the purchasing options (Numbering tab), enter a unique PO (purchase order) number. Otherwise, the number generates when you save your work. See: Defining Purchasing Options, *Oracle Purchasing User's Guide*. The Rev (revision) appears to the right of the number.
3. Select Standard Purchase Order from the Type list of values. You can modify the document type names in the Document Types window (See: Defining Document Types, *Oracle Purchasing User's Guide*).
4. Optionally select a Supplier. A supplier must be provided for approval.
5. Select the supplier Site. A site must be provided for approval. After the purchase order is approved, you can change the supplier site if the PO: Change Supplier Site profile option is set to Yes (See: Purchasing Profile Options, *Oracle Purchasing User's Guide*).
6. Optionally select a Contact. This is the name of the contact at the supplier site.
7. Optionally enter the Ship-To and Bill-To locations for the purchase order. If you entered a supplier site, the location values you assigned to the supplier or supplier site default into these fields. See: Purchase Order Defaulting Rules, *Oracle Purchasing User's Guide*
8. If the Enforce Buyer Name option in the Purchasing Options is set to yes, your name appears as the Buyer. Otherwise, you can enter the name of any buyer. See:

9. Enter a Description for the purchase order. This description does not print on the purchase order, and is for internal use. If you want to add unlimited notes, use the attachments feature (See: Attaching Notes to Purchasing Documents, *Oracle Purchasing User's Guide*)
10. Select the Lines tab. For new purchase order lines, Purchasing displays the next sequential line Num (number) available. You can accept this number or enter any line number that does not already exist. This number is used for all tabs in this window.
11. Select the a Goods or Services line Type. Purchasing automatically copies the corresponding defaults, based on the selected line type. See: Defining Line Types, *Oracle Purchasing User's Guide*.
12. Optionally select an Item to purchase. Items that are defined in Inventory, with the Stockable check box cleared, are available. See: Inventory Attribute Group, *Oracle Inventory User's Guide*.
13. Select the purchasing Category of the item you want to purchase. See: Defining Categories, *Oracle Inventory User's Guide*.
14. Enter the Description of the item. This description should be meaningful, because it is used to procure the item. If this item is not inventoried, this how an internal person understands what item you are attempting to procure.
15. Enter the Quantity you are purchasing.
16. Select a UOM. The unit of measure qualifies the quantity you enter on the purchase order line. When you choose a line type, its default unit of measure populates this field. If you previously chose an item, its default unit of measure overwrites the line type default. You can change the UOM until the item is received, billed, or encumbered.
17. Enter the unit Price for the item.
18. Choose Shipments to enter multiple shipments for standard and planned purchase order lines, and to edit shipments Purchasing automatically created for you (See: Entering Purchase Order Shipments, *Oracle Purchasing User's Guide*).
 1. Select the More tab.

Shipments Window

Num	Receipt Close Tolerance (%)	Invoice Close Tolerance (%)	Match Approval Level	Invoice Match Option	Accrue at Receipt
1		0	3-Way	PO	<input checked="" type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

Line Num: 1 Item: Oil Filter

Buttons: Receiving Controls, Distributions

2. Select the Accrue at Receipt check box to indicate that the items on this purchase order line accrue at receipt.
19. Choose Distributions to enter distribution information for purchase order shipments, or to view distributions that Purchasing automatically created for you. You can enter multiple distributions per shipment line, and enter information regarding paper requisitions (See: *Entering Purchase Order Distributions, Oracle Procurement User's Guide*).
20. Choose Outside Services to associate this purchase order with a maintenance Work Order.
21. Select a maintenance Work Order from the Job list of values. After a Work Order is selected, any eAM project and task information associated with the Work Order copies to the corresponding Project and Task fields within the Project tab in the requisitions or purchase order Distributions window.
22. Select an Operation Sequence. The purchased material is associated with this operation on the current Work Order. Purchasing displays the operation Code and the Department.
23. Choose Done.
24. Save your work.
25. The purchase order needs to be approved (See: *Creating Process Definitions in Oracle Workflow Builder, Oracle Workflow Guide*). After the purchase order is

approved, it will appear on the eAM Work Order, and is viewed in Purchasing.

Related Topics

Entering Purchase Order Headers, *Oracle Purchasing User's Guide*

Entering Outside Processing Information, *Oracle Purchasing User's Guide*

Entering Purchase Order Lines, *Oracle Purchasing User's Guide*

eAM Direct Procurement Accounting

You can charge Direct Items (Non-Stock and Description-based) to a selected appropriate Purchasing Cost Elements by selecting a Purchasing Order Category. To bypass the outside processing setup because the outside resource service is a one-time event (See: Setting Up Outside Service Processing, page 2-169), you can charge labor, equipment, and material accounts to a Work Order by assigning a category to the requisition line (See: Setting Up Purchase Order Category Associations for Direct Items, page 2-185).

For all requisition or purchase order distribution lines with a destination type of Shop Floor (not related to outside processing), the amount (quantity * purchase price * exchange rate) charges to the eAM Work Order Material account.

The receiving process creates the following accounting entries:

Receiving Process Entries

Account	Debit	Credit
Receiving Inspection	XXX	-
Accounts Payable Accrual	-	XXX

The material delivery process creates the following entries:

Account	Debit	Credit
Work Order Material	XXX	-
Receiving Inspection	-	XXX

Contractor Services

This chapter covers the following topics:

- Introduction
- Overview of eAM Contractor Services
- Setting Up Outside Service Processing

Introduction

Enterprise Asset Management (eAM) integrates with Outside Service Processing, enabling your maintenance environment to track outside service purchasing transaction and costing information for maintenance Work Orders. This chapter contains the following topics:

- Overview of eAM Contractor Services, page 8-1
- Setting Up Outside Service Processing, page 2-169

Overview of eAM Contractor Services

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

Outside Service Processing provides the functionality to create items that are contractor services, such as landscaping, include these items on a Work Order, and execute the related purchasing transactions as the Work Order is released. By creating a contract service as an Outside Service Processing item, the purchasing requisition is created when the Work Order is Released. The additional purchasing transaction, including the

creation of the purchase order, the approval, and invoicing process, are then managed by Purchasing. This optional process ensures that the actual charges are applied to the Work Order. The supplier accesses the purchase order and maintenance Work Order via iSupplier Portal. Within iSupplier Portal, the supplier can view all open and closed outside service operations and their associated maintenance Work Orders. The supplier can enter mandatory collection plan results, before completing the outside operation (See: Oracle iSupplier Portal, *Oracle iSupplier Portal User's Guide*).

The other option is to enable Standard Rate. This applies pre-determined standard rates, for contractor services, to the Work Order, without invoking the purchasing transaction.

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

- Setting Up Outside Service Processing, page 2-169

Setting Up Outside Service Processing

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

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

To set up purchasing information:

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

Financials Options

Financials Options (Vision Operations: USD)

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

Ship-To Location: AD-Atlanta

Bill-To Location: AD-Atlanta

Inventory Organization: V1 - Vision Operations

Ship Via:

FOB: Vendor's responsibility ceases upon transfer

Freight Terms: Due

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

3. Select Ship-To and Bill-To Locations. These are the names of the ship-to/bill-to location for the system default values. If the name you want does not appear in the list of values, use the Location window to select a new location (See: Setting Up Locations, *Using Oracle HRMS - The Fundamentals*).
4. Select an Inventory Organization. You can associate each of your purchasing operating units with one inventory item master organization. Your eAM Organization should point to this item master. When you associate your purchasing operating unit with an inventory organization, items you define in this organization are available in Purchasing. You can choose an inventory organization that uses the same set of books as your Purchasing operating unit. Do not change the inventory organization after you have already assigned one to Purchasing.
5. Optionally, select a Ship Via code. This is the freight carrier you use with suppliers. If the type of freight carrier you want is not available, use the Freight Carriers window to define a new shipping method. The value you enter is the value in the Description field of the Freight Carriers window, within Purchasing.
6. Select an FOB. If the type of FOB you want is not available, use the Oracle Purchasing Lookups window to define a new FOB.
7. Select a Freight Terms code. The freight terms for a supplier identify whether you or your supplier pay for freight charges on goods you receive. You can define new

freight terms in the Oracle Purchasing Lookups window.

8. Save your work.

To set up outside services as items:

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

1. Navigate to the Master Item window.

Master Item

Master Item (V1)

Organization: **V1 Vision Operations**

Item: **TM Rebuild**

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

Display Attributes: ☒ Master ☐ Org ☐ All

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

Unit of Measure

Primary: **Each**

Tracking: **Primary**

Pricing: **Primary**

Secondary: [...]

Defaulting: [...]

Deviation Factor +: **0**

Deviation Factor -: **0**

Conversions

☐ Standard

☐ Item specific

☒ Both

User Item Type: **Outside Processing**

Item Status: **Active**

Long Description

[...]

2. Enter the item Name for the contractor service. For example, Landscape Service.
3. Select Copy From within the Tools menu.
4. Select @Outside Processing Item from the Template list of values.
5. Choose Apply.
6. Choose Done.
7. Within the Purchasing tab, ensure that the Outside Processing Item check box is selected.
8. Select the Resource Unit Type.

Resource: Costs are based on the resource standard rate.

9. Select a Default Buyer.
10. Enter a List Price for this contractor service.
11. Select Each for the Unit of Issue. This is the unit of measure you use to issue the item from inventory.
12. Within the Receiving tab, select Direct from the Receipt Routing list of values.
13. Save your work.
14. Select the Organization Assignment tab on the left side of the window, and then assign this item to the eAM organization.
15. Save your work.

To link outside service items to resources

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

16. Navigate to the Resources window.

Resources

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

- Resource:** TMREBUILD
- Description:** Truck Motor Rebuild - Outside Services
- Type:** Miscellaneous
- Charge Type:** PO Move
- Basis:** Item
- UOM:** Ea
- Expenditure Type:** (empty)
- Supply Subinventory:** (empty)
- Supply Locator:** (empty)
- Outside Processing:** ☒ (checked)
- Item:** TM Rebuild
- Truck Motor Rebuild Services:** (empty)
- Costed:** ☒ (checked)
- Activity:** (empty)
- Standard Rate:** ☐ (unchecked)
- Absorption Account:** 01-000-2215-0000-000
- Variance Account:** 01-520-5210-0000-000
- Overheads:** (empty)
- Rates:** (empty)
- Billing:** (empty)
- Skills:** (empty)
- Competence:** (empty)
- Skill Level:** (empty)
- Qualification:** (empty)
- Batchable:** ☐ (unchecked)
- Minimum Batch Capacity:** (empty)
- Maximum Batch Capacity:** (empty)
- Batch Capacity UOM:** (empty)
- Batching Window:** (empty)
- UOM:** (empty)

Buttons at the bottom: Employees, Equipment, Setups.

17. Select Miscellaneous from the Type list of values.
18. Select a UOM. This value is the default unit of measure for all transactions, for the current resource.
19. Select the PO Receipt Charge Type.
20. Verify that the Enabled check box is enabled for outside processing.
21. Enter the outside services Item that was entered in Inventory (See: To set up outside services as items;, page 8-4), and associate it with the eAM resource.
22. Select the Costed check box to include this outside resource in your Work Order cost. When you define a resource with a charge type of PO Receipt, Cost Management automatically defaults Outside Processing as the cost element.
23. Enter an Absorption Account. You must define an absorption account for each outside resource. The absorption account defaults from the organization's receiving account, which is debited when an outside processing item is received and is subsequently credited when the item is delivered to eAM. The debit goes to the outside processing account associated with the accounting class of the Work Order when the item is delivered to eAM.

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

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

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

Resource Costs

The screenshot shows a software window titled "Resource Costs (EM1) - TMREBUILD". Inside the window is a table with three columns: "Cost Type", "Description", and "Resource Unit Cost". The first row of the table is highlighted in yellow and contains the text "AvgRates", "Resource & Overhead Rates used un", and "2,550.000". There are several empty rows below the first one. A vertical scrollbar is visible on the right side of the table.

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

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

To link the outside service resource to a department:

1. Navigate to the Departments window.

Departments

Departments (EM1)

Department **F-Maint**

Description **Fleet Services Maintenance**

Cost Category **Maintenance**

Class **Maint Dept** Maintenance Departments

Location **Seattle Mainte** Seattle Manufacturing Maintenance Organization

Project Expenditure Org

Inactive On

Rates **Resources**

2. Select the Department to associate with the outside service resource.
3. Select a Cost Category for this department. If this is left blank, then the costs related to this department are charged, based on the eAM parameter settings (See: Defining eAM Parameters, page 2-11).
4. Select a valid Location.
5. Choose Resources.

Resources

Resources (EM1) - F-Maint

Owned

Main Planning

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

Instances Tolerance Fences Shifts

Borrowed

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

6. Select the outside service Resource.
7. Optionally, indicate whether this resource is Available 24 Hours a day. You cannot assign shifts to a resource that is available 24 hours a day.
8. Optionally, indicate whether this department can share this resource and capacity with other departments.
9. Enter the number of capacity Units (resource units) available for this department.
10. Save your work.

To define WIP parameters:

1. Navigate to the Work in Process Parameters window.

Work in Process Parameters

Work in Process Parameters (EM1)

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

Shop Floor Status for PO Move Resources

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

Job Roles for Notifications

Production Scheduler

Shipping Manager

Job Change Controls for Purchasing Documents

Propagate Job Change to Purchasing **Automatic**

Need-By Date Tolerance

Days Early **5** Days Late **5**

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

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

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

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

4. Save your work.

Related Topics

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

Defining a Resource, *Oracle Bills of Material User's Guide*

eAM Property Manager

This chapter covers the following topics:

- Introduction
- Overview of eAM Property Manager
- Property Manager Integration

Introduction

The eAM and Property Manager integration enables properties defined in Property Manager to import as assets in eAM. This chapter contains the following topics:

- Overview of eAM Property Manager, page 9-1
- Property Manager Integration, page 9-2

Overview of eAM Property Manager

The eAM and Property Manager integration enables eAM assets to correspond with locations defined in Property Manager. The information transferred from Property Manager are the three-level land or building hierarchies, and the associated Location Codes within Property Manager. eAM also provides user-defined Area codes, enabling you to logically sort assets by where they are physically located. Area codes in eAM do not equal locations in Property Manager. See: Setting Up Areas, page 2-16.

A concurrent request process transfers locations defined in Property Manager into eAM assets, associating eAM assets with locations. During this process, the Organization ID, Asset Group, and the Owning Department parameters are specified. These entities are set up before the process is executed.

This seamless, one-way integration from Property Manager into eAM is invoked within the Property Manager concurrent process. The eAM and Property Manager integration includes the following topics:

- Property Manager Integration Setup, page 2-198
- Executing the Export Process
- Executing the Asset Number Interface, page 2-201
- Property Manager Integration, page 9-2

Property Manager Integration

Property Manager can store three-level land or building hierarchies, providing a parent/child location hierarchy. eAM provides a parent/child asset hierarchy. The integration enables locations defined in Property Manager to import into eAM as Asset Numbers. The process also imports the land or building hierarchy, while respecting its current structure.

Locations are set up in Property and exported to Enterprise Asset Management (eAM) via a two-step process, enabling you to modify data before it exports to eAM. First, push the location records from Property Management to eAM. (See: Executing the Export Process). After submission of the concurrent process, the Property Management Location information is entered into the EAM Asset Interface table and are accessed via the Pending Asset Number window within eAM. You can update all relevant information, including Asset Group, Asset Number, Owning Department, and WIP Accounting Class, for this information, before submitting the interface process (See: Executing the Asset Number Interface, page 2-201). You can use this window to update the information multiple times.

You can view this integration when viewing assets. Location information imports into fields within the Define Asset Number window.

Note: If you make changes to locations within Property, run the export process again. You can run the export process to push location records to eAM multiple times. See: Executing the Export Process.

To view and update assets:

1. Navigate to the Find Asset Numbers window.
2. Within the Others tab, select a Location Code. This location code was exported from Property Manager into eAM.
3. Choose Find. The Define Asset Number window appears. Notice that the asset is the same as the location code.

Define Asset Number

Define Asset Number (EAM)

Asset Type: Capital

Asset Group: HQ BLD 300 Easter Shutdown

Asset Number: WCP.0001.0001

Asset Category:

Main Production Others

Fixed Asset

Category: Number:

Property Management

Location Name: 0001 Location Code: WCP.0001.0001 Location Details

Attributes Resource Usage Associate Activity

4. Optionally associate this Asset Number with an Asset Category. This is the Class and Subclass code, such as CRANE.OVERHEAD or BUILDING.FLOOR. See: Setting Up Category Codes, page 2-55.
5. Within the Main tab, optionally select a Criticality code, indicating the importance of the asset to the organization. This field is for information purposes.
6. You can optionally select a WIP Accounting Class to identify the Expense cost elements associated with the work performed, such as material, labor, and resources.
7. Optionally select the Area where this Asset Number resides. This is a user defined listing of logical areas of work. For example, North Plant, East Wing, or Area 1 (See: Setting Up Areas, page 2-16).
8. Indicate if this Asset Number is Maintainable. If the Maintainable check box is selected, you can create Work Requests, Service Requests, and Work Orders for this asset.
9. Within the Others tab, optionally enter the Fixed Asset region information if Oracle Fixed Assets is installed. This is eAM's integration with Fixed Assets.
 1. To associate the asset/location with a fixed asset, select a Category, which is a

grouping of fixed assets, defined within Oracle Fixed Assets. This category is associated with a set of books, and must be the same set of books that is assigned to the current eAM organization. See: Setting Up Category Codes, page 2-55.

2. Optionally enter the Number if Oracle Fixed Assets is installed. This represents a fixed asset number that belongs to a fixed asset category, associated with the asset.
10. The Property Management fields, Location Name, and Location Code, default from a Property Manager export process (Export Locations to Enterprise Asset Management) if Oracle Property Management is installed. These fields are disabled. The Location Code and Asset Number fields display the same number, and cannot be changed.

Note: Before the above information can pass from Property Manager into eAM, Asset Groups are first established. See: Defining Asset Groups, page 2-58 and Property Manager Integration Setup, page 2-198.

11. Optionally choose Location Details to view the current location's details.

Locations Inquiry

The screenshot shows a software window titled "Locations Inquiry". Inside, there is a table with four columns: "Operating Unit", "Location Type", "Location Name", and "Location Code". The first row of the table is highlighted in blue and contains the text "Vision Operations", "Section", "0001", and "WCP.0001.0001". Below the table, there are four buttons: "Assignments", "Section", "Pargel", and "Open".

Operating Unit	Location Type	Location Name	Location Code
Vision Operations	Section	0001	WCP.0001.0001

12. Choose Open. Location attributes are visible with Enterprise Asset Management. You can view Occupancy, Area, and Usage information.

Section

Details	
Name	0001
Alias	.0001
Location Code	WCP.0001.0001
From	01-JAN-0001
To	

Area	
Rentable	1000
Usable	1000
Common Flag	<input type="checkbox"/>
Common	100
Assignable	900
Secondary Circulation	0
Vacant	900

Occupancy	
Maximum	100
Optimum	100
Utilized	0
Vacancy	100

Usage	
Space Type	Construction
Function Type	
Standard Type	

13. Close the window to return to the Define Asset Number window.
14. You can select Resource Usage if the fields in the Production Equipment region are populated. This enables you to view production work orders and resources associated with this equipment.
15. Optionally select Attributes to directly apply an attribute group template to this asset. See: Setting Up Attributes, page 2-70

Existing, enabled attribute groups appear (See: Setting Up Attributes, page 2-70). These attribute templates are optional; you do not need to enter values for all existing attribute groups. From this window, you cannot generate attribute groups.
16. Optionally select Associate Activity to directly associate this Asset Number with an Activity. See: Activity Association Templates, page 2-67.
17. Optionally create file, URL, or text attachments to this asset by selection the paperclip Attachments icon.
18. Save your work.

Related Topics

Defining Asset Numbers, page 2-74

Properties Overview, *Oracle Property Manager User's Guide*

Setting Up Oracle Property Manager, *Oracle Property Manager User's Guide*

Process and Discrete Manufacturing Integration

This chapter covers the following topics:

- Introduction
- Overview of the Process and Discrete Manufacturing Integration
- Viewing Resource Usage
- Production Equipment Downtime

Introduction

Enterprise Asset Management (eAM) integrates with process and discrete manufacturing, enabling your maintenance environment to identify eAM asset relationships with production equipment. This chapter contains the following topics:

- Overview of the Process and Discrete Manufacturing Integration, page 10-1
- Viewing Resource Usage, page 10-2
- Production Equipment Downtime, page 10-5

Overview of the Process and Discrete Manufacturing Integration

Enterprise Asset Management integrates with Process and Discrete Manufacturing, enabling your maintenance environment to identify Enterprise Asset Management asset relationships with production equipment. This feature associates an asset or many assets to the production equipment located in a discrete or process manufacturing organization. After establishing, you can view the resource usage (jobs, batches, or FPOs) emanating from production, associated with a maintainable asset. In discrete manufacturing organizations, you can view maintenance equipment downtime requirements and their affect on capacity during production planning and scheduling.

Oracle Process Manufacturing (OPM) retrieves maintenance downtime information for a resource from maintenance Work Orders. OPM loads this information into OPM's resource calendar; it is visible within Advanced Planning and Scheduling and Manufacturing Planning.

This integration includes the following topics:

- Organization Setup, page 2-190
- Associating Assets with Production Equipment, page 2-191
- Viewing Resource Usage, page 10-2
- Production Equipment Downtime, page 10-5

Viewing Resource Usage

You can view the resource usage, associated with a specific Asset Number, created by discrete work orders, batches, or FPOs. You can view resource usage in both forms and Maintenance User applications.

To view resource usage from the forms application:

1. Navigate to the Define Asset Number window.
2. Choose the flashlight icon (Find) to display the Find Asset Number window.
3. Find an Asset Number to view that has associated production equipment.
4. Choose Find to display the Define Asset Number window.

Define Asset Number

Define Asset Number (EAM)

Asset Type	Capital	
Asset Group	av-ag1	Asset Group #1
Asset Number	av-an1	Caterpillar machine
Asset Category	Maintenance Supply.Supply	Maintenance Supplies

[-]

Main Production Others

Production Organization EAM

Equipment Item cap-eqpt

Equipment Serial Number cap-eqp001

Attributes Resource Usage Associate Activity

5. Choose Resource Usage.

Resource Usage

Production Equipment

Production Org Item
Serial Number

Resources

Resource	Description	UOM	Resource Group	Department	Owning Department
DRILL		HR		BL1	BL1

Work Order

Work Order	Scheduled Start Date	Scheduled Completion Date	Status	Entity Type

Ok

This window enables you to view resource demand (discrete work orders, batches, or FPOs) associated with the current Asset Number. All Work Orders that use the asset as a resource appear.

6. Choose OK to return to the Define Asset Number window.

To view resource usage from the Asset Numbers page:

You can view resource demand within Maintenance Super User.

1. Navigate to the Asset Management page, and query an Asset Number. See: Obtaining Asset Number Information, page 21-4.
2. Choose Go.
3. In the Results region, select the radio button next to your Asset Number, then select Details from the *Select Asset Number*: list of values to view associated Asset Number, Attributes, and Activity details.

Asset Numbers Page

ORACLE Asset Management

DiagnosticsHomeLogoutPreferencesPersonalize Page

HomeAssetsWork RequestsWork OrdersWork PlanStores

Capital | Rebuildable Inventory

Assets: Capital >

Current Organization : EAM

Asset Details: HPPresario

Work RequestsGo

Asset NumberHPPresario

Asset Number DescriptionHP Presario

Asset Groupsj-computer

Asset Group Descriptioncomputer at home

Current OrgEAM

Parent Asset Number

Parent Asset Group

Category

Owning Departmentsj-home

Area

Accounting ClassEAMWAC

AttachmentsNone

CriticalityHigh

MaintainableYes

Asset RouteNo

Equipment Serial Number

Attributes

Attribute Group	Description
No data exists.	

Activities

Activity	Start Date	End Date	Activity Type	Activity Cause	Activity Source	Owning Department	Priority	Last Service Start Date	Last Service End Date	Next Service Start Date	Next Service End Date
No data exists.											

Return to Search

Work RequestsGo

Home | Assets | Work Requests | Work Orders | Work Plan | Stores | Diagnostics | Home | Logout | Preferences | Personalize Page

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About this Page

- Optionally select View Equipment Details if the current Asset Number has associated equipment details. This link is next to the Equipment Serial Number field, and is available if there are associated equipment details. You can view all equipment details in the production organization to which this Asset Number is linked.

You can also view resource demand (Work Orders) associated with the Asset Number. This information is the integration with Process and Discrete Manufacturing.

- Optionally select the View Resource Usage glasses icon to view all Work Orders created against the current Asset Number for the current equipment resource. This enables you to view resource demand (discrete work orders, batches, or FPOs) associated with the Asset Number. This information is eAM's integration with Process and Discrete Manufacturing.

Production Equipment Downtime

You can view equipment downtime, associated with a specific resource, caused by maintenance Work Orders. To view resource downtime, execute the Load Production Equipment Maintenance Downtime process to load downtime information into a simulation set. Resource downtime is viewed within the Department Resource Capacity

Change window.

To generate production equipment downtime:

Note: If your manufacturing and maintenance organizations are separate, execute this process within the manufacturing organization.

1. Navigate to the Load Production Equipment Maintenance Downtime window.

Load Production Equipment Maintenance Downtime

The screenshot shows the 'Load Production Equipment Maintenance Downtime' window. The main window has a title bar 'Load Production Equipment Maintenance Downtime (EAM)'. It contains a 'Run this Request...' section with a 'Copy...' button. Below this are fields for 'Name' (Load Production Equipment Maintenance Downtime), 'Parameters' (empty), and 'Language' (American English). There are also sections for 'At these Times' and 'Upon Completion'. A 'Parameters' dialog box is open in the foreground, showing fields for 'Simulation Set' (cap-sim), 'Run Option' (Load Maintenance Downtime), 'Include Unreleased Maintenance Orders' (Yes), 'Firm Maintenance Orders Only' (No), 'Department' (empty), and 'Resource' (empty). The dialog box has 'OK', 'Cancel', 'Clear', and 'Help' buttons.

2. Enter the following parameters:
 - *Simulation Set*: Select a Simulation Set.
 - *Run Option*: You can optionally load or purge maintenance downtime information.
 - *Include Unreleased Maintenance Work Orders*: Select whether to include Unreleased maintenance Work Orders. Valid values are Yes and No.
 - *Firm Maintenance Work Orders Only*: Select whether to include firmed maintenance work Orders. Valid values are Yes and No.
 - *Department*: Optionally select a Department to indicate that Work Orders associated with the selected department are included. See: Defining Departments and Resources, page 2-17.
 - *Resource*: Optionally select a Resource to indicate that Work Orders associated

with the selected Resource are included. See: Defining Departments and Resources, page 2-17.

3. Choose OK.
4. Choose Submit.

Related Topics

Submitting a Request, *Oracle Applications User's Guide*

eAM Project Manufacturing

This chapter covers the following topics:

- Introduction
- Overview of eAM Project Manufacturing
- Project Definition
- Associating a Work Order with a Project
- Creating Requisitions or Purchase Orders
- Viewing the Requisition within the Maintenance Work Order
- Updating the Commitments for a Project
- Viewing Commitments

Introduction

Enterprise Asset Management integrates with Project Manufacturing, enabling a seamless, integrated business solution for program management, configuration management, financial project management and reporting, project supply chain management and execution, and business intelligence. This chapter contains the following topics:

- Overview of eAM Project Manufacturing, page 11-2
- Project Definition, page 2-194
- Associating a Work Order with a Project, page 11-6
- Creating Requisitions or Purchase Orders, page 11-7
- Viewing the Requisition within the Maintenance Work Order, page 11-13
- Updating the Commitments for a Project, page 11-15

- Viewing Commitments, page 11-16

Overview of eAM Project Manufacturing

Enterprise Asset Management supports a variety of ways to define work breakdown structures. The methods include, using third party project management systems (with on-line integration), project templates, Seiban number wizard, copy, and manual entry. Work breakdown structures are commonly needed for program management. To support financial project management and reporting, the combination of Oracle Projects and Oracle Project Manufacturing enables budgeting, project costing and tracking, project billing, project revenue recognition, project cash forecasting, and project cost collection, including multi-currency and tax regulations.

To support project supply chain management and execution, Project Manufacturing provides functionality for project sales management, project advanced supply chain planning, project procurement, project execution, and project quality management.

The following diagram illustrates the eAM Project Manufacturing process. First, a maintenance Work Order is linked to a project or task. If a requisition or purchase order is created for that Work Order, the commitments for the Work Order's associated project or task are updated. The Project Cost Collector process (See: Project Cost Collector, *Oracle Cost Management User's Guide*) then passes the costs to the Work Order's associated project WIP accounting class accounts, rather than the WIP accounting class associated with the eAM asset or eAM organization.

eAM Project Manufacturing



This section includes the following topics:

- Project Definition, page 2-194
- Associating a Work Order with a Project, page 11-6
- Creating Requisitions or Purchase Orders, page 11-7
- Viewing the Requisition within the Maintenance Work Order, page 11-13
- Viewing Commitments, page 11-16
- Updating the Commitments for a Project, page 11-15

Project Definition

You can inquire on an existing, or copy a new project from a template or existing project. To create a new project, See: Project Definition (Assigning Project Parameters), *Oracle Project Manufacturing User's Guide*. You need to associate this project number with a planning group, a cost group, and a default WIP accounting class.

To inquire on an existing project:

1. Navigate to the Find Projects window.

Find Projects

Find Projects (Vision Project Mfg: ANY)

Project		Key Member	
Search For	Projects, Templates	Name	
Number	eAM CIP Project Template	Number	
Name	eAM CIP Project Template	Role	
Long Name	eAM CIP Project Template		
Type			
Organization			
Status			
Product Source			
Source Reference			

Classification		Customer	
Category		Name	
Class Code		Number	
		Relationship	

Clear Find

2. Select a project Number.
3. Choose Find.
4. Choose Open.

Projects, Templates

Projects, Templates (Vision Project Mfg: ANY)

Number	eAM CIP Project Template	Name	eAM CIP Project Template
Type	Construction	Organization	Los Angeles Manufacturing
Long Name	eAM CIP Project Template		
Trans Duration	05-MAY-2004 -	Status	Active
Description	eAM CIP Project Template		
	<input type="checkbox"/> Public Sector	<input type="checkbox"/> Workflow in Process	
		<input checked="" type="checkbox"/> Template	[]
Template Dates	-	Change Status	

Options

Option Name
<input checked="" type="checkbox"/> Tasks
<input type="checkbox"/> Classifications
<input type="checkbox"/> Currency
<input type="checkbox"/> Cross Charge
<input type="checkbox"/> Key Members
<input type="checkbox"/> Additional Information
<input type="checkbox"/> Resource List Assignments
<input type="checkbox"/> Transaction Controls

[Detail](#)

5. Optionally, you can view detailed task information by choosing Detail (See: *Viewing Project Details, Oracle Project Manufacturing User's Guide*).

To assign project parameters:

1. Navigate to the Project Parameters window.

Project Parameters

Project Parameters

Project Number **eAM CIP 1** Project Name **eAM CIP 1**

Planning Group

General Invoice Transfer Task AutoAssignment Other

— Default WIP Classes —

Organization	Planning Group	Cost Group	Standard	Maintena []
Los Angeles Manufacturing		eAM		Mainten

WIP Classes by Task

2. Select a valid Project Number.
3. Optionally, select the name of the Planning Group with which you want to associate your project.

If you plan material requirements by a group of projects, rather than each individual project, you need to define a planning group and assign all projects to this planning group. If you plan material requirements by a single project, you do not need to associate the project with any planning group (See: Defining Planning Group Lookups, *Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide*).

4. Select an eAM enabled Organization.
5. Select a Cost Group.

If the current organization contains Average as its primary costing method, in the Organization Parameters window, the Cost Group field is required. The Common Cost Group and user defined cost groups are available. The list of user defined cost groups includes those cost groups with valid accounts and with Project selected in the Cost Group window (See: Project Cost Groups, *Oracle Cost Management User's Guide*). You must assign the project to its own Cost Group to keep weighted average costing at the project level.

If the current organization contains Standard as its primary costing method, in the

Organization Parameters window, the Cost Group field is disabled.

6. Optionally, select a Maintenance WIP Accounting Class.

If the current organization is a Standard costing organization, you can choose any discrete WIP accounting class.

If the current organization is an Average costing organization, you can choose any WIP accounting class that has been associated with the selected cost group in the WIP Accounting Classes for Cost Groups window within Cost Management (See: *Defining Project Cost Groups, Oracle Cost Management User's Guide*).

When you create maintenance Work Orders for a project, this WIP accounting class is defaulted. It can be overwritten, but with another accounting class that is assigned to the cost group.

7. Select the Other tab.
8. Save your work.

Related Topics

Associating a Work Order with a Project, page 11-6

Creating Purchase Orders from Requisitions, page 11-7

Updating the Commitments for a Project, page 11-15

Viewing Commitments, page 11-16

Project Definition, *Oracle Project Manufacturing User's Guide*

Assigning Project Parameters, *Oracle Project Manufacturing User's Guide*

Project Cost Groups, *Oracle Cost Management User's Guide*

Defining Project Cost Groups, *Oracle Cost Management User's Guide*

WIP Accounting Classes, *Oracle Work in Process User's Guide*

Project Manufacturing Parameters, *Oracle Project Manufacturing User's Guide*

Associating a Work Order with a Project

You can create a maintenance work order for a project. The project number enables the correct cost group and default WIP accounting class to associate with the work order.

Creating a project maintenance work order:

1. Navigate to the Work Order window.

Work Order

Work Order (EM1)

Work Order: WO90005

Asset Number: FL1010

Asset Group: Fork Lifts

Asset Activity:

Class: MaintWAC

Status: Draft

Work Order Type:

Instance Number:

Fork Lift 1010

Scheduled Dates

Start: 29-MAR-2004 17:48:26

Completion:

Duration(hours):

Activity Type:

Activity Cause:

Activity Source:

Main Project Rebuild Work Request Service Request Bill, Routing

Project: AM_PROJ_1

Task: 3.0

AM_PROJ_1

Production

Operations Materials Resources Asset Route Costs

2. Enter necessary work order information. See: eAM Work Orders, page 3-3.
3. Select the Project tab.
4. Select a Project.

You can associate a work order to a project at any status of the Work Order (See: eAM Work Order Statuses, page 3-23).

5. Optionally, select a specific Task.
6. Save your work.

Creating Requisitions or Purchase Orders

You can create a requisition or purchase order for a project, maintenance Work Order. You can update the commitments for the Work Order's associated project or task. You can create requisitions and purchase orders using either Oracle iProcurement, if you have it installed, or Oracle Purchasing.

To create a requisition using Oracle Purchasing:

1. Navigate to the Requisitions window.

Requisitions

Requisitions (Vision Project Mfg) - [New]

Number Type **Purchase Reqi** Preparer **Kingston, Mr. Max**
 Description **Crane** Status **Incomplete** Total **ANY** **1,500.00000**

Items Source Details Details Currency

Num	Type	Item	Rev	Category	Description	UOM	C	
1	Goods			MISC.MISC	Crane	EA	1	

Destination Type **Shop Floor** Source **Supplier**
 Requestor **Kingston, Mr. Max** Supplier
 Organization **SS** Site
 Location **SS ORG LOCATION** Contact
 Subinventory Phone

Outside Services Catalog... Distributions Approve...

2. If automatic requisition number generation is active, you do not need to enter a requisition Number. See: Defining Numbering Options, *Oracle Purchasing User's Guide*. Otherwise, enter a unique requisition Number.
3. The Type will default as Purchase Requisition. The requisition lines are usually satisfied from an outside supplier by means of a purchase order.
4. Select the Items tab.
5. Select the line Type of Goods for the requisition line. Line types help you to define how you want to categorize your items. The default for this field is the Line Type from the Purchasing Options window (See: Defining Default Options, *Oracle Purchasing User's Guide*). If you change this field, defaults from the Line Types window appear in the Category, UOM, and Price fields (See: Defining Line Types, *Oracle Purchasing User's Guide*).
6. Select the purchasing Category.
7. Enter the item Description. This description should be detailed because this is how someone in your organization will know what is being requested.
8. Enter the Quantity you want to request for the item. You can enter decimal quantities, but you must enter a value greater than zero.

9. Enter the UOM you want to use for your requisition line. If you change this value, the quantity is rounded again if appropriate, and the price is recalculated. If you enter a line type that is amount based, Purchasing uses the unit of measure that you assign to that line type in the Line Types window (See: *Defining Line Types, Oracle Purchasing User's Guide*).
10. Enter the unit Price for the item. You can enter the price in decimal format. You must enter a value greater than or equal to zero. Unit prices are in functional currency.
11. Enter the Need By date for the requested item. This is required for planned items. You must enter a date greater than or equal to the requisition creation date.
12. The Charge Account rolls up from a single distribution after the distribution is created. If more than one distribution is created for the line, Multiple appears.
13. Select Shop Floor from the Destination Type list of values for all direct item and non-stock item, eAM related requisitions. You can select a destination type of Shop Floor for all purchasable items that are not selected as Stockable in the item master (See also: *Defining Items, Oracle Inventory User's Guide*).

When you select a destination type of Shop Floor, eAM recognizes this as a requirement to deliver the direct item to the maintenance work order.
14. Enter the name Requestor (employee) who is requesting the item. You must provide a Requestor before the requisition can be approved. The default is the requisition creator.
15. Enter the Organization.
16. Enter the delivery Location for the requested items. Purchasing defaults the deliver-to location that you assign to the employee.
17. Enter the Source type. The source type determines the source of the requisitioned items. The choices you have for this field is dependent on the PO: Legal Requisition Type profile option (See: *Purchasing Profile Options, Oracle Purchasing User's Guide*).
 - For the Supplier source type, enter the suggested Supplier, Supplier Site, Contact, and Phone.
18. Choose Outside Services to select the work order you previously created.

Outside Processing

Job **AM_PJM_WO_2** ... Line

Assembly

Operation

Sequence **10**

Code

Department **MAINTNANCE**

Resource

Sequence

UOM

Resource Qty

Unit Type

Assembly Qty

1. Select the maintenance project work order, you previously created, from the Job list of values.
 2. Select a specific Operation Sequence from the Sequence list of values. This enables you to procure directly to the operation on the maintenance work order. The Department will default from the department associated with the work order selected.
 3. Choose Done.
19. Select a requisition line number, then choose Distributions to associate project and task information with that requisition line. You can charge the cost of this requisition line to multiple Accounting Flexfields or update the default values you provided in the Requisition Preferences window (See: Entering Requisition Preferences, *Oracle Purchasing User's Guide* and Entering Requisition Distributions, *Oracle Purchasing User's Guide*).
1. Select the Accounts tab.

Distributions (Accounts tab)

The screenshot shows the 'Distributions (Accounts tab)' window. It features a table with the following columns: Num, Quantity, Charge Account, Recovery Rate, GL Date, and Budget Account. The first row is populated with the following data: Num 1, Quantity 10, Charge Account 101.0000.404.111000.0000.000, Recovery Rate, GL Date, and Budget Account. Below the table is an 'Account Description' section with fields for Charge, Accrual, Budget, and Variance, all containing the text 'Vision Project Manufactur.No Locatio'.

- Enter the Quantity you want to distribute. Purchasing displays the quantity you have not yet assigned to an Accounting Flexfield. Multiple distribution quantities must total to the requisition line quantity.
- The Charge Account will default from the WIP accounting class of the cost group, associated with the project. Purchasing uses the Account Generator to create the following accounts for each distribution:
- *Accrual*: AP accrual account
- *Variance*: invoice price variance account
- If you are using encumbrance control (See: Financials Options, *Oracle Payables User's Guide*), Purchasing also creates the following account for each distribution:
- *Budget*: encumbrance budget account
- Change or accept the default Recovery Rate for taxable items. The recovery rate is the percentage of tax your organization can reclaim for credit. This rate defaults in based on the Tax Code on the line in the Requisitions window and the setup in the Financial Options window (See also: Recoverable Tax, *Oracle Payables User's Guide*).
- If you are using encumbrance control for requisitions (See: Financials Options, *Oracle Payables User's Guide*), enter the GL Date that you want to use to reserve funds.
- Save your work.

2. Select the Project tab. Oracle Project Manufacturing must be installed with the Enable Project References check box selected in the Project Manufacturing Parameters window (See also: Project Manufacturing Parameters, *Oracle Project Manufacturing User's Guide*).

Distributions (Project tab)

The screenshot shows the 'Distributions (Project tab)' window. The 'Project' tab is selected. The window contains a table for 'Expenditure' with columns: Num, Project, Task, Award, Type, Org, and Dt. The first row is populated with '1' in the Num column, 'AM_PROJ_1' in the Project column, and '2.0' in the Task column. Below the table is a section for 'Account Description' with fields for Charge, Accrual, Budget, and Variance, all containing the text 'Vision Project Manufactur.No Locatio'.

Num	Project	Task	Award	Type	Org	Dt
1	AM_PROJ_1	2.0				

Account Description

Charge	Vision Project Manufactur.No Locatio	Budget	
Accrual	Vision Project Manufactur.No Locatio	Variance	Vision Project Manufactur.No Locatio

3. Select the Project.
 4. Select a Task.
20. Save your work.
 21. Choose Approve to submit the requisition for approval.

Approve Document

Approve Document (Vision Project Mfg) - 4254

☒ Submit for Approval
☐ Forward
Forward From
Note
☐ Print

Document has been submitted for Approval. To determine the next approver or the action taken please navigate to the Action History window from the Summary form.

OK Cancel

22. Choose OK.

23. Choose OK.

Related Topics

Entering Requisition Headers, *Oracle Purchasing User's Guide*

Entering Requisition Lines, *Oracle Purchasing User's Guide*

Requisitions, *Oracle iProcurement Implementation Guide*

Setting Up Project Manufacturing Costing, *Oracle Cost Management User's Guide*

Viewing the Requisition within the Maintenance Work Order

After the purchase requisition is created and associated with a maintenance Work Order, the requisition appears on the maintenance Work Order.


To view purchase requisition information on a maintenance work order:

1. Navigate to the Find Work Orders window, and select the project, maintenance Work Order number, you previously created.

2. Choose Find.

Work Orders

Work Order (EM1)

Work Order	WO90005	
Asset Number	FL1010	 Fork Lift 1010
Asset Group	Fork Lifts	
Asset Activity		
Class	MaintWAC	
Status	Draft	
Work Order Type		
Instance Number		

Scheduled Dates

Start	29-MAR-2004 17:48:26
Completion	
Duration(hours)	

Activity Type	
Activity Cause	
Activity Source	

[☐]

Main Project Rebuild Work Request Service Request Bill, Routing

Project	AM_PROJ_1	AM_PROJ_1
Task	3.0	Production

Operations Materials Resources Asset Route Costs

3. Choose Materials to display the requisition created in the Material Requirements window.

Material Requirements

Operation	Requisition Number	PO Number	Item Description	UOM	Quantity Ordered
10	4250	30064	CNC Machine for Drill	EA	10
10	4251		Crane	EA	20
10	4252		Crane	EA	10

The requisition number appears in the Direct Items region. After a purchase order is created from this requisition, the PO Number field populates with that related purchase order number.

Updating the Commitments for a Project

After the requisition is created and approved, the project's accounting commitments can be updated. This is performed by executing the Refresh Project Summary Amounts concurrent process. This process is normally set up to automatically execute, periodically.

To update project commitments:

1. Navigate to the Find Requests window using the Project Manufacturing responsibility. Choose Submit a New Request.
2. Choose OK to run a Single Request.

Submit Request

Run this Request...

Name: **PRC: Refresh Project Summary Amounts**

Parameters:

Language: **American English**

Copy...

At these Times...

As Soon as

Upon Completion...

☒ Save all C

Notify

Print to: **noprint**

Help (E)

Submit

Cancel

Parameters

From Project Number: **AM_PROJ_1**

To Project Number:

Through Date:

OK

Cancel

Clear

Help

3. Select PRC: Refresh Project Summary Amounts from the Name list of values.
4. Enter the following parameters:
 1. Optionally, enter a From and To Project Number to execute the process over a range of projects.
 2. Optionally, enter a Through Date to narrow the data selection based on a specific end date.
5. Choose OK.
6. Choose Submit.

Related Topics

Submitting a Request, *Oracle Applications User's Guide*

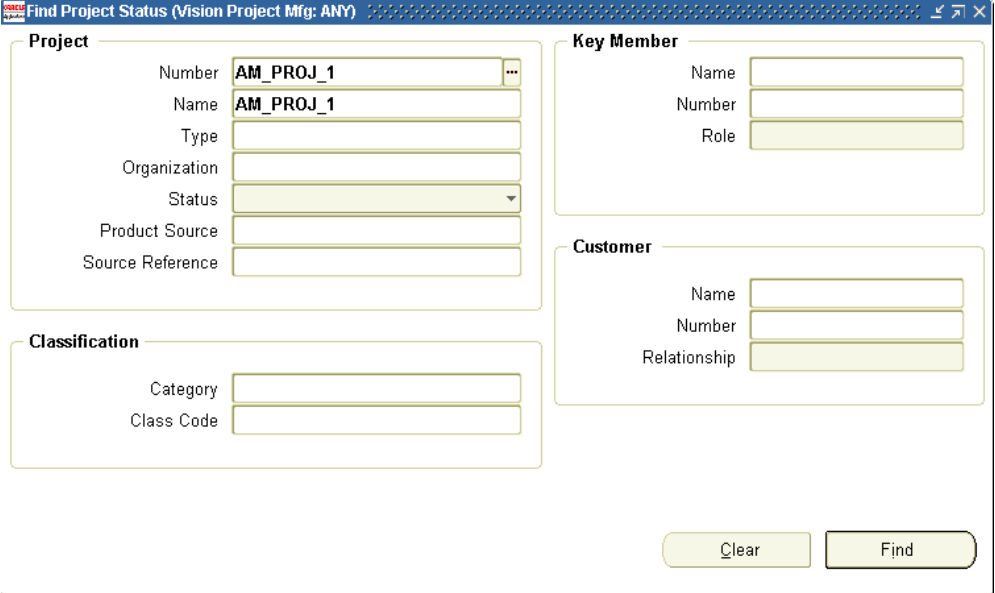
Viewing Commitments

You can view commitments for specific projects. After the Refresh Project Summary Amounts process executes (See: Updating the Commitments for a Project, page 11-15), the commitment amounts for your project increase.

To view commitments for a project:

1. Navigate to the Find Project Status window.

Find Project Status



The screenshot shows a software window titled "Find Project Status (Vision Project Mfg: ANY)". The window contains several input fields organized into four sections: "Project", "Key Member", "Customer", and "Classification". The "Project" section has fields for Number (AM_PROJ_1), Name (AM_PROJ_1), Type, Organization, Status (a dropdown menu), Product Source, and Source Reference. The "Key Member" section has fields for Name, Number, and Role. The "Customer" section has fields for Name, Number, and Relationship. The "Classification" section has fields for Category and Class Code. At the bottom right of the window are two buttons: "Clear" and "Find".

Project	
Number	AM_PROJ_1
Name	AM_PROJ_1
Type	
Organization	
Status	
Product Source	
Source Reference	

Key Member	
Name	
Number	
Role	

Customer	
Name	
Number	
Relationship	

Classification	
Category	
Class Code	

Clear Find

2. Select your project Number.
3. Choose Find.

Project Status

The screenshot shows the 'Project Status' window with the title bar 'Project Status (Vision Project Mfg: ANY)'. The 'Current Period' is set to 'JUL-W4-02'. The main table has the following data:

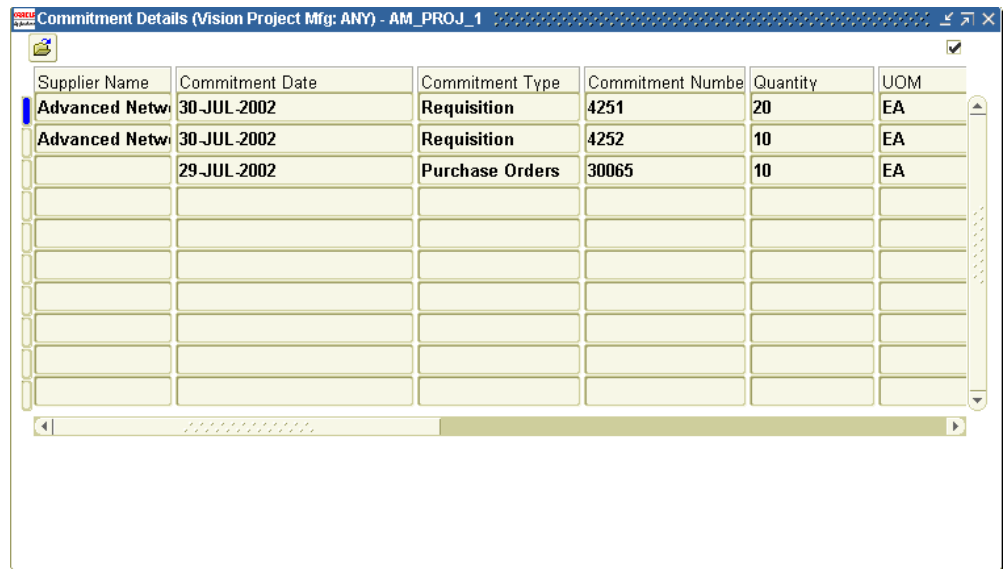
Project	Project Name	Ovr Bgt	ITD - Rev Bgt	ITD - Act Rev	ITD - Cst Bgt	ITD - Act
AM_PROJ_1	AM_PROJ_1		0	0	2663419	

Below the table is a horizontal scrollbar. At the bottom, there are several buttons: 'Totals', 'Events', 'Invoices', 'Commitments', 'Project', 'Resource Status', and 'Task Status'.

This window displays the commitments by a specific project number. The Commit Amt (commitment amount) field has increased in value in comparison to before you entered the requisition.

4. Optionally, choose Totals to add up commitment totals for multiple projects.
5. Choose Commitments, and then choose Find to view commitment details for the current project. All requisitions and purchase orders associated with the current project appear.

Commitment Details



The screenshot shows a software window titled "Commitment Details (Vision Project Mfg: ANY) - AM_PROJ_1". It contains a table with the following data:

Supplier Name	Commitment Date	Commitment Type	Commitment Number	Quantity	UOM
Advanced Netw	30-JUL-2002	Requisition	4251	20	EA
Advanced Netw	30-JUL-2002	Requisition	4252	10	EA
	29-JUL-2002	Purchase Orders	30065	10	EA

- The Commitment Number is the requisition or purchase order number. After a purchase order has been created from a requisition, the Commitment Number field value changes from the requisition number to the purchase order number.
 - The Project Raw Cost is the cost of the individual requisition or purchase order. The Project Raw Costs are added together to obtain the total commitment amount for the project.
6. Close this window, and then choose Task Status to display commitment information at the task level. All tasks associated with the current project appear.

Task Status

Task Status (Vision Project Mfg: ANY) - AM_PROJ_1

Task	Task Name	Ovr Bgt	ITD - Rev Bgt	ITD - Act Rev	ITD - Cst Bgt
1.0	Engineering D		0	0	0
2.0	Prototype	*	0	0	0
3.0	Production		0	0	2663419
4.0	Shipping	*	0	0	0
5.0	Installation		0	0	0

Events Commitments Actuals Task Resource Status

7. Select a Task, then choose Commitments.
8. Choose Find to view the commitment details for the specific task.

Commitment Details

Commitment Details (Vision Project Mfg: ANY) - AM_PROJ_1, 3.0					
Supplier Name	Commitment Date	Commitment Type	Commitment Number	Quantity	UOM
Advanced Netw	30-JUL-2002	Requisition	4252	10	EA

Related Topics

Viewing Project Details, *Oracle Project Manufacturing User's Guide*

Setting Up Project Manufacturing Costing, *Oracle Cost Management User's Guide*

Project Cost Collector, *Oracle Cost Management User's Guide*

Integration with Oracle Time and Labor

This chapter covers the following topics:

- Introduction
- Integration with Oracle Time and Labor Overview
- Setting Up the Integration
- Time and Expenses
- Entering Timecard Information
- Extracting Information to Enterprise Asset Management
- Executing the Cost Manager Process

Introduction

This chapter provides the necessary information to set up and use the integration between Oracle Enterprise Asset Management and Oracle Time and Labor.

Integration with Oracle Time and Labor Overview

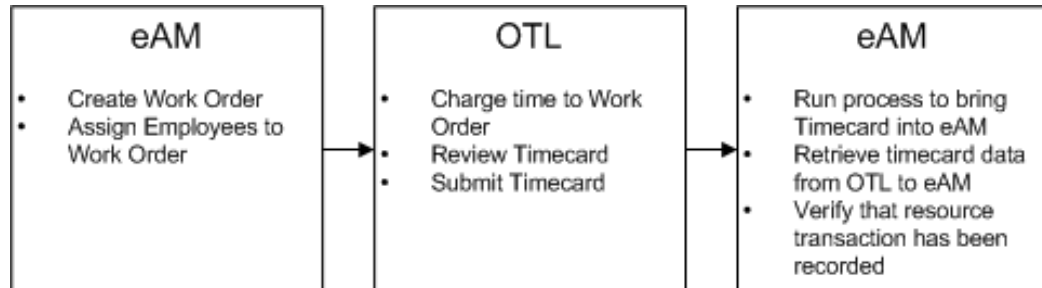
Oracle Time and Labor (OTL) is the repository in which time is entered by employees working in a particular organization. Employees working on Oracle Enterprise Asset Management (eAM) work orders enter their time using OTL Self-Service. Information collected is stored in OTL Time Store, and is composed of a series of business rules and processes. eAM extracts information from the Time Store and charges eAM work orders for the time spent by employees that work on them.

There are multiple steps within the integration flow. First, timecard information is entered for a specific Work Order, within Oracle Time Store (a piece of Oracle Time and Labor). That information is then extracted from Oracle Time Store to Oracle Enterprise Asset Management. This extraction dynamically creates a resource transaction within Oracle Enterprise Asset Management. Finally, the Cost Manager process is executed. This process charges the resource transaction. After this process executes, you can view

the actual costs for the period that you charged, within the Work Order.

The process is as follows:

OTL Process Flow



This chapter contains the following topics:

- Setting Up the Integration, page 12-2
- Time and Expenses, page 12-2

Setting Up the Integration

There are two required setup procedures for this integration. The first is to establish employees needing to use this functionality as Persons within Oracle Human Resources (See: *Oracle Human Resources User's Guide*). Once established, those Persons are assigned to respective Users, within Enterprise Asset Management. The second setup procedure consists of creating Preference Values, and then linking those values to eligibility criteria.

This section contains the following topics:

- Defining Persons as Users, page 2-207
- Creating Eligibility Criteria, page 2-208

Time and Expenses

There are multiple steps within the integration flow. First, timecard information is entered for a specific Work Order, within Oracle Time Store (a piece of Oracle Time and Labor). That information is then extracted from Oracle Time Store to Oracle Enterprise Asset Management. This extraction dynamically creates a resource transaction within Oracle Enterprise Asset Management. Finally, the Cost Manager process is executed. This process charges the resource transaction. After this process executes, you can view the actual costs for the period that you charged, within the Work Order.

This section includes the following topics:

- Entering Timecard Information, page 12-3
- Extracting Information to Enterprise Asset Management
- Executing the Cost Manager Process, page 12-6

Entering Timecard Information

You can enter timecard information and expenses to a work order. When you enter time on a Work Order, the information is stored in Oracle Time Store, a piece of Oracle Time and Labor (OTL). Oracle Enterprise Asset Management (eAM) extracts this information and applies it to the appropriate Work Order.

To enter timecard information:

1. Navigate to the Timecard. All timecards that the current user has entered and submitted appear.

2. Select a Period. The current period defaults.

Note: You cannot submit time for a future period.

3. Choose GO.
4. Select a Work Order. Work Orders with a status of Released or Complete, and that have operations assigned to a department that the current user (you) is assigned to, appear. If you are not assigned to a Work Order's operation but are a resource associated to the department on the Work Order's operation, you can see the Work Order in the list of values. After you charge time and submit the timecard, and the retrieval process is executed, you are assigned to the Work Order's operation.
5. The Asset Number associated with the current Work Order defaults in the Asset Number field.
6. Select an Operation. Operations associated with the current Work Order are available.
7. Select a Resource. Resources associated with the current operation are available.
8. Optionally, select a Charge Department. For example, if the current resource is borrowed, you might want to charge the department that owns the resource. The value defaults with the current operation's assigned department.
9. Use the remaining date fields to enter your time in hours.
10. Optionally, choose Calculate to view the Total hours calculated for both the period,

and specific days.

11. Optionally, to quickly remove information entered, choose Delete.
12. Optionally, choose Save For Later.
For example, you might need to work again on Friday. Save For Later enables you to do this. If this is chosen, the Timecard is given a Working status. Oracle Enterprise Asset Management cannot extract the information, within timecards with a Working status, from Oracle Time and Labor.
13. When you are ready to submit the current timecard, choose Review.
14. To submit the current timecard, choose Submit. The current timecard has a Submitted status.
15. Optionally, choose Return to Activities to view your timecards. All timecards that are at Working and Submitted statuses appear.
16. Optionally, select the Update icon to make changes to the current timecard.
17. Optionally, select the Delete icon to delete a specific timecard.
18. Optionally, select the Details icon to review the current timecard information.

Extracting Information to Enterprise Asset Management

You can extract all timecard information at a Submitted status from Oracle Time and Labor (OTL) to Oracle Enterprise Asset Management (eAM). A concurrent process executes in the background and performs time charge extractions. After extracted, a resource transaction dynamically generates within eAM. Most organizations set this process to periodically execute, automatically.

To extract information from OTL to eAM:

1. Navigate to the Submit Request window.

Retrieve Timecard Data from OTL to EAM

Run this Request...

Name: **Retrieve Timecard Data from OTL to EAM**

Parameters:

Language: **American English**

At these Times...

Run the Job: **As Soon as Possible**

Upon Completion...

☒ Save all Output Files

Notify:

Print to: **adsprinter**

Buttons: Copy..., Languages..., Schedule..., Options..., Help (B), Submit, Cancel

2. Select Retrieve Timecard Data from OTL to EAM.
3. A range of dates must be entered in the Parameters window to specify information to extract from OTL.

The concurrent process will also consider the OTL dates for the time entries if they fall within closed accounting periods.

Note: The decision to extract timecard information once is defined in OTL preferences. By default, the preference is set to NO. The US OTL Administrator can change this preference to YES in the OTL Preferences window (for example, a timecard is submitted with erroneous charges).

4. Choose OK.
5. Choose Submit. A resource transaction has dynamically created in eAM. The timecard information is now in the Resource Transaction Interface table.
6. Choose No to return to the menu.

Executing the Cost Manager Process

Finally, you need to execute the Cost Manager process. Most organizations set this process to periodically execute, automatically. This process charges the resource transaction. After this process runs, you can see the actual costs for the period that you charged, within the Work Order.

Note: Set up the Cost Manager Interface Manager to execute in the background, before executing the Cost Manager process. See: Windows and Navigation Paths for information on how to access this process.

To execute the Cost Manager process:

1. Navigate to the Submit Request window.
2. Select Cost Manager.
3. Choose Submit. The previously created resource transaction is now charged, and you can view the actual resource costs within the Work Order that the timecard was initially charged to; the information exists in the cost tables. To view the resource cost information from within the Work Order, See: Viewing Cost Information, page 6-4.

Cost Manager Process

Submit Request

Run this Request...

Name: **Cost Manager** Copy...

Parameters:

Language: **American English** Languages...

At these Times...

Run the Job: **As Soon as Possible** Schedule...

Upon Completion...

☒ Save all Output Files

Notify:

Print to: **adsprinter** Conditions...

Help (B) Submit Cancel

Decision

Request submitted.
(Request ID = 2525006)

Submit another request?

Yes No

4. Choose No to return to the menu.

eAM Quality

This chapter covers the following topics:

- Introduction
- Quality Setup
- Using eAM Quality
- Adding Collection Plan Attachments
- Triggering a Work Request
- Triggering a Work Order
- Entering Quality Results

Introduction

eAM integrates with Quality, enabling you to collect quality results on your assets. If an asset is not up to the required standards, a Work Request can automatically generate. This chapter contains the following topics:

- Quality Setup, page 13-2
- Using eAM Quality, page 13-2
- Adding Collection Plan Attachments, page 13-3
- Triggering a Work Request, page 13-4
- Triggering a Work Order, page 13-7
- Entering Quality Results, page 13-10

Quality Setup

A maintenance Work Order transitions through various steps in its lifecycle (See: eAM Work Order Statuses, page 3-23). One of the steps in the lifecycle is Completion. Certain quality plans might apply to the transaction, depending on the quality plan's setup and its association to transactions and triggers. A list of quality collection plans that applies to the completion transaction appears during the completion process. If a quality plan is specified as mandatory, results are entered before the transaction can finish. Otherwise, results entry is optional or can defer.

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

Quality Setup tasks for Enterprise Asset Management include the following:

- Creating eAM Collection Elements, page 2-158
- Creating eAM Quality Collection Plans, page 2-162
- Creating eAM Quality Collection Plans for a Supplier, page 2-166

Related Topics

Creating eAM Quality Collection Plans, page 2-162

Creating Collection Elements, page 2-158

Creating eAM Quality Collection Plans for a Supplier, page 2-166

Using eAM Quality

You can attach illustrative or explanatory files in the form of text, images, word processing documents, spreadsheets, video, graphics, OLE objects, and so on, to collection plans and specifications.

For each collection element, you can specify that Quality initiates an action based on the quality data that you collect. The condition that you specify and the resulting action comprise an Action Rule. Action Rules are evaluated and executed during the quality data collection process. For example, eAM enables you to specify that a Work Request or a Work Order is created automatically, based on certain conditions of the asset, determined by the quality data collected. The Action Rule is defined within the collection plan definition.

This section includes the following topics:

- Adding Collection Plan Attachments, page 13-3
- Triggering a Work Request, page 13-4
- Triggering a Work Order, page 13-7
- Entering Quality Results, page 13-10

Adding Collection Plan Attachments

You can attach illustrative or explanatory files in the form of text, images, word processing documents, spreadsheets, video, graphics, OLE objects, and so on, to collection plans and specifications. You can also attach files to quality results, as you enter them.

You can view collection plan attachments as you enter, view, and update quality results. You can view specification attachments as you enter quality results. You can view quality results line attachments as you update and view quality results. See *Viewing Attachments Associated with Quality Results, Oracle Quality User's Guide*.

To add collection plan attachments:

1. Navigate to the Collection Plans or Specifications (See: Overview of Specifications, *Oracle Quality User's Guide*) window. See: Creating eAM Quality Collection Plans, page 2-162 and Defining Specifications, *Oracle Quality User's Guide*.

Note: You must save the collection plan or specification before you can add an attachment to it.

2. Choose the Attachments icon or choose attachments from the View menu. The Attachments window appears.

Attachments

Seq	Category	Description	Data Type	May Be Changed
10	Miscellaneous		File	<input checked="" type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

Entity Name: Quality Collection Plans

Magnification: 100%

☐ Include Related Documents

Open Document...

Document Catalog...

To add attachments to quality results lines:

1. Navigate to the Enter Quality Results window. See: *Entering Quality Results Directly, Oracle Quality User's Guide*.
2. Select a quality results line.
3. Choose the Attachments icon or choose attachments from the View menu. The Attachments window appears.

Related Topics

Working With Attachments, *Oracle Applications User's Guide*

Attachments for Collection Plans, Specifications, and Results Lines, *Oracle Quality User's Guide*

Triggering a Work Request

For each collection element, you can specify that Quality initiates an action based on the quality data that you collect. The condition that you specify and the resulting action comprise an Action Rule. Action Rules are evaluated and executed during the quality data collection process. For example, eAM enables you to specify that a Work Request is

created automatically, based on certain conditions of the asset, determined by the quality data collected. The Action Rule is defined within the collection plan definition.

A Work Request is used to request work on an asset. A Work Request is not a Work Order, but is referenced by the Work Order that is ultimately created because of the Work Request.

To set up work request triggers:

1. Navigate to the Collection Plans window.

Collection Plans

Collection Plans (EM1)

Collection Plan: TIRE WEAR INSPECTION EM1 [Views...]

Description: Tire tread Depth Wear Inspection Plan - EAM

Effective: 11-AUG-2004 - []

Plan Type: Maintenance Inspection [Inspection of in-service assets] []

[Copy Elements...] [Transactions] [Specifications...]

Quality Collection Elements

Name	Seq	Prompt	Mandatory	Enabled	Read-Only	Displayed	[]
<input type="checkbox"/> Asset Group	10	Asset Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[]
<input type="checkbox"/> Asset Serial Number	20	Asset Serial Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[]
<input checked="" type="checkbox"/> Maintenance WorkOrder	30	Work Order	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[]
<input type="checkbox"/> DriverFront Tread Depth mm	40	DSF Tread Depth mm	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[]
<input type="checkbox"/> DriverRear Tread Depth mm	50	DSR Tread Depth mm	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[]

[Values] [Actions]

2. Select a valid Collection Plan. To create a new collection plan, See: 'Creating Collection Plans, *Oracle Quality Users Guide*.
3. In the Quality Collection Elements region, select the collection element to create an action rule for. Choose Actions.

Quality Actions

Seq	Element	Condition	Value	Spec Limit
				From To
10	Asset Number	equals (=)	<input checked="" type="radio"/>	av-rsn50
			<input type="radio"/>	
			<input type="radio"/>	

Defaults...

Actions this Rule Invokes

<input checked="" type="checkbox"/>	Create a work request
<input type="checkbox"/>	
<input type="checkbox"/>	

Action Details

Message to Display or Log for this Action

4. In the Action Rules region, enter the Sequence number for the action rule. See: 'Action Rule Sequencing, *Oracle Quality Users Guide*.

The sequence number establishes the order in which action rules are evaluated as data is collected. The sequence number can be from 0 to 99999.

5. Select the Condition that must be met to invoke the action. For example, when the brake pad thickness wears to less than .2, a Work Request is automatically created. See: 'Query Operators, *Oracle Quality Users Guide*.
6. Choose either Value or Spec Limit to specify the evaluation method.

Value: If you choose Value, as quality data is collected, the action rule is evaluated using the results value and the value entered. If you have defined a list of values for the collection element, you must choose a value from this list. If you have not defined a list of values for the collection element, you can enter any value.

Spec Limit: If you choose Spec Limit, as quality data is collected, the action rule is evaluated using the quality results value and either the specification limit target value (collection element level), the upper or lower user-defined range limits, or the upper or lower specification range limits. Specification limits are defined at the collection element level.

Spec Limits can be used to define action rules that evaluate numeric results.

7. If the selected Condition requires a range of values, enter both the From and To

value. If the selected Condition requires a single value, enter the From value.

Note: Some conditions (for example, is entered and is empty) do not require values.

If you have chosen the Values, and a list of values has been defined for the collection element, you can select values from this list. If you have not defined a list of collection element values, you can enter any value. See: 'Defining Collection Element Values, *Oracle Quality Users Guide*.

8. In the Actions this Rule Invokes region, select *Create a work request*.
9. In the Action Details region, enter a Message to Display or Log for this Action. See: 'Message Actions, *Oracle Quality Users Guide*

If the selected action requires a status code, enter the status code in the Action Details region. See: 'Application Specific Actions, *Oracle Quality Users Guide*.

10. Save your work.

Related Topics

'Associating Output Variables with Actions, *Oracle Quality Users Guide*

'Defining a Launch a Workflow Action, *Oracle Quality Users Guide*

'Defining Collection Plan Element Alert Actions, *Oracle Quality Users Guide*

'Defining Collection Element Actions, *Oracle Quality Users Guide*

'Quality Actions, *Oracle Quality Users Guide*

Triggering a Work Order

For each collection element, you can specify that Quality initiates an action based on the quality data that you collect. The condition that you specify and the resulting action comprise an Action Rule. Action Rules are evaluated and executed during the quality data collection process. For example, eAM enables you to specify that a Work Order is created automatically, based on certain conditions of the asset, determined by the quality data collected. The Action Rule is defined within the collection plan definition.

To set up work request triggers:

1. Navigate to the Collection Plans window.

Collection Plans

Collection Plans (EM1)

Collection Plan: TIRE WEAR INSPECTION EM1 Views...

Description: Tire tread Depth Wear Inspection Plan - EAM

Effective: 11-AUG-2004 -

Plan Type: Maintenance Inspection Inspection of in-service assets []

Copy Elements... Transactions Specifications...

Quality Collection Elements

Name	Seq	Prompt	Mandatory	Enabled	Read-Only	Displayed	[]
<input type="checkbox"/> Asset Group	10	Asset Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Asset Serial Number	20	Asset Serial Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Maintenance WorkOrder	30	Work Order	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> DriverFront Tread Depth mm	40	DSF Tread Depth mm	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> DriverRear Tread Depth mm	50	DSR Tread Depth mm	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Values Actions

2. Select a valid Collection Plan. To create a new collection plan, See: 'Creating Collection Plans, *Oracle Quality Users Guide*.
3. In the Quality Collection Elements region, select the collection element to create an action rule for. Choose Actions.

Quality Actions

Quality Actions (EAM) - EAM PICKUP BRAKES, Asset Number

Action Rules

Seq	Element	Condition	Value	Spec Limit
				From To
10	Asset Number	equals (=)	<input checked="" type="radio"/>	av-rsn50
			<input type="radio"/>	
			<input type="radio"/>	

Defaults...

Actions this Rule Invokes

<input checked="" type="checkbox"/>	Create a Maintenance Work Order
<input type="checkbox"/>	
<input type="checkbox"/>	

Action Details

4. In the Action Rules region, enter the Sequence number for the action rule. See: 'Action Rule Sequencing, *Oracle Quality Users Guide*.

The sequence number establishes the order in which action rules are evaluated as data is collected. The sequence number can be from 0 to 99999.

5. Select the Condition that must be met to invoke the action. For example, when the brake pad thickness wears to less than .2, a Work Request is automatically created. See: 'Query Operators, *Oracle Quality Users Guide*.
6. Choose either Value or Spec Limit to specify the evaluation method.

Value: If you choose Value, as quality data is collected, the action rule is evaluated using the results value and the value entered. If you have defined a list of values for the collection element, you must choose a value from this list. If you have not defined a list of values for the collection element, you can enter any value.

Spec Limit: If you choose Spec Limit, as quality data is collected, the action rule is evaluated using the quality results value and either the specification limit target value (collection element level), the upper or lower user-defined range limits, or the upper or lower specification range limits. Specification limits are defined at the collection element level.

Spec Limits can be used to define action rules that evaluate numeric results.

7. If the selected Condition requires a range of values, enter both the From and To

value. If the selected Condition requires a single value, enter the From value.

Note: Some conditions (for example, is entered and is empty) do not require values.

If you have chosen the Values, and a list of values has been defined for the collection element, you can select values from this list. If you have not defined a list of collection element values, you can enter any value. See: 'Defining Collection Element Values, *Oracle Quality Users Guide*.

8. In the Actions this Rule Invokes region, select Create a Maintenance Work Order or Create a Maintenance Work Order.
9. In the Action Details region, enter a Message to Display or Log for this Action. See: 'Message Actions, *Oracle Quality Users Guide*.

If the selected action requires a status code, enter the status code in the Action Details region. See: 'Application Specific Actions, *Oracle Quality Users Guide*.

10. Save your work.

Related Topics

'Associating Output Variables with Actions, *Oracle Quality Users Guide*

'Defining a Launch a Workflow Action, *Oracle Quality Users Guide*

'Defining Collection Plan Element Alert Actions, *Oracle Quality Users Guide*

'Defining Collection Element Actions, *Oracle Quality Users Guide*

'Quality Actions, *Oracle Quality Users Guide*

Entering Quality Results

You might need to enter Quality results when completing a Work Order, Operation, or Supplier Operation. Quality results entry is mandatory if you selected the Mandatory check box, when creating the collection plan (See: Creating eAM Quality Collection Plans, page 2-162).

To enter quality results when completing a Work Order:

1. Navigate to the Work Order Completion window.

Work Order Completion

ORACLE Asset Management

Home Layout Preferences Diagnostics

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis

All Requests Crew Schedule Mass Time Entry

Work Orders: All >

Current Organization: EMI

Complete Work Order: WO246727

Cancel Apply

Work Order: WO246727
 Asset Type: Capital
 Asset Group: Fork Lifts
 Status: Released

Description: Vehicle Point Inspection Activity
 Asset Number: FL1010
 Department: W-Maint

Enter completion data and meter readings, click 'Apply' to complete the work order.

Completion Details

* Indicates required data

Transaction Type: Complete Job
 Completion Status: Complete
 Actual Start Date and Time: 13-Feb-2009 07:06:00
 Actual Duration (hours): 91.643
 Actual End Date and Time: 17-Feb-2009 02:38:35
 Shutdown Start Date and Time:
 Shutdown Duration (hours): 0
 Reconciliation Code:
 Completion Subinventory:
 Completion Locator:
 Completion Lot:

Quality Plans

Plan Name	Description	Mandatory	Results Entered	Enter Quality Results	View Quality Results	Quality Plan Attachments
VEHICLE INSPECTION EMI	Vehicle Checklist Inspection EAM EMI					

Meters

Details		History	Source										
Meter Name			Meter Name	Mandatory	Reading Type	Value	New Readings Direction	UOM	Value	Date	Last Reading	Flex Fields	History
FL1010 Hour Meter			FL1010 Hour Meter	N	Absolute		Ascending	Hour	6000	14-Dec-2006 12:01:06			

Replaced Rebuilds

Rebuild Work Order	Item Taken Out	Serial Taken Out	Activity
No results found.			

Set Source Meter of Issued Serials

2. Select the Work Order.
3. Save your work. If the collection plan that is triggered requires quality results entry, the Quality Results Entry window appears. If not, select Enter Quality Results from the Tools menu or select the Enter Quality Results icon. A collection plan is triggered if its Transaction Description reads, *EAM Work Order Completions (Oracle Enterprise Asset Management)*. See: Creating eAM Quality Collection Plans, page 2-162.

Enter Quality Results

ORACLE Asset Management

Home Logout Preferences Diagnostics

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis

All Requests Crew Schedule Mass Time Entry

Work Orders: All > Complete Work Order: WO246727 >

Enter Quality Results: VEHICLE INSPECTION EM1

* Indicates required field

Cancel Add Another Row Apply

Work Order Details

Work Order	WO246727	Asset Serial Number	FL1010
Asset Group	Fork Lifts	Description	Vehicle Point Inspection Activity
Asset Num	FL1010	Asset Activity	Vehicle Point Inspection

Data

WO Completion Notes	<input type="text"/>	% Water	<input type="text"/>
Viscosity	<input type="text"/>	Specific Gravity	<input type="text"/>
Attachments		None <input type="button" value="Add"/>	

Cancel Add Another Row Apply

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis Home Logout Preferences Diagnostics

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4. Enter the required information.
5. Save your work.

To enter quality results when completing an operation:

1. Navigate to the Work Order window.
2. Select a Work Order.
3. Choose Operations.
4. Complete an Operation. See: Operation Completion, page 3-57.
5. Save your work. If the collection plan that is triggered requires quality results entry, the Quality Results Entry window appears. If not, select Enter Quality Results from the Tools menu or select the Enter Quality Results icon. A collection plan is triggered if its Transaction Description reads, *EAM Operation Completions (Oracle Enterprise Asset Management)*. See: Creating eAM Quality Collection Plans, page 2-162.

Note: If you want to update the quality results for a work order with a status of Closed, you must unclosed the work order.

6. Enter the required information.
7. Save your work.

To enter quality results via iSupplier Portal:

eAM enables you to create Quality collection plans that are optionally mandatory for a supplier to enter crucial Quality data, via iSupplier Portal, before the supplier can

complete an Outside Service operation. A supplier will complete an Outside Service operation when the outside service is performed or shipped to the eAM organization.

1. Navigate to the iSupplier Portal.
2. Select the Orders tab.
3. Select Work Orders sub-tab.
4. Query a Work Order by PO, Work Order, From/To Need by Date, or From/To Promise Date.
5. Select a Work Order. The Work Order Detail page appears.
6. Choose Complete Operations.
7. Enter necessary information and Quality Results.

Related Topics

Entering Quality Results, *Oracle Quality User's Guide*

Work Order Billing

This chapter covers the following topics:

- Introduction
- Setting Up Work Order Billing
- Billing Work Orders
- Creating a Billable Work Order
- Associating Items and Activities to a Price List
- Initiating Billing
- Creating an Invoice

Introduction

While maintaining an asset or servicing a customer request, you can bill a third party customer for the work that they performed. This chapter discusses Work Order Billing, including the following topics:

- Setting Up Work Order Billing, page 14-1
- Billing Work Orders, page 2-212
- Creating an Invoice, page 14-12

Setting Up Work Order Billing

While maintaining an asset or servicing a customer request, you can bill a third party customer for the work that they performed. The cost of the work performed is based on the material and resource requirements (Bill of Material) of the Work Order, or the cost of the Activity associated with the Work Order.

This section includes the following topics:

- Work Order Billing Setup, page 2-212
- Setting Up Parameters, page 2-212
- Setting Up Costs for the Cost Plus Billing Basis, page 2-213
- Setting Up Prices for the Price List Billing Basis, page 2-215
- Service Attribute Setup, page 2-216
- Setting Up Billable Material, page 2-217
- Setting Up a Billable Resource, page 2-218
- Setting Up a Billable Activity, page 2-220

Billing Work Orders

After the setup tasks are complete (See: Setting Up Work Order Billing, page 14-1), you can bill third parties and customers the work performed, while maintaining an asset or servicing a customer request. The cost of the work performed is based on the Work Order's material and resource requirements (Asset Bills of Material and Asset Routes), or the cost of the Activity that is associated with the Work Order.

This section includes the following topics:

- Creating a Billable Work Order, page 14-2
- Associating Items and Activities to a Price List, page 14-4
- Initiating Billing, page 14-4

Creating a Billable Work Order

Work Order Billing requires completed, billable work orders.

To set up a billable work order:

1. Navigate to the Work Order window and create a work order.

Work Order

Work Order (EM1)

Work Order: 57673

Asset Number: Fork Lift Daily Maintenance

Asset Group: Fork Lifts

Asset Activity: Fork Lift Daily Maintenance

Class: MaintWAC

Status: Released

Work Order Type:

Instance Number:

Activity Type:

Activity Cause:

Activity Source: []

Scheduled Dates

Start: 09-NOV-2002 23:00:00

Completion: 11-NOV-2002 07:36:00

Duration(hours): 32.6

Main | Project | Rebuild | Work Request | Service Request | Bill, Routing

Owing Department: W-Maint

Priority:

Requested Start Date: 09-NOV-2002 23:00:00

Requested Due Date:

Shutdown Type:

☒ Firm

☐ Notification Required

☐ Tagout Required

☒ Planned

☐ Enable Material Issue Requests

Operations | Materials | Resources | Asset Route | Costs

2. If you are billing by requirements, add the previously defined billable material to the current work order's Bill of Material, as operation 10. See: Setting Up Billable Material, page 2-217 and Defining Inventory Material Requirements, page 3-36. Add the previously defined billable resource to the current work order's routing, as operation 10. See: Setting Up a Billable Resource, page 2-218 and Defining Resource Requirements, page 3-45.
3. If you are billing by activity, add the previously defined activity to this work order. See: Setting Up a Billable Activity, page 2-220.
4. Release the current work order. See: eAM Work Order Statuses, page 3-23.
5. Issue some material (not all) and charge some resources (not all) to the current work order (See: Transacting Material, page 3-63 and Transacting Resources, page 21-67, respectively).
6. Complete the current work order. See: Work Order Completion, page 3-59.
7. Update the status of the work order to Complete - No Charges. See: eAM Work Order Statuses, page 3-23. You can bill work orders at a Closed status, as well.
8. Save your work.

Associating Items and Activities to a Price List

Material, Resources, and Activities require association with a price list, before you can bill them.

To add items and activities to a price list:

1. Navigate to the Advanced Pricing - Price Lists window.

Advanced Pricing - Price Lists

The screenshot shows the 'Advanced Pricing - Price Lists' window. The 'Price List' tab is selected. The form contains the following fields:

- Name: EAM M1 Maintenance Price List
- Description: EAM M1 Price List for Work Order Billing
- Currency: USD
- Multi-Currency Conversion: Generated Currency Cor
- Round To: -2
- Effective Dates: 14-JUL-2003 -
- Payment Terms:
- Freight Terms:
- Freight Carriers:
- Comments:

Below the form, there are three tabs: 'List Lines', 'Secondary Price List', and 'Qualifiers'. The 'List Lines' tab is selected, showing a table with the following data:

Product Context	Product Attribute	Product Value	Product Description	U
Item	Item Number	WB-MaintTech	Work Order Billing Facilities	E
Item	Item Number	WB-Mechanic1	Work Order Billing Fleet Serv	E
Item	Item Number	WB-PrdMaint	Work Order Billing Production	E
Item	Item Number	Lubricate Fork Lift M	Lubricate Fork Lift Mast	E
Item	Item Number	Front Wheels - Elect	Front Wheels Electric Fork Lif	E

At the bottom of the window, there are two buttons: 'Price Breaks' and 'Pricing Attributes'.

2. Add your material and resource items and/or your Activities to the price list.
3. Save your work.

Related Topics

Setting Up Item Costs and Prices, page 2-212

Initiating Billing

If a Work Order is at a Complete - No Charges or Closed status, you can select it for billing.

To bill by requirements:

1. Navigate to the Find Work Orders window.

Find Work Orders

The screenshot shows the 'Find Work Orders (EM1)' window. It has a title bar with standard window controls. The main area is divided into several sections:

- Search Criteria:** Fields for Work Order (57673), Maintained Item (Fork Lifts), Maintained Unit (Fork Lift Daily Maintenance), Asset Activity (Fork Lift Daily Maintenance), Start Date, Completion Date, Owning Department, Project, and Task.
- Work Request:** A text field.
- Status:** A section with checkboxes for 'Completed No Charge' (checked), 'Closed' (checked), and 'Previously Billed' (unchecked).
- Reference Invoice:** A text field.
- Internal Customer:** A checkbox (unchecked).
- Customer:** A text field.
- Buttons:** 'Clear' and 'Find' buttons.

Below the search criteria is a table titled 'Work Orders' with the following columns: Work Order, Maintained Item, Maintained Unit, Asset Activity, Status, Project, and Task. The first row is highlighted with a blue selection bar.

Work Order	Maintained Item	Maintained Unit	Asset Activity	Status	Project	Task
57673	Fork Lifts	Fork Lift Daily M	Fork Lift Daily M	Complete - No		

At the bottom of the window are three buttons: 'Bill by Activity', 'Bill by Requirements', and 'View Past Details'.

2. Select the Work Order you wish to bill.
3. Choose Find.
4. Choose Bill by Requirements.

Work Order Billing

Work Order Billing (EM1) - EM181738

☐ Internal Customer

Customer: **Global Enterprises**

Bill To: **5400, Walsh Drive SAINT**
San Jose
CA 95106
US

Billing Basis: **Price List**
Price List: **Corporate** USD
Cost Type:
Markup %:
Project:
Task:

Organization Currency: **USD**
Billing Currency: **USD**

Currency Conversion
Type:
Date:

Calculate Amounts

-Bill by Requirements-

Op Sequence	Item/Resource	Type	UOM	Applied Quantity	Previous Billed Quantity	-Billing Details-				
						Item	UOM	Quantity	Cost/Price	Mark %
10	Shop Rags	Material	Ea	2	0	Shop Rags	Ea	2		
10	Fork Lift Battery	Material	Ea	1	0		Ea	1		

Calculated Total: **0.00**
Billed Total: **0.00**

Cancel View Past Details Initiate Billing

5. Within the Work Order Billing window, select a Customer.
6. Select a Bill To for the current customer.
7. Select a Billing Basis. Valid values are Price List and Cost Plus.
 - If you select Cost Plus, select a Cost Type and Markup %. For example, choose a Frozen Cost Type, if you defined a frozen cost for the material and resource items. See: Setting Up Item Costs and Prices, page 2-212. The Markup % defaults with a 0% value, but you can optionally update it.
 - If you select the Price List Billing Basis, select a Price List. All billable items appear on the selected price list, if they are Customer Order enabled (See: Setting Up Item Costs and Prices, page 2-212).
8. Choose Calculate Amounts. The unit rates are calculated for each billable item. The total amount of each billable item is a function of the unit rate, and the billed quantity.
 - If you previously chose a Cost Plus Billing Basis, the unit rate is calculated from the item cost and markup.
 - If you previously chose a Price List Billing Basis, the unit rate is retrieved from the price list that is associated with the item (See: Associating Items and Activities to a Price List, page 14-4). If multiple rates exist for the item, the system defers to the Price List setup (See: Setting Up Item Costs and Prices,

page 2-212).

9. Within the Bill by Requirements region, enter the Quantity to bill, for each billable item. This quantity should be no greater than the difference between the Applied Quantity and Previous Billed Quantity.

The Applied Quantity is what the Work Order used; for material, the Applied Quantity is the material issued to the Work Order. For resources, the Applied Quantity equals the resources charged to the Work Order.

10. Optionally enter the Markup %, for each billable item.
11. To indicate the lines that you want to bill, for each billable item, you can optionally select the individual Bill check boxes. To bill all lines, select the top check box; this automatically selects all check boxes.
12. Choose Initiate Billing to execute the billing process and populate the billing information within the Accounts Receivables interface tables.
13. Choose OK on the confirmation note, indicating that billing has successfully completed.

To bill by an activity:

1. Navigate to the Find Work Orders window.

Find Work Orders

Find Work Orders (EM1)

Work Order:

Maintained Item:

Maintained Unit:

Asset Activity:

Start Date: -

Completion Date: -

Owning Department:

Project:

Task:

Work Request:

Status

☒ Completed No Charge

☒ Closed

☐ Previously Billed

Reference Invoice:

☐ Internal Customer

Customer:

Work Orders

Work Order	Maintained Item	Maintained Unit	Asset Activity	Status	Project	Task
57673	Fork Lifts	Fork Lift Daily M	Fork Lift Daily M	Complete - No		

2. Select the Work Order you wish to bill.
3. Choose Find.
4. Choose Bill by Activity.

Work Order Billing

Work Order Billing (EM1) - 57673

☐ Internal Customer

Customer: **ABC Corporation America**

Bill To: **300 ABC Parkway**
San Francisco
CA 94111
US

Billing Basis: **Price List**
Price List: **EAM M1 Maintenanc**
Cost Type: **USD**
Markup %:
Project:
Task:

Organization Currency: **USD**
Billing Currency: **USD**

Currency Conversion
Type:
Date:

Calculate Amounts

Bill by Activity

Asset Activity: **Fork Lift Daily Maintenance** | **All Fork Lift Daily Maintenance**

Activity Type:
Activity Source:
Activity Cause:

Billing Details
Activity: **Fork Lift Daily Maintenance**
UOM: **Ea**
Quantity: **1**

Calculated Amount:
Billed Amount:

Cancel **View Past Details** **Initiate Billing**

5. Within the Work Order Billing window, select a Customer.
6. Select a Bill To for the current customer.
7. Select a Billing Basis. Valid values are Price List and Cost Plus.
 - If you select Cost Plus, select a Cost Type and Markup %. For example, choose a Frozen Cost Type, if you defined a frozen cost for the material and resource items. See: Setting Up Item Costs and Prices, page 2-212. The Markup % defaults with a 0% value, but you can optionally update it.
 - If you select the Price List Billing Basis, select a Price List. All billable items appear on the selected price list, if they are Customer Order enabled (See: Setting Up Item Costs and Prices, page 2-212).
8. Choose Calculate Amounts. The unit rates are calculated for each billable item. The total amount of each billable item is a function of the unit rate and the billed quantity.

Work Order Billing

Work Order Billing (EM1) - 57673

☐ Internal Customer

Customer: **ABC Corporation America**

Bill To: **300 ABC Parkway**
San Francisco
CA 94111
US

Billing Basis: **Price List**

Price List: **EAM M1 Maintenance**

Cost Type: **USD**

Markup %: **USD**

Project: **USD**

Task: **USD**

Organization Currency: **USD**

Billing Currency: **USD**

Currency Conversion

Type: **USD**

Date: **USD**

Calculate Amounts

Bill by Activity

Asset Activity: **Fork Lift Daily Maintenance** **All Fork Lift Daily Maintenance**

Activity Type: **USD**

Activity Source: **USD**

Activity Cause: **USD**

Billing Details

Activity: **Fork Lift Daily Maintenance**

UOM: **Ea**

Quantity: **1**

Calculated Amount: **37.50**

Billed Amount: **37.50**

Cancel **View Past Details** **Initiate Billing**

9. Choose Initiate Billing.

Billing Initiated

Work Order Billing (EM1) - 57673

☐ Internal Customer

Customer: **ABC Corporation America**

Bill To: **300 ABC Parkway**
San Francisco
CA 94111
US

Billing Basis: **Price List**
Price List: **EAM M1 Maintenance**
Cost Type: **USD**
Markup %:
Project:
Task:

Organization Currency: **USD**
Billing Currency: **USD**

Currency Conversion
Type:
Date:

Calculate Amounts

Bill by Activity

Asset Activity: **Fork Lift Daily Maintenance**

Activity Type:
Activity Source:
Activity Cause:

OK
This billing transaction was successfully completed.

Quantity: **1**

Calculated Amount: **37.50**
Billed Amount: **37.50**

Cancel **View Past Details** **Initiate Billing**

10. Choose OK.

11. Optionally choose View Past Details to view what was billed.

Past Invoice Details

Past Invoice Details (EM1) - 57673

Reference Invoice Number	Reference Line Number	Invoice Number	Invoice Line Number	Invoice Date	Customer
61	1				ABC Corporation A

Close

If you billed by Activity, one line appears. If you billed by requirements, multiple lines may appear.

12. Choose Close to return to the Find Work Orders window.

Creating an Invoice

After billing is initiated, you can create invoices. First, a source is defined in Oracle Receivables to identify where your invoicing activity originates. The batch source also controls invoice defaults and invoice numbering. Next, ensure that a Work Order Billing flexfield code exist. Finally, you can run the AutoInvoice concurrent process to create invoices. You can set this program to automatically run, or execute it from the menu.

To ensure a batch source exists:

1. Navigate to the Transaction Sources window.

Transaction Sources

Transaction Sources (Order Management Super User, Vision Operations (USA))

Operating Unit: **Vision University**

Name: **Work Order Billing** Type: **Imported**

Batch Source | AutoInvoice ... | Customer Inf... | Accounting I... | Other Inform... | Sales Credit ...

Description: **Work Order billing Batch Source**

☒ Active Effective Dates: **23-APR-2004** -

☐ Automatic Batch Numbering Last Number:

☒ Automatic Transaction Numbering Last Number: **1**

☐ Copy Document Number to Transaction Number

Reference Field Default Value: **interface_header_attribute1**

Standard Transaction Type:

Credit Memo Batch Source: []

2. Query on Work Order Billing in the Name field, to ensure that it exists. If it does not exist, perform the following steps:

1. Enter Work Order Billing in the Name field.

2. Select Imported from the Type list of values.

Because this is an Imported transaction batch source, the system automatically numbers the batch with the batch source name - request ID.

3. Enter a Description.

4. Enter the range of Effective Dates.

The start date defaults as the current date, but you can change it. If you do not enter an end date, this transaction batch source is active indefinitely.

5. To automatically number new transactions created using this source, check the Automatic Transaction Numbering check box and enter a Last Number.

You can use automatic transaction numbering with both Imported and Manual sources.

6. Optionally, to assign the same number to both the document and transaction, for transactions assigned to this source, check the Copy Document Number to Transaction Number check box.

7. Save your work.

For information on all remaining fields, See: Transaction Batch Sources, *Oracle Receivables User's Guide*.

To ensure a Work Order Billing flexfield code exists:

1. Navigate to the Descriptive Flexfield Segments window.

Descriptive Flexfield Segments

Application: **Oracle Receivables** Title: **Line Transaction Flexfield**

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

Context Field

Prompt: **Context Value** ☐ Required

Value Set: ☒ Displayed

Default Value:

Reference Field:

Context Field Values

Code	Name	Description	Enabled
PROJECTS INVOICES-600	PROJECTS INVOICES-600	Project Mfg Accounting Invoices	<input checked="" type="checkbox"/>
Property-Projects	Property-Projects	Property Manager - Projects	<input checked="" type="checkbox"/>
SERVICE	SERVICE	Service Credit Memos	<input checked="" type="checkbox"/>
STP NETTING	STP NETTING	STP NETTING	<input checked="" type="checkbox"/>
VISION BUILD	VISION BUILD	Vision Build	<input checked="" type="checkbox"/>
Work Order Billing	Work Order Billing	Work Order Invoices	<input checked="" type="checkbox"/>

Compile **Segments**

2. Query on the Line Transaction Flexfield within the Oracle Receivables Application. If Work Order Billing does not exist as a Code within the Context Field Values region, perform the following steps:
 1. Enter Work Order Billing in the Code field.
 2. Enter Work Order Invoices in the Description field.
 3. Select the Enabled check box.
 4. Choose Segments.
 5. Ensure that, at least, the following segments are defined: Work Order, Work Order Id, Invoice Number, and Line Number.
 6. Save your work.

To create invoices:

1. Navigate to the Run AutoInvoice window.
2. Select AutoInvoice Master Program, from the Name list of values.

Parameters

Parameters

Number of Instances: 1

Invoice Source: Work Order Billing

Default Date: 17-FEB-2003

Transaction Type:

(Low) Bill To Customer Number:

(High) Bill To Customer Number:

(Low) Bill To Customer Name: ABC Corporation Americas

(High) Bill To Customer Name: ABC Corporation Americas

(Low) GL Date:

(High) GL Date:

(Low) Ship Date:

(High) Ship Date:

(Low) Transaction Number:

(High) Transaction Number:

(Low) Sales Order Number:

(High) Sales Order Number:

(Low) Invoice Date:

OK Cancel Clear Help

3. Enter the Number of Instances. An instance refers to how AutoInvoice groups and processes your transactions.

Submitting a greater number of instances enables you to import transactions into Receivables faster. You can submit a maximum of 15 instances.

Tip: Enter a number of instances based on how many CPUs are available. Use the following formula to determine the number of instances to enter:

$$(\text{Number of Available CPUs}) - 1 = \text{Number of Instances}$$

For example, if you have five CPUs, submit four instances of the AutoInvoice Master program.

4. Select the Work Order Billing Invoice Source.
5. Enter a Default Date.

The Default Date must be in an open or future period. Depending on how you defined your transaction batch source, AutoInvoice uses the Default Date if the GL date is not provided or if the date provided is in a closed period. See: *Determining Dates, Oracle Receivables User's Guide*.

6. Click the **OK** button.
7. Choose Submit.

Related Topics

Transaction Batch Sources, *Oracle Receivables User's Guide*

Running AutoInvoice, *Oracle Receivables User's Guide*

Oracle Service Integration

This chapter covers the following topics:

- Introduction
- Oracle Service Integration Overview
- Creating Service Requests
- Service Requests and eAM Work Orders

Introduction

If you have Oracle Service installed, you can use Service Requests to report and request maintenance service. This chapter contains the following topics:

- Oracle Service Integration Overview, page 15-1
- Service Request Statuses, page 15-1
- Creating Service Requests, page 15-2
- Service Requests and eAM Work Orders, page 15-4

Oracle Service Integration Overview

Service Request functionality provides organizations that utilize call centers the tools necessary to capture and track maintenance Service Requests. You can create Service and Work Requests on both eAM capital assets and rebuildable inventory and both request types can simultaneously exist within one eAM organization.

Service Requests for eAM maintenance are classified as type Asset Maintenance and Service Requests that are created as an Asset Maintenance type are directed to, and viewable within eAM. You can view a maintenance Service Request's work in progress and associated eAM Work Orders' pertinent information within Oracle Service; use the Work Order tab within the Service Requests window. You can optionally customize a

workflow to send Service Request notifications, such as sending a notification to a maintenance planner that a Service Request was created for an asset.

An eAM work page enables easy review of all eAM maintenance Service and Work Requests. You can create maintenance Work Orders from the Service and/or Work Requests, or associate the requests to existing Work Orders.

The following topics are pertinent to the Oracle Service integration:

- Service Integration Setup, page 2-202
- Service Request Statuses, page 15-1
- Creating Service Requests, page 15-2
- Service Requests and eAM Work Orders, page 15-4

Service Request Statuses

You can assign Work Orders to Service Requests with any status, except Final. Enterprise Asset Management does not change a Service Request status, when assigning Work Orders to it.

Creating Service Requests

Call center operators can create a Service Request within the Service Request window. Call center operators can also view the details of associated maintenance Work Orders, within the Work Orders tab. They can relay this information to the customer, as needed.

To create a service request:

1. Navigate to the Service Request window.
2. From the Folder menu, select Open. Select the Folder that displays Enterprise Asset Management (eAM)-specific fields. See: Enabling eAM Specific Fields, page 2-205.

Service Request

Service Request - Pacific Time

Log and Notes Dashboard(P)

Contact Type: Customer Customer Type: Organization Operating Unit: Vision Operations

Name: Vision Operations Number: 50407 Category: Item: Desc: Revision: Instance: Serial: Group: Owner:

First: Last: Email: Relationship: Phone: Phone Type:

Reported: 25-JAN-2012 09:13 Type: Customer Call Status: Open Severity: Low

Subject Workbench Contacts / Addresses Tasks Interactions Related Objects Service History Charges Work Orders

Problem Summary: There is a problem with the monitor. Problem Code: Urgency: Respond - 24 Error Code: Resolution Summary: Resolution Code: Respond By: 28-JAN-2012 09:13 On: Resolve By: 11-FEB-2012 05:13 On:

Solutions Outcome Title Type Number Visibility

Search Knowledge Unlink Solution Refresh

Notes View By: From: 29-JUL-2011 00:00 To: 25-JAN-2012 23:59 Print Friendly Refresh

Type: Description: Visibility:

New Note Details Log and Notes

3. Select a Contact Type. Values are Customer and Employee.
4. Select a Customer Type.
5. Select an eAM enabled Inventory Organization. See: Enabling Organizations for Enterprise Asset Management, page 2-7.
6. Select a maintenance request Type. See: Creating Maintenance Service Request Types, page 2-203.
7. Select an Open Status. See: Service Request Statuses, page 15-1.
8. Select the request Severity.
9. Within the Workbench tab, enter the Problem Summary.
10. In the Notes region, optionally select a note Type.
11. Optionally enter the Description of the note type.
12. Save your work.

Related Topics

Oracle Service User's Guide

Service Requests and eAM Work Orders

Using the Maintenance Super User responsibility, you can create Work Orders from Service Requests, or associate a Service Request with an existing Work Order. Because more than one Work Order might be needed to complete a Service Request issue, a Service Request can associate with multiple Work Orders. Because Service and/or Work Requests can be used to report the same maintenance problem, Service and Work requests can associate with the same Work Order. The Show/Hide functionality enables you to display details of a Service Request.

To create a work order from a service request:

1. Navigate to the Work Orders tab.
2. Select the Requests sub-tab.
3. Populate at least one of the following fields:
 1. Optionally, if you know the specific Service Request number to view, select a Request Number.
 2. To narrow your selection, optionally select an Asset Type. If you select Capital, Service and Work Requests that are created for Asset Numbers appear. If you select Rebuildable Inventory, Service and Work Requests that are created for Rebuildable Items appear.
 3. Optionally select an Assigned Department.
 4. Optionally select a Status.
 5. Optionally select an Asset Number to search for related Service Requests and Work Orders.
4. Choose Go.

Requests

Simple Search
 Personalize "Query Region"
 Note that the search is case insensitive

Asset Type: Capital
 Asset Group:
 Reported Date From:
 To:
 Department:
 Asset Number:
 Request Number: 29232

Go Clear

Personalize "Requests Results Table"

Details	Request Number	Description	View Assigned Work Orders	Status	Asset Group	Asset Type	Asset Number	Department	Expected Resolution Date	Create Work Order	Assign Work Order	Attachments
Show	29232	AA		Awaiting Fork Work Order Lifts	Capital	Capital	FL1020	W-Maint	21-Nov-2008 02:02:32			

Save Search

- To create a work order associated with the current Service Request, click the Create Work Order icon.

You can also view or add work request attachments. In the Attachments column, click the Add or View buttons to add an attachment, or to view a list of existing attachments currently associated with the service request.

Important: If you are creating a work order, you must first save the work order before you can add a work request attachment.

- Enter the required Work Order information (See: Routine Work Orders, page 3-3).
- Choose Apply.
- To assign an existing Work Order to the current Service Request, choose Assign Work Order.
- Query for existing Work Orders.
- Choose the Assign icon next to the Work Order(s) you wish to associate with the current Service Request.

To obtain service requests using the advanced search:

- Navigate to the Work Orders tab.
- Select the Requests sub-tab.

3. Choose Advanced Search.
4. Populate at least one of the following fields:
 1. To narrow your selection, optionally select an Asset Type. If you select Capital, Service and Work Requests that are created for Asset Numbers appear. If you select Rebuildable Inventory, Service Requests that are created for Rebuildable Items appear.
 2. Optionally select an Asset Group. An Asset Group is a grouping of similar Asset Numbers. See: Defining Asset Groups, page 2-58.
 3. Optionally select an Asset Number to search for related Service Requests and Work Orders.
 4. Optionally select an Asset Category. This is the Class and Subclass code, such as CRANE.OVERHEAD or BUILDING.FLOOR. See: Setting Up Category Codes, page 2-55.
 5. Optionally select an Add Another value.
 - Optionally select Area. This is a user-defined listing of logical areas of work. Areas are where the assets reside. For example, North Plant, East Wing, or Area 1. See: Setting Up Areas, page 2-16.
 - Optionally Assigned Department to view all Service Requests associated with a specific department.
 - Optionally if you know the specific Service Request number to view, select Request Number.
 - Optionally select Request By Date.
 - Optionally select a Status.
 - Optionally select a Priority. See: Work Order and Work Request Priority Codes, page 2-50.
 - Optionally select Request Type. Request Types describe and categorize Service Requests. For example, Manual, System, Routine, Capital, and Furniture. Service Request Types are user-defined (See: Work Request Types, page 2-49).
 - Optionally select Work Order to display all Service Requests associated with that Work Order. An unlimited number of Service Requests can associate with a Work Order.

- Optionally select Creation Date to view Service Requests created on a specific date.
- Optionally select Created By to view Service Requests created by a specific user.
- Optionally select Requested For to view Service Requests requested for a specific user.
- Optionally select *Include children from hierarchy*. If Asset Number is populated and Yes is selected, then Service Requests for the Asset Number and all of its children appear. If Asset Number is not populated and Yes is selected, all Service Requests in the system appear. If Asset Number is not populated, Yes is selected, and additional criteria are entered, this additional criteria is ignored; all Service Requests in the system appear.

5. Choose Go.

Secure Enterprise Search for Asset Lifecycle Management

This chapter covers the following topics:

- Supporting Secure Enterprise Search for Asset Lifecycle Management

Supporting Secure Enterprise Search for Asset Lifecycle Management

Oracle E-Business Suite Secure Enterprise Search provides a centralized search capability, enabling you to search text on applications content without compromising the security and context sensitive information. To enable SES search for Assets, the global grants have been modified to Role Based Grants. A new role, EAM SES Asset Search Role, has been created and has to be assigned to each user who explicitly wants to perform the Asset Search using SES.

Through a secure text search, you get the immediate search results with accuracy, easily refine the search by narrowing down the results or tracing back to original results in an efficient way.

Before you can search on applications content, searchable objects must be set up first, constructed with secure context, and indexed into a full text search engine by SES in order to be ready for query. To accomplish this goal, Oracle E-Business Suite Secure Enterprise Search uses a flexible mechanism to help analyze these searchable objects, group related objects into categories, and build security rules around them for easier, secure search and fast result display.

Searchable objects are business objects that are made available for text search. For example, a purchase order is a searchable object that can be defined as a set of searchable properties or business attributes along with its relationship to other searchable objects. This abstraction allows searchable objects to be bound to different context at runtime and grouped into searchable categories.

Refer to the *Oracle Applications User's Guide* and *Oracle Applications System Administrator's Guide - Maintenance* for more details on how to build the searchable objects database.

Refer to Chapter 5 Administering Oracle E-Business Suite Secure Enterprise Search of *Oracle Applications System Administrator's Guide - Maintenance* for details on the setups and how to administer Secure Enterprise Search.

At design time, application developers create view objects first and then update them by adding searchable attributes which enable them become searchable objects or metadata.

At crawl time, the SES search engine starts a crawling job for a specific business object type. Based on an object type, searchable business objects or attributes get retrieved, indexed, and stored in the SES index store.

At query time, when a search is performed through the centralized user interface, it is searched against a pre-indexed store that contains numerous objects or metadata that has been preprocessed with indexes at crawl time. The search engine queries the results enforced by security rules and constructs the hits returning as search results.

To enable and support EBS Applications-based Secure Enterprise Search (SES) for Asset Lifecycle Management, the following new profiles were added by Applications and are supported for ALM as well:

- SES Search Enabled
- SES URL
- SES Username
- SES Password
- SES MLS Supported

Refer to the Oracle Applications User's Guide and Oracle Applications System Administrator's Guide – Maintenance for more details on Using Oracle E-Business Suite Secure Enterprise Search feature.

After the enhancement, you set the SES Search Enabled profile to Yes to use the Enterprise Search capability. The following search is supported:

- Search for Assets like a Google free text search
- Search for Assets within an organization's domain
- Navigate to asset details page
- Synchronize real time data with SES instance

Searching Assets in a Free Text Search

Previously, Enterprise Asset Management and Installed Base products supported transaction-based search. You had to know minimum values and input right value in

the fields for search. With this enhancement, you can search by entering any value from the centralized Applications Search region to obtain desired results.

The current scope in this release includes only search for assets or instances that are maintainable.

You can perform free text searches using the following set of attributes:

- Asset Number
- Asset Serial Number
- Asset Number Description
- Asset Number DFF
- Asset Group
- Asset Description
- Category
- Category Description
- Extensible Attribute values
- Owning Department
- Area
- Criticality
- Accounting class code
- Asset attachments

Searching Assets within the Organization's domain

You can search assets within an organization's domain view results. From Release 12, eAM supports organization concept. When you search assets from Applications Secure Enterprise Search (SES) region of Oracle EBS, you can see:

- Assets owned and maintained by eAM-enabled organizations to which you have access.
- Assets owned by production organization but maintained by eAM-enabled organizations to which you have access.

Navigating to the Asset Details page

After search results are displayed for Assets, you can navigate to Asset details page available in the Maintenance Super User responsibility.

Synchronizing Real Time Assets Information with SES Instance

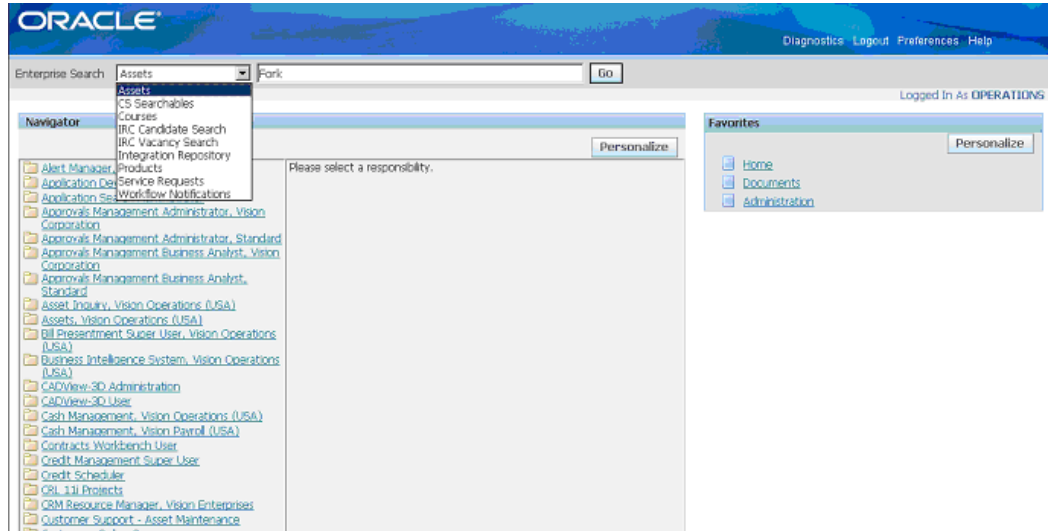
Enables initial and incremental crawl for synchronizing Asset information with Secure Enterprise Search (SES) instance.

- Initial - Crawl View Object for Assets.
- Incremental - Uses Date-based incremental crawl mechanism to synchronize real-time Asset information with the SES instance.

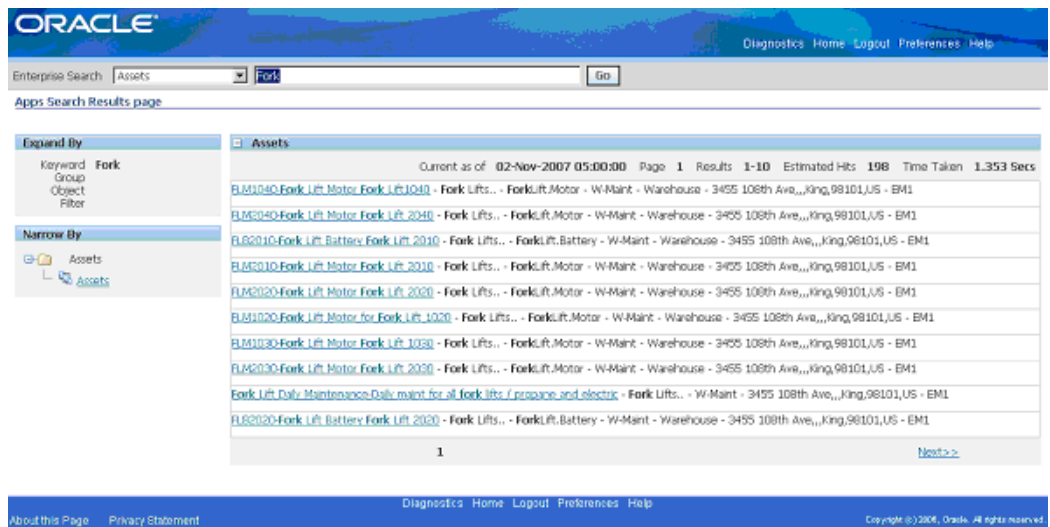
Searchable Page Regions

Based on the SES Search Enabled profile option setting, the Search Region is embedded and displayed on the Oracle Application Home Page. The Enterprise Search list of values display a list of searchable objects enabled based on the user-security context. If you have access to Maintenance Super User responsibility, then Assets searchable object is enabled. Once you select Assets and enter a value, then the system retrieves values from Assets searchable business object and displays the results along with a link to run the search on the Search Results page. If no search results are returned, then a link displays using a synonym.

The subsequent paragraph and graphic show the Central Search Region with the Assets Search Group. Select Assets Search Group and give query criteria and click go.



The application searches the SES Repository for the Assets based on the query criteria (Fork) and displays the results.



You can narrow the search by attributes of the underlying Asset Searchable Object as shown.

ORACLE®

Enterprise Search: Assets Fork Go

Apps Search Results page Result Style: Classic

Expand By

Keyword: Fork
Group: AppSearchVO
Object: Area, Location
Filter: Area, Location

Narrow By

AppSearchVO
Asset
AssetGroup
Category
Department
Area
Location
Organization

Filter Region

Area: Warehouse
Location: 3455
Search With Filter

AppSearchVO

Current as of: 02-Nov-2007 05:00:00 Page: 1 Results: 1-10 Estimated Hits: 20 Time Taken: 1.518 Secs

BLB2030-Fork Lift Battery Fork Lift 2030	- Fork Lifts.. - ForkLift.Battery - W-Maint - Warehouse - 3455 108th Ave.,King,98101,US - EM1
BLB2040-Fork Lift Battery Fork Lift 2040	- Fork Lifts.. - ForkLift.Battery - W-Maint - Warehouse - 3455 108th Ave.,King,98101,US - EM1
BLM1020-Fork Lift Motor for Fork Lift 1020	- Fork Lifts.. - ForkLift.Motor - W-Maint - Warehouse - 3455 108th Ave.,King,98101,US - EM1
BLB2010-Fork Lift Battery Fork Lift 2010	- Fork Lifts.. - ForkLift.Battery - W-Maint - Warehouse - 3455 108th Ave.,King,98101,US - EM1
BLM1030-Fork Lift Motor Fork Lift 1030	- Fork Lifts.. - ForkLift.Motor - W-Maint - Warehouse - 3455 108th Ave.,King,98101,US - EM1
BLM1040-Fork Lift Motor Fork Lift 1040	- Fork Lifts.. - ForkLift.Motor - W-Maint - Warehouse - 3455 108th Ave.,King,98101,US - EM1
BLM2010-Fork Lift Motor Fork Lift 2010	- Fork Lifts.. - ForkLift.Motor - W-Maint - Warehouse - 3455 108th Ave.,King,98101,US - EM1
BLM2020-Fork Lift Motor Fork Lift 2020	- Fork Lifts.. - ForkLift.Motor - W-Maint - Warehouse - 3455 108th Ave.,King,98101,US - EM1
BLB2020-Fork Lift Battery Fork Lift 2020	- Fork Lifts.. - ForkLift.Battery - W-Maint - Warehouse - 3455 108th Ave.,King,98101,US - EM1
BLM2030-Fork Lift Motor Fork Lift 2030	- Fork Lifts.. - ForkLift.Motor - W-Maint - Warehouse - 3455 108th Ave.,King,98101,US - EM1

1 Next >>

Query Results style can be changed to Classic as shown in the above graphic or as shown in the following graphic:

ORACLE®

Enterprise Search: Assets Fork Go

Apps Search Results page Result Style: Tabular

Expand By

Keyword: Fork
Group: AppSearchVO
Object: Area, Location
Filter: Area, Location

Narrow By

AppSearchVO
Asset
AssetGroup
Category
Department
Area
Location
Organization

Filter Region

Area: Warehouse
Location: 3455
Search With Filter

AppSearchVO

Current as of: 02-Nov-2007 05:00:00 Page: 1 Results: 1-10 Estimated Hits: 20 Time Taken: 1.518 Secs

Asset	AssetGroup	Category	Department	Area	Location	Organization
BLB2030-Fork Lift Battery Fork Lift 2030	Fork Lifts..	ForkLift.Battery	W-Maint	Warehouse	3455 108th Ave.,King,98101,US	EM1
BLB2040-Fork Lift Battery Fork Lift 2040	Fork Lifts..	ForkLift.Battery	W-Maint	Warehouse	3455 108th Ave.,King,98101,US	EM1
BLM1020-Fork Lift Motor for Fork Lift 1020	Fork Lifts..	ForkLift.Motor	W-Maint	Warehouse	3455 108th Ave.,King,98101,US	EM1
BLB2010-Fork Lift Battery Fork Lift 2010	Fork Lifts..	ForkLift.Battery	W-Maint	Warehouse	3455 108th Ave.,King,98101,US	EM1
BLM1030-Fork Lift Motor Fork Lift 1030	Fork Lifts..	ForkLift.Motor	W-Maint	Warehouse	3455 108th Ave.,King,98101,US	EM1
BLM1040-Fork Lift Motor Fork Lift 1040	Fork Lifts..	ForkLift.Motor	W-Maint	Warehouse	3455 108th Ave.,King,98101,US	EM1
BLM2010-Fork Lift Motor Fork Lift 2010	Fork Lifts..	ForkLift.Motor	W-Maint	Warehouse	3455 108th Ave.,King,98101,US	EM1
BLM2020-Fork Lift Motor Fork Lift 2020	Fork Lifts..	ForkLift.Motor	W-Maint	Warehouse	3455 108th Ave.,King,98101,US	EM1
BLB2020-Fork Lift Battery Fork Lift 2020	Fork Lifts..	ForkLift.Battery	W-Maint	Warehouse	3455 108th Ave.,King,98101,US	EM1
BLM2030-Fork Lift Motor Fork Lift 2030	Fork Lifts..	ForkLift.Motor	W-Maint	Warehouse	3455 108th Ave.,King,98101,US	EM1

1 Next >>

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Diagnostics Home Logout Preferences Help

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From the Results region, navigate to the Asset Details Page.

ORACLE Asset Lifecycle Management [Diagnostics](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

Enterprise Search:

[App Search Results page](#)

Expand By

Keyword: Fork

Group: Fork

Object: Fork

Filter: Fork

Narrow By

Assets

Assets

Assets

Current as of: 02-Nov-2007 05:00:00 Page 1 Results 1-10 Estimated Hits 198 Time Taken 1.331 Secs

[RLM1040Fork Lift Motor Fork Lift 1040](#) - Fork Lifts... - Fork Lift Motor - W-Maint - Warehouse - 3455 108th Ave., King, 98101, US - EMI

[RLM1040Fork L](#)

[RLM1040Fork L](#)

[RLM1040Fork L](#)

[RLM1040Fork L](#)

[RLM1040Fork L](#)

[RLM1040Fork L](#)

[RLM1040Fork L](#)

[Fork Lift 1040 M](#)

[RLM1040Fork L](#)

Asset Details: RLM1040 - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address: http://ip63009t.us.oracle.com:9041/OLM_HTM/OLM.jsp?%0AFunc=EAM_ASSET_DETAIL;StadID=adCrumb=Viteand Go Links

Google C+ Go + Bookmarks Popups okay Check 39 Settings

ORACLE Asset Lifecycle Management [Diagnostics](#) [Home](#) [Logout](#) [Preferences](#)

Current Organization: EMI

Asset Details: RLM1040

View: Work Requests Go

Asset Number	RLM1040
Description	Fork Lift Motor Fork Lift 1040
Serial Number	RLM1040
Asset Group	Fork Lifts
Asset Group Description	Fork Lift Asset Group
Parent Asset Number	RL1040
Parent Asset Group	Fork Lifts
Parent Asset Location	

Asset Health

- Open Work Requests
- Open Work
- Planned Work
- Planned Work Data
- Shutdown
- Officality
- Normal
- W-Maint
- Chaining Department
- Trusted sites

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Part 4

Self-Service Work Requests User

The Self-Service Work Requests User is a person in an organization, often an employee (not involved in the maintenance department), who uses work requests to report maintenance problems. This person also uses work requests to check the statuses of problems that he/she has reported.

This part contains the following chapter:

- Chapter 17, "Self Service Work Requests", page 17-1
- Chapter 18, "Using the Self-Service Assets Tab", page 18-1

Self Service Work Requests

This chapter covers the following topics:

- Overview of Work Requests
- Work Request Statuses
- Obtaining Work Request Information
- Creating and Updating Work Requests

Overview of Work Requests

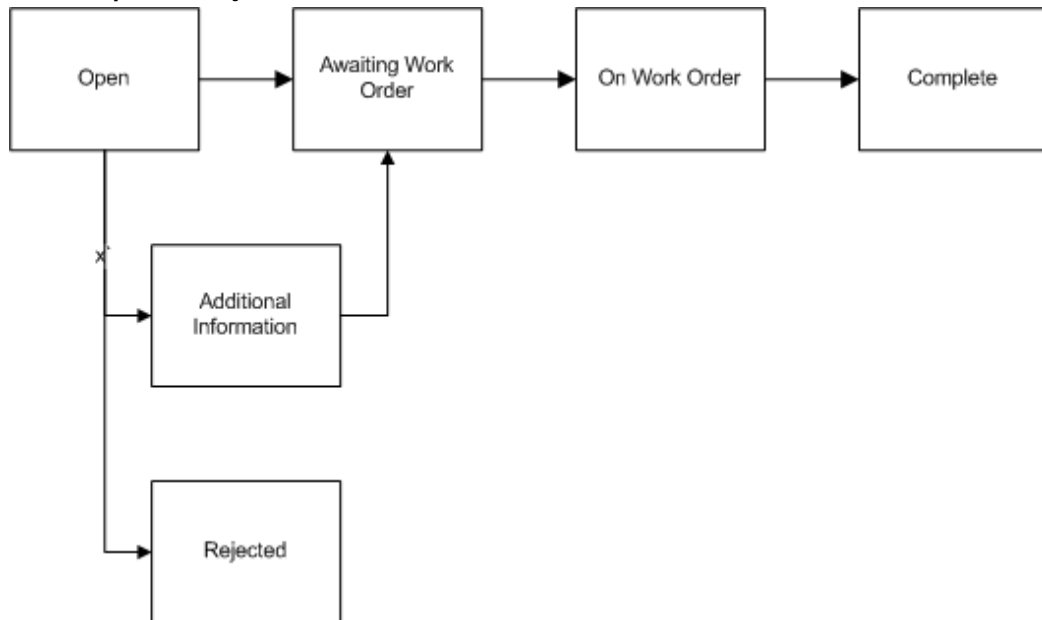
A work request serves a different function than a work order: it is a request for maintenance on an asset (Capital or Rebuildable Inventory). eAM enables operations and maintenance staff to report any problems with an asset. A supervisor can approve, request additional information, or reject a work request. A work request requires approval before it is generated into a Work Order. The Work Requests tab enables you to query existing, and create new work requests for an asset. This section's tasks include:

- Work Request Statuses, page 17-1
- Obtaining Work Request Information, page 17-3
- Creating and Updating Work Requests, page 17-6

Work Request Statuses

A work request transitions through several statuses during its lifecycle. The work request lifecycle is as follows:

Work Request Lifecycle



Open - A work request is created in an Open status.

Awaiting Work Order - The work request status changes from Open to Awaiting Work Order if the individual on the approval route has approved it. If the Auto-Approve Work Request functionality is enabled for the current organization, the status is automatically Awaiting Work Order (See: Defining eAM Parameters, page 2-11).

On Work Order - After a work request is associated with a Work Order, the status changes to On Work Order.

Rejected - The individual on the approval route rejected the work request.

Additional Information - If the work request's status is Additional Information, the originator needs to add the requested information. During the approval process, the system adds the information to the work request notes and does not transfer the work request back using Workflow.

Complete - The work request status transitions to Complete when the Work Order associated with the request is completed.

Requesting Information Through Work Request Workflow Notifications

You can request more work request information by clicking one of the following action buttons on the workflow notification received:

- **Request Information:** Click this button to obtain additional input from any specified user. The Requested Information text will appear in the notification's Action History region only, and will not update the work request log. Also, the

status of the work request is not changed during this request process.

- **Additional Information:** Click this button to alternatively request more information and to obtain additional input from the work request originator. The text entered in the notifications response comments are updated to the Work Request Log and to the notification's Comments region. Also, the status of the work request is changed to 'Additional Information' during this process.

See Defining EAM Parameters, page 2-11 for more information regarding Oracle Workflow and eAM notifications.

Obtaining Work Request Information

Query for work requests using either the personalized, simple, or advanced search modes. The personalized mode enables you to select specific fields that you like to search with. The simple search mode displays commonly used fields that are normally used for searching. The advanced search mode provides more search criteria options. From the results table, you can view, update, and create work requests.

To obtain work request information using the simple search:

1. Navigate to the Work Requests tab (Self Service Work Requests: Work Requests tab).
2. Choose Simple Search.

Work Requests

ORACLE® Asset Management

Navigator Favorites Diagnostics Home Logout Preferences Help Page Personalize

Home Assets Work Requests

All Create Work Request

Current Organization : EM1

Work Requests

Personalize Query: (WrQueryRegion)
Personalize "Simple Search"

Simple Search

Note that the search is case insensitive

Request Number

Asset Type

Assigned Department

Status

Asset Number

Go Clear

Advanced Search

Personalize "Work Request Results Table"

Create Work Request Export Work Requests

Details Number	Description	Asset Type	Asset Group	Asset Number	Status	Request By Date	Originator	Update	Attachments
No search conducted.									

Save Search

3. Populate at least one of the following fields:
 1. Optionally, if you know the specific work request number to view, select a Request Number.
 2. To limit your selection, optionally select an Asset Type. If you select Capital, work requests that are created for Asset Numbers appear. If you select Rebuildable Inventory, work requests that are created for Rebuildable Items appear.
 3. Optionally select an Assigned Department.
 4. Optionally select a Status. See: Work Request Statuses, page 17-1.
 5. Optionally select an Asset Number to search for related work requests.
4. Choose Go.

To obtain work request information using the advanced search:

1. Navigate to the Work Requests tab.
2. Choose Simple Search.
3. Choose Advanced Search to narrow your selection criteria. Populate at least one of the following fields:

1. To narrow your selection, optionally select an Asset Type. If you select Capital, work requests that are created for Asset Numbers appear. If you select Rebuildable Inventory, work requests that are created for Rebuildable Items appear.
2. Optionally select an Asset Group. An Asset Group is a grouping of similar Asset Numbers. See: Defining Asset Groups, page 2-58.
3. Optionally select an Asset Number to search for related work requests.
4. Optionally select an Asset Category. This is the Class and Subclass code, such as CRANE.OVERHEAD or BUILDING.FLOOR. See: Setting Up Category Codes, page 2-55.
5. Optionally select an Add Another value.
 - Optionally select Area. This is a user-defined listing of logical areas of work. Areas are where the assets reside. For example, North Plant, East Wing, or Area 1. See: Setting Up Areas, page 2-16.
 - Optionally select an Assigned Department to view all work requests associated with a specific department. See: Defining Departments and Resources, page 2-17.
 - Optionally, if you know the specific work request number to view, select Request Number.
 - Optionally select Request By Date.
 - Optionally select a Status. See: Work Request Statuses, page 17-1.
 - Optionally select a Priority. See: Work Order and Work Request Priority Codes, page 2-50.
 - Optionally select Request Type. Request Types describe and categorize work requests. For example, Manual, System, Routine, Capital, and Furniture. Work Request Types are user-defined (See: Work Request Types, page 2-49).
 - Optionally select Work Order to display all work requests associated with that Work Order. An unlimited number of work requests can associate with a Work Order.
 - Optionally select Creation Date to view work requests created on a specific date.
 - Optionally select Created By to view work requests created by a specific

user.

- Optionally select Requested For to view work requests requested for a specific user.
- Optionally select *Include children from hierarchy*. If there are populated search criteria, they are applied (or effective) on the results of all the current Asset Number's work requests and its children. If Asset Number is not populated and Yes is selected, the *Include children from hierarchy* check box setting is neglected and other search criteria are considered.

4. Choose Go.

Creating and Updating Work Requests

You can create a work request within the simple or advanced search pages.

To create a work request:

1. Navigate to the Work Requests tab.
2. Select the Create Work Request Sub-tab.
3. If it is indicated as a required field, select an Asset Number; otherwise, optionally select an asset number.

This determination is based on a setting in the eAM parameters. See: Defining eAM Parameters, page 2-11 and Defining Asset Numbers, page 2-74.

4. Select a Priority. See: Work Order and Work Request Priority Codes, page 2-50.
5. Select a Requested By Date.

The default value is the system date plus one day.

6. Select an Assigned Department.
See: Defining Departments and Resources, page 2-17.

7. Optionally select a work request type.
See: Work Request Types, page 2-49.

8. Optionally select a Requested For value.

9. Enter an Additional Description for the work request.

You can enter a maximum of 240 characters in this field.

10. Save your work.

You must first save the work request before you can add attachments in the Request Attachment region.

11. Optionally enter your phone number.
12. Optionally select a Contact Preference; values are E-mail or Phone Number.
13. Optionally enter your e-mail address.
14. Optionally select a Context Value.
15. Click the **Apply** button.
16. Click the **OK** button.
17. Save your work.

The status of the work request changes to Awaiting Work Order if the individual on the approval route has approved it. If the Auto-Approve Work Request functionality is enabled for the current organization, the status is automatically Awaiting Work Order.

Adding Attachments to Work Requests:

You can add attachments such as breakdown photos, work instructions, and so on when you create work requests.

Important: You must first save the work request before you can add attachments.

In addition, you can add attachments when you update a work request.

To add attachments when you create work requests:

1. After you have saved the work request, click the Return to Work Requests link.
2. Click or hover over the **Add** button in the Request Attachments region of the work request.

If you want to view the attachments, hover or click the View button.

The Add Attachment page appears.

You can attach file, URL, and text attachments.

The screenshot shows a dialog box titled "Add Attachment". It contains a "Text" dropdown menu. Below this, there are three fields: "Title" (with a dropdown showing "File", "Url", and "Text"), "Category" (with a dropdown showing "Attachments"), and a large "Text" area. At the bottom of the dialog are three buttons: "Save", "Add Another", and "Cancel".

3. In the Add drop-down list, select one of these values:
 - Desktop File/Text/URL
 - From Document Catalog
4. Enter a title for the attachment.
5. Enter a description of the attachment.
6. Select a category.

You can add attachments with a type of Miscellaneous or Work Request Attachments.
7. In the Define Attachment group box, select the Type of attachment that you want to add.
 - If you are adding a File, browse to select the file.
 - If you are adding a URL, type in the URL address.
 - If you are adding plain Text, type the text in the field.
8. When you are finished, select one of these buttons:
 - Cancel - if you do not want to add the attachment to the work request.
 - Add Another - this action saves the current attachment to the work request and enables you to add another attachment.

- **Apply** - this action adds the attachment to the work request.
You will receive a confirmation that the attachments have been added successfully.

To update a work request:

1. Navigate to the Work Requests tab.
2. Populate at least one of the following fields:
 1. *Request Number*
 2. *Asset Type*: If you select Capital, work requests that are created for asset numbers appear. If you select Rebuildable Inventory, work requests that are created for rebuildable items appear.
 3. *Assigned Department*
 4. *Status*: See: Work Request Statuses, page 17-1.
 5. *Asset Number*: Select in order search for related work requests and work orders.
3. Click the **Go** button.
4. Click the Update icon next to the work request you want to update.
5. Optionally add an Additional Description.
You can enter a maximum of 240 characters in this field.
6. Optionally add an attachment to the work request by clicking the **Add** button in the Request Attachments region.

If there are existing attachments associated with the work request, the Attachments icon appears. Click the Attachments icon to view the list of existing work request attachments.

See "To add attachments when you create work requests."
7. Optionally update the values in the Creation Information region.
8. Click the **Apply** button.
9. Click the **OK** button.

To view a list of work request attachments:

1. Navigate to the Work Requests tab.

2. Enter the search criteria for your work request to view the list of attachments.
3. Click the **Go** button.
4. Click the View icon in the Attachments column for the work request.
The Attachments page appears and displays the list of all attachments for the work request.
5. Optionally click the Add Attachment button to add more attachments.
6. If the View link is enabled, you can click this link to view the list of existing attachments associated with the work request.
7. Click the attachment link to view the attachment.
You can also save the attachment to a location on your computer.

To delete a work request attachment:

1. Navigate to the Work Requests tab.
2. Enter the search criteria for your work request to view the list of attachments.
3. Click the **Go** button.
4. Click the View link in the Request Attachments group box.
The Attachments page appears and displays the list of all attachments for the work request.
5. Click the Delete icon for the attachment that you want to delete from the work request.
6. Click Yes if you want to delete the attachment.

Using the Self-Service Assets Tab

This chapter covers the following topics:

- Using the Assets Tab
- Searching for Assets

Using the Assets Tab

Use the Assets tab to search and view capital and rebuildable inventory assets from an asset hierarchy. You can perform the following from either tab:

- Asset simple search
- Asset advanced search
- Text Search
- Save Search
- View Work Requests
- View drop-down list actions
 - Create Work Request: Select and click Go to access the Create Work Request page.
 - Hierarchy: Select and click Go to view the asset hierarchy.
 - Create My Work Order: Select and click Go to access the Create Work Order page.

Searching for Assets

To search for assets from the Self-Service responsibility:

1. Navigate to the Self-Service Work Requests responsibility.
2. Click the Work Requests link, and the Home page appears.
3. Click the Assets tab, and the Asset Numbers page appears.
4. Enter an asset number, or perform an Advanced Search.
5. Click the Go button.

ORACLE® Asset Management

Home Assets Work Requests

Capital Rebuildable Inventory

Maintenance Organization EM1

Asset Numbers

Text Search Save Search

Personalize Query: (FamAssetQueryRegion)
Personalize "Simple Search"

Simple Search

Note that the search is case insensitive

Asset Number FL1010

Category

Asset Route No

Go Clear

Advanced Search

Personalize Table Layout: (FamResultsNr)
Personalize Table Layout: (ResultsTableLayout2)
Personalize "Asset Number Search Results Table"

Select Asset Number: View Work Requests View Create Work Request Go Export

Select	Asset Number	Description	Asset Group	Category	Area	Owning Department	Criticality	Check In Out
<input checked="" type="radio"/>	FL1010	Fork Lift 1010	Fork Lifts	ForkLift.Electric	Warehouse	W-Maint	High	

6. Select the specific asset number row, and click the **View Work Requests** button to view associated work requests.
7. Select the specific asset row, and click a value from the View drop-down actions list:
 - Create Work Request: Select and click Go to access the Create Work Request page.
 - Hierarchy: Select and click Go to access the asset Hierarchy page to view the asset hierarchy details.
 - Create My Work Order: Select and click Go to access the Create Work Order page.

8. Select the specific asset row, and click the **Export** button to export the asset details and save as a .csv file.
9. You can also perform a Check In or Check Out for an asset.

Part 5

Maintenance User

The Maintenance User is a maintenance person who is generally responsible for completing tasks that are assigned on a Work Order. This person reports maintenance problems using Work Requests, troubleshoots on jobs, and works on a team with other maintenance workers.

This part contains the following chapters:

- Chapter 19, "Maintenance User Workbench", page 19-1
- Chapter 20, Wireless Maintenance User Workbench, page 20-1

Maintenance User Workbench

This chapter covers the following topics:

- Overview of the Maintenance User Workbench
- Viewing and Managing Your Work

Overview of the Maintenance User Workbench

You can quickly access your daily work information. After selecting Maintenance User Workbench, you are automatically logged into your own personalized user interface.

You can quickly access your daily work information, such as Work Orders and execution processes. After selecting the Maintenance User Workbench role, you are automatically logged into your own personalized user interface. The Maintenance User Workbench provides the information needed for you to evaluate the list of work that you need to complete, and to determine how to organize your workday.

A Key Performance Indicator dashboard displays a summary of your work today, overdue work, and open work. You can view your Open, Past Due, and/or yesterday's work, as well as your Work Orders lined up for tomorrow. You can also view all of your department's and/or Resource's unassigned Work Orders. You can view attachments, Work Order details, asset details, material requirements, and other employees assigned to your Operations. You can enter quality results, meter readings, complete Operations, Work Orders, charge resources, handover work, add notes, and assign yourself to Work Orders that are not yet assigned to an employee.

This section's tasks include:

- Viewing and Managing your Work, page 19-1

Viewing and Managing Your Work

You can view your current workload, including all operations and work orders that you are assigned to. You can view your Open, Past Due, and-or yesterday's work, as well as

your work orders lined up for tomorrow. You can also view all of your department's and-or resource's unassigned work orders. You can view attachments, work order details, asset details, material requirements, and other employees assigned to your operations. You can enter quality results, meter readings, complete operations, work orders, charge resources, add notes, and assign yourself to work orders that are not yet assigned to an employee.

To view your work:

1. Navigate to the My Work Queue page (Maintenance User Workbench).

My Work Queue

2. Select an Organization.
3. Choose Go.
4. Optionally select a View value.
 - *Open Work*: View all open work orders that are assigned to you.
 - *Overdue Work*: View all work orders that are overdue, based on their scheduling rules.
 - *My Department's Work*: View all work orders that are assigned to your department.
 - *Today's Work*: View all work orders that are assigned to you for today.
 - *Tomorrow's Work*: View all work orders that are assigned to you for tomorrow.
 - *Yesterday's Work*: View all work orders that were assigned to you yesterday.
 - *Work Pending Completion*: View all work orders that you have worked on and that are pending completion.

5. Choose Go.

All work orders appear, according to what is populated in the View field.

6. The Key Indicators region displays current workload personal performance indicators, such as Today's Work, Overdue Work, and Open Work.

Optionally, select a link to display the respective work orders.

7. The Shortcuts region enables you to quickly create a Work Request and/or work order.

Optionally, select Create Work Request or Create Work Order, respectively. See: eAM Work Orders, page 21-36 and Creating and Updating Work Requests, page 17-6.

8. In the My Work Queue region, you can optionally select show or hide work order details, by selecting Show or Hide, respectively.

You can view a summary of operation details, including material requirements and material request statuses.

Work Details

Oracle Asset Management

Home | Diagnostics | Home | Logout | Preferences

My Work Queue | Organization: EM4 | Go | Logged In As: Smith, Mr. Jones

Date and Time: 23-OCT-2006 15:47:16 | Export | Printable Page

View: Open Work | Go

Create Work Order | Create Work Request

Details	Work Order	Op	Description	Start Date	Due Date	Priority	Asset Number	Op Attachments	Charge Time	Complete Operation
Hide	AV-WO-DUT-191703-emp1evlsch	10		02-Jun-2006 07:00:00	02-Jun-2006 12:00:00		av-an-dut2-1			

Work Details

Asset Group: av-ag-dut2 | Asset Type: Capital
 Asset Activity: av-act-dut1 | Work Order Status: Released
 Duration(hrs): 5 | Assigned Department: Dept1
 Long Description: | Resource: Welder

Material Requirements

Material	Description	UOM	Required Qty	Open Qty
av-item1	EAM Item #1	Ea	2	2
av-item2	EAM Spare Item #2	Ea	2	2

Export | Printable Page

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9. Optionally select a work order number to view its details.

The Operations sub-tab defaults as selected.

1. This sub-tab enables you to view Operations on the current work order, and the operations' dependencies in the View Dependency region. Operations are scheduled to run in parallel, sequence, or through dependent steps.

ORACLE® Asset Management Home Logout Preferences Diagnostics

Home: Home > Organization: EM4

Work Order: AV-WO-DUT-191703-empvelschsch

Work Order	AV-WO-DUT-191703-empvelschsch	Description	WO to check data upgrade for employee instances assigned
Department	Dept2	Scheduled Start Date	02-Jun-2006 00:09:16
Asset Activity		Scheduled Completion Date	05-Jun-2006 09:00:00
Status	Released	Duration(hours)	80.846
System Status	Released	Enable Material Issue Request	No
Project		Material Shortage	No as of 03-Oct-2006 05:32:26
Task	No	Work Order Type	Maintenance
Firm	No	Activity Type	Routine
Activity Cause	Normal Wear	Activity Source	
Work Order Attachments	None		

[Show Additional Details](#)

Asset Details

Asset Number	av-an-dut2-1
Asset Group	av-ag-dut2
Area	Area1
Department	Dept2
Organization	EM4
Location	Cyber Gateway
Parent Asset	

[Operations](#) [Materials](#) [Quality Plans](#) [Requests](#) [Work Relationships](#) [Approval History](#) [Preventive Maintenance](#) [Failure Information](#)

Select Row: Previous 1-5 Next 5

[Show All Details](#) [Hide All Details](#)

Select	Details	Operation	Description	Department	Resource	Required	Assigned Employee or Units Equipment	Start Time	End Time	Duration (hours)	Attachments
<input checked="" type="radio"/>	Show	10		Dept1	Supervisor	1	1	02-Nov-2005 00:09:16	02-Nov-2005 00:09:16	0	+
<input type="radio"/>	Show	10		Dept1	Supervisor	1	1 Alexander, Donald	02-Jun-2006 07:00:00	02-Jun-2006 08:00:00	1	+
<input type="radio"/>	Show	10		Dept1	Welder	2	1	02-Nov-2005 00:09:16	02-Nov-2005 00:09:16	0	+
<input type="radio"/>	Show	10		Dept1	Welder	2	1 Hamilton, Ms. Claudia	02-Jun-2006 08:00:00	02-Jun-2006 10:00:00	2	+
<input type="radio"/>	Show	10		Dept1	Welder	2	1 Smith, Mr. Jonathan	02-Jun-2006 08:00:00	02-Jun-2006 10:00:00	2	+

[Show Dependencies](#)

- It is important in asset management to capture both estimated and actual time spent on each operation of a work order. When resources are identified on a work order, there is a time estimate of how long it takes to perform the work. In many cases, the extent of the work load is unknown until the work starts. Resource charging enables you to post actual usage time for employees, equipment, and miscellaneous materials for specific operations on a work order.

To charge resources, select an Operation and then select Charge Time from the Select Operation list of values.

- Choose Go.
- Select a Resource Sequence.
The Resource, Unit of Measure, and Quantity (reflects the number charged, normally in hours) default, based on the selected resource sequence and the resources associated with the work order. For information on Resource Sequence, Resource, and Unit of Measure, See: Defining Resource Requirements, page 3-45
- Optionally select the Work Performed Date to indicate the actual date the work was performed.
- Optionally select the Employee that performed the work.
- Optionally select the Equipment used to perform the work.

- Optionally select the Charge Department to identify which department is charged for the employee or equipment usage.

You can display the list of values if the Employee name or Equipment serial number fields are populated. The list of values displays all departments that the person or equipment is assigned to (See: Defining Department Resources, page 2-17). If you enter a Charge Department manually, the system validates that the department matches the current operation's assigned department. If it does not, you will receive an error.

- Optionally select a Reason code to indicate the reason the resource is used.
- Optionally enter a Reference.
- Click the **Apply** button to save your work and return to the Work Order page.

10. Optionally choose Check Material Shortage.

The Material Shortage field updates to display whether there is a shortage of the material (at that moment in time) that is needed to complete the work order's operations. This status helps you to determine when to start work. For example, if there is a material shortage, you typically would not start work. The process that populates this field considers both stocked and direct items. For stocked items, the Work Order Material Shortage process determines whether all of the inventoried material within the work order's associated BOM is available to transact (ATP is not considered). For direct items, the Work Order Material Shortage process determines if all of the direct items that are included within the work order's associated BOM are received into Inventory. This process is normally set to automatically execute periodically, but you can execute it from the menu at any time.

11. Optionally select the Materials sub-tab to view or add items from the associated Asset Number's items list. When you enter a work order for an Asset Number, the Asset Number's associated Activity attaches the required material (See: Setting Up Maintenance Bills of Material, page 2-101) and resources to complete its operations. The Inventory and Direct Item requirements display. You can update, add, view, and delete material requirements for a specific operation.

1. You can optionally Request New Inventory Items.

- Select an Item.
- Enter a Required Quantity.
- Select a Date Required.

The system date and time defaults.

- Optionally select a Supply type.
 - Optionally select an Auto Select Material value.
If you select Yes, Requisitions/Purchase Orders are created automatically, for the current Inventory Item, when the work order is Released.
 - Optionally enter a Description.
 - Optionally enter a Comment.
 - Select whether to include this Inventory Item in the MRP Net.
 - Choose Apply to add the Inventory Item to the operation's material requirements.
2. Optionally choose One Step Material Issue. A one-step material issue is a substitute for the Material Issue Request and Material Issue Verification activities; a separate request is not created.
- Optionally select the specific Operation to view results on existing One Step Material Issues that were issued to that operation. Operations existing within the selected work order are available.
 - Optionally select a specific Material if your query is to view existing One Step Material Issues.
 - Choose Go. All planned material appears in the Select Material(s) region. Planned material is material that exists in the work order's material requirements. See: Defining Inventory Material Requirements, page 3-36.
 - Within the Select Material(s) region, optionally select unplanned Material (material not part of the work order's material requirements) to issue to the current work order.
 - Select an Operation to issue the material. The UOM defaults to the current Material's UOM.
 - Select the Quantity of the material that you are issuing to the work order.
 - Optionally select a Subinventory to pull the material from in Inventory.
 - If you previously selected a Subinventory requiring a Locator, select a Locator.
 - If the current material is lot controlled, select a Lot.

- If the current material is serial controlled, select From and To Serial numbers.
- Optionally select a Revision.
- If the material is Rebuildable Inventory, optionally choose the Replaced Rebuild Details icon to specify the replacement Rebuildable Item information for the current Rebuildable Item. After selected, you can indicate the following within the Replaced Rebuild Details page:

Rebuild Item - defaults as the current Rebuild Item; you can update it.*Rebuild Serial Number* - optionally enter if you know what serial number is coming out (for serialized rebuilds).*Rebuild Activity* - the activity you want to associate with the created rebuild work order.*Rebuild Work Order* - the name of the work order created for the replaced Rebuildable Item. If you specify a replaced rebuildable item, a work order generates for the replaced rebuildable item because it is most likely problematic and you can have it repaired. If a serial number is provided for the replaced Rebuildable Item, it is removed from the asset's hierarchy and the configuration history updates. If nothing is specified within the Replaced Rebuild Details page, the replaced rebuild defaults as the same rebuild item that you are issuing. A work order is created for the replaced rebuild item.

- Optionally, select the Details Show/Hide toggle icon.
Optionally select a Reason for the current issue. Select the Date required for the material to the work order. Today's date and time defaults. Optionally enter a Reference.
- Select the Select check box next to the lines you are issuing to the current work order.
- Choose Issue.

3. You can optionally choose Request New Direct Items to add Direct Items to the operation's material requirements. Direct Items represent items with infrequent use or criticality; they are not included in the internal catalog as stocked items. These items are considered "one off", bought directly from a vendor for a specific work order and Operation. These items are delivered directly to the Shop Floor for maintenance work order execution. See: Defining Direct Item Material Requirements, page 3-42.

- Select a Direct Item Type.

Description Based Item: This direct item type is not stored in Oracle Inventory.*Non Stock Item*: This direct item type is stored in Oracle Inventory. Its Master Item record's Stockable check box is cleared.

- If you selected a Non Stock Item Type, select an Item. This field is disabled if a Description Based Item Type was previously selected.
 - Enter a Description, if you previously selected a Description Based Item Type.
 - Enter a UOM. If you previously selected a Non Stock Item Type, this value defaults from the Master Item.
 - Enter a Need By Date. The system date defaults.
 - Optionally enter a Purchasing Category. See: Setting Up Purchase Order Category Associations for Direct Items, page 2-185.
 - Choose Apply.
4. Optionally select the Update icon to update the current material requirement information.
 5. Optionally select the Request More icon to request more of the current material requirement to the operation.
 6. Optionally choose Delete to delete the current material requirement.
 7. To access iProcurement, choose Search Catalog.
12. Optionally select the Resources sub-tab to view or update the current work order's employee and equipment resource requirements. When you enter a work order for an Asset Number, the work order's associated Activity attaches the required material (See: Setting Up Maintenance Bills of Material, page 2-101) and resources to complete its operations.

For Employee Resources, you can optionally choose Charge Time to charge time to the current resource.

1.
 - Select a Resource Sequence. The Resource, Unit of Measure, and Quantity (reflects the number charged, normally in hours) default, based on the selected resource sequence and the resources associated with the work order. For information on Resource Sequence, Resource, and Unit of Measure, See: Defining Resource Requirements, page 3-45.
 - Select a Resource to charge.
 - Select a Unit of Measure. The value defaults as the current Resource's Unit of Measure.
 - Enter a Quantity.

- Optionally select the Work Performed Date to indicate the actual date the work was performed.
- Optionally select the Employee that performed the work.
- Optionally select the Equipment used to perform the work.
- Optionally select the Charge Department to identify which department is charged for the employee or equipment usage.

You can display the list of values if the Employee name or Equipment serial number fields are populated. The list of values displays all departments that the person or equipment is assigned to. If you enter a Charge Department manually, the system validates that the department matches the current operation's assigned department. If it does not, you will receive an error.

- Optionally select a Reason code to indicate the reason the resource is used.
 - Optionally enter a Reference.
 - Choose Apply.
2. For Employee Resources, you can optionally choose the View Assigned Employees icon to view the specific employee numbers associated with the current resource.
 3. Optionally choose the Delete icon to delete the current resource requirement.
13. Optionally choose the Quality Plans sub-tab to view the current work order and operation-quality collection plans. Collection plans appear that are associated with the current work order's Asset Number. When a collection plan is created, it is specified whether the collection plan requires completion. Triggers might have been specified to make specific assets eligible for the collection plan. See: Quality Integration Setup, page 2-158.
 1. Optionally select the Enter Quality Results icon. Required Data fields depend on the Collection Plan's collection element specifications. See: Quality Integration Setup, page 2-158.
 - Optionally choose Add to attach any necessary files, URLs, or text to the current Quality results. Each results entry can have an unlimited number of attachments. Choose Apply.
 - Choose Apply to save the results entry.
 2. Optionally select the View Quality Results icon to view or update existing

Quality results already entered. Select Return to Work Order Details.

14. Optionally select the Requests sub-tab to view any Service and/or Work Requests associated with the current work order.
15. Optionally select the Purchasing sub-tab to Direct Items or Outside Services for the current work order.
 1. Optionally select a specific Requisition Number to view its details.
 2. Optionally view a specific Line's Details. Choose OK to return to the Requisition page.
 3. Choose OK.
16. Optionally select the Work Relationships sub-tab to view the schedules and details for the work order. Work Order Relationships enable you to manage a network of related work orders, enabling you to manage complex projects, such as planned or facility shutdowns. The different relationships provide separate scheduling rules that are used to manage large projects. A Gantt chart enables you to manage work by displaying work order schedules and a summary of work order details. See: Work Order Relationships, page 3-50.
17. Optionally select the Approval History sub-tab to view the work order's approval history.

A work order might require approvals or notifications at different stages of its lifecycle. For example, organizations typically want an approval process in place before a work order is released. Workflow automates this process. You can initiate Workflow to generate notifications, approvals, transactions, and update a work order status. You can enable Workflow for Work Orders within the eAM Parameters (See: Defining eAM Parameters, page 2-11). You can set up Business Events and Event Subscriptions (or use seeded events and subscriptions) within Oracle Workflow to indicate what events trigger Workflow. Seeded events that you can enable to trigger Workflow are: Work Order creation, Work Order release approval, Work Order completion, Work Order status change, and Operation completion. See: Setting Up Oracle Workflow, *Oracle Workflow User's Guide* and Setting Up the Business Event System, *Oracle Workflow User's Guide*.
18. Optionally select the Op Attachments View icon to view the current Operation's existing attachments. This icon appears if there are existing attachments.
 1. Optionally view an attachment by selecting the File Name. If the attachment has a Text Type, the View Attachment page appears. Otherwise, the specific file type opens.
 - Optionally update an attachment by selecting the Update icon.

- After making changes, choose Apply to save them, or Cancel to return to the Attachments page.
2. Optionally delete an attachment by selecting the Delete icon.
 3. Optionally choose Add Attachments to attach any necessary files, URLs, or text to the current operation. Each operation can have an unlimited number of attachments.
 4. Choose Apply.
 5. Select Return to My Work Queue.
19. Optionally select the Op Attachments Add icon to attach any necessary files, URLs, or text to the current operation. Each operation can have an unlimited number of attachments.
 20. Optionally select the Charge Time icon to charge resource time to the current Operation. See: Transacting Resources, page 21-67.
 21. Optionally select the Complete Operation icon to complete the current Operation. See Operation Completion, page 3-57.
 1. The Actual Start Date and Time defaults; you can optionally update it.
 2. Actual Duration identifies the total elapsed time of the Work Order. It is automatically calculated as the difference between the operation's Scheduled Start and End Dates.
 3. Optionally select a Reconciliation Code to describe why you are completing this operation. For example, Operation Completed or Operation Partially Completed.
 4. Optionally select a Reconciliation Code to describe why you are completing or uncompleting this operation.
 5. Optionally enter a Reference.
 6. Optionally choose Add to attach any necessary files, URLs, or text to the current operation. Each operation can have an unlimited number of attachments.
 7. Optionally select a Context Value.
 8. Enter a segment1 flexfield value.
 9. The Quality Plans region displays collection plans that are associated with the current Work Order's Asset Number. When a collection plan is created, it is

specified whether the collection plan requires completion. Triggers might have been specified to make specific assets eligible for the collection plan. See: Quality Integration Setup, page 2-158. If results entry is required for the collection plan, you are prompted to enter Quality results upon completing the operation.

10. Optionally select the Enter Quality Results icon. Required Data fields depend on the Collection Plan's collection element specifications. See: Quality Integration Setup, page 2-158.
11. Optionally select the **Add** button to attach any necessary files, URLs, or text to the current Quality results.

Each results entry can have an unlimited number of attachments. Select the **Apply** button.
12. Select the **Apply** button to save the results entry or Cancel to return to the Complete Operation page.
13. Optionally select the View Quality Results icon to view or update existing Quality results already entered.
 - Optionally select the Update icon to update the current quality results.
14. Select the Return to Complete Operation link.
15. Select the **Apply** button to complete the operation or Cancel to return to the Work Order page.
22. If you belong to the resource department on the Work Order, you can assign the current Operation to you by selecting the Self Assign icon. This is useful if your maintenance organization schedules operations at the employee resource level and not the employee level.

Related Topics

Defining Inventory Material Requirements, page 3-36

Defining Direct Item Material Requirements, page 3-42

Wireless Maintenance User Workbench

A Maintenance User can log on to a mobile device and view all work that is assigned to him/her. You can view today's Work Orders, overdue work, and Work Orders that you are assigned to you in the future.

This chapter covers the following topics:

- Using the Wireless Maintenance User Workbench

Using the Wireless Maintenance User Workbench

A Maintenance User can log on to a mobile device and view all work that is assigned to him/her. You can view today's work orders, overdue work, and work orders that you are assigned to in the future.

To use the wireless maintenance user workbench:

1. Log on to your mobile device.



This page defaults to display your scheduled work today.

2. Optionally search for work that is specific to an asset.
 1. Optionally select a specific Asset Number from the *Search Asset* list of values.
 2. Choose Go.
3. Optionally view work assigned to you, within different views.



1. Select one of the following:
 - Today's Work - work assigned to you that is due to start today
 - Yesterday's Work - work assigned to you that is due to start yesterday
 - Tomorrow's Work - work assigned to you that is due to start tomorrow
 - Overdue Work - work assigned to you that is due in the past
 - Open Work - all work that is assigned to you
 - My Department Work - all unassigned work that is assigned to your department. From this view, you can assign work to yourself



- Work Pending Completion - work orders that have completed operations but not completed work
- Completed Work - all of your completed work

2. Choose Show.

4. You can perform actions on the displayed Work Order/Operation combinations.

1. Select a Work Order/Operation's radio button.
2. Select one of the following actions from the *Select and...* list of values.
 - Complete Operation - complete the selected operation/work order combination

You can fill in the actual operation dates, reconciliation codes, and add attachments. When you completing an operation, you are prompted to enter any mandatory collection plan results that were not entered during work execution. Only mandatory collection plans appear. From the Complete Operation screen, you can optionally select the Full List hypertext link to view all associated collection plans.

After completing the operation, you can optionally select to complete the work order, if all operations on the work order are complete. You can fill in the actual work order start and end dates, shutdown information,

reconciliation code, and add attachments. When you completing a work order, you are prompted to enter any mandatory collection plan results that were not entered during work execution. Only mandatory collection plans appear. From the Complete Work Order screen, you can optionally select the Full List link to view all associated collection plans.

- Charge Time - charge time against the selected operation/work order combination
- Enter Quality Results - enter collection plan results for the selected operation/work order combination
- Create Followup Work - create a follow-up work order for the selected operation/work order combination
- Issue Materials - issue material for the selected operation/work order combination
- Create Work Order
- Create Work Request

3. Choose Go.

5. Optionally view details of an operation listed, by selecting an operation's link.



You can scroll down to view the required materials for the operation. Within the Operation Details, you can view the current operation's assigned list of employees and/or list of equipment.



To perform an action from the Operation Details screen

1. From the Operation Details, screen you can return to your work queue, complete an operation, view collection plans, and hand work over to another department. Select an action from the list of values:
 - Return to Work Queue - return to your list of work
 - Complete Operation - complete the current operation
 - View Quality Plans - view the current operation/work order combination's collection plans
 - Handover - hand work over to another department, if you are unable to finish it. You can optionally hand work over to a specific employee in another department.
2. Choose OK.

You can express issue any selected material or request new material, including Inventory, Non-stock Direct, or Description Direct Items.



1. Select one of the following options:
 - Express Issue Material
 - Inventory Item
 - Direct Nonstock Item
 - Direct Description Item
2. Choose Go.
6. From the Home Page work list, you can optionally view a specific work order's details, by selecting a work order's link.



7. From the Home Page work list, you can optionally complete a work order.

1. Select Complete Operation.



2. Choose Go.

You can fill in the actual operation dates, reconciliation codes, and add attachments. When you completing an operation, you are prompted to enter any mandatory collection plan results that were not entered during work execution. Only mandatory collection plans appear. From the Complete Operation screen, you can optionally select the Full List hypertext link to view all associated collection plans.

8. From the Home Page work list, after completing all operations on the work order, you can optionally complete a work order by selecting Complete Work Order.

You can fill in the actual work order start and end dates, shutdown information, reconciliation code, and add attachments. When you completing a work order, you are prompted to enter any mandatory collection plan results that were not entered during work execution. Only mandatory collection plans appear. From the Complete Work Order screen, you can optionally select the Full List hypertext link to view all associated collection plans.

9. Optionally complete multiple work orders at once by selecting Express Complete.

You can update details on the work order or operation, before performing the express completion. You can also scroll down to enter any mandatory collection plan results that were not entered during work execution.



10. From the Home Page work list, you can optionally select Charge Time to enter the amount of time spent on an operation.



11. From the Home Page work list, you can optionally select View Checked Out Assets to view the assets that you have checked out.



If a particular asset is not checked out, you can check out the asset. You can check in an existing asset that you previously checked out. You can record quality plans and meter readings as part of the check in/check out process. If you select Yes from the Create Work Request drop-down list, the check in/check out transaction saves, and you are prompted to report a new problem.

Related Topics

For information on setting up Check In and Check Out collection plan transactions, see: Creating eAM Quality Collection Plans, page 2-162.

Asset Operational Logging, page 21-8

Part 6

Maintenance Super User

The Maintenance Super User is generally a Maintenance Planner or Supervisor and is often defined as a "super user". A Maintenance Planner plans and schedules maintenance jobs, manages and balances workloads over time, manages preventive maintenance strategy and scheduling, manages material requirements, monitors availability, and coordinates strategies with other departments, such as Operations, Purchasing, and Inventory. A Supervisor manages a crew of maintenance workers, assigns jobs based on workers' abilities and availability, inspects and verifies work, communicates with other departments, knows the current status of all jobs and assets, and is responsible for environmental health and safety.

This person has extensive knowledge of the Enterprise Asset Management system and is responsible for creating and scheduling work orders, including Preventive Maintenance work orders. This person updates work orders, orders parts, and completes operations and work orders.

This part contains the following chapters:

- Chapter 21, "Maintenance Super User", page 21-1
- Chapter 22, "Construction Units", page 22-1
- Chapter 23, "Google Maps Integration", page 23-1
- Chapter 24, "ESRI Integration", page 24-1
- Chapter 25, "GIS: Custom Mapviewer", page 25-1
- Chapter 26, "Stores", page 26-1
- Chapter 27, "Safety Management", page 27-2
- Chapter 28, "Failure Analysis", page 28-1
- Chapter 29, "Reports and Processes", page 29-1

Maintenance Super User

This chapter covers the following topics:

- Introduction
- Home
- Assets
- Obtaining Asset Number Information
- Viewing Asset Number Information
- Entering Mass Meter Readings
- Using the Asset Move Workbench
- Work Requests
- Work Orders
- Stores
- Budget Forecasts
- Safety Management
- Failure Analysis

Introduction

This chapter discusses eAM's Maintenance Super User role, and its web based user-interface.

Maintenance Super User is an internet based user-interface for maintenance personnel. It introduces you to an easier approach of entering and searching for information from any browser. Its step-by-step process requires minimal training and is intuitive enough for you to find and update information.

Maintenance Super User is designed for the casual maintenance user (for example, trades people, such as fitters, mechanics, and electricians), in a plant or facility.

Responsibilities can be assigned by employee or by role. This determines the information you can view and update.

Home

The Maintenance Super User's Home tab enables you to change organizations, as well as view and transact purchase order and work request notifications.

Note: If Oracle Endeca is installed and licensed in your environment, then refer to the *Oracle E-Business Suite Extensions for Oracle Endeca Integration and System Administration Guide* for detailed information about the Endeca enhancements to your product.

You can indicate whether work requests are automatically approved upon creation. Within the eAM Parameters, if the Auto Approve check box is selected, work requests are created in an Awaiting Work Order (approved) status (See: Defining eAM Parameters, page 2-11). Otherwise, if the check box is not selected, work requests are created in an Open status. If an organization has selected Work Request Approval through Oracle Workflow Management, the system will notify all users that belong to that approval group to take action on the work request created (See: Defining Department Approvers, page 2-21). After an individual has taken action, the notification is removed from other approvers' notification lists belonging to that same approval group.

From the Home page in the Maintenance Super User responsibility, an approver can select a work request approval notification, and then click the Work Request Details link on the notification page to access the View Work Request page to view all the details. You can see any notifications routed for your responsibility (See: Defining Department Approvers, page 2-21).

To select an organization to view notifications:

1. Navigate to the Home page (Maintenance Super User: Home tab).

Note: First choose an eAM organization before you can select additional tabs. See: Organization Setup, page 2-5.

ORACLE® Asset Management

Navigator Favorites Diagnostics Home Logout Preferences Help Personalize Page

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis Construction Units

Welcome Stock, Ms. Pat Organization EM1 Go

My Work Requests

Create Work Request

Work Request Number	Asset Number	Asset Description	Request Description	Status	Department
No results found.					

My Checked Out Assets

Check Out Asset

Asset Number	Asset Description	Date	Check In
No results found.			

Notifications

Full List

From	Type	Subject	Sent	Due
Stock, Pat	PO Approval	Standard Purchase Order 6662 has been approved	19-Jul-2011	
Stock, Pat	PO Approval	Standard Purchase Order 6661 has been approved	19-Jul-2011	

2. Within Subject column, select the work request or purchase order notification to open and view.
3. You can Approve, Reject, Reassign a notification, or you can Request Information from the originator by choosing the appropriate buttons, respectively.
Choose Reassign to reassign the work request approval to another approval group.
4. Optionally close the approval request by clicking Return to Worklist.

Assets

The Assets tab enables you to identify asset numbers using capital and Rebuildable Inventory navigators. By obtaining detailed asset number information, you can either view details or launch pages to view current or historical configurations of the asset number. As Serialized Rebuildables are installed and removed from a particular asset, the genealogy automatically updates.

You can also access the Mass Geocode Entry tab which enables you to enter geocode information for the assets. This information is used to display assets and work on the chosen map viewer.

This section's tasks include:

- Obtaining Asset Number Information, page 21-4
- Viewing Asset Number Information, page 21-6
- Entering Mass Meter Readings, page 21-31
- Using the Asset Move Workbench, page 21-33

Obtaining Asset Number Information

You can query asset numbers that you would like to view associated details, hierarchal information, cost information, associated work and service requests, enter and view meter readings, and Quality information. You can use a Simple or Advanced Search to obtain your desired asset numbers.

For assets that transferred from one organization to another, each organization can view only the work order costs on those assets that were incurred by itself.

To obtain asset number Information:

1. Navigate to the Assets tab.
2. Select the Capital or the Rebuildable Inventory sub-tab to view information on capital asset numbers or serialized rebuildable asset numbers.
3. If you have previously saved some search criteria, the Views mode appears.

You might use this mode if you frequently search for asset number information with specific criteria, such as Owning Department or Asset Group, among many. You can personalize a view to narrow your search criteria.

 1. The View list of values contains already existing Views. You can optionally select an existing View.
 2. Optionally choose Go to display the asset number information that applies to the current View's search criteria rules.
 3. Optionally choose Personalize to update, delete, or duplicate an existing View. You can also create a new View.
 4. Optionally select a View Name and then choose Duplicate to default all of the selected View's values to a new View.
 5. Optionally choose Create View to create a new view.
 - Enter a View Name.
 - Optionally select the Number of Rows Displayed.
 - Optionally select the Set as Default check box to indicate that this view is the default view.
 - Optionally enter the View's Description.
 - Specify whether the search results for the current View must contain all of, or may contain any one of, the following values entered, by selecting

the appropriate radio button, respectively.

- Optionally enter an Asset Number.
 - Optionally select an Asset Group.
 - Optionally select whether the asset numbers have an associated Asset Route.
 - Optionally select an Owning Department.
 - Optionally select additional search criteria from the Add Another list of values.
 - Choose Cancel, Revert, Apply and View Results, or Apply.
6. The Display List value determines whether the current View exists within the View list of values.
 7. Optionally select the Update icon to update the values for the current View.
 8. Optionally select the Delete icon to delete the current View.
 9. Optionally choose Cancel to exit the Personalize Views page, without selecting a View
 10. Optionally select one or many Views to add to the Views drop down list, and then choose Apply to exit the Personalize Views page.
4. By default, you are in the Simple Search mode.

Assets (Simple Search)

Oracle Asset Management

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Capital Rebuildable Inventory Mass Meter Readings Mass Geocode Entry

Maintenance Organization EM1

Asset Numbers

Text Search Save Search

Simple Search

Note that the search is case insensitive

Asset Number

Category

Asset Route

Go Clear

Advanced Search

Select Asset Number: View Work Requests View Work Orders View Asset Operational Log Go Map All Export

Select Asset Number	Description	Asset Group	Category	Area	Owning Department	Criticality	Check In Out
FL1010	Fork Lift 1010	Fork Lifts	ForkLift.Electric	Warehouse	W-Maint	Normal	

Text Search Save Search

5. Optionally enter an asset number.
You can enter a portion of an asset number and append a % (wildcard) to display multiple asset numbers with similar names.
6. If the Capital sub-tab is selected, you can optionally select a Category to narrow your selection criteria.
7. If the Rebuildable Inventory sub-tab is selected, you can optionally select an Asset Group.
8. If the Capital sub-tab is selected, you can optionally select whether to display asset numbers with associated asset routes (tasks). Values are Yes and No. See: Defining Asset Routes, page 2-83.
9. Optionally choose Advanced Search to further narrow your selection criteria, to values such as Asset Group, Asset Route, Owning Department, Category, Area, Accounting Class, Fixed Asset Number, Criticality, Maintainable, Description, Attributes, Production Organization, Equipment Item, Equipment Serial Number, Property Location Code, and/or Property Location Name. For information on these values, See: Defining Asset Numbers, page 2-74.
10. Click the **Go** button

Viewing Asset Number Information

You can display specific details about an asset number, such as an asset's configuration history, costs, hierarchy information, associated meter readings, quality information,

associated work orders, and associated work requests. You can also view the asset number's associated asset group, parent, parent group, Category, Owning Department, Area, Accounting Class, Criticality, maintainability, the associated equipment serial number, attachments, associated activities, and asset attributes.

The asset number, description, criticality and work order priority are copied (in a concatenated format) from the work order to the Justification field on the purchase requisition.

Obtaining Asset Number Information, page 21-4

To display asset number details:

1.

Asset Details

ORACLE® Asset Management

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Capital Rebuildable Inventory Mass Meter Readings

Assets: Capital > Current Organization : EM1

Asset Details: DTF35000

View Work Requests Go

Asset Number	DTF35000
Description	Delivery Erand Truck 35000
Serial Number	DTF35000
Asset Group	Vehicles
Asset Group Description	Vehicle Asset Group
Parent Asset Number	Delivery Trucks
Parent Asset Group	Fleet
Fixed Asset Number	102183
Category	Vehicle.Trucks
Accounting Class	MaintWAC
Maintainable	Yes
Equipment Serial Number	
Asset Route	No
Supplier Warranty Expiration Date	
Attachments	None
Failure Set	

Asset Health

Open Work Requests	0
Open Work	
Planned Work	
Planned Work Date	
Shutdown	No
Criticality	Normal
Owning Department	F-Maint

Asset Location

Current Org	EM1
Subinventory	
Area	Fleet Garage
Location	3455 108th Ave.,,King,98101,US

Descriptive Information

Context Value	
FSCSM_g 1 (150 c)	
csegment_dut1	

Attributes

Attribute Group	Description
No results found.	

Activities

Activity				Effective		Last Service		Next Service		
Name	Type	Cause	Source	Priority	Start Date	End Date	Start Date	End Date	Start Date	End Date
3000 Mile Maint	Maintenance	Preventive	F-Maint		09-Oct-		13-Jun-2005	13-Jun-2005	04-Nov-2004	

2. Select an asset number to view.
3. You can select the specific asset number or you can select Details from the View list of values, to view associated asset number information, attributes, and activities.
4. Optionally choose View Equipment Details if the current asset number has associated equipment details. This link is next to the Equipment Serial Number field, and is available if there are associated equipment details. You can view all equipment details in the production organization.
 - Optionally choose the View Resource Usage glasses icon to view all Work

Orders created against the asset number for the current equipment resource. This enables you to view resource demand (Work Orders) associated with the asset number. This information is eAM's integration with Process Manufacturing.

To track asset operational statuses:

Maintenance organizations must track current and past operating statuses of their equipment, such as asset maintenance downtime and Check In and Check Out statuses. Maintenance organizations must track operational downtime and other critical information about an asset for a better understanding of its operations statuses and history. You can view current statuses, show operation and shutdown history, check in and check out assets, and view an Asset Operational log for analysis.

1. Navigate to the Asset Numbers page, and query an asset number.

ORACLE Asset Management

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Maintenance Organization EM1

Asset Numbers

Text Search Save Search

Simple Search

Note that the search is case insensitive

Asset Number: DTF35000

Category:

Asset Route: No

Go Clear

Advanced Search

Select Asset Number: View Work Requests View Work Orders View Asset Operational Log Go Export

Select Asset Number	Description	Asset Group	Category	Area	Owning Department	Criticality	Check In Out
DTF35000	Delivery Erand Truck 35000	Vehicles	Vehicle.Trucks	Fleet Garage	F-Maint	Normal	Check In Out

Text Search Save Search

2. Select Asset Operational Log from the View list of values to view all current and past asset operational information, such as Check Out, Check In, associated work requests and work orders.

You can remove or add a child asset, remove a parent asset, activate or deactivate the asset, transfer the asset to another location, and receive or issue the asset into and from Inventory. By default, logging is turned off for an asset (See: Defining Asset Numbers, page 2-74 and Defining eAM Parameters, page 2-11).

1. Select *Asset Operational Log* from the View drop-down list.
2. Click the **Go** button.

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Capital Rebuildable Inventory Mass Meter Readings

Assets: Capital > Maintenance Organization : EM1

Asset Operational Log: DTF35000

View Asset Operational Log Go Save Search

Simple Search

Note that the search is case insensitive

View Event [v]

From 23-Aug-2006 13:00:33 [calendar icon]

To 24-Aug-2006 13:00:33 [calendar icon]

Go Clear

Create Events Export

Advanced Search

Asset Details

Asset Number DTF35000

Asset Group Vehicles

Area Fleet Garage

Department F-Maint

Organization EM1

Location 3455 108th Ave

Parent Asset Delivery Trucks

Date	Event	Reference	Operable	Reason Code	Comments	Employee
(no matching records)						

Return To Search

View Asset Operational Log Go Save Search

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis Diagnostics Home Logout Preferences

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3. Optionally query information by a date and time period or Event. Choose Go.
 4. Optionally choose Create Events to create events that occur for the asset. This information is important and needed to help you analyze the asset's lifecycle. Choose Apply when finished. These events are extensible; you can add to them.
 5. Select the *Return to Search* link to return to the Asset Numbers page.
3. Optionally select the Check Out icon to check out an asset from the Asset Search page. You can view asset details, enter collection plan data, enter meter information, and optionally create a Work Request from this page.

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Capital Rebuildable Inventory Mass Meter Readings

Assets: Capital > Asset Details: DTF35000 > Maintenance Organization EM1

Check Out Asset: DTF35000

* Indicates required field

* Asset

* Date (example 24-Aug-2006 12:29:36)

Comments

Operable

* Check Out For

Asset Details

Asset Number [DTF35000](#)

Asset Group [Vehicles](#)

Area [Fleet Garage](#)

Department [F-Maint](#)

Organization [EM1](#)

Location [3455 108th Ave](#)

Parent Asset [Delivery Trucks](#)

Last Check In Details

Date

Operable

Checked In For

Meters											
				Source							
Details		History		Reading Type		New Readings		Last Reading		Flex Fields	
Meter Name		Meter Name		Value	Direction	UOM	Value	Date			
Show DTF35000 Odometer		DTF35000 Odometer		Absolute		Ascending	Mile	130100	25-Mar-2005 07:15:00		

Collection Plans						
Name	Description	Results Entered	Mandatory	Enter Results	View Results	Attachments
No results found.						

Descriptive Information

Context Value

Work Request

☐ Create Work Request

4. Choose Apply.
5. Optionally choose the Check In icon to check this asset in. You can view asset details, enter collection plan data, enter meter information, and optionally create a Work Request from this page.
6. Choose Apply.

To display configuration history:

You can view specified parent and child information in a tabular format, as well as dynamically add parents and children to a hierarchy.

1. Navigate to the Asset Numbers page, and query an asset number.
2. Select Configuration History from the View list of values.
3. Choose Go.

Configuration History

ORACLE Asset Management

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Capital Rebuildable Inventory Mass Meter Readings

Assets: Capital > Current Organization : EM1

Configuration History: DTF35000

Asset Number DTF35000 View Meter Readings Go
Description Delivery Erand Truck 35000 Asset Group Vehicles

Configuration History View Options

Show ☐ Parents ☒ Children

From Date (example 28-Aug-2006 00:00:44)

To Date

Go

Associate Child Export Configuration Results

Asset group	Asset Number	Asset Type	Start Date	End Date	Update
F350Y2000 Rbit Motor	F350Y2000RBLTMTR01	Rebuildables	09-Nov-2002 02:06:21		
Vehicles	CDTF35000	Capital	27-Sep-2002 00:19:14		
Vehicles	TDTF35000	Capital	27-Sep-2002 00:17:56		

Return to Search View Meter Readings Go

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4. Select whether to show the current asset number's Parents or Children information. The page defaults showing Children information. If you select Parents, choose Go to display the associated information.
5. Optionally narrow your selection criteria by selecting a date range.
6. Optionally choose Associate Child or Associate Parent (depending on whether you are showing Parent or Children information) to dynamically add a Child or Parent to the current asset number's hierarchy.
 1. Select an asset number.
 2. Enter a Start Date that this new configuration is effective. The system date defaults.
 3. Optionally enter an End Date.
 4. Choose Apply to save your work.
 5. Choose Cancel to return to the Configuration History window.
7. Optionally select the Update icon to update configuration history information for the current asset number.
8. Optionally save and export your configuration results to a spreadsheet by selecting Export Configuration Results.

To view asset cost information:

eAM integrates with Oracle Cost Management, honoring all costing rules set at the organization level, for example, the costing method used. You can view the costs of Material, Labor, and Equipment for maintenance Work Orders, associated with the current asset number. You can view different types of transactional cost information, including actual, estimated, variance, and summary. eAM maintains the hierarchy integrity. For example, when viewing the parent asset number, you can view just the parent's costs, or the costs of the parent, including all child costs rolled up to the parent level.

1. Navigate to the Asset Numbers page, and query an asset number.
2. Select Costs from the View list of values.
3. Choose Go.
4. Select an asset number.
5. Choose Go.

Asset Costs

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Capital Rebuildable Inventory Mass Meter Readings

Assets: Capital > Current Organization : EM1

Warning
Low-level logging is currently enabled. Your application will not perform as well while low-level logging is on.

Asset Costs: DTF35000

Asset Number: DTF35000 Asset Group: Vehicles
Description: Delivery Brand Truck 35000

Cost View Options
Indicates required data

View: Actual Costs
Period From: Q1-00
Include Child Assets
Go

View Cost By: Period
Period To:
Go

Actual Costs

Period	Material (USD)	Labor (USD)	Equipment (USD)	Total (USD)
Nov-02	90.10	245.00	2,550.00	2,885.10
Apr-04	16.34	31.25	0.00	47.59
Mar-05	0.00	18.75	0.00	18.75

Cost Summary

Total Material Cost (USD)	106.44
Total Labor Cost (USD)	295.00
Total Equipment Cost (USD)	2,550.00
Total Asset Maintenance Cost (USD)	2,951.44

[Return To Search](#) View: Work Requests Go

6. In the Cost View Options region, you can narrow your selection criteria.

1. From the View drop down list, select the type of cost information to view. Valid values are Actual Costs, Estimated Costs, Variance Costs, and Cost Summary.

Actual Costs: This is the accumulation of all cost for material and resource transactions for associated maintenance Work Orders, based on a specified period, or any specified selection criteria you entered in the Cost View Options region. When you select the Actual Costs from the list of values, the actual cost information for your specified criteria is provided. The Cost Manager process runs in the background to provide updated, actual cost information at user defined, periodic intervals, and/or when it is launched from the menu.

Estimated Costs: A BOM (material parts list) and routing (resources) can be associated with a Work Order. When you select Estimated Costs, the estimated costs of all materials and resources associated with a work order display, enabling you to budget costs. The Work Order Cost Estimation process runs in the background to provide updated, estimated cost information at user defined, periodic intervals, and/or when it is launched from the menu. Estimated and actual costs might differ because all materials or resources associated with a Work Order might not actually be used when the Work Order is executed.

Variance Costs: When you select Variance Cost, the difference between the actual and estimated costs appear.

Cost Summary: When you select Cost Summary type, the cost information from all work orders associated with the current asset appear.

2. From the View Cost By drop down list, select how you would like to view your cost information. Valid values are Period and Cost Category.

- If you selected Cost Category, you can view cost information by defined categories, such as Maintenance, Contract, or Operations.

Material: All material and material overhead transaction costs appear

Labor: All employee resource and resource overhead transaction costs appear.

Equipment: All material resource and resource overhead transaction costs appear.

- If you selected Period, optionally enter the Period From and Period To. Accounting Periods are defined within Oracle Inventory (See: Maintaining Accounting Periods, *Oracle Inventory User's Guide*).

7. Select the Include Child Assets check box to roll up all costs for the current asset number and its children. See: Defining Asset Numbers, page 2-74 to review how hierarchies are created.
8. Choose Go to view cost element information. Summary totals, of material, labor, and equipment costs, appear.
9. Optionally save and export your cost information to a spreadsheet by choosing Export.
10. Optionally view asset cost information, broken down by specific Work Order, by choosing Work Order Cost Details.

Work Order Cost Details

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Capital Rebuildable Inventory Mass Meter Readings

Assets: Capital > Asset Costs: DTF35000 > Current Organization : EM1

Warning
Low-level logging is currently enabled. Your application will not perform as well while low-level logging is on.

Work Order Cost Details
* Indicates required data

* Asset NumberDTF35000Period FromQ1-00GoClear

Include Child AssetsNoPeriod To

Export

Work Order	Asset Number	Asset Group	Asset Type	Actual Cost(USD)	Estimated Cost(USD)	Variance Cost(USD)
159227	DTF35000	Vehicles	Capital	6.25	6.25	0
EM182651	DTF35000	Vehicles	Capital	2885.1	2815.1	<70>
159228	DTF35000	Vehicles	Capital	6.25	6.25	0
WO102907	DTF35000	Vehicles	Capital	47.59	16.84	<30.75>
159229	DTF35000	Vehicles	Capital	6.25	6.25	0

[Return To Asset Costs: DTF35000](#)

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1. Optionally select the Actual Cost link to view the Work Order's actual cost details by Period/Cost Category.

Work Order Actual Cost Details

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Capital Rebuildable Inventory Mass Meter Readings

Assets: Capital > Asset Costs: DTF35000 > Work Order Cost Details > Current Organization : EM1

Warning
Low-level logging is currently enabled. Your application will not perform as well while low-level logging is on.

Work Order Cost: 159227

Work Order	159227	Description	All Wheel Tire Inspection Activity
Asset Number	DTF35000	Asset Group	Vehicles
Department	F-Maint	Status	Complete

Cost View Options

View By Period Go

Period From Q1-00 Period To

Export

Period	Material(USD)	Labor(USD)	Equipment(USD)	Total(USD)
Mar-05	0	6.25	0	6.25

Total Asset Maintenance Cost

Total Material Cost(USD)	0
Total Labor Cost(USD)	6.25
Total Equipment Cost(USD)	0
Total Asset Maintenance Cost(USD)	6.25

[View Transactions](#)

[Return To: Work Order Cost Details](#)

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- Optionally choose View Transactions to view the transaction details.

Actual Cost Distributions

ORACLE Asset Management

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Capital Rebuildable Inventory Mass Meter Readings

Assets: Capital > Asset Costs: DTF35000 > Work Order Cost Details > Work Order Cost: 159227 > Current Organization : EM1

Work Order Transaction Cost Details: 159227

Work Order	159227	Description	All Wheel Tire Inspection Activity
Asset Number	DTF35000	Asset Group	Vehicles
Department	F-Maint	Status	Complete

Cost Distribution

Period From Q1-00 Period To

Export

Details	Transaction Date	Operation Account	Accounting Line Type	Transaction Type	Unit Quantity	Cost	UOM	Item Resource	Transaction Value (USD)
Hide	12-Mar-2005 01:55:10	10	01-580-5321-0000-000	WIP valuation	Resource transaction	0.25	25	HR	Mechanic1 6.25
		Currency Basis	Item					Subinventory	
		Item Revision						Purchase Order Number	
		Resource Sequence Number	10					Transaction ID	29789025
Show	12-Mar-2005 01:55:10	10	01-000-5810-0000-000	Resource absorption	Resource transaction	0.25	25	HR	Mechanic1 <6.25>

[Return To Work Order Cost: 159227](#)

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- Optionally select the Work Order Cost Details hypertext link at the top of the page.
- Optionally select the Estimated Cost link to view the Work Order's estimated cost details by Period/Cost Category.

Work Order Estimated Cost

ORACLE Asset Management

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Capital Rebuildable Inventory Mass Meter Readings

Assets: Capital > Asset Costs: DTF35000 > Work Order Cost Details > Current Organization : EMI

Warning
Low-level logging is currently enabled. Your application will not perform as well while low-level logging is on.

Work Order Cost: 159227

Work Order 159227
Asset Number DTF35000
Department F-Maint

Description All Wheel Tire Inspection Activity
Asset Group Vehicles
Status Complete

Cost View Options

View By Period

Period From Q1-00 Period To

Period	Material(USD)	Labor(USD)	Equipment(USD)	Total(USD)
Mar-05	0	6.25	0	6.25

Total Asset Maintenance Cost
Total Material Cost(USD) 0
Total Labor Cost(USD) 6.25
Total Equipment Cost(USD) 0
Total Asset Maintenance Cost(USD) 6.25

[Return To: Work Order Cost Details](#)

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- Optionally choose View Estimated Cost Details to view the Work Order's estimated cost details by Period/Cost Category.

Work Order Estimate Details

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Assets: Capital > Asset Costs: DTF35000 > Work Order Cost Details > Work Order Cost: 159227 >
 Current Organization : EM1

Warning
 Low-level logging is currently enabled. Your application will not perform as well while low-level logging is on.

Work Order Estimate Details: 159227

Work Order	159227	Description	All Wheel Tire Inspection Activity
Asset Number	DTF35000	Asset Group	Vehicles
Department	F-Maint	Status	Complete

Cost Estimate Details

Period From	Q1-00	Period To	
Total Estimated Cost(USD)	6.25		

Inventory Item Cost
 Total Inventory Item Cost(USD) 0.0

Item	Required Quantity	Item Unit Cost(USD)	Total Item Cost(USD)
No results found.			

Resource Cost
 Total Resource Cost(USD) 6.25

Resource	Resource Type	Usage	Basis Type	UOM	Resource Rate(USD)	Overhead Cost(USD)	Total Resource Cost(USD)
Mechanic1	Person	0.25	Item	HR	25	0	6.25

Direct Item Cost
 Direct Item Cost(USD) 0.0

Item	Description	Unit Cost	Quantity	Requisition Number	Purchase Order Number	Total Cost of Direct Items(USD)
No results found.						

[Return To Work Order Cost: 159227](#)

- Select the Work Order Cost Details hypertext link, at the top of the page, to exit.
- Optionally select the Variance Cost link to view the variance between the estimated and actual costs.

Variance Cost

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Assets: Capital > Asset Costs: DTF35000 > Work Order Cost Details >
 Current Organization : EM1

Warning

Low-level logging is currently enabled. Your application will not perform as well while low-level logging is on.

Work Order Cost: EM182651

Work Order	EM182651	Description	Rebuild Truck Motor using outside
Asset Number	DTF35000	Asset Group	vehicles
Department	F-Maint	Status	Cancelled

Cost View Options

View By Period Go

Period From Q1-00 Period To

Export

Period	Material(USD)	Labor(USD)	Equipment(USD)	Total(USD)
Nov-02	0	<70>	0	<70>

Total Asset Maintenance Cost

Total Material Cost(USD) 0

Total Labor Cost(USD) <70>

Total Equipment Cost(USD) 0

Total Asset Maintenance Cost(USD) <70>

[Return To: Work Order Cost Details](#)

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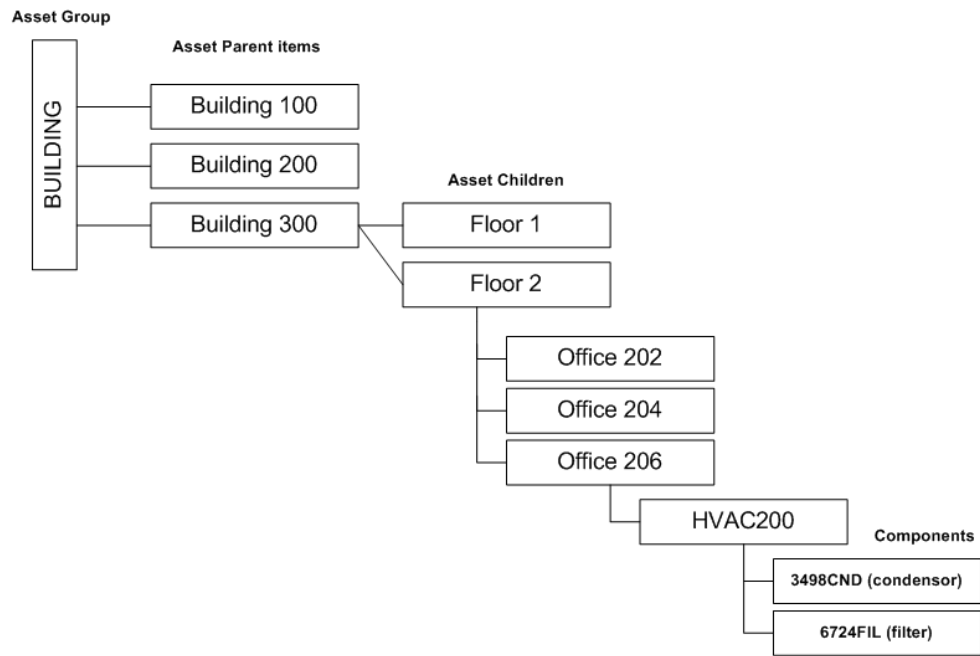
To display the asset hierarchy:

You can view asset number hierarchy information, enabling you to identify asset numbers using a navigator and the details of each asset number belonging to the hierarchy.

As Serialized Rebuildables are added and removed from a particular hierarchy, the asset genealogy is dynamically updated.

1. Navigate to the Asset Numbers page, and query an asset number.
2. Select Hierarchy from the View list of values.
3. Choose Go. The associated hierarchy for the current asset number appears in the shaded region.

Asset Hierarchy Example



- 4. Optionally select any asset number in the hierarchy to view its details.

Hierarchy

Warning
Low-level logging is currently enabled. Your application will not perform as well while low-level logging is on.

Hierarchy

View:

Asset Hierarchy:

- DTF35000
 - CDTF35000
 - E350Y2000RBLTMTR01
 - TDTF35000

Asset Details for DTF35000:

Asset Number	DTF35000
Description	Delivery Erand Truck
Serial Number	35000
Asset Group	DTF35000
Asset Group Description	Vehicles
Parent Asset Number	Vehicle Asset Group
Parent Asset Group	Delivery Trucks
Fixed Asset Number	Fleet
Category	102183
Accounting Class	Vehicle.Trucks
Maintainable	MaintWAC
Equipment Serial Number	Yes
Asset Route	No
Supplier Warranty Expiration Date	
Attachments	None
Failure Set	

✓TIP: Click on the Parent Asset Number to go one level up the Hierarchy.

[Return to Search](#)

View:

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5. Optionally select the Parent Asset Number to view the complete hierarchy at the parent level.
6. Choose Return to Search to exit.

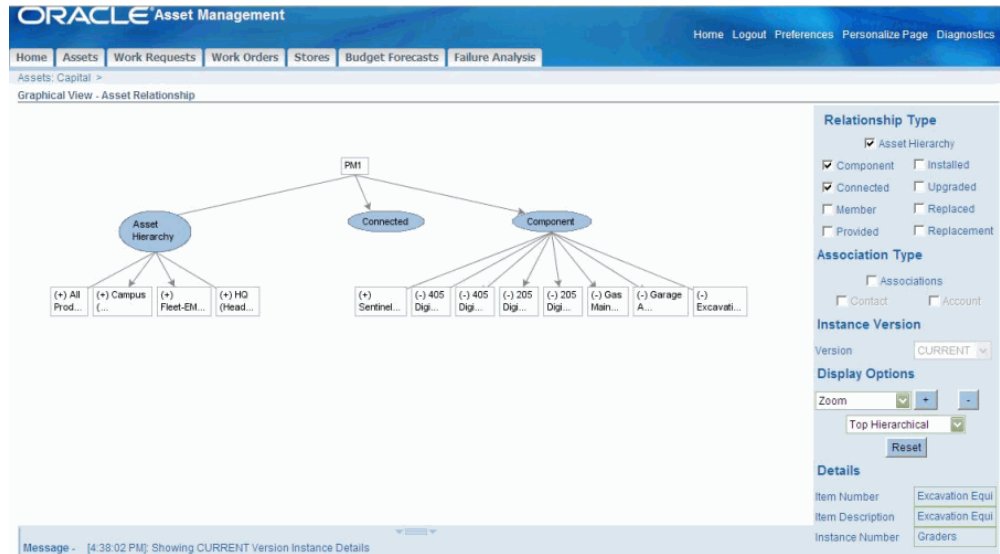
To view asset relationships graphically:

You can view asset relationships in a graphical format using Oracle eAM.

Use this procedure to view asset relationships graphically:

1. Navigate to the Asset Search page, and query for a specific asset.
2. Select Graphical Hierarchy from the View list of values.
3. Click the **Go** button.

The Viewer appears displaying the asset relationship in a graphical format.



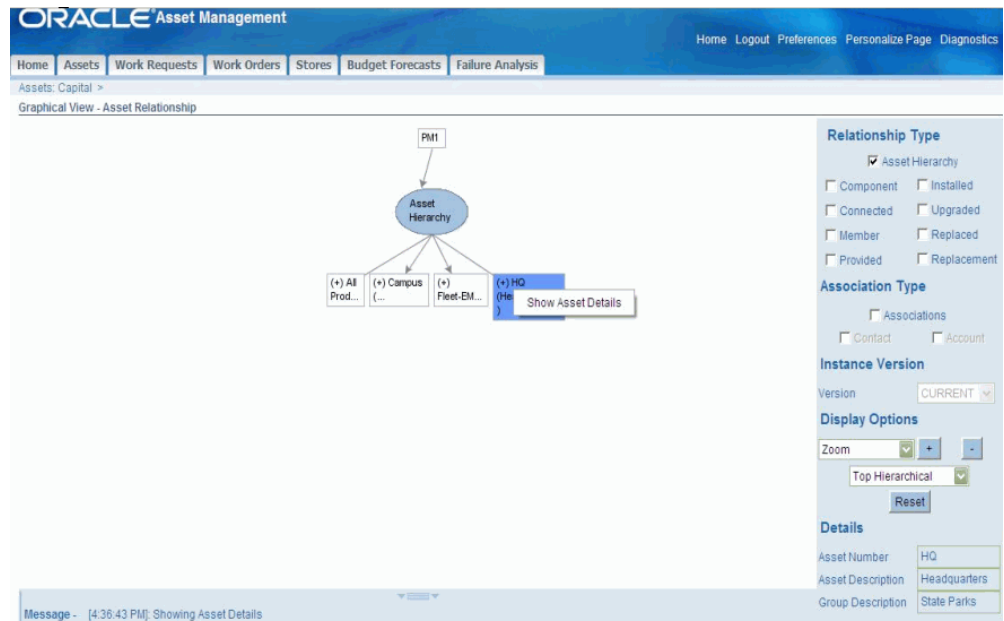
4. View the asset relationships.

You cannot view instance relationships.

Note: You can only view asset relationships using this navigation. If you want to add child assets or create other relationships for the asset, you must access the asset through Oracle Asset Tracking or Oracle Installed Base.

For more information about viewing asset relationships, see Viewing Item Instance and Asset Network Relationships, *Oracle Installed Base User's Guide*.

5. Right-click an asset relationship node to view the asset details.



To enter or view meter readings:

Meters are defined and associated with asset numbers to measure an asset or rebuildable item's usage. Examples include odometers or counters. Meters are used in Preventive Maintenance Scheduling to schedule and generate Preventive Maintenance Work Orders.

You can enter and view meter readings for the current asset number.

1. Navigate to the Asset Numbers page, and query an asset number.
2. Select the asset number, and then select Meter Readings from the View list of values.
3. Choose Go. Meters that are associated with the current asset number appear. See: Associating Meters with Asset Numbers, page 2-127.

Enter Asset Meter Readings

ORACLE Asset Management

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Capital Rebuildable Inventory Mass Meter Readings

Assets: Capital > Maintenance Organization EM1

Enter Asset Meter Readings: DTF35000

Cancel Apply

Asset Number DTF35000 Asset Group Vehicles
Description Delivery Erand Truck 35000

Search
Meter Name Go

Meter Readings		Source	
Details	History	New Readings	
Meter Name	Meter Name	Reading Type	Value
Hide DTF35000 Odometer	Show DTF35000 Odometer	Absolute	130100
		Direction	28-Aug-2006 01:00:54
		UOM	25-Mar-2005 20:45:00
		Date	
		Value	
		Date	

New Readings
Comments

Meter Property Value				Target Meters			
Name	Type	UOM	Property Value	Name	UOM	Factor	Last Reading
No search conducted.				No search conducted.			

Reset

☐ Include Target Reset

Reset Reading

Reset Comment

Cancel Apply

4. Enter a Value or Change Reading value for new meter readings, depending on the meter type. If the meter is an Absolute type, the Value column is enabled. If the meter is a Change type, the Change column is enabled.

5. Optionally enter any necessary Comments.

6. Optionally enter Reset information.

1. If you enter a Reset Reading value, you are resetting the source meter to this value. For example, if a motor must be replaced, you can reset the meter reading value of the pump, associated with the motor.

Companies can associate a source meter to an asset number and meter association. The Source Meter reading subsequently feeds corresponding meters that are associated with assets within the meter hierarchy (See: Defining Meters, page 2-125 for more information on meter hierarchies).

2. Optionally select the Include Target Reset check box to reset the current asset's target meter to the source meter's Reset Reading.

3. Optionally enter a Reset Comment.

7. Choose Apply to save your work.

8. Optionally select the History icon to view all meter readings for the selected meter and current asset number. This helps you to make logical decisions when entering and updating meter readings. For example, you can view the last meter reading, enabling you to make a logical choice when entering the next meter reading.

Meter Reading History

ORACLE Asset Management

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Assets: Capital > Enter Asset Meter Readings: DTF35000 >

Meter Reading History DTF35000 Odometer

Reading From Date ☐ Show Average reading in Date Range
(example: 27-Aug-2006 19:45:00)

Reading To Date ☐ Show Disabled Readings

Meter Readings						
Select	Date	Value	Net Life to Date	Comments	Reset Comments	Flex Fields
<input type="radio"/>	28-Aug-2006 01:31:23	130200	130200	130200		
<input type="radio"/>	25-Mar-2005 20:45:00	130100	130100	130100		
<input type="radio"/>	17-Jul-2003 21:19:19	120100	120100	120100		
<input type="radio"/>	12-Nov-2002 04:36:31	120000	120000	120000		

Property Readings

Property Name	Value	UOM	Type
No results found.			

[Return To Assets: Capital](#)

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9. Optionally select the Disable icon to disable a past meter reading for the current Reading. If meter readings are entered before resetting the meter, you cannot disable those meter readings. The most current reading before the meter is reset cannot be disabled, unless the meter reset reading entry is disabled.

Note: Preventive Maintenance Scheduling does not use any disabled information. After a meter reading is disabled, you cannot re-enable it.

To view quality information:

You can view a list of Quality collection plans and enter quality results for the current asset number.

1. Navigate to the Asset Numbers page, and query an asset number.
2. Select the asset number, and then select Quality from the View list of values.
3. Choose Go.

Quality Plans

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Capital Rebuildable Inventory Mass Meter Readings

Assets: Capital >

Warning
Low-level logging is currently enabled. Your application will not perform as well while low-level logging is on.

Quality Plans

Asset Details	
Asset Group	Vehicles
Asset Num	DTF35000
Asset Serial Number	DTF35000
Description	Delivery Grand Truck 35000
Category	Vehicle.Trucks
Area	Fleet Garage
Owning Department	F-Maint

Collection Plan	Description	Type	Enter Quality Results	View Quality Results	Attachment	Visited
VEHICLE INSPECTION EM1	Vehicle Checklist Inspection EAM EM1	Inspection Checklist				No

[Return To Asset Page](#)

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4. A list of collection plans, associated with the current asset number and requiring completion, appear (See: Creating eAM Quality Collection Plans, page 2-162 When the collection plan was created, it was specified whether the collection plan required completion. Also, during the eAM collection plan creation process, triggers are specified to make specific asset numbers eligible for the collection plan (See: Creating eAM Quality Collection Plans, page 2-162). See: Quality Integration Setup, page 2-158
5. Optionally enter quality results by selecting the Enter Quality Results icon. You can enter quality results for a collection plan or update a collection plan's quality results multiple times.
 1. Required fields depend on the Collection Plan's collection element specifications (See: Creating eAM Quality Collection Plans, page 2-162).
 2. Optionally choose Add to attach any necessary files, URLs, or text to the chosen collection plan. Each collection plan can have an unlimited number of attachments.
 3. Choose Apply to save your work or Cancel to return to the Quality Plans page.
6. Select the View Quality Results icon to view or update any results entered for the current collection plan.
 1. Select either the *Show table data when all conditions are met* or *Show table data when any condition is met* radio button.
 - *Show table data when all conditions are met*: Quality results containing all of the following entered parameters appear in the results set table.
 - *Show table data when any condition is met*: Quality results containing any of

the following parameters appear in the results set table.

2. Optionally specify parameters to filter the data displayed. The parameters are the collection elements defined for the current collection plan. See: Creating eAM Quality Collection Plans, page 2-162.
3. Optionally select an additional parameter from the Add Another list of values. Choose Add.
4. Choose Go to view the entered parameters' results. Optionally choose Clear to enter new parameters.

View Quality Results

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Capital Rebuildable Inventory Mass Meter Readings

Assets: Capital > Quality Plans >

View Quality Results: VEHICLE INSPECTION EM1

Advanced Search

Specify parameters and values to filter the data that is displayed in your results set.

☒ Show table data when all conditions are met.

☐ Show table data when any condition is met.

% Water is

Viscosity is

Specific Gravity is

Followup Activity is

Add Another % Water

% Water	Viscosity	Specific Gravity	Followup Activity	WD Completion Notes	Asset Activity	Work Order	Created By	Entry Collection Date	Attachments	Update
No results found.										

[Return To List of Plans Page](#)

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5. Optionally select the Attachments icon to attach any necessary files, URLs, or text to the chosen collection element (result entry). Each collection element in the collection plan can have an unlimited number of attachments.
 6. Optionally select the Update icon to update the current entry.
 7. Select the Return To List Of Plans Page link at the bottom of the page to return to the list of quality collection plans.
7. The Visited column indicates whether the associated collection plan has been updated.

Note: Quality results are entered at Work Order Completion for an asset number's required collection plans.

To view or create work requests for an asset:

You can view an asset's associated Work Requests, create new Work Requests, or update existing Work Requests for the current asset.

1. Navigate to the Asset Numbers page, and query an asset.
2. Select an asset number, and then choose View Work Requests.

Existing Work Requests

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Capital Rebuildable Inventory Mass Meter Readings

Assets: Capital > Current Organization : EM1

Existing Work Requests: LX0002

Asset Number: LX0002 View: Details Go

Asset Group: Lexus ES300

Create Work Request Export Work Requests

Details	Number	Description	Asset Type	Asset Group	Asset Number	Status	Request By Date	Originator	Update
<input type="checkbox"/> Hide	12208	Driver side Front Windo Chippe...	Capital	Lexus ES300	LX0002	Awaiting Work Order	06-Nov-2005 02:38:45	MFG	

Priority: High Requested For: MFG Assigned Department: Lexus Shop Work Order

Return to Search View: Details Go

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3. Optionally select a work request Number to view its details, such as the log explaining the issue reported and priority code.

View Work Request

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Assets: Capital > Existing Work Requests: LX0002 > Current Organization : EM1

Warning
Low-level logging is currently enabled. Your application will not perform as well while low-level logging is on.

View Work Request: 12208

Asset Number LX0002 Asset Group Lexus ES300

Create Update

Request Details

Asset Number	LX0002	Assigned Department	Lexus Shop
Request Number	12208	Status	Awaiting Work Order
Priority	High	Work Request Type	Emergency
Request By Date	06-Nov-2005 02:38:45	Requested For	MFG

Request Description

Description History *** MFG (2005-11-04 13:09:36) ***
Driver side Front Window Chipped By a small rock while driving on the highway.
This should either be replaced or repaired.

Creation Information

Created By	MFG	Notify User	No
Phone Number	212-445-3383	E-mail	dsmith@vision.com
Contact Preference	E-mail	Date Filled	05-Nov-2005 02:39:35

Descriptive Information

Context Value

Return to Existing Work Requests: LX0002

Create Update

4. Optionally choose Update if you are within the details of the work request, or you can select the Update icon on the Existing Work Requests page.
 1. Update fields as needed.
 2. Choose Apply to save your work.
 3. Choose Cancel to return to the Existing Work Requests page, without updating the work request.
5. Optionally choose Create Work Request to create a new work request, or click the **Create** button if you are viewing an existing work request.

Create Work Request

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Capital Rebuildable Inventory Mass Meter Readings

Assets: Capital > Existing Work Requests: LX0002 > Current Organization : EM1

Warning
Low-level logging is currently enabled. Your application will not perform as well while low-level logging is on.

Create Work Request
* Indicates required field

Asset Number LX0002 Asset Group Lexus ES300

Request Details

* Asset Number LX0002 * Assigned Department Lexus Shop
* Priority * Work Request Type
* Request By Date 29-Aug-2006 02:16:35 Requested For MFG
(example 29-Aug-2006 02:16:36)

Request Description
* Additional Description

Creation Information

Created By MFG Notify User No
Phone Number 212-445-3383 E-mail dsmith@vision.com
Contact Preference

Descriptive Information
Context Value

Cancel Apply

1. If required, select an asset number. Depending on the current organization's parameter, defining an asset number on work requests may be optional. See: Defining eAM Parameters, page 2-11.
2. Select a Priority, for example High, Medium, or Low.
3. Select a Request By Date. The system date defaults.
4. Select an Assigned Department. The current asset number's associated Assigned Department defaults. See: Defining Asset Numbers, page 2-74.
5. Optionally select a Work Request Type.
6. Optionally select the user the work request is Requested For. The current user defaults.
7. Enter the detailed information about the work requested in the Additional Description field.
8. Enter your Creation Information, such as Phone Number, E-Mail address, and Contact Preference.
9. Optionally select a Context Value.

10. Choose Apply to create the work request.
11. Choose Cancel to return to the Existing Work Requests page, without creating a work request.
6. Optionally select Show in the Details column to display Work Orders linked to the current Work Request.
 1. Optionally select the Work Order number to view the Work Order's associated information.
 2. Choose Return to Existing Work Requests to return to the previous page.
7. Optionally save and export the Work Request information to a spreadsheet, by selecting Export Work Requests.

Related Topics

Viewing Resource Usage, page 10-2

Defining Asset Numbers, page 2-74

Meters, page 4-2

Entering Meter Readings, page 4-3

Overview of Cost Management, *Oracle Cost Management User's Guide*

Submitting a Request, *Oracle Applications User's Guide*, *Oracle Applications User's Guide*

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

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

Entering Mass Meter Readings

Meters are defined and associated with asset numbers to measure an asset or rebuildable item's usage. Examples include odometers or counters. Meters are used in Preventive Maintenance Scheduling to schedule and generate Preventive Maintenance Work Orders.

You can enter readings for all meters that are associated with an asset. You can enter readings for all assets that are associated with a queried meter. This page enables you to enter multiple readings from one screen.

The Meter Reading window invokes with a Disable button based on the Disable Meter Reading function security setting. If you do not have access to the function security, eAM Disable Meter Reading, then the Disable button does not display and you cannot disable a meter reading.

To enter mass meter readings:

1. Navigate to the Mass Meter Readings page (Maintenance Super User: Assets > Mass Meter Readings).

Mass Meter Readings

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Capital Rebuildable Inventory Mass Meter Readings Maintenance Organization EM1

Mass Meter Readings

Search

Meter Name Asset Number DTF35000 Go

Meter Readings		Source										
Details	Meter Name	History	Meter Name	Reading Type	Value	Direction	UOM	Date	Last Reading Value	Last Reading Date	Flex Fields	History
Hide	DTF35000 Odometer	Show	DTF35000 Odometer	Absolute		Ascending	Mile	28-Aug-2006 03:29:46	130200	28-Aug-2006 01:31:23		

New Readings

Comments

Meter Property Value

Name	Type	UOM	Property Value	Name	UOM	Factor	Last Reading	History
No search conducted.				No search conducted.				

Reset

☐ Include Target Reset

Reset Reading

Reset Comment

Add 5 Rows

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2. Optionally enter a Meter Name and then choose Go.
3. Optionally enter an asset number and then choose Go. All meters that are associated with this asset appear (See: See: Associating Meters with Asset Numbers, page 2-127.).
4. Enter a Value or Change Reading value for new meter readings, depending on the meter type. If the meter is an Absolute type, the Value column is enabled. If the meter is a Change type, the Change column is enabled. The Change field indicates the difference between the last reading and the current reading; it defaults when the Value field is populated. The Change field indicates the difference between the last reading and the current reading. The Change value is used to calculate the Life To Date Reading, within the Latest tabbed region.
5. Optionally enter any necessary Comments.
6. Optionally enter Reset information.
 1. If you enter a Reset Reading value, you are resetting the source meter to this

value. For example, if a motor must be replaced, you can reset the meter reading value of the pump, associated with the motor.

Companies can associate a source meter to an asset number and meter association. The Source Meter reading subsequently feeds corresponding meters that are associated with assets within the meter hierarchy (See: Defining Meters, page 2-125 for more information on meter hierarchies).

2. Optionally select the Include Target Reset check box to reset the current asset's target meter to the source meter's Reset Reading.
3. Optionally enter a Reset Comment.

Note: You cannot reset past meter readings if a meter reading is entered after the reading date.

7. Click the **Apply** button to save your work.
8. Optionally select the History icon to view all meter readings for the selected meter and current asset number. This helps you to make logical decisions when entering and updating meter readings. For example, you can view the last meter reading, enabling you to make a logical choice when entering the next meter reading.
9. Optionally select the Disable icon to disable a past meter reading for the current Reading. If meter readings are entered before resetting the meter, you cannot disable those meter readings. The most current reading before the meter is reset cannot be disabled, unless the meter reset reading entry is disabled.

Note: Preventive Maintenance Scheduling does not use any disabled information. After a meter reading is disabled, you cannot re-enable it.

Using the Asset Move Workbench

You may need to move assets from one organization (often a different location) to another organization for different reasons, to replace a failed asset , or to borrow an asset for a particular job or project.

The Asset Move Workbench enables you to transfer an asset and its child assets from one maintenance organization to another as a single unit, and the parent child asset relationships are preserved.

This feature also enables you to move assets using the EAM user interface by minimizing the dependency on the Inventory user interface to carry out asset transfer transactions. You can perform a miscellaneous receipt of the assets within EAM, using

the Asset Move page. EAM performs a miscellaneous receipt of an asset if there is no quantity available in the expense subinventory. This process does not track the quantity for the asset. These miscellaneous receipts are done at zero cost, and are placed in an expense intermediate subinventory.

The following entities will also move with the asset:

- Activities: if the Activity Definition is assigned to the destination organization. If not, you will need to use the Activity Workbench to assign an activity to the new organization.
- PM schedules
- Meters
- Failure history and setup

These entities do not move with the asset:

- Work orders
- Routing
- Cost history
- Collection plans

You can move assets, including any child assets, between organizations and sub-inventories only.

After you have performed the asset move, you can manually adjust the asset hierarchy using the Asset Hierarchy page or the Graphical Network Page.

To move assets using the Asset Move Workbench:

1. Navigate to the Maintenance Super User Home page.
2. Select a value from the Organization drop-down and click the **Go** button
3. Click the Assets tab.
4. Enter search criteria for the asset to be moved, and click the **Go** button.

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Capital Rebuildable Inventory Mass Meter Readings Maintenance Organization EM1

Asset Numbers Text Search Save Search

Simple Search Advanced Search

Note that the search is case insensitive

Asset Number

Category

Asset Route

Select Asset Number: View

Select Asset Number	Description	Asset Group	Category	Area	Owning Department	Criticality	Check In	Check Out
EAM-AG3/003		EAM-AG3					<input type="button" value="In"/>	<input type="button" value="Out"/>

5. Select the Move Asset value in the View drop-down list, and click the **Go** button.
6. Select a value from the Move Type field, Inter-Org Transfer or Sub-Inventory Transfer. This a required field.
7. Enter the destination organization (required).
8. Enter a destination sub-inventory.
9. Select Yes or No in the Include Child Assets field (required).
10. Optionally select a destination locator.

Note: The current asset information relating to the organization, sub-inventory, and location displays.

ORACLE® Asset Management Diagnostics Home Logout Preferences

Assets: Capital > Maintenance Organization EM1

Move Asset: EAM-AG3/003

* Move Type

* Destination Organization

Shipment No

Destination Sub-Inventory

* Include Child Assets

Destination Locator

Current Organization

Current Sub-Inventory

Current Location

[Expand All](#) | [Collapse All](#)

Focus Asset Number	Description	Asset Group	Asset Type	Current Organization	Current Sub-Inventory
EAM-AG3/003		EAM-AG3	Asset	EM1	Spares

[Return to Search](#)

11. Click the **Apply** button.
12. You will receive a confirmation message that the assets have been moved.

ORACLE Asset Management Diagnostics Home Logout Preferences

Assets: Capital > Maintenance Organization EM1

Confirmation

Asset(s) are successfully moved. Results can be exported.

Move Asset: EAM-AG3/003

Move Type	Inter-Org Transfer	Include Child Assets	Yes
Destination Organization	FAC	Destination Locator	
Shipment No		Current Organization	EM1
Destination Sub-Inventory	Stores	Current Sub-Inventory	Spares
		Current Location	3455 108th Ave,,,King,98101,US

[Expand All](#) | [Collapse All](#)

Focus Asset Number	Description	Asset Group	Asset Type	Current Organization	Current Sub-Inventory
EAM-AG3/003		EAM-AG3	Asset	FAC	Stores

[Return to Search](#)

Work Requests

A work request serves a different function than a work order; it is a request for maintenance on an asset (Capital or Rebuildable Inventory). eAM enables operations and maintenance staff to report any problems with an asset. A supervisor can approve, request additional information, or reject a work request. A work request requires approval before it is generated into a work order. The Work Requests tab enables you to query existing, and create new work requests for an asset. See: Overview of Work Requests, page 21-36 and Creating and Updating Work Requests, page 17-6.

Work Orders

The Work Orders tab is designed for users, such as crew supervisors, who execute work plans generated by a planner. You can manage operations on a work order. You can search for skills across departments, assign employees to a work order, adjust crew schedules, complete operations, hand work over to another department, complete a work order, request material, and enter quality plan information, such as inspection data. The Work Orders tab enables you to query and create work orders, view and update work order details, and create relationships among work orders (See: Work Order Relationships, page 3-50). After executing a work order search, you can drill into a specific work order. The Work Order page contains content containers, providing work order header information, asset details information, and work order details information.

You can query Service and Work Requests, view the requests' associated work orders, and create and assign work orders to the requests.

This section's tasks include:

- Creating Work Orders, page 21-37
- Creating Express Work Orders, page 21-44

- Adding Completion Details to Work Orders, page 21-46
- Viewing Work Orders, page 21-48
- Completing Work Orders, page 21-68
- Updating Work Orders, page 21-72

Creating Work Orders:

Work orders are normally created by a planner from the Maintenance Workbench (See: Using the Maintenance Workbench, page 3-69), and are also created within the Maintenance Super User responsibility. Material and resource planning (See: Overview of Planning and Scheduling, page 5-1) is used at each status of the routine work order (See: eAM Work Order Statuses, page 3-23).

1. Navigate to the Work Orders page.
2. Click the Create Work Order button.

Note: This function is available for those users with responsibilities and roles that include function, EAM_WO_DETAILS_MODE, with their associated menu. Otherwise, you can only view work orders, and cannot update associated asset hierarchy, work order hierarchy, material, resource, operation, cost, collection plan results, work request, and attachment information. See: Implementing Function Security, *Oracle Applications System Administrator's Guide - Security*.

The header information displays general information about the Asset Number and the type of work required.

ORACLE® Asset Management

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Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis

All Requests Express Work Crew Schedule Mass Time Entry

Current Organization : I

Work Orders

Text Search Save Search

Personalize Query

Simple Search

Personalize "Simple Search"

Personalize Default Single Column: (SimpleSearchSingleCol)

Note that the search is case insensitive

Work Order: WO197545 Start Date From: To: Department: Status:

Asset Number: Include Asset Children: Go Clear

Show More Search Options

Personalize Stack Layout: (ResultsRN)

Personalize "Work Order Results Table"

Select Work Order: Go Create Work Order Print Work Orders Export Work Order Export Schedule

Select	Work Order	Asset Number	Asset Group	Description	Scheduled Start Date	Duration (hours)	Owning Department	Status	Update Work Order
<input checked="" type="radio"/>	WO197545	DTE35001	Vehicles	Quality Initiated Work Request: Percentage of oil in water exceeds recommended limit. Create Work Order for Oil Change.	13-Oct-2005 11:28:24	1	F-Maint	Complete	

- The work order number is assigned, but you can update it.
- Enter an asset number (or Serialized Rebuild) requiring maintenance. The Asset Group (or Rebuildable Item) defaults (See: Defining Asset Numbers, page 2-74).
- Enter the work order's Scheduled Start Date if it is based on a forward schedule. The scheduling process uses this date as a starting point to calculate the Scheduled Completion Date and duration for allocated resources and material. If the material/resources are not available by this date, the scheduling process moves the start date forward (See: eAM Scheduling, page 5-6).

Note: Actual dates are entered at operation and work order completion. Scheduled dates are calculated by the Manufacturing scheduler if you have Oracle Manufacturing Scheduling enabled (See: Overview of Setting Up, *Oracle Manufacturing Scheduling User's Guide*). Otherwise, the EAM scheduler calculates the dates.

- Enter a Scheduled Completion Date for backward scheduling. This date indicates the requested end by date for the work. The scheduling process uses this date as a starting point to calculate the scheduled start date and duration for allocated resources and material. If the material and resources are not available by that date, the scheduling process moves the start date backwards to ensure completion by the required completion date (See: eAM Scheduling, page 2-152).

Note: Actual dates are entered at operation and work order completion. Scheduled dates are calculated by the Enterprise Asset

Management scheduler if you have Oracle Manufacturing Scheduling enabled (See: Overview of Setting Up, *Oracle Manufacturing Scheduling User's Guide*). Otherwise, the EAM scheduler calculates the dates.

7. Enter a WIP Accounting Class code to represent the charge (expense) accounts associated with the Asset Number. This defaults from the current Asset Number (See: Defining Asset Numbers, page 2-74); you can update it.
8. Optionally select a Request Number to associate a Work Request/Service Request with this work order. After selected, the Description updates to this Work Request's Description.
9. Optionally enter a Description for this work order.
10. The Department defaults from the selected asset number (See: Defining Asset Numbers, page 2-74). This indicates the persons or department responsible for this asset number.

You can change the department at the operation level if no transactions have been recorded for the work order.

11. Optionally select a Planner for this work order.
12. After selecting an Asset Activity, the associated maintenance BOM (material) (See: Setting Up Maintenance Bills of Material, page 2-101) and maintenance route (resources), associated with the Activity (See: Defining Maintenance Routes, page 2-106), attach to the work order. After an asset activity is saved to a work order, you cannot change or delete it.

Select an Asset Activity. Only Asset Activities associated with this Asset Number are available.

Note: If this work order was previously created, you can add an Asset Activity, as long as the work order is at an Unreleased or Draft status, or an Asset Activity was not previously defined. If any tasks, material, or resource requirements exist, these must be deleted before adding an Asset Activity to an existing work order.

13. If you select Yes from the Firm list of values, planning and scheduling does not adjust the schedule, regardless of material or resource availability (See: Overview of eAM Planning and Scheduling, page 5-1). This value defaults as Yes or No, depending on the Auto Firm on Release and Auto Firm on Create check box settings, established in the Enterprise Asset Management Parameters setup for the current organization (See: Defining eAM Parameters, page 2-11). This defaults after

the work order is Released, if you select the Auto Firm on Release check box, and defaults immediately if you selected the Auto Firm on Create check box.

If you select No from the Firm list of values, the completion date is calculated based on the work order duration. The scheduler automatically calculates the duration based on the operations (resource duration setup) on the work order. You can update the Firm setting for work orders at Draft, Released, Unreleased, On-Hold, or Cancel statuses (See: eAM Work Order Statuses, page 3-23).

If Firm is set to Yes, you can still manually reschedule a resource on the work order, thereby updating the dates on its corresponding operation and work order.

14. Optionally select this work order's Status.

The list of values includes all system and user-defined statuses. If you select a user-defined status, however, the validation and the work order behavior remain unchanged, because they are based on the system status that is associated with the user-defined status. If the work order is changed to a status that requires approval (See: Workflow for Work Orders, page 3-10), the Pending flag is selected until an action, such as approval or rejection, occurs. If the status change is approved, the new status remains, and the Pending check box is cleared. If rejected, the status of the work order is changed to *Canceled by Approver* and the Pending check box is also cleared.

15. The Shutdown Type defaults from the current Asset Activity. This setting helps the planner group work orders that might require shutdowns, so that they are planned together.

16. Optionally select a Priority, for example, High, Medium, or Low.

17. Optionally enter information within the Additional Details region. The Warranty field values default from the current asset's definition, but you can update the Warranty Status and Warranty Active fields here.

If you are creating a work order from a work request and if the work request has attachments, you can view the list of attachments by clicking the View link in the Request Attachments field.

18. Optionally open the Failure Information region to enter Failure Analysis information (See: Failure Analysis Overview, page 28-1).

1. The Failure Entry Required setting indicates whether failure code entry is

required during work order completion. This setting defaults from the value set when you assign the Asset Group to the Failure Set. However, you can update this setting as needed (See: Defining Failure Codes and Sets, page 28-2).

2. Valid codes that are available are dependent on the associated Failure Set and defined Failure Codes. A Failure Set defaults, if one is associated with the current Asset Group (See: Defining Failure Codes and Sets, page 28-2).

Note: You cannot associate one failure occurrence with multiple work orders. For example, if you report failure data for the same asset on two different work orders, two failures are created, regardless of the failure date. When MTBF is calculated, the failure count would be two. Similarly, you can associate one combination of failure tracking codes (failure/cause/resolution) to a work order.

19. Optionally open the Operation Requirements region to prepare necessary operations. Operations (also known as tasks) are the instructions to perform maintenance activities.

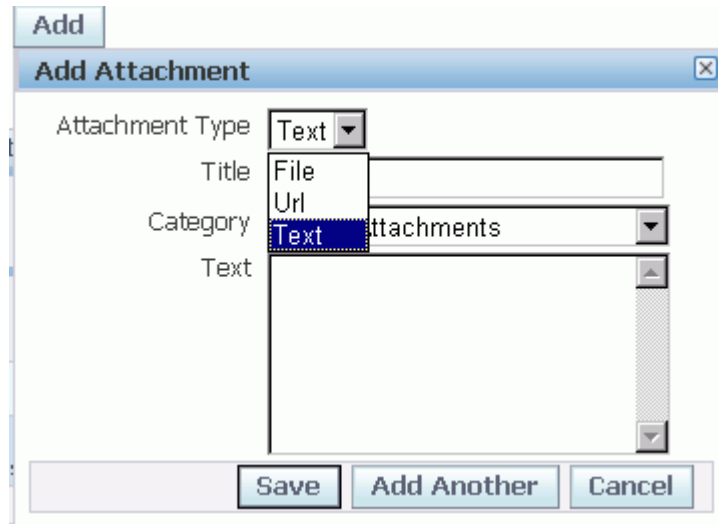
Important: Since operation 1 is reserved for system use, we recommend that you begin the operation sequence numbering at 2 or above, and use operations in multiples of 10.

Each operation is assigned to a department (See: Defining Departments and Resources, page 2-17), associated with assigned resources (trades people, outside service providers, and equipment). When you create a work order for an Asset Number, you can attach the Asset Number's associated Activity (See: Associating Asset Numbers with Activities, page 2-103) to that work order, bringing its related maintenance route and BOM. The maintenance route is comprised of operations necessary to complete the Activity. You can view and update these operations from the work order. After creating the work order, you can view operations that default from the maintenance route (See: Defining Maintenance Routes, page 2-106) associated with the current Activity.

When you query for an existing work order, you can update and add to its operations. You can also assign and schedule specific employees or equipment to each operation. There are two sub-tabs within the Operations tab: Detail and Summary. The Summary sub-tab displays information at the Resource line level and assigned employees appear in the Hide/Show region. The Detail sub-tab displays the operation-resource-instance. You can remove the 'EAM_OP_SUMMARY' function from the menu to hide the Summary sub-tab, or remove the 'EAM_OP_DETAILS_TAB' function to hide Details sub-tab (See: Preparing Work Order Operations, page 3-29 and Updating Work Orders, page 21-72).

You can change the department or resources at the operation level if no transactions have been recorded for the work order.

Click or hover over the Add or View button to add or view attachments. You can attach file, URL, and text attachments. If you want to view the attachments, hover or click the View button.



20. Optionally open the Material Requirements region to view or add items. After creating the work order, you can view the associated Asset Number's items list (See: Setting Up Maintenance Bills of Material, page 2-101 and Defining Material Requirements, page 3-36). You can add both stocked and non-stocked material from the Asset BOM to the material requirements for this work order.

In addition, you can click the Copy icon for the material requirement and copy the existing material line to a new line. This feature reduces the data entry effort when adding similar material requirement lines. The following attributes are copied to the new line:

- Details such as Operation, Item Type, Line Type, Item Code, Quantity, and Date Required.
- Flexfield values.
- Material details such as the Auto Request Material option, Sub-inventory, Locator and Comments.

21. Adding Work Permits to Work Orders

Click the Work Permits region to create work permits or add existing work permits to this work order:

- Select the **Create** check box to create a new work permit, and enter the

following information (all fields are required except the Description field):

- Work Permit name (or number)
 - Description (optional)
 - Permit status
 - Status (Draft is the default value, but you can change it)
 - Valid From Date
 - Valid To Date
 - Flexfields
- Click the **Work Permits** field to search and add an existing work permit from the list of values.

22. Adding Work Clearances to Work Orders

Click the Work Clearance region to add existing work clearances to this work order.

Enter the work clearance that you want to add. The status of the work clearance must be at Draft or Released.

Note: Any work clearances associated with this work order are for informational purposes only. No actions are allowed on them.

Note: You can also add (associate) work clearances to work orders using the Work Clearance pages (Maintenance Super User > Safety Management > Work Clearance). See Safety Management, page 21-89.

Work Permits and Work Clearance Regions

Work Permits

✓ TIP

Permits associated with this work order indirectly via work clearances are only for view purpose.No actions are allowed on them.

Create Work Permit	Description	Permit Type	Status	Valid From Date	Valid To Date	Flex Fields	Attachments	Delete
15015	ka permit	Hazardous Work	Draft	21-Apr-2011 00:27:03	24-Apr-2011 23:27:45			
15016	Permit to do maintenance on Pump TF-PS-01	Hazardous Work	Draft	12-Apr-2011 02:54:20	14-Apr-2011 01:55:37			
<input type="text"/> <input type="button" value="Add 3 Rows"/>								

Work Clearance

✓ TIP

Work Clearances associated with this work order indirectly via permits are only for view purpose.No actions are allowed on them.

Work Clearance	Description	Status	Isolation Type	Scheduled Establishment Start Date	Scheduled Reestablishment Completion Date	Attachments	Flex Fields	Delete
11002	Clearance to work on TF-PS-01	Complete	HAZARDUS	12-Apr-2011 05:39:15	12-Apr-2011 05:39:15			
<input type="button" value="Add 3 Rows"/>								

23. Optionally click the **Save** button to save data entered, without applying it to the database.
24. Click the **Apply** button to create the work order.

Creating Express Work Orders:

If you need to capture work that has already been completed, use the Express Work Orders feature. You can access this page through the Maintenance Super User responsibility:

- Home > Work Orders > Express Work
- Home > Work Orders > Work Orders > One Step Material Release

Note: You cannot create an express work order that contains direct items.

1. Select an organization from the drop-down, and then click the **Go** button.
2. Select the Work Orders tab.
3. Click the Express Work link.

The system defaults the following information on the page, but you can change the values:

- Work Order Number - if your organization is automatically generating work order numbers
- Start Date - the current system date and time

- Status - Released. This is the default status for the work order
 - WIP Accounting Class
 - Completion Date - default value is the same as the Start Date
4. Optionally enter an asset number.
When you select an asset number, the default value for the Department field appears.
 5. Enter an asset group; this is a required field.
 6. Optionally enter an asset activity for the work order.
When you click the Save button, the asset activity and any material and resource requirements are populated on the page.
 7. Optionally enter a department number. If a department has been set up for the asset, the default department value appears.

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Express Work Order

Cancel Save Apply

* Work Order WO247806

Asset Number Fleet-EM1

* Asset Group Fleet

Activity

Start Date 29-May-2008 09:47:51

Department F-Maint

Description

Work Request

Status Released

Wip Accounting Class MaintWAC

Work Order Type

Completion Date

Additional Details

Resource Reporting

Material Reporting

Failure Information

Quality Plans

Cancel Save Apply

8. Optionally add details in the Additional Details group box.
9. Optionally add details the Resource Reporting group box such as resources (including contingent workers), quantities used, departments to charge, and whether you want to complete any operations. If you want to complete the work order, select the Complete check box.
You will enter the completion details using the Debrief Work Order page. This page is available after you save the work order.
10. Optionally add details in the Material Reporting group box.

Note: Any direct items in the BOM for the activity will not display.

Resource Reporting									
Select Details	Operation	Description	Department	Charged Quantity	Resource	Employee or Equipment	Quantity	Charge Department	
<input type="radio"/> Show	1	Inspect	BK-Mant		BK-MTEC	Moll, Mr. Jox	1		
<input type="radio"/> Show	2	Repair and Te	BK-Mant		BK-TRIM	ATTK0001	2		
<input type="radio"/> Show									
Add 3 Rows									

Material Reporting														
Select All		Select None												
Select Details	Material	Operation	Issued Quantity	Quantity	UOM	Subinventory	Locator	Lot	From Serial	To Serial	Revision	Enter Rebuild	Delete File	
<input type="checkbox"/> Show	Fleet	2		1	Ea	Fleet								
<input type="checkbox"/> Show														
<input type="checkbox"/> Show														
Add 3 Rows														

11. Optionally add details in the Failure Information group box.
12. Optionally add any quality plans.
13. Click the **Save** button.

Adding Completion Details to Work Orders:

You can add completion details to existing work orders by clicking the Debrief Work Order icon from the Work Orders page.

1. Navigate to the Work Orders page, and select an existing work order.
2. Click the Debrief Work Order icon for the work order to which you want to add completions information.

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All Requests Express Work Crew Schedule Mass Time Entry

Current Organization : EM1

Work Orders Text Search Save Search

Simple Search

Note that the search is case insensitive

Work Order: WO247707 Start Date From: To: 05-Jun-2008 09:57:43

Asset Number: Include Asset Children: Go Clear

Advanced Search Perso

Department: Status: Released

Show More Search Options

Select Work Order: Go Create Work Order Print Work Orders Export Work Order Export Schedule Im

Select	Work Order	Asset Number	Asset Group	Description	Scheduled Start Date	Duration Owning (hours)	Department	Status	Update Work Order	Debrief Work Order
<input type="radio"/>	WO247707	FL1010	Fork Lifts		27-May-2008 13:19:21	0 W-Maint		Released		

- Expand the Resource Reporting section to add resource information associated with employees (including contingent workers) and equipment.

Resource Reporting

Select Object: Assign Employee Go

Select	Details	Operation	Description	Department	Charged Quantity	Resource	Employee or Equipment
<input type="radio"/>	Show	10	Inspection	Fac Maint		MaintTech	Moll, Mr. Joe
<input type="radio"/>	Show	20	Repair and tes	Fac Maint		MaintTech	Moll, Mr. Joe
<input type="radio"/>	Show	30	QA	BK-Mant		BK-TRIM	ATTK0001

Add 3 Rows

Quantity	Charge Department	Complete	Flexfields
1	Fac Maint	<input checked="" type="checkbox"/>	
1	Fac Maint	<input checked="" type="checkbox"/>	
1	BK-Mant	<input checked="" type="checkbox"/>	

- Expand the Material Reporting section to add material information.

You can manually add material to the operations, add the material to an asset BOM, copy the material associated with the asset BOM, and view on hand quantity.

Note: If you are adding material information for an Express Work Order, bear in mind that the material was issued out of inventory when you created the work order, and you are simply reporting these actions. Therefore, no allocations are necessary.

Select Material: Copy To Asset BOM |

[Select All](#) | [Select None](#)

Select	Details	Material	Operation	Quantity	UOM	On Hand	Quantity	Details	Subinventory	Locator	Lot	From Serial	To Serial
<input type="checkbox"/>	Show	Air Filter	10	1	Ea	0			FkftStore				
<input type="checkbox"/>	Show												
<input type="checkbox"/>	Show												

- When you are finished, click the **Save** button to save your changes.
- Click the **Apply** button if all the information associated with the work order is complete.
- If you are using electronic reporting and electronic signatures (ERES), a notification will be generated after clicking the **Save** or **Apply** buttons.

The ERES flow is identical to the flow associated with the Complete Work Order page.

Viewing Work Orders:

To view work orders, you can use either the Simple or Advanced Search modes. To view work orders for assets that were transferred to another organization, perform an Advanced Search within the originating organization. You can enter an Asset Group to view all work orders for the transferred assets, in the current Asset Group, that were created in the originating organization. A Simple Search filters out the transferred assets, and does not include them in the search results. You can charge resources and material, and complete open work orders for transferred assets. You can execute a Simple Search on a transferred asset, within its destination organization, to view only work orders that were created in that destination organization.

If you perform an Advanced Search, you can search for work orders based on other criteria such as Asset Group, construction Estimate Number, Creation By, Created Date, Estimate Number, Estimation Status, Firm, Notification Required, Planner, Operation Status, and so on.

You can also save search criteria to personalize your search.

After executing the search, you can drill into a specific work order. The Work Order page contains content containers, providing information relating to the work order header, asset details, and work order details.

- Navigate to the Work Orders tab. The All sub-tab is selected.

Note: By default, you are using the Simple Search mode. To switch to the Advanced Search mode, choose Advanced Search. Choose Advanced Search to view work orders for assets that were

transferred to another organization.

2. Optionally select an Asset Number to search for its related work orders.

You can execute a Simple Search on a transferred asset, within its destination organization, to view only work orders that were created in that destination organization.

3. Optionally select a specific work order.
4. Optionally select Start Date From and To values to display work orders that fall within the specified date range.
5. Choose Go to display all work orders associated with the current search criteria.

Work Orders

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All Requests Crew Schedule Mass Time Entry

Current Organization : EMI

Work Orders

Text Search Save Search

Simple Search

Note that the search is case insensitive

Asset Number Start Date From To Work Order Status

Department Go Clear

Show More Search Options

Advanced Search

Select Work Order: Go Create Work Order Print Work Orders Export Work Order

Work Order	Asset Number	Asset Group	Description	Scheduled Start Date	Duration (hours)	Department	Status	Complete Work Order	Charge Time	Update Work Order	Print Work Order
WO102907	DTF35000	Vehicles	Leaking Oil	08-Apr-2004 09:06:00	0.017	F-Maint	Complete				

Text Search Save Search

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6. Optionally select a work order number to view its details such as attachments. Click or hover over the View button to view the attachments.

Request Attachments

Attachments

View

Creation Information

Cre.

Phone M

Contact Pref

Descriptive Information

Attachments

Previous

Next

Title	Type	Details	Update	Delete
WR Attachment1	File	SCM.gui		
WR Attachment2-updated1	Web Page	http://www.oracle.com		

Previous

Next

Work Order

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[Crew Schedule](#)
[Mass Time Entry](#)

Work Orders: All >

Organization : EM1

Work Order: W0102907

Update Work Order

Check Material Shortage

Re-Estimate

View Costs

Work Order

W0102907

Description

Leaking Oil

Scheduled Start Date

08-Apr-2004 09:06:00

Scheduled Completion Date

08-Apr-2004 09:07:00

Duration(hours)

0.017

Enable Material Issue Request

Yes

Task

Reactive

Work Order Type

Yes

Firm

Breakdown

Activity Cause

None

Work Order Attachments

Add

Asset Details

Asset Number

0TE35000

Asset Group

Vehicles

Area

Fleet Garage

Department

F-Maint

Organization

EM1

Location

3455 108th Ave

Parent Asset

Delivery Trucks

[Operations](#)
[Materials](#)
[Quality Plans](#)
[Requests](#)
[Work Relationships](#)
[Approval History](#)
[Preventive Maintenance](#)
[Failure Information](#)

Select Row:

Go

Add

[Show All Details](#)
[Hide All Details](#)

View Dependency

Expand All

Collapse All

April

T

W0102907

1

2

7. Optionally choose Check Material Shortage.

The Material Shortage field updates to display whether there is a shortage of the material (at that moment in time) that is needed to complete the work order's operations. This status helps you to determine when to start work. For example, if there is a material shortage, you typically would not start work. The process that populates this field considers both stocked and direct items. For stocked items, the Work Order Material Shortage process determines whether all of the inventoried material within the work order's associated BOM is available to transact (ATP is not considered). For direct items, the Work Order Material Shortage process determines if all of the direct items that are included within the work order's associated BOM

are received into Inventory. You should set this process to automatically execute periodically by scheduling the Check Material Shortage concurrent process, but you can execute it from the menu at any time.

8. The Operations sub-tab defaults as selected.

This sub-tab enables you to view Operations on the current work order, and the operations' dependencies in the View Dependency region. Operations are scheduled to run in parallel, sequence, or through dependent steps.

- 1.** It is important in asset management to capture both estimated and actual time spent on each operation of a work order. When resources are identified on a work order, there is a time estimate of how long it takes to perform the work. In many cases, the extent of the work load is unknown until the work starts. Resource charging enables you to post actual usage time for employees, equipment, and miscellaneous materials for specific operations on a work order.

To charge resources, select an Operation, and then select Charge Time from the *Select Row*: list of values.

- 2.** Choose Go.

Charge Resource

ORACLE Asset Management

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All Requests Crew Schedule Mass Time Entry

Work Orders: All > Work Order: WO102907 > Maintenance Organization: EM1

Charge Time: WO102907

Cancel Save Apply

Work Order: WO102907
 Asset Number: DTF35000
 Asset Group: Vehicles
 Operation: 1
 Date Released: 08-Apr-2004 09:10:15

Description: Leaking Oil
 Scheduled Start Date: 08-Apr-2004 09:06:00
 Scheduled Completion Date: 08-Apr-2004 09:07:00
 Assigned Department: F-Maint

Show All Details Hide All Details

Details	Resource	Qty	UOM	Employee or Equipment	Charge Department
Show	Mechanic1	0.01	HR		
Show					
Show					
Show					
Show					
Show					
Show					
Show					
Show					
Show					
Show					

Add 3 Rows

Cancel Save Apply

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- Select a Resource Sequence. The Resource, Unit of Measure, and Quantity (reflects the number charged, normally in hours) default, based on the selected resource sequence and the resources associated with the work order. For information on Resource Sequence, Resource, and Unit of Measure, See: Defining Resource Requirements, page 3-45

You can change the resource at the operation level if no transactions have been recorded for the work order.

- Optionally select the Work Performed Date to indicate the actual date the work was performed.
- Optionally select the Employee that performed the work.
- Optionally select the Equipment used to perform the work.
- Optionally select the Charge Department to identify which department is charged for the employee or equipment usage.

You can display the list of values if the Employee name or Equipment serial number fields are populated. The list of values displays all departments to which the person or equipment is assigned. If you enter a Charge Department manually, the system validates that the department matches the current operation's assigned department. If it does not, you will receive an error.

- Optionally select a Reason code to indicate the reason the resource is used.
 - Optionally enter a Reference.
 - Choose Apply to save your work and return to the Work Order page.
3. Operations are scheduled to run in parallel, sequence, or through dependent steps. For example, Operation 20 is dependent on Operation 10; Operation 20 cannot be performed until Operation 10 is complete. Operations 30 and 40 run in parallel to each other. Operation 40 is independent; it can be performed at any time.
- To add an operation dependency, select an Operation, and then select Add Dependency from the *Select Row*: list of values. After the dependency is added, you can view the dependency within
4. Choose Go.

Operation Dependency

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All Requests Crew Schedule Mass Time Entry

Work Orders: All > Work Order: W0102907 > Current Organization : EM1

Operation Dependency

Work Order W0102907 Description Leaking Oil
 Asset Number DTF35000 Asset Description Delivery Erand Truck 35000
 Asset Group Vehicles Asset Activity F-Maint
 Operation Sequence 1 Assigned Department F-Maint
 Scheduled Start Date 08-Apr-2004 09:06:00 Scheduled End Date 08-Apr-2004 09:06:00

Dependent Operation	Description	Dependency Type	*Scheduled Start Date	Scheduled End Date	Delete
2	Check Oil Pressure	Prior	08-Apr-2004 00:00:00	08-Apr-2004 00:00:00	

Add Another Row

Return To Work Order: W0102907

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- Select the Dependent Operation.
 - Select the Dependency Type.
 - Optionally delete existing dependencies by selecting the Delete icon.
 - Choose Apply to create the dependency or Cancel to return to the Work Order page.
5. You can Complete and Uncomplete operations. After an operation is complete, you can perform an Operation Uncompletion. If an operation is dependent upon another operation, you cannot uncomplete that operation's dependency if the current operation is complete. For example, operation 20 is dependent on operation 10 completing. You cannot uncomplete operation 10 after operation

20 is complete.

To Complete or Uncomplete an operation, select an Operation, and then select Complete/Uncomplete from the *Select Row:* list of values.

6. Choose Go.

Complete Operation

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All Requests Crew Schedule Mass Time Entry

Work Orders: All > Work Order: WO102907 > Current Organization : EMI

Complete Operation

Work Order: WO102907 Asset Type: Capital
Asset Number: DTF35000 Asset Group: Vehicles
Operation: 1 Description: Check Oil Filter Seal
Assigned Department: F-Maint Assigned Employees: 0

Cancel Apply

Enter completion information and hit 'Apply' to complete the operation.

Completion Details
Indicates required data

Transaction Type: Complete Operation

* Actual Start Date and Time: 08-Apr-2004 09:06:00
(example 07-Sep-2008 10:32:21)

* Actual Duration (hours): 0

Actual End Date and Time: 08-Apr-2004 09:06:00

Shutdown Start Date and Time: 08-Apr-2004 09:06:00

* Shutdown Duration (hours): 0

Reconciliation Code:

Reference:

Attachments: None Add

Quality Plans

Plan Name	Description	Mandatory	Results Entered	Enter Quality Results	View Quality Results	Quality Plan Attachments
A OP COMP PLAN1						

Prior Operations

- The Actual Start Date and Time defaults; you can optionally update it.
- Optionally enter a Reconciliation Code to describe why you are completing this operation. For example, Operation Completed or Operation Partially Completed.
- Actual Duration identifies the total elapsed time of the work order. It is automatically calculated as the difference between the operation's Scheduled Start and End Dates.
- Optionally select a Reconciliation Code to describe why you are completing or uncompleting this operation.
- Optionally enter a Reference.
- Optionally choose Add to attach any necessary files, URLs, or text to the current operation. Each operation can have an unlimited number of attachments.

- The Quality Plans region displays collection plans that are associated with the current work order's Asset Number. When a collection plan is created, it is specified whether the collection plan requires completion. Triggers might have been specified to make specific assets eligible for the collection plan. See: Quality Integration Setup, page 2-158. If results entry is required for the collection plan, you are prompted to enter Quality results upon completing the Operation.

Optionally select the Enter Quality Results icon. Required Data fields depend on the Collection Plan's collection element specifications. See: Quality Integration Setup, page 2-158.

Enter Quality Results

- Optionally choose Add to attach any necessary files, URLs, or text to the current Quality results. Each results entry can have an unlimited number of attachments. Choose Apply.
- Choose Apply to save the results entry or Cancel to return to the Complete Operation page.
- Optionally select the View Quality Results icon to view or update existing Quality results already entered. Select Return to Complete Operation.
- Choose Apply to complete the operation or Cancel to return to the Work Order page.
- Optionally update the operations for the current work order. These operations default from the maintenance route (See: Defining Maintenance Routes, page 2-106) associated with the current Activity, but you can update and add to them (See: Preparing Work Order Operations, page 3-29).

9. Optionally select the Materials sub-tab to view or add items from the associated

Asset Number's items list. When you enter a work order for an Asset Number, the Asset Number's associated Activity attaches the required material (See: Setting Up Maintenance Bills of Material, page 2-101) and resources to complete its operations. The Inventory and Direct Item requirements appear. For Direct Items, the requirement entered in the work order, as well as the items directly procured in Purchasing that have not been received yet, are included in the display. You can update, add, view, and delete material requirements for a specific work order.

1. You can optionally request new inventory items.

Request New Inventory Items

Material Requirements							
Select Material: <input type="button" value="Copy To Asset BOM"/> <input type="button" value="Go"/> <input type="button" value="Copy From Asset BOM"/>							
Select All Select None Show All Details Hide All Details							
Select Details	Operation	Item Type	Line Type	Item	Item Description	Quantity/Amount	UOM Date Required
<input type="checkbox"/>	Show	10 Stocked Inventory		Fork Lift Battery	Batteries used for electric Fork Lifts	1 Ea	14-Dec-2006 10:43:00
<input type="checkbox"/>	Show	10 Stocked Inventory		Shop Rags	Shop Rags for Clean up	2 Ea	14-Dec-2006 10:43:00
<input type="checkbox"/>	Show	<input type="text"/> Stocked Inventory		<input type="text"/>		1	

- Enter an operation.
- Select an Item to search for and add a new inventory item.

You can search for new inventory items by using one of these options:

- Item
- Description
- Cross Reference
- Cross Reference Description
- Manufacturer
- Manufacturer Part Number

1. Query for the item to be added to the work order.
2. Click the **Select** radiobutton for the inventory item to be added.

Search and Select: Material Cancel Select

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By Manufacturer Go

Results

[Personalize "Material LOV"](#)

Previous 1-10 Next 10

Select	Quick Select	Material	Description	Cross Reference Type	Cross Reference	Cross Reference Description	Manufacturer	Manufacturer Part Number
<input type="radio"/>		CM32546	Battery - NIHM					
<input type="radio"/>		Wheel Assembly - Goodyear	Wheel Assembly: Goodyear Eagle GA P205/65R15				Standard Textile	00014
<input type="radio"/>		Wheel Assembly - Michelin	Wheel Assembly: Michelin LTXX LT215/85R16				Standard Textile	10071

- Enter a required Quantity.
 - Select a Date Required. The system date and time defaults.
 - Optionally select a Supply type. You can optionally select a subinventory location and source locator for the material.
 - Optionally select whether an Auto Request Material value. If you select Yes, requisitions and purchase orders are created automatically for the current inventory item when the work order is released.
 - Optionally enter a Comment.
 - Select whether to include this Inventory Item in the MRP Net.
 - Click the **Apply** button to add the inventory item to the work order's material requirements.
2. Optionally choose Request All to deliver all required material from stores to the work order. A material issue request is generated (move order in Inventory) to request the material associated with a work order. This process is automated upon the work order release, by selecting a check box in the Enterprise Asset Management Parameters (See: Defining eAM Parameters, page 2-11).

Request All Materials

ORACLE® Asset Management

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All Requests Crew Schedule Mass Time Entry

Work Orders: All > Work Order: WO102907 > Current Organization : EM1

Request All Materials: WO102907

Work Order WO102907
Asset Number DTF35000
Asset Group Vehicles

Description Leaking Oil
Asset Description Delivery Erand Truck 35000
Asset Type Capital

Only open material requirements are displayed and you can request any amount upto the open quantity. For the most optimal allocation, leave the Source Subinventory blank.

Select Material	Op Date Required	Request Qty	Open Qty	Required Qty	Issued Qty	Allocated Qty	UOM	Source	Subinv	Update Material Requirement
No Material Required										

[Return To Work Order: WO102907](#)

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- Choose Request to allocate the material requirements to the work order.
3. Optionally choose Copy From Asset BOM to update the BOM associated with the Asset Group with any items list changes (See: Setting Up Asset Bills of Material, page 2-86)

Copy From Asset BOM

ORACLE® Asset Management

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All Requests Crew Schedule Mass Time Entry

Work Orders: All > Work Order: WO102907 > Current Organization : EM1

Copy From Asset BOM

Work Order WO102907
Asset Number DTF35000
Asset Group Vehicles

Description Leaking Oil
Asset Description Delivery Erand Truck 35000
Asset Type Capital

* Indicates required field
* Operation 1

Select Material	Material Description	Quantity	UOM	Supply Type
No results found.				

Cancel Apply

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- Select the necessary Material, and then choose Apply.
4. Optionally choose One Step Issue. A one-step issue is a substitute for the Material Issue Request and Material Issue Verification activities; a separate request is not created.

One Step Issue

Oracle Asset Management

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All Requests Crew Schedule Mass Time Entry

Work Orders: All > Work Order: WO102907 >

Current Organization : EMI

One Step Material Issue

* Work Order: WO102907

Operation:

Material:

Go Clear

Select Material(s): Issue

Select All Select None Show All Details Hide All Details

Select	Details	Material	Operation	Qty	Issued Qty	UOM	Subinventory	Locator	Lot	From Serial	To Serial	Revision	Replaced Rebuild Details
<input type="checkbox"/>	Show	10-40W Oil	1	1	0	QT							
<input type="checkbox"/>	Show	Oil Filter	1	1	0	Ea							
<input type="checkbox"/>	Show												
<input type="checkbox"/>	Show												
<input type="checkbox"/>	Show												
<input type="checkbox"/>	Show												
<input type="checkbox"/>	Show												
<input type="checkbox"/>	Show												

Add 5 Rows

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis Home Logout Preferences Personalize Page Diagnostics

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- Select the work order that you wish to issue material. It must be enabled for material issue requests. The current work order defaults. See: Routine Work Orders, page 3-3.
- Optionally select the specific Operation to view results on existing One Step Material Issues that were issued to that operation. Operations existing within the selected work order are available.
- Optionally select a specific Material if your query is to view existing One Step Material Issues.
- Choose Go. All planned material appears in the Select Material(s) region. Planned material is material that exists in the work order's material requirements. See: Defining Inventory Material Requirements, page 3-36.
- Within the Select Material(s) region, optionally select unplanned Material (material not part of the work order's material requirements) to issue to the current work order.
- Select an Operation to issue the material. The UOM defaults to the current Material's UOM.
- Select the Quantity of the material that you are issuing to the work order.
- Optionally select a Subinventory to pull the material from in Inventory.
- If you previously selected a Subinventory requiring a Locator, select a

Locator.

- If the current material is lot controlled, select a Lot.
- If the current material is serial controlled, select From and To Serial numbers.
- Optionally select a Revision.
- If the material is Rebuildable Inventory, optionally choose the Replaced Rebuild Details icon to specify the replacement Rebuildable Item information for the current Rebuildable Item. After selected, you can indicate the following within the Replaced Rebuild Details page:

Rebuild Item- defaults as the current Rebuild Item; you can update it.

Rebuild Serial Number - optionally enter if you know what serial number is coming out (for serialized rebuilds).

Rebuild Activity - the activity you want to associate with the created rebuild work order

Rebuild Work Order - the name of the work order created for the replaced Rebuildable Item

- If you specify a replaced rebuildable item, a work order generates for the replaced rebuildable item because it is most likely problematic and you can have it repaired. If a serial number is provided for the replaced Rebuildable Item, it is removed from the asset's hierarchy and the configuration history is updated. If nothing is specified within the Replaced Rebuild Details page, the replaced rebuild defaults as the same rebuild item that you are issuing. A work order is created for the replaced rebuild item.

- Optionally, select the Details Show-Hide toggle icon.
Optionally select a Reason for the current issue. Select the Date required for the material to the work order. Today's date and time defaults. Optionally enter a Reference.
- Select the Select check box next to the lines you are issuing to the current work order.
- Choose Issue.

5. You can optionally choose Request Item, within the Direct Items region, to add Direct Items to the work order's material requirements. Non-stock direct items can be included in the internal catalog, but the decision is made to not maintain an inventory balance. These items are not transactable, not stockable, but you can procure them. Direct items are either non-stock or description-based.

Non-Stock Direct Items can represent items that are not stocked in inventory, or services that need to be purchased from a supplier. Non-Stock Direct Items are not stocked in inventory but are defined in the Item Master as an inventory item, purchaseable, and purchase but not stockable (See: Inventory Attribute Group, *Oracle Inventory User's Guide*). Direct Items are contrived as "one-off", bought directly from a vendor for a specific work order and Operation. They are delivered directly to the Shop Floor from maintenance work order execution. See: Defining Direct Item Material Requirements, page 3-36. You can add Planned Direct Items to a work order's Bill of Material (BOM) or an Activity BOM. Planned Direct Items must first be created in the Item Master as Non-Stockable and Purchasable inventory items (See: Non-Stock Direct Item Setup, page 2-119). A purchase requisition is optionally automatically created for these items, when the work order is released. *Inventory Attribute Group, Oracle Inventory User's Guide*

Request New Direct Items

Update Work Order: WO102907

* Indicates required field
Time = hours

Work Order: **WO102907**
Asset Number: **D1F35000**
Asset Group: **Vehicles**
Scheduled Start Date: 08-Apr-2004 09:06:00
Scheduled Completion Date: 08-Apr-2004 09:07:00
Duration: 0.017
Wip Accounting Class: **MaintWAC**
Request Number:

Description:
Department:
Asset Activity:
Firm:
Shutdown Type:
Priority:
☐ Pending

Work Order Stats

Required Hours	0.02
Assigned Hours	0.0
Unassigned Hours	0.02
Estimated Cost	16.84
Actual Cost	47.59
Material Shortage	

Additional Details

Failure Information

Operation Requirements

Material Requirements

Select Material: 1-3 of 5

Select All | Select None | Show All Details | Hide All Details

Select	Details	Operation	Item Type	Line Type	Item	Item Description	Quantity/Amount	UOM	Date Required	Delete
<input type="checkbox"/>	<input type="button" value="Show"/>		1 Stocked Inventory		10-40W Oil	10-40W Car / Truck Motor Oil	1	QT	08-Apr-2004	<input type="button" value="Delete"/>
<input type="checkbox"/>	<input type="button" value="Show"/>		1 Stocked Inventory		Oil Filter	Oil Filter for Vehicles	1	Ea	08-Apr-2004	<input type="button" value="Delete"/>
<input type="checkbox"/>	<input type="button" value="Hide"/>		Non-Stock Direct	Quantity	<input type="text"/>		1			<input type="button" value="Delete"/>

Operation Description:
Requisition Quantity:
Received Quantity:
Supplier:
Supplier Site:
Purchasing Category: **MISC.MISC**
Currency: **USD**

Department:
Purchase Order Quantity:
Auto Request Material:
Contact Name:
Contact Phone:
Supplier Item:
Price:

- Select an Operation.
- Select an Item Type.

Description Direct: This direct item type is not stored in Oracle Inventory.

Non-Stock Direct: This direct item type is stored in Oracle Inventory. Its Master Item record's Stockable check box is cleared.

- If you selected a Non-Stock Direct item type, select an Item. This field is disabled if a Description Direct item type was previously selected.

- Enter a Description, if you previously selected a Description Direct item Type.
 - Enter a Date Required. The system date defaults.
 - Optionally enter a Purchasing Category. See: Setting Up Purchase Order Category Associations for Direct Items, page 2-185.
 - Choose Apply.
6. Optionally select Check ATP from the *Select Material(s)*: list of values to check available to promise information for all selected Material.
 - Choose Go.
 7. Optionally select Copy To Asset BOM from the *Select Material(s)*: list of values, to copy any selected Material to the current Asset Number's Asset BOM.
 - Choose Go. Both stocked and non-stocked inventory items are copied.
 8. Optionally select the Update icon to update the current material requirement information.
 9. Optionally select the Request More icon to request more of the current material requirement to the work order.
 10. Optionally choose Delete to delete the current material requirement.
10. Optionally choose the Quality Plans sub-tab to view the current work order's work order and operation specific Quality collection plans. Collection plans appear that are associated with the current work order's Asset Number. When a collection plan is created, it is specified whether the collection plan requires completion. Triggers might have been specified to make specific assets eligible for the collection plan. See: Quality Integration Setup, page 2-158.

Quality Plans

ORACLE Asset Management

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All Requests Crew Schedule Mass Time Entry

Work Orders: All >

Organization: EM1

Work Order: W0102907

Update Work Order Check Material Shortage Re-Estimate View Costs

Work Order: **W0102907**
 Department: **F-Maint**
 Asset Activity: **Complete**
 Status: **Complete**
 System Status: **Complete**
 Project:
 Material Shortage:
 Warranty Status:
 Activity Type: **Service**
 Activity Source: **Routine**

Description: **Leaking Oil**
 Scheduled Start Date: **08-Apr-2004 09:06:00**
 Scheduled Completion Date: **08-Apr-2004 09:07:00**
 Duration(hours): **0.017**
 Enable Material Issue Request: **Yes**
 Task:
 Work Order Type: **Reactive**
 Firm: **Yes**
 Activity Cause: **Breakdown**
 Work Order Attachments: **None** Add

Asset Details
 Asset Number: **07E35000**
 Asset Group: **Vehicles**
 Area: **Fleet Garage**
 Department: **F-Maint**
 Organization: **EM1**
 Location: **3455 108th Ave**
 Parent Asset: **Delivery Trucks**

Operations Materials **Quality Plans** Requests Work Relationships Approval History Preventive Maintenance Failure Information

Work Order Quality Plans

Plan Name	Description	Mandatory	Results Entered	Enter Quality Results	View Quality Results	Quality Plan Attachments
RM_EAM_PLAN3	EAM PLAN 3					
RP_CP_DR_EAM	DR PLAN TO CHECK IN EAM UI					

Operation Quality Plans

View Quality Plans for Operation **1**

Plan Name	Description	Mandatory	Results Entered	Enter Quality Results	View Quality Results	Quality Plan Attachments
KA_OP_COMP_PLAN1						

Return To Work Orders: All

Update Work Order Check Material Shortage Re-Estimate View Costs

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- Optionally select the Enter Quality Results icon. Required Data fields depend on the Collection Plan's collection element specifications. See: Quality Integration Setup, page 2-158.
 - Optionally choose Add to attach any necessary files, URLs, or text to the current Quality results. Each results entry can have an unlimited number of attachments. Choose Apply.
 - Choose Apply to save the results entry.
 - Optionally select the View Quality Results icon to view or update existing Quality results already entered. Select Return to Complete Operation.
 - Choose Update Work Order to update the current work order.
11. Optionally select the Requests sub-tab to view any Service or Work Requests associated with the current work order.

Click the Request Number link to access the View Work Request page to view work request details.

Requests

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All Requests Express Work Crew Schedule Mass Time Entry

Work Orders: All > Organization: EM1

Work Order: WO254905

Complete Work Order Update Work Order Check Material Shortage Estimate View Costs

Personalize Table Layout: (workOrderDetails)

Work Order	WO254905	Description	Lubricate Fork Lift Mast
Department	W-Maint	Scheduled Start Date	17-Jul-2013 07:00:00
Asset Activity	Lubricate Fork Lift Mast	Scheduled Completion Date	17-Jul-2013 08:00:00
Status	Released	Duration(hours)	1
System Status	Released	Enable Material Issue Request	Yes
Project		Material Shortage	Yes as of 29-Jul-2013 23:32:21
Task	Yes	Work Order Type	Lubrication
Firm	Yes	Activity Type	Lubrication
Activity Cause	Normal Wear	Activity Source	
Work On Map		Work Order Attachments	None Add...
Priority			

Show Additional Details Show Completion Details

Operations Materials Operation Quality Plans Requests Work Relationships Approval History Preventive Maintenance Failure Information

Personalize "Requests"

Personalize Table Layout: (region1)

Personalize "Requests"

Assign to Work Order

Request Number	Description	Status	Request Type	Asset	Dept	Delete Ass
25224	Quality Initiated Work Request: From Quality	On Work Order	Work Request	Fork Lift Daily Maintenance	W-Maint	
49782	test SR	Open	Service Request			

- Choose Assign to Work Order to associate the selected requests to the current work order.

- Optionally select the Work Relationships sub-tab to manage work order schedules and view work order details. Work order relationships enable you to manage a network of related work orders, enabling you to manage complex projects, such as planned or facility shutdowns. The different relationships provide separate scheduling rules that are used to manage large projects. A Gantt chart enables you to manage work by displaying work order schedules and a summary of work order details. The Gantt Chart's drag and drop functionality enables you to manage schedules with ease. See: Work Order Relationships, page 3-50.

Work Relationships

Operations Materials Operation Quality Plans Requests **Work Relationships** Approval History Preventive Maintenance Failure Information

Personalize "Work Relationships"

Personalize Gantt: (RelationshipsGanttRN)

Select Work Order: Update Dependencies Go Update Work Hierarchy Update Alternate Cost Hierarchy View Cost

Expand All Collapse All

Select Focus Work Order July W

WO254905

WO254906

Personalize Stack Layout: (HideStackLayout)

View All Relationships

Personalize "Relationships"

Work Order	Description	Relation	Relation Status	Asset Type	Asset Group	Asset Number
WO254906		Scheduling Child	Valid	Capital	Fork Lifts	FL1020

Return To Work Orders: All Complete Work Order Update Work Order Check Material Shortage Estimate View Costs

- Optionally choose Update Work Hierarchy to view or update the Scheduling Relationship.
 - Select Create Child Work Order from the *Select Work Order*: list of values to create a Parent Child Relationship. See: Work Order Relationships, page 3-50.
 - Select Add Existing Work Orders from the *Select Work Order*: list of values to add Scheduling children to the current work order.
 - Choose Apply.
 - Optionally choose Shift Dates to shift the scheduling dates.
 - Optionally choose Remove to remove the selected work order from the hierarchy.
 - Optionally choose Update Alternate Cost Hierarchy to view and or update the Cost Relationship. See: Work Order Relationships, page 3-50. You can optionally create child work orders, add existing work orders, and view cost information for the current Cost Relationship.
 - Optionally choose View Costs to view the current work order's cost information.
- Click the Work Order link in the View All Relationships region to view work order dependencies.
 - Optionally select the Approval History tab to view the work order's approval history.

Approval History

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Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis

All Requests Crew Schedule Mass Time Entry Work Orders: All > Organization: EM1

Confirmation

- Low-level logging is currently enabled. Your application will not perform as well while low-level logging is on.
- The material shortage status has been successfully calculated for the Work Order W0102907

Work Order: W0102907

Update Work Order Check Material Shortage Re-Estimate View Costs

Work Order	W0102907	Description	Leaking Oil
Department	F-Maint	Scheduled Start Date	08-Apr-2004 09:06:00
Asset Activity		Scheduled Completion Date	08-Apr-2004 09:07:00
Status	Released	Duration(hours)	0.017
System Status	Released	Enable Material Issue Request	Yes
Project		Task	
Material Shortage	No as of 15-Sep-2006 15:55:48	Work Order Type	Reactive
Warranty Status		Firm	Yes
Activity Type	Service	Activity Cause	Breakdown
Activity Source	Routine	Work Order Attachments	None Add

Asset Details

Asset Number	DTF35000
Asset Group	Vehicles
Area	Fleet Garage
Department	F-Maint
Organization	EM1
Location	3455 108th Ave
Parent Asset	Delivery Trucks

Operations Materials Quality Plans Requests Work Relationships Approval History Preventive Maintenance Failure Information

Workflow Name

Seq No.	Approver Name	Approval Status	Status Date	Email	Phone
No results found.					

[Return To Work Orders: All](#) Update Work Order Check Material Shortage Re-Estimate View Costs

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A work order might require approvals or notifications at different stages of its lifecycle. For example, organizations typically want an approval process in place before a work order is released. Workflow automates this process. You can initiate Workflow to generate notifications, approvals, transactions, and update a work order status. You can enable Workflow for Work Orders within the eAM Parameters (See: Defining eAM Parameters, page 2-11). You can set up Business Events and Event Subscriptions (or use seeded events and subscriptions) within Oracle Workflow to indicate what events trigger Workflow. Seeded events that you can enable to trigger Workflow are: work order creation, work order release approval, work order completion, work order status change, operation completion. See: Setting Up Oracle Workflow, *Oracle Workflow User's Guide*, Setting Up the Business Event System, *Oracle Workflow User's Guide*, and Defining Work Order Statuses, page 3-23).

15. Optionally select the Preventive Maintenance tab to view this work order's Preventive Maintenance information. Enterprise Asset Management enables you to generate work orders automatically based on meter readings, runtime intervals, and calendar days. Preventive maintenance Activities reduce the probability of failure or degradation of the assets' physical conditions. These Activities are executed periodically, by usage, or based on the condition of an Asset Number (asset or rebuildable serial number). Meters are entered to measure any Asset Number that needs to be measured and periodically serviced, based on the measurement (See: Preventive Maintenance Overview, page 4-1).
16. Optionally select the Failure Information tab to view Failure Analysis information

for this work order (See: Failure Analysis Overview, page 28-1).

Viewing Crew Schedules:

You can perform a comprehensive view of employee schedules by department or resource. Planners can determine their crews' workload details. Planners may also modify and change their employees' workloads.

1. Navigate to the Crew Schedule page (Work Orders tab > Crew Schedule sub-tab).

Crew Schedule

Save Export Printable Page

Personalize Query: (EmpSearchRN)

Search
Personalize "Search"

To view schedules for a different horizon, change the From and To Dates.

Department: F-Maint Employee: Competence Type: Competence:

Resource: From Date: 01-May-2006 16:54:38 To Date: 25-Aug-2006 16:54:38

Go Clear

Personalize Stack Layout: (ResultLayout)

TIP Allotment, Assigned, Available hours do not include time in the past.

Personalize Advanced Table: (EmpResultsRN)

Select	Details	Name	Department	Resource	Allotment	Hours Assigned	Assigned Available	Percent
<input checked="" type="radio"/>	Hide	Short, Mr. Dave	F-Maint	Mechanic1	24	0	24	0
Competence Type								
MAINT Maintenance.Brakes								
MAINT Maintenance.Planned Maintenance								
MAINT Maintenance.Engine Replacement								
MAINT Maintenance.Diagnostics								
<input type="radio"/>	Show	Moll, Joe	F-Maint	Mechanic1	24	0	24	0
<input type="radio"/>	Show	Rome, Ms. Gerry	F-Maint	Mechanic1	24	0	24	0

Assignment Details: Short, Mr. Dave
Personalize "Assignment Details"

Personalize Gantt: (EmpAssignmentGanttRN)

Work Order	Resource	Usage	Start Date	End Date	Assign	Update

August W

Save Export Printable Page

2. Using the fields in the Search region, you can select the list of employees in which to view or update work loads. You can specify a date range for which employee workload details appear.
3. Choose Go to display a list of employees, based on the results of the entered search criteria.

Entering Time for Multiple Work Orders:

Resource transactions define the time an assembly spends at an operation and the cost you incur for an operation. There are two types of resources: person and machine. You can transact both person and machine resources. A resource is an employee, piece of equipment, or contractor service, used to perform an operation. You can charge resources to a specific work order

You can enter time for one or multiple orders at once, using the Mass Time Entry page. See Also: Resource Transactions, *Oracle Work in Process User's Guide*.

1. Navigate to the Mass Time Entry page (Maintenance Super User: Work Orders tab > Mass Time Entry sub-tab).

ORACLE Asset Management

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All Requests Crew Schedule Mass Time Entry

Maintenance Organization: EM1

Mass Time Entry

Cancel Apply

Show All Details Hide All Details

Details	Work Order	Operation	Resource	Qty	UOM	Employee or Equipment	Charge Department
Show	WO183802	10	FlirtMech	2	HR	Small, Mr. Andy	W-Maint
Show							
Show							
Show							
Show							
Show							
Show							
Show							
Show							
Show							

Add 3 Rows

Cancel Apply

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2. Select a valid work order.
3. Enter the Operation sequence, of the current work order's routing, to charge (See: Preparing Work Order Operations, page 3-29).
4. Enter the Resource sequence to charge (See: Defining Resource Requirements, page 3-45).
5. Enter the Quantity to charge.
6. Select a UOM to measure the quantity charged. This defaults from the current resource's department setup (See: Defining Departments and Resources, page 2-17).
7. Select an Employee or Equipment resource to charge. You can add contingent workers as employees.
8. Select a Charge Department.
9. Optionally, in the Hide region, enter Resource Sequence, Reason, Reference, and Work Performed Date information.
10. Choose Apply to save your work.

Completing Work Orders:

Enterprise Asset Management work orders are created against assets. They are defined manually, or generated automatically based on a scheduled Activity. If you attach a

manually created work order to an activity (normally the role of a Planner), the work order inherits the Activity's attributes, such as the Asset BOM, Asset Route (operations), attachments, quality plans, cost information, and scheduling rules.

The operations within a work order do not need to be complete to complete a work order. However, the date you complete a work order must be greater than (later) or equal to the end date of the operation that has the latest end date. Likewise, the date you start a work order must be earlier than or equal to the start date of the operation with the earliest start date. You can uncomplete a work order after it is completed to transition it to a Released status (See: eAM Work Order Statuses, page 3-23).

Planners or Crew Supervisors can complete or uncomplete work orders, using the Maintenance Workbench (See: Using the Maintenance Workbench, page 3-69) or from the Work Orders tab in Maintenance User. After completing a work order, the completion transaction record is created with your electronic signature (User Name). A record is created with this signature, during completion, for any mandatory collection plan results or mandatory meter readings, as well.

Note: You can complete associated work permits at the same time that you complete work orders. However, the associated work permit must have a status of Released or a user-defined equivalent.

1. Navigate to the Work Orders page.

Work Order Completion

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All Requests Express Work Crew Schedule Mass Time Entry

Current Organization : EM1

Work Orders

Text Search Save Search

Personalize Query

Simple Search

Personalize "Simple Search"

Personalize Default Single Column: (SimpleSearchSingleCol)

Note that the search is case insensitive

Work Order wo254905 Start Date From To

Asset Number

Include Asset Children

Go Clear

Show More Search Options

Personalize Stack Layout: (ResultsRN)

Personalize "Work Order Results Table"

Select Work Order: Complete Work Order Go Create Work Order Print Work Orders Map All Export Work Order Export Sch

Select	Work Order	Asset Number	Asset Group	Description	Scheduled Start Date	Duration Owning (hours)	Department	Status	Update Work Order	Debi
<input checked="" type="radio"/>	WO254905	FL1010	Fork Lifts	Lubricate Fork Lift Mast	17-Jul-2013 07:00:00	1 W-Maint		Released		

Text Search Save Search

2. Enter a work order number.
3. Choose Go.

4. Click the Update Work Order pencil icon.

5. You can change the status of the work order.

If the work order has a status of Complete and you change the status to Complete-No Changes, the system validates if there are any existing open purchase requisitions or purchase orders for the work order materials. You will receive an error message if there are any open purchase requisitions or purchase orders. You cannot complete or update work orders to Complete-No Charges if there are open purchase requisitions or purchase orders attached to the work order.

6. Enter a duration value: Actual Duration or Actual Start Date and Time. The Actual Start Date and Time defaults as the system date, but you can optionally update it. The value that you do not enter is automatically calculated.

Actual Duration identifies the total elapsed time of the work order. It is automatically calculated as the difference between the Scheduled Start Date and Scheduled End Date.

7. Optionally enter a Reconciliation Code. This is a simple description of why you are completing this work order, for example, Work Order Completed or Work Order Partially Completed.

8. Oracle Quality collection plans associated with the current work order's Asset Number and requiring completion appear in the Quality Plans region. When the collection plan was created, it was specified if the collection plan required completion. Also, during the Enterprise Asset Management collection plan creation process, triggers might have been specified to make only certain assets eligible for the collection plan. See: Quality Setup, page 2-158.

Required fields are dependent on the Collection Plan's collection element specifications. See: Quality Setup, page 2-158.

9. Open the Meters region to enter readings for meters associated with this Asset Number. Readings for meters defined as mandatory must be entered. You can optionally enter non-mandatory readings.

At work order completion, meter readings are mandatory for work orders generated by the Preventive Maintenance scheduling engine. After a work order is completed, meter readings are required for all runtime interval meters associated with the Asset Number in the Preventive Maintenance scheduling definition. See: Preventive Maintenance Scheduling, page 2-137. If there is a meter associated with this Asset Number, you are prompted to enter a Current Reading or a Reading Change. If you enter a Current Reading, the Reading Change defaults. If you enter a Reading Change, the Current Reading defaults. See: Entering Meter Readings, page 4-3.

- Enter Reset Reading value to indicate that you would like to Reset the Current Reading.

10. Open the Failure Information region to enter Failure Analysis information (See: Failure Analysis Overview, page 28-1). The Failure Information region appears if the *Failure Code Required* value is set to *Yes*, within the Failure Set definition (See: Defining Failure Codes and Sets, page 28-2).

Failure information entry is mandatory during work order completion if the Failure Entry Required check box was selected when this work order was created. However, if the Failure Entry Required check box is clear, you can still enter failure information at work order completion (See: Creating Work Orders, page 21-37).

11. Choose Apply to complete the work order.

Uncompleting Work Orders:

1. Navigate to the Work Orders page.
2. Enter a work order number (with a Complete status).
3. Click the **Go** button.
4. Choose the Uncomplete Work Order pencil icon.

The screenshot displays the Oracle Asset Management web interface. At the top, there's a navigation bar with tabs: Home, Assets, Work Requests, Work Orders, Stores, Budget Forecasts, and Failure Analysis. Below this is a sub-navigation bar with links: All, Requests, Crew Schedule, Mass Time Entry. The main content area is titled 'Uncomplete Work Order: W0211621'. It shows details for the work order: W0211621, Asset Type Capital, Asset Group Lexus ES300, Status Complete. To the right, it shows Description: 15000 Miles Scheduled Maintenance, Asset Number LX0002, and Department Lexus Shop. Below this, there's a section for 'UnCompletion Data' with fields for Transaction Type (Uncomplete Job) and Uncompletion Status (Released). Further down is the 'Failure Information' section, which includes a 'Failure Entry Required' checkbox (checked), a 'Failure' dropdown (Mechanical), a 'Cause' dropdown (Lub System Failure), a 'Resolution' dropdown (Auto-Lub Correction), a 'Failure Date' field (14-Aug-2006 12:30:00), a 'Failure Comments' text area, and a 'Failure Set' dropdown (MAIN). At the bottom right of the 'Failure Information' section are 'Cancel' and 'Apply' buttons. The footer of the page contains navigation links and copyright information: Copyright (c) 2006, Oracle. All rights reserved.

5. Choose Apply to uncomplete this work order. When you uncomplete a work order, entered failure information is not reversed. However, when you re-complete the work order, you can update your failure information.

Updating Work Orders:

1. Navigate to the Work Orders page.

2. Enter a work order number.

Optionally, indicate whether you want to include the child assets associated with the work order.

3. Click the **Go** button.

The screenshot shows the Oracle Asset Management interface. At the top, there's a navigation bar with links like Home, Logout, Preferences, Personalize Page, and Diagnostics. Below this is a menu bar with tabs for Home, Assets, Work Requests, Work Orders (selected), Stores, Budget Forecasts, and Failure Analysis. Under the Work Orders tab, there are sub-links: All, Requests, Express Work, Crew Schedule, and Mass Time Entry. The current organization is displayed as 'Current Organization : I'. The main section is titled 'Work Orders'. It includes a 'Personalize Query' button, a 'Text Search' button, and a 'Save Search' button. Below this is a 'Simple Search' section with a note: 'Note that the search is case insensitive'. The search fields include 'Work Order' (with value WO197545), 'Asset Number', 'Start Date From', 'To', 'Department', and 'Status'. There are 'Go' and 'Clear' buttons. A link 'Show More Search Options' is also present. Below the search fields, there are links for 'Personalize Stack Layout: (ResultsRN)' and 'Personalize "Work Order Results Table"'. A 'Select Work Order:' dropdown is followed by 'Go', 'Create Work Order', 'Print Work Orders', 'Export Work Order', and 'Export Schedule' buttons. The main table has columns: 'Select', 'Work Order', 'Asset Number', 'Asset Group', 'Description', 'Scheduled Start Date', 'Duration Owning (hours)', 'Department', 'Status', and 'Update Work Order'. The first row shows a selected work order with ID WO197545, Asset Number DTF35001, Asset Group Vehicles, and a description about oil change. The status is 'Complete' and there is an 'Update Work Order' button in the last column.

Select	Work Order	Asset Number	Asset Group	Description	Scheduled Start Date	Duration Owning (hours)	Department	Status	Update Work Order
<input checked="" type="radio"/>	WO197545	DTF35001	Vehicles	Quality Initiated Work Request: Percentage of oil in water exceeds recommended limit. Create Work Order for Oil Change.	13-Oct-2005 11:28:24	1	F-Maint	Complete	

4. Click the **Update Work Order** button.

Note: This function is available for those users with responsibilities and roles that include function, EAM_WO_DETAILS_MODE, with their associated menu. Otherwise, you can only view work orders, and cannot update associated asset hierarchy, work order hierarchy, material, resource, operation, cost, collection plan results, work request, and attachment information. See: *Implementing Function Security, Oracle Applications System Administrator's Guide - Security.*

5. Optionally update the work order information, such as:

- **Asset Number:** You can change the asset number for manual (not PM) work orders with a status of Unreleased and Draft.

When you select a different asset number, all related information such as

Department and WIP Accounting Class will be updated in the work order. In addition, any cost estimates and failure information associated with the previous asset will be removed if it does not match the new asset. Further, the updated costs are reflected in the estimation pages for both the old and the new asset.

Note that the following may occur during the asset number update in a work order:

- The activity of the work order will be removed if the new asset does not have the same activity associated to it. Removing the activity in the work order due to an asset number update does not delete the previously added material and resource requirements.
 - **Department:** You can change the department at the operation level if no transactions have been recorded for the work order.
 - Optionally select a Planner for this work order.
6. **Status:** You can change the status of the work order.
- If the work order has a status of Complete and you change the status to Complete-No Changes, the system validates if there are any existing open purchase requisitions or purchase orders for the work order materials. You will receive an error message if there are any open purchase requisitions or purchase orders. You cannot complete or update work orders to Complete-No Charges if there are open purchase requisitions or purchase orders attached to the work order.
7. Optionally select or hover over the paperclip Attachments icon to attach relevant documents, such as drawings, standard procedures, and reference guides. You can attach file, URL, and text attachments. If you want to view the attachments, hover or click the **View** button.

The screenshot shows a standard Windows-style dialog box titled "Add Attachment". It contains several input fields: "Attachment Type" is a dropdown menu currently showing "Text"; "Title" is a text field with a small dropdown menu open showing "File" and "Url"; "Category" is a dropdown menu showing "Text" and "Attachments"; and a large "Text" area for the attachment content. At the bottom of the dialog are three buttons: "Save", "Add Another", and "Cancel".

Note: The Estimate Number field is display-only and cannot be updated.

To assign employees or equipment to an operation for scheduling

1. Open the Operation Requirements region.
2. Select the operation in which to assign the employee or equipment resource.
3. Select Assign Employee from the *Select Row:* drop-down list.
4. Choose Go.

ORACLE® Asset Management Diagnostics Home Logout Preferences Personalize Page

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis

All Requests Crew Schedule Mass Time Entry

Work Orders: Crew Schedule > Work Order: WO102907 > Current Organization : EM1

Assign Employee: Operation 1 Cancel Save Apply Export Printable Page

Work Order: WO102907 Status: Complete Asset Number: DTF35000 Asset Group: Vehicles Operation: 1 Department: F-Maint From: 08-Apr-2004 09:06:00	Description: Leaking Oil Firm: Yes Description: Delivery Erand Truck Description: 35000 Description: Vehicle Asset Group Description: Check Oil Filter Seal Duration: 0 To: 08-Apr-2004 09:06:00
---	---

Resource Details

Resource	Mechanic1
Assigned Units	1
Required	0.01
Assigned	0
Unassigned	0.01
From	08-Apr-2004 09:06:00
To	08-Apr-2004 09:06:00

Search

To view schedules for a different horizon, change the From and To Dates.

Department: <input type="text" value="F-Maint"/> Resource: <input type="text" value="Mechanic1"/> From Date: <input type="text" value="08-Apr-2004 09:06:00"/> <small>(example 07-Sep-2006 13:36:30)</small> To Date: <input type="text" value="08-Apr-2004 09:06:00"/> <input type="button" value="Go"/> <input type="button" value="Clear"/>	Employee: <input type="text"/> Competence Type: <input type="text"/> Competence: <input type="text"/>
---	---

✓TIP Allotment, Assigned, Available hours do not include time in the past.

Select	Details	Name	Department	Resource	Allotment	Hours Assigned	Available	Percent	Start Date	End Date	Duration	Assign
<input checked="" type="radio"/>	Show	Short, Mr. Dave	F-Maint	Mechanic1	0	0	0	0	08-Apr-2004 C	08-Apr-2004 09:06:00	0	<input type="checkbox"/>
<input type="radio"/>	Show	Moll, Joe	F-Maint	Mechanic1	0	0	0	0	08-Apr-2004 C	08-Apr-2004 09:06:00	0	<input type="checkbox"/>
<input type="radio"/>	Show	Rome, Ms. Gerry	F-Maint	Mechanic1	0	0	0	0	08-Apr-2004 C	08-Apr-2004 09:06:00	0	<input type="checkbox"/>

Assignment Details: Short, Mr. Dave

Work Order	Resource Usage	Start Date	End Date	Assign	Update
September					
					T

The header region displays information about the current work order and the specific operation. You can assign employees to a work order operation and work order resource. Employee assignments result in the creation of new employee or equipment Instances that are assigned to the chosen Resource code and the creation of a new resource requirement. The Resource Details content, within the header, displays all information about the resource.

Using the fields in the Search region, you can search for employees, based on their eligibility or availability, and assign one or more to the work order. All employees who belong to the current operation's department and who are assigned to the Resource code appear. The employees' start and end times default to the Resource start and end time.

5. Optionally select a different department. Available departments are all departments within the current organization.

Note: You can only view employees and their schedules from other departments; they are not available for assignment. If you want to assign employees from other departments, you can perform this within the Update Work Order page by adding another operation, assigning that department to it, and then accessing this Assign Employee page.

6. Optionally select a Resource. All resources, within the current operation's department, are available.

You can change the resource at the operation level if no transactions have been recorded for the work order.

7. Optionally specify a date range for which employee workload details are displayed.
8. Optionally select an Employee. All employees who are assigned who are assigned to the work order's operation are available.
9. Optionally select a Competence Type.
10. Optionally select a Competence.
11. Choose Go. A list of employees appears, based on your search criteria. You can view employee availability information to decide which employee to assign to the current operation.
 - *Allotment*: Total hours an employee is available for work, based on shift and specified Date Horizon (From and To Date in the Search region of the Assign Employee page).
 - *Assigned Hours*: Total time an employee is scheduled for any work orders during the same Date Horizon. Assigned Hours does not account for work that is at Complete-No Charges, Complete, Cancelled, or Closed statuses.
 - *Available Hours*: Alloted Hours – Assigned Hours
 - *Assigned Hours*: Total time an employee is schedule for any work orders during the same Date Horizon. Assigned Hours do not account for work that might be at Complete-No Charges, Complete, Cancelled, or Closed statuses.
 - *Assigned %*: Assigned Hours/Available Hours

You can update the employee schedules on existing work orders, or dissociate them using the links in this section. The region displays work orders across departments and organizations that an employee is assigned to. If the work order is from a different organization, you cannot drill down or modify it.

Note: You can modify employee schedule dates only if the work order is firm.

Note: You can update the employee's start and end dates within the previous Update Work Order page by selecting the Update Work Order link at the top of the page. You can stagger

employee start and end times on the Update Work Order page, as well, by adding a new employee row and providing the staggered employee's start and end times.

12. The Assignment Details region displays the list of work orders, at any status, that the employee is assigned to. You can update employees' schedules on existing work orders, or unassign them using the links in this section. This region also displays work orders across departments and organizations that an employee is assigned to. If a work order is from a different organization, you cannot drill down or modify it.

Note: You can modify employee schedule dates only if the work order is firm.

13. Select the Assign check box next to the employee to assign to this operation.
 14. Choose Apply.
8. Optionally choose **Shift Dates** to shift the work order dates forward or backward by a specified number of days. You can also enter a new scheduled start date or end date. All other work order dates, including operations, resource, and resource instance dates, are shifted and synchronized accordingly.
 9. Optionally choose **Estimate** to estimate your work order's costs. The newly updated estimated costs appear in the work order's Content container.
 10. Optionally choose **Copy Work Order** to copy all work order details, including asset number, activity, operation, resource, resource instance, and materials, to a new work order. You can change any fields before creating the new work order.
 11. Optionally choose **Save** to save the updated information, without leaving the current screen.
 12. Choose **Apply** to save all updates and return to the Work Orders page.

Using Microsoft Projects to Change Work Order Dates:

You can use Microsoft Projects to change the dates on asset work orders. You may want to use this feature to perform 'what if' scenarios without actually changing the data in Oracle eAM. After you have made revisions to the dates associated with the work order, you can import the revised data back into Oracle eAM.

Note: You can use Microsoft Projects 2003 with this feature.

By using this feature, you can:

- Export the work order data in an XML format into Microsoft Projects.
- Change the dates associated with the work order.

Note: You can only change the dates associated with tasks associated with a work order. You cannot change or add resources.

- View Gantt charts reflecting the date changes while creating and updating the tasks.
- Access multiple views of the revised schedule such as resource graphs, resource usage charts and so on.
- Print the revised reports and views.
- Import the revised work order data back into Oracle Enterprise Asset Management.

To use Microsoft Projects to change the dates associated with a work order:

1. Navigate to the Work Orders page and query for the asset work order to which you want to make changes.
2. Click the **Go** button.
3. Select the radiobutton for the work order, and then click the **Export Schedule** button.

ORACLE® Asset Management Home Logout Preferences Personalize Page Diagnostics

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis

All Requests Express Work Crew Schedule Mass Time Entry

Current Organization : EM1

Work Orders

Text Search Save Search

Personalize Query

Simple Search

Personalize "Simple Search"

Personalize Default Single Column: (SimpleSearchSingleCol)

Note that the search is case insensitive

Work Order: WO102907 Start Date From: To: 09-Jun-2008 11:46:29 Department: Status:

Asset Number: Include Asset Children: Go Clear

Show More Search Options

Personalize Stack Layout: (ResultsRN)

Personalize "Work Order Results Table"

Select Work Order: Go Create Work Order Print Work Orders Export Work Order Export Schedule

Work Order	Asset Number	Asset Group	Description	Scheduled Start Date	Duration (hours)	Owning Department	Status	Update Work Order	Debrief Work Order
WO102907	DTF35000	Vehicles	Leaking Oil	06-Apr-2004 09:06:00	0.017	F-Maint	Complete		

- On the Export Work Orders page, select Microsoft Project in the Target System field.
- Select the check box for the work order, and click the **Apply** button.

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis

All Requests Express Work Crew Schedule Mass Time Entry

Work Orders: All >

Export Work Orders

Cancel Apply

Personalize Stack Layout: (ExportRN)

Personalize Stack Layout: (region)

Export Work Order to XML File

Target System: Microsoft Project

Personalize "Work Order Results Table"

Select Entire Search Result

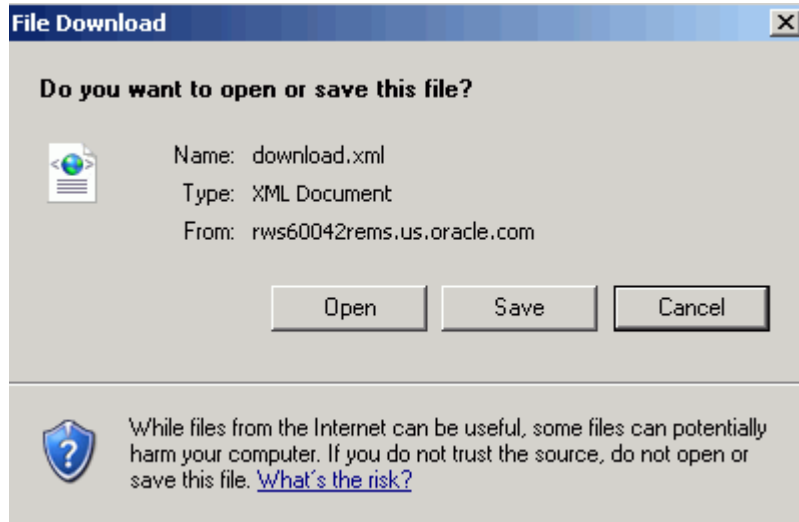
Select All Select None

Select Work Order	Asset Number	Asset Group	Description	Scheduled Start Date	Duration (Hours)	Owning Department	Status
<input checked="" type="checkbox"/> WO102907	DTF35000	Vehicles	Leaking Oil	06-Apr-2004 09:06:00	0.017	F-Maint	Complete

Return To Work Orders: All

Cancel Apply

- Click the **Open** button to edit the file immediately, or click the **Save** button to save the document and edit it at a later time.



7. Open Microsoft Projects and then select the document.
8. Make your date changes in Microsoft Projects.
9. Review the changes and when you are finished, save the project.
10. Access the Work Orders search page and click the **Import Schedule** button.
11. On the Import Work Orders page, select the file that you revised and now want to import.
12. In the Select Source System field, select Microsoft Project, and click the **Go** button.
13. Click the **Apply** button to import the revised data.

ORACLE Asset Management

Home Logout Preferences Personalize Page Diagnostics

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis

All Requests Express Work Crew Schedule Mass Time Entry

Work Orders: All >

Import Work Orders

Personalize Table Layout: (tableLayout0)

File Browse...

Select Source System Go

Personalize "Work Orders Imported"

Work Order	Asset Number	Asset Group	Description	Scheduled Start Date	Scheduled Completion Date	Duration	Status
No Import Done							

Apply Cancel

Using Primavera to Change Work Order Dates:

You can also use Primavera to change the dates on asset work orders. You may want to use this feature to perform 'what if' scenarios without actually changing the data in

Oracle eAM. After you have made revisions to the dates associated with the work order, you can import the revised data back into Oracle eAM.

Primavera retains any work hierarchy and parent-child relationships that may exist in Oracle eAM.

Important: You can export only employee resources to Primavera.

Field Mappings from Oracle eAM to Primavera

Oracle eAM	Primavera
Work order scheduled start and end dates	Start and Finish milestones
Operations	Activities
Departments and Resources on an operation	Roles (concatenated)
Resources (employees)	Resources
Parent-child relationships	WBS relationships

By using this feature, you can:

- Export work order data in an XML format into Primavera.
- Change the dates associated with the work order.

Note: You can only change the dates associated with tasks associated with a work order. You cannot change or add resources.

- Import the revised work order data back into Oracle eAM.

To use Primavera to change work order dates:

1. Navigate to the Work Orders page and query for the asset work order to which you want to make changes.
2. Click the **Go** button.
3. Select the radiobutton for the work order, and then click the **Export Schedule** button.
4. On the Export Work Orders page, select Primavera in the Target System field.

5. Select the check box for the work order, and click the **Apply** button.
6. Click the **Open** button to edit the file immediately, or click the **Save** button to save the document and edit it at a later time.
7. Open Primavera and then select the document.
8. Make changes to the work order dates.
9. Save your work in Primavera.
10. Access the Work Orders search page and click the **Import Schedule** button.
11. On the Import Work Orders page, select the file that you revised and now want to import back into eAM.
12. In the Select Source System field, select Primavera, and click the **Go** button.
13. Click the **Apply** button to import the revised work order schedule.

Printing Work Orders:

After you receive the list of work orders from the Work Order Search page, you have two options to print the work order:

- A **Print Work Order** icon at the work order level enables you to print a selected work order
- The **Print Work Order** button at the Result table level enables you to print multiple work orders.

Both options navigate to the Work Order Report page.

1. Navigate to the Work Orders page (Maintenance Super User > Work Orders).
2. If you choose the **Print Work Order** icon at the work order level from the Search page, only one work order appears. If you choose the **Print Work Orders** button from the Search page, a list of work orders appears. You can then selectively specify the work orders or select all work orders to print.
3. The Select Parameters region provides print content options. Items that are checked are printed.
4. You can select a work order print template. Maintenance Work Order Report and Maintenance Work Order Report With Summary are the seeded templates. See Maintenance Work Order Report With Summary, page 29-12 for more information.
You can also define XML templates.

5. Select a language from the **Locale** list of values, to specify the language to print.
6. Select a Format for the work order print. The supported formats are: EXCEL, HTML, PDF, and RTF.
7. Click the **Run** button to print your work orders.

Related Topics

Defining Inventory Material Requirements, page 3-36

Defining Direct Item Material Requirements, page 3-42

Entering Meter Readings, page 4-3

Stores

Material issue to work orders and returns to Inventory are typical store room functions.

The Stores tab provides Material Issue Request and Verification functionality, and is used to manage the material availability for a work order. The material requirements for a work order are defined on its Maintenance Bill of Material, and are available to the work order via the Material Issue Request and Verification process.

There are two activities involved in delivering material from stores to a work order. First, a Material Issue Request is generated (Move Order in Oracle Inventory) to request the material to be allocated a work order. This process is automated upon work order release, by selecting a check box in the Enterprise Asset Management Parameters (See: Defining eAM Parameters, page 2-11). The second activity involves Material Issue Verification (Move Order in Oracle Inventory), and is generated when you access the Stores tab and select material for a work order, based on available, unprocessed move orders. A one-step material issue is a substitute for these two activities; a request is not created.

You can return material to Inventory from a maintenance work order. If excess or defective material is issued to a work order, it needs to be returned.

Related Topics

Stores, page 26-1

Budget Forecasts

You can extract work order cost information from Enterprise Asset Management to a spreadsheet. You can use the results as a base for creating organization budgets and forecasts. You can extract historical costs for past accounting periods, or estimated costs of future periods, based on Preventive Maintenance rules. A forecast contains criteria, along with filter options, based on work orders, assets, and costing information.

To create a forecast:

1. Navigate to the Forecasts page (Maintenance Super User > Budget Forecasts tab).
2. Choose *Create Forecast*.

The screenshot shows the Oracle Asset Management interface. The top navigation bar includes links for Home, Assets, Work Requests, Work Orders, Stores, Budget Forecasts, and Failure Analysis. The 'Budget Forecasts' tab is active. Below the navigation bar, the 'Create Forecast' form is displayed. The form includes fields for Forecast Name (Car Maintenance), Description (Car Maintenance Forecast), Accounting Period From (Jan-06), and Accounting Period To (Oct-06). There is an 'Apply Template' dropdown menu set to 'Template 1' and an 'Include' dropdown menu set to 'Historical Planned Work'. A checkbox for 'Include Other Organizations' is also present. Below these fields is a section titled 'Additional Optional Criteria' which contains a table with columns for 'Criteria Type', 'From', and 'To'. The table lists various criteria types such as Account, Area, WIP Accounting Class, Activity, Department, Project, Asset Number, Asset Group, Work Order, and Work Order Type, each with corresponding input fields for the 'From' and 'To' values. The form also includes 'Cancel' and 'Apply' buttons at the bottom right.

Criteria Type	From	To
Account		
Area		
WIP Accounting Class		
Activity		
Department		
Project		
Asset Number		
Asset Group		
Work Order		
Work Order Type		

3. Enter a **Forecast Name**.
4. Enter a **Description**.
5. Optionally select a template from the **Apply Template** list of values. This template indicates the type of information to include in your forecast. If you select a template, the template's associated work information is populated in the Include field, such as Historical Planned Work, Historical Non-Planned Work, All Historical Work, or Forecasted Work.
6. Optionally select the **Include Other Organizations** check box.
7. Enter the **Accounting Period From** and **To** values to indicate the accounting period in which to include information. For historical forecasts, you can select periods in the past or the current period. For future (Preventive Maintenance) forecasts, you can select periods in the future or the current period.
8. Optionally narrow the forecast to specific criteria, such as Account, Area, WIP Accounting Class, Activity, Department, Project, Asset Number, Asset Group, Work Order, and Work Order Type.

9. Choose Apply to save the forecast.

To generate a forecast:

After you save a forecast, you can generate Forecast entries by selecting the icon at the Forecast level. After the forecast entries are generated for a selected forecast, you can view them by Accounts or Work Orders.

1. Choose the **Generate** icon.

ORACLE Asset Management

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis Diagnostics Home Logout Preferences Personalize Page

Forecasts Templates Current Organization: EMI

Confirmation
Forecast (Car Maintenance) has been submitted for generation. Requery the forecast for updated status.

Forecasts

Personalize Stack Layout: (regions)

Simple Search

Note that the search is case insensitive

Name Description Status

Go Clear

Select Forecast: Delete Create Forecast

Select All Select None

Select Name	Description	Update	Creation Date	Status	Total	Generate	Export
<input type="checkbox"/> Car Maintenance	Car Maintenance Forecast		21-Jan-2007 15:47:39	Pending	0		

Currency = US dollars

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis Diagnostics Home Logout Preferences Personalize Page

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- *View By Accounts:* Forecast costs are aggregated by General Ledger accounts into Accounting Period buckets. Costs derived from historical work orders are aggregated, based on the actual period when they occurred. Costs derived from planned work orders are aggregated in the period of the forecasted completion date.
- *View By Work Orders:* Forecast costs for each work order appear. If it is a historical work order, the actual work order number appears. If it is a planned work order, the Work Order Number field is blank.

To manage existing forecasts:

1. Navigate to the Forecasts page (Maintenance Super User > Budget Forecasts tab).

Forecasts

Oracle Asset Management

Diagnostics Home Logout Preferences Personalize Page

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis

Forecasts Templates

Current Organization EM1

Forecasts

Save Search

Personalize Stack Layout: (region5)
Personalize Query: (ForSearchRN)

Simple Search

Personalize "Simple Search"

Note that the search is case insensitive

Name Description Status

Go Clear

Advanced Search

Personalize Advanced Table: (results)

Create Forecast

Select Name	Description	Update	Creation Date	Status	Total	Generate	Export
No search conducted.							

Currency = US dollars

Save Search

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis Diagnostics Home Logout Preferences Personalize Page

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2. You can perform Simple or Advanced Searches for existing forecasts. Using the Simple Search mode, you can search on an existing forecast's Name, Description, and/or Status. You can optionally choose Advanced Search to add more search criteria.
3. Choose Go to display existing forecasts, based on entered search criteria. If you did not enter any search criteria, all existing forecasts appear.

ORACLE Asset Management

Diagnostics Home Logout Preferences Personalize Page

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis

Forecasts Templates

Current Organization : EM1

Forecasts

Save Search

Personalize Stack Layout: (region5)
Personalize Query: (ForSearchRN)

Simple Search

Personalize "Simple Search"

Note that the search is case insensitive

Name Description Status

Go Clear

Advanced Search

Personalize Advanced Table: (results)

Select Forecast: Delete Create Forecast

Select All Select None

Select Name	Description	Update	Creation Date	Status	Total	Generate	Export
<input checked="" type="checkbox"/> Car Maintenance	Car Maintenance Forecast		25-Sep-2006 16:29:06	Not Submitted	0		
<input type="checkbox"/> cs-test	Hello		25-Sep-2006 16:25:58	Completed	0		

Currency = US dollars

Save Search

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- If a forecast has a Not Submitted status, you can optionally update its Name, Description, Accounting Periods, and Criteria, by choosing the Update icon.
- Optionally select a forecast's hypertext link to view its details.

ORACLE Asset Management

Diagnostics Home Logout Preferences Personalize Page

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis

Forecasts Templates

Budget Forecasts: Forecasts >

Current Organization : EM1

Forecast: Car Maintenance

Export Full Forecast

Personalize Stack Layout: (stackLayoutRN)
Personalize Flow Layout

Description Car Maintenance Forecast
Include Forecasted Work

Period From Nov-06
Period To Apr-07

Show More Criteria

Accounts Work Orders

View Periods Nov-06 - Apr-07

Export Accounts

Show All Details Hide All Details

Details Account	Forecast Total	Nov-06	Dec-06	Adj-06	Jan-07	Feb-07	Mar-07	Apr-07
Show 01-580-5320-0000-000	56.88	0	0	0	56.88	0	0	0
Total	56.88	0	0	0	56.88	0	0	0

Currency = US dollars

Return to Forecasts

Export Full Forecast

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- The Accounts tab displays the forecast's affected accounts.
- You can optionally export the displayed account information to an Excel spreadsheet, by choosing *Export Accounts*.

3. Optionally select the Work Orders tab to display work order information. Future, forecasted work orders appear, if the forecast's Include field value reads Forecasted Work. Historical work orders appear, if the Include field's value reads Historical Planned Work, Historical Non-Planned Work, or All Historical Work.
4. Optionally choose *Export Work Orders* to:
 - export only the selected work order information to an Excel spreadsheet, if the forecast includes historical work.
 - create new forecasted work orders for the selected work, if the forecast includes forecasted work.
5. Optionally choose *Export Full Forecast* to:
 - export all work order cost information to an Excel spreadsheet, if the forecast includes historical work.
 - create new forecasted work orders for all displayed work, if the forecast includes forecasted work.
6. Optionally choose the Generate icon to generate the forecast, based on saved criteria. After the Generate icon is selected, the forecast's status transitions to a Pending status while it executes. After the forecast finishes executing, the forecast's status transitions to Completed. You can generate the forecast an unlimited number of times.
7. Optionally choose the Export icon to export the completed forecast to an Excel spreadsheet, HTML, PDF, or RTF file.

ORACLE Asset Management

Diagnostics Home Logout Preferences Personalize Page

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis

Forecasts Templates

Budget Forecasts: Forecasts >

Current Organization: EM1

Forecast: Car Maintenance

[Personalize Flow Layout](#)

Description: Car Maintenance Forecast
Include: Forecasted Work

Period From: Nov-06
Period To: Apr-07

[Show More Criteria](#)

Personalize Header: (MainRegion)

Template: Budget Forecast Locale: Default Format: HTML

Run Export

Personalize Table Layout: (TableRn)

Account	Organization	WIP Accounting Class	Asset Group	Asset	Area	Activity	Owning Department	Project	Work Order Type	Work Order Number	Source	Nov-06	Dec-06	Adj-06	Jan-07	Feb-07	Mar-07	Apr-07
01-580-3320-0000-000	Seattle Maintenance	MaintWAC	Lexus ES300	LX0003	Fleet Garage	7500 Mile Lexus Service	Lexus Shop				PM	0	0	0	28.44	0	0	0
01-580-3320-0000-000	Seattle Maintenance	MaintWAC	Lexus ES300	LX0003	Fleet Garage	7500 Mile Lexus Service	Lexus Shop				PM	0	0	0	28.44	0	0	0

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1. Select a Template.
2. Select a Locale.
3. Select the Format. This choice indicates whether you are exporting information to an Excel spreadsheet, HTML, PDF, or RTF file.
4. Choose Run to display the cost information.
5. Choose Export to export the cost information to the file type populated in the Format field.

Safety Management

This feature enables you to create work permits mandated by regulatory agencies to be followed by operations, maintenance and safety personnel during maintenance of assets which require work permits before the assets can be repaired.

You can create isolations and work clearances in addition to work permits. An isolation represents a standard procedure to isolate an asset from its surroundings when it is to be repaired. It contains the steps and details required to isolate the asset before maintenance technicians carry out repair work (the Establishment), and also contains the steps to place the asset back in working condition after they have performed the repair work (the Re-establishment). You can associate additional assets to an isolation.

A work clearance represents the actual tasks of establishment and re-establishment to

be performed during a specific period while maintaining the asset. You can use isolations to derive the establishment and re-establishment steps included in a work clearance or enter them manually.

You can associate a work order with permits and work clearances to record the complete safety information while performing repair work on assets which have safety requirements.

Related Topics

See Safety Management, page 27-2

Failure Analysis

Failure Analysis enables you to track an asset failure from the time it is reported until its resolution. Statistics from your collected failure data provide you with information on why an event occurs and causes your asset failure. You can then take the necessary steps to eliminate that event. Additionally, you can use the failure statistics, among others, to help you formulate your Reliability-Centered Maintenance (RCM) program. Failure hierarchies that support multiple-level failure reporting provide effective root cause and reliability analysis. For specific Asset Groups or Rebuildable Items, each failure (problem) has a defined number of root causes, with each root cause having a defined number of resolutions (remedies).

When failure is reported, each work order represents one single failure occurrence (event) for the asset specified on the work order. The cost to repair an asset that fails to a normal, operational state is assumed to be the charges accumulated in the work order that is associated with the failure. If the repair is outsourced to an external party and requisitioned on a purchase order, a work order must be created to collect the repair costs for Failure Analysis to pick it up.

Related Topics

Failure Analysis, page 28-1

Construction Units

This chapter covers the following topics:

- Overview of Construction Units
- Using Construction Units
- Creating Construction Units
- Copying Construction Units
- Viewing and Modifying Construction Units
- Defining Difficulty Codes
- Creating Construction Estimates
- Modifying Construction Estimates
- Viewing Construction Estimates
- Copying Construction Estimates
- Generating Work Orders for Construction Estimates
- Using the Construction Estimate Workbench
- Capitalizing Actual Costs Associated with Construction Estimates
- Capitalizing Work Order Costs for Construction Estimates

Overview of Construction Units

Construction units (specifically known as compatible units in the utility and telecommunications industry) are standardized repetitive units of work, which involve labor, material and equipment. An example of a construction unit is the erection of transmission towers, which involves the similar efforts of excavation, erection, and so on, and requires similar materials and equipment. Installing multiple towers includes performing the same repetitive work, while allowing for specific factors such as terrain, accessibility, and so on. One construction unit is used as a typical requirement of such work, including resources and equipment to be used repetitively. The use of

construction units can reduce estimating and planning efforts.

By using this feature, you can:

- Define a construction unit and associate activities, operations and resources.
- Copy construction units.
- View and modify a construction unit.
- Group construction units to create construction estimates.
- Define difficulty codes.
- Generate construction estimates.
- View and modify a construction estimate.
- Generate work orders for the construction work, including estimates.
- Use the Estimation Workbench to create and modify work orders for construction units and estimates.
- Capitalize actual costs associated with construction estimates.

Using Construction Units

You must perform several prerequisite tasks before you can use the construction units feature.

Prerequisites

- ☐ You must perform the following before you can create construction units:
 1. Define activities to be used with the construction units, and associate the activities to your organization. See *Defining Activities*, page 2-61
 2. Create material BOMs for the activities. See *Setting Up Maintenance Bills of Material*, page 2-101
 3. Define operations for the construction units. See *Preparing Work Order Operations*, page 3-29
 4. Assign resources to be used with the activities.

Creating Construction Units

One construction unit is a collection of activities, as defined in the eAM Master Items table. You can also define a routing and bill of material for the construction unit.

Construction units are defined at the organization level, and can include only those activities that are assigned to the same inventory organization. However, you can query construction units associated with different organizations and copy them to another organization. You can search by name, description, and organization.

When you define a construction unit, you enter the activity quantities for materials, resources, and resource multipliers for the construction unit.

Perform the following steps to create construction units:

To create a construction unit:

1. Navigate to the Maintenance Super User responsibility, enter EM1 in the Organization field, and then click the **Go** button.
2. Click the Construction Units tab, and then click the **Create Construction Unit** button.

The Create Construction Unit page appears.

The screenshot shows the Oracle Asset Management interface for creating a construction unit. The top navigation bar includes links for Home, Logout, Preferences, Personalize Page, and Diagnostics. The main navigation tabs are Home, Assets, Work Requests, Work Orders, Stores, Budget Forecasts, Failure Analysis, and Construction Units. The 'Construction Units' tab is selected, and the 'Create Construction Unit' button is visible. The current organization is set to EM1.

The 'Create Construction Unit' form includes the following sections:

- Personalize Default Double Column: (ConstructionUnitDetails)**: Fields for * Name (Training Construction Un), * Effective From (09-Dec-2008 12:32:57), Description (To be used in Training), and Effective To.
- Attachments**: A section for adding attachments, with a tip that the Attachments option is enabled after saving the Construction Unit.
- Flexfields**: A section for adding flexfields, with a context value dropdown and fields for Construction Unit Tag and Construction Unit Note.
- Activities**: A section for adding activities, with a table for activities and a table for activity details.

Activity	Description	Quantity	WIP Accounting Class	Effective From	Effective To
Fork Lift Daily Maintenan	All Fork Lift Daily Maintenance	2	MaintWAC	09-Dec-2008 12:32:57	

3. Enter a name for the construction unit (required).
4. Enter a description.
5. Enter a date in the Effective From (required) and Effective To fields.

Note that the Effective From date is required.

6. Add at least one activity the construction unit.
7. Enter a Quantity to indicate the amount of the activity that is required for the construction unit.

The quantities defined in the activity routing and material BOM would be multiplied with this quantity.

8. Optionally enter a WIP Accounting Class to identify the expense cost elements associated with the work performed, such as materials, labor, and resources.
9. Save your work.

Copying Construction Units

You can copy an existing construction unit to create a new construction unit.

To copy a construction unit:

1. Navigate to the Maintenance Super User responsibility.
2. Click the Construction Units tab.
3. Enter the search criteria to query for construction units that you want to copy.
4. Click the **Go** button.
5. Select the construction units that you want to copy.

6. Click the **Copy Construction Unit** button.

The Copy Construction Unit page appears.

7. Enter a name and a description for the new construction unit.
8. Optionally enter dates in the Effective From and Effective To fields.
9. You can revise the quantity, WIP Accounting Class and effective dates to apply to the new construction unit.

The effective dates of the activities must occur after the effective date of the construction unit. You must enter an effective from date.

10. Optionally select the Assign to Org check box.

Select this check box to assign the activities to the organization. If this check box is selected, the activity has been assigned to the organization, the check box is display

only.

Important: Although an activity is assigned to a new organization, you must define the BOM and the routing for the activity.

11. Save your work.

Viewing and Modifying Construction Units

You can search for construction units to add, delete or modify the activities, quantities, factors, and other related attributes. These attributes may require changes depending on the user requirements relating to specific construction projects.

To view and modify a construction unit:

1. Navigate to the Maintenance Super User responsibility, enter EM1 in the Organization field, and then click the **Go** button.
2. Click the Construction Units tab.
3. Enter the organization for the construction unit that you want to view or modify. By entering a value in the Organization field and leaving all the other fields blank will return all construction units that are associated with the organization. You can further refine your search by including values in the other fields such as Name, Description, and so on.
4. Click the **Go** button.
5. Click the link for the construction unit to view the details.
The Construction Unit page appears.

6. To modify the construction unit, click the Update button for the construction unit.
The Update Construction Unit page appears. Use this page to add attachments to the construction unit. You can hover or click the Add button to add new attachments to the construction unit, or hover over the View attachment link to view or update an existing attachment.

Note: You must first create and save a construction unit before you can add an attachment.

7. Make revisions to the construction unit such as adding attachments, flexfields, and additional activities.

8. Save your work.

Defining Difficulty Codes

Difficulty codes are defined as a multiplier with resource quantities that specify the additional resource usage required relating to factors such as soil condition, accessibility of the work site, and so on. The quantities defined for resource and material requirements are multiplied with quantities on the construction unit for cost estimation and on work orders. Difficulty codes are defined with a value assigned with them (a number larger than zero), which gets multiplied with resource quantities.

To define a difficulty code:

1. Navigate to the Maintenance Super User responsibility, enter EM1 in the Organization field, and then click the **Go** button.

2. Click the Construction Units tab, and click the Difficulty Codes link.

The Difficulty Codes page appears. You can use this page to search and define difficulty codes.

3. Click the **Add 5 Rows** button to define difficulty codes.

ORACLE Asset Management

Home Logout Preferences Personalize Page Diagnostics

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis Construction Units

Construction Unit Construction Estimate Difficulty Codes

Current Organization : EM1

Difficulty Codes

Save Search

Personalize Query: (QueryRN)

Simple Search

Personalize "Simple Search"

Note that the search is case insensitive

Code Description

Go Clear

Advanced Search

Personalize Table Layout: (TableLayoutRN)

Personalize Header: (DifficultyCodes)

Personalize Advanced Table: (DifficultyCodeTable)

Apply

Code	Description	Resource Multiplier	Effective From	Effective To
Rocky Terrain	Rocky Terrain	1.25	09-Dec-2008	

4. Add an alphanumeric name for your difficulty code.
5. Optionally add a description for the difficulty code.
6. Add a resource multiplier.

You must enter a number larger than zero. This value which gets multiplied with

the labor and equipment quantities derived from the BOM, routing, construction unit and estimate definitions.

7. Save your work.

Creating Construction Estimates

You can group one or more construction units to create construction estimates and define work requirements. Grouping construction units enables you to combine various operations that are involved (and their resource and material requirements), and this assists in the design, planning and estimation of the costs.

You can also create a construction estimate and add activities directly, without adding any construction units.

You can use the construction estimates for cost estimation, planning and scheduling the work and creating work orders for execution. All the operations defined on the activities appear as default values in the Estimating Workbench, but you can make changes to the defaulted resources, materials, quantities, factors, and so on.

To create a construction estimate:

1. Navigate to the Maintenance Super User responsibility, enter EM1 in the Organization field, and then click the **Go** button.
2. Click the Construction Units tab, and then click the Construction Estimates link.
The Construction Estimates page appears.
3. Click the **Create Construction Estimate** button.
The Select Activities page appears.

ORACLE® Asset Management

Home Logout Preferences Personalize Page Diagnostics

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis Construction Units

Construction Unit Construction Estimate Difficulty Codes

Current Organization : EM1

Select Activities Estimate Workbench

Error

Select Activities

Cancel Next

Personalize Default Double Column: (ConstructionEstimateHdr)

* Name TrainConstructEstimate1 Description Training Construction Es

Personalize Header: (EstimateActivities)

Personalize Advanced Table: (EstimateActivityTable)

Construction Unit	Construction Unit Quantity	Activity	Activity Quantity	Difficulty Code	Resource Multiplier	WIP Accounting Class	Remove
Training Construction Un	2						

Add 3 Rows

4. Add a Name for the new construction estimate.
This is a required field.
5. Optionally add a description.
6. Select the construction units and activities that you want to add to this construction estimate.
You can add construction units, activities or a combination of both construction units and activities to the construction estimate.
7. Click the **Next** button to access the Construction Estimate Workbench where you can add other information such as:
 - Attachments
 - Descriptive Flexfields
 - Work Order default information
 - Model Work Order information
8. Make additional changes to the estimate, if required.
9. Optionally perform other tasks by clicking one of these buttons:
 - **Select Activities:** Click this button to revise or add other activities
 - **Estimate Costs:** Click this button to generate an cost estimate for the construction estimate.

- **Save:** Click this button if you are finished to commit the construction estimate to the system.
- **Cancel:** Click this button to delete all changes that you made.
- **Create Work Order(s):** Click this button to generate work orders for the construction estimate.

See Generating Work Orders for Construction Estimates, page 22-13

Modifying Construction Estimates

You can modify construction estimates. You may need to change the construction units or the quantity of the construction unit.

To modify a construction estimate:

1. Navigate to the Maintenance Super User responsibility, enter EM1 in the Organization field, and then click the **Go** button.
2. Click the Construction Units tab, and then click the Construction Estimates link.
The Construction Estimates page appears.
3. Enter the Name of the construction estimate that you want to modify.
If you want to view a list of all the construction estimates associated with the current organization, leave the Name field blank.
4. Click the **Go** button.
5. Click the Update icon for the construction estimate that you want to modify.
The Construction Estimate Workbench appears.

ORACLE® Asset Management

Home Logout Preferences Personalize Page Diagnostics

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis Construction Units

Construction Unit Construction Estimate Difficulty Codes

Current Organization : EM1

Construction Estimates

Personalize Query: (QueryRN)

Save Search

Simple Search

Personalize "Simple Search"

Note that the search is case insensitive

Name TrainingConsEstimate1 Description

Go Clear

Advanced Search

Personalize Table Layout: (TableLayoutRN)

Personalize "Construction Estimates Table"

Create Construction Estimate

	Description	Effective From	Update	Copy
TrainingConsEstimate1		10-Dec-2008		

6. Modify the components of the construction estimate.
7. Save your work.

Viewing Construction Estimates

You can view a construction estimate.

Construction estimates are organization specific.

To view a construction estimate:

1. Navigate to the Maintenance Super User responsibility, enter EM1 in the Organization field, and then click the **Go** button.
2. Click the Construction Units tab, and then click the Construction Estimates link.
The Construction Estimates page appears.

3. Enter a construction estimate in the Name field.

If you want to retrieve all the construction estimates assigned to the current organization, leave the Name field blank.

4. Click the **Go** button.
5. Select a construction estimate that you want to view by clicking the link for the construction estimate.
6. View the details of the construction estimate such as:
 - Cost estimate
 - Model work order details such as Work Order Number, Asset Number, Cost

- Parent Work Order details such as Asset Number, Status

Copying Construction Estimates

You can copy existing construction estimates to create new construction estimates. This can eliminate the need for manual entry of information for a construction project that has similar costs associated to it.

To copy a construction estimate:

1. Navigate to the Maintenance Super User responsibility, enter EM1 in the Organization field, and then click the **Go** button.
2. Click the Construction Units tab, and then click the Construction Estimates link.
The Construction Estimates page appears.
3. Enter the Name of the construction estimate that you want to copy.
If you want to view a list of all the construction estimates associated with the current organization, leave the Name field blank.
4. Click the **Go** button.
5. Click the Copy icon for the construction estimate that you want to use for the new construction estimate.
The Construction Estimate Workbench appears.
6. Enter a name in the Construction Estimate field.
7. Optionally add a description.
8. Optionally add attachments by clicking the **Add** button.
The Add Attachment page appears. You can add a Desktop File, Text or URL or a file from the Document Catalog. Add a title and description for the attachment. Select and enter information in the Define Attachments region of the page.
If you are finished, click the Apply button. Click Add Another to add other attachments to the construction estimate.
9. Click the Select Activities button to add activities.
The Select Activities page appears.

ORACLE® Asset Management

Home Logout Preferences Personalize Page Diagnostics

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis Construction Units

Construction Unit Construction Estimate Difficulty Codes

Current Organization : EMO

Select Activities Estimate Workbench

Select Activities

* Name Description

Cancel Next

Construction Unit	Construction Unit Quantity	Activity	Activity Quantity	Difficulty Code	Resource Multiplier	WIP Account
Mechanical1	2	Mechanical fittings	<input type="text" value="2"/>	<input type="text"/>	<input type="text" value="1"/>	MaintWAC
MK-CU01	2	MK-CUE-ACT4	<input type="text" value="2"/>	<input type="text"/>	<input type="text" value="1"/>	MaintWAC
MK-CU01	2	MK-CUE-ACT3	<input type="text" value="2"/>	<input type="text"/>	<input type="text" value="1"/>	MaintWAC
MK-CU01	2	MK-CUE-ACT2	<input type="text" value="2"/>	<input type="text"/>	<input type="text" value="1"/>	MaintWAC
MK-CU01	2	MK-CUE-ACT1	<input type="text" value="2"/>	<input type="text"/>	<input type="text" value="1"/>	MaintWAC
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Add 3 Rows

10. Enter a construction unit.
 11. Select activities.
 12. Enter a value in the Activity Quantity field for each activities.
 13. Optionally enter difficulty codes for each activity.
 14. Enter a number in the Resource Multiplier field for each activity.
 15. Optionally enter a WIP Accounting Class.
 16. Click the **Next** button.
 17. Click one of these buttons:
 - **Select Activities** - to add or delete activities by using the Estimation Workbench.
 - **Estimate Costs** - to run the cost estimation
 - **Save** - save the construction estimate
 - **Cancel** - to discard the entire new construction estimate
 - **Create Work Order(s)** - to create work orders for the construction estimate
- See Generating Work Orders for Construction Estimates, page 22-13

Generating Work Orders for Construction Estimates

You can generate work orders for construction estimates.

To generate work orders for a construction estimate:

1. Navigate to the Maintenance Super User responsibility, enter EM1 in the Organization field, and then click the **Go** button.
2. Click the Construction Units tab, and then click the Construction Estimates link.
The Construction Estimates page appears.

3. Enter the Name of the construction estimate that you want to view.

If you want to view a list of all the construction estimates associated with the current organization, leave the Name field blank.

4. Click the **Go** button.

The Construction Estimate Workbench page appears.

Construction Estimate Workbench

The screenshot shows the Oracle Asset Management interface. The top navigation bar includes links for Home, Logout, Preferences, Personalize Page, and Diagnostics. Below this is a secondary navigation bar with tabs for Home, Assets, Work Requests, Work Orders, Stores, Budget Forecasts, Failure Analysis, and Construction Units. The Construction Units tab is selected, and the sub-tab 'Construction Estimate' is active. The page title is 'Construction Estimate Workbench'. Below the title, there are buttons for 'Select Activities', 'Estimate Costs', 'Save', 'Cancel', and 'Create Work Order(s)'. The main form area contains a 'Construction Estimate' section with a text field for 'Construction Estimate' (containing 'TrainingEstimate1') and a 'Description' field. To the right of these fields is a 'Cost Estimate' box showing 'Total - \$2050'. Below the main form, there is an 'Attachments' section with a 'None' button and an 'Add' button. At the bottom, there is a 'Flexfields' section with a 'Context Value' dropdown menu.

5. Optionally select a value in the Group Rows By drop-down list.

Values are None, Activity, Construction Unit, Single Work Order and WIP Accounting Class.

If you want specific information to default into the fields in the Model Work Order region, optionally enter values for these fields:

- **Work Order**
- **WIP Accounting Class**

- **Start Date**
- **End Date**
- **Asset Number**
- **Department**
- **Project**
- **Task**
- **Status** - Unreleased, Awaiting Scheduling, Released, On Hold or Draft

6. Click the **Apply Defaults** button to populate the default values in the Model Work Order fields.

7. Enter the Work Order Sequence to indicate the order in which each work order should be executed.

The screenshot shows the 'Work Order Defaults' and 'Model Work Order' sections. The 'Work Order Defaults' section includes fields for Group Rows By (Activity), Work Order, WIP Accounting Class (MaintWAC), Start Date (17-Dec-2008 17:51:35), End Date, Asset Number (POLE-AG2/002), Project, Task, and Status (Draft). An 'Apply Defaults' button is present. The 'Model Work Order' section includes a tip, buttons for Delete Row(s), Export, and Sort, and a table with columns: Select, Details, Work Order Sequence, Work Order, Work Order Description, Asset Number, WIP Accounting Class, Operation Sequence, Operation Description, Department, Resource Sequence, and Resource.

Select	Details	Work Order Sequence	Work Order	Work Order Description	Asset Number	WIP Accounting Class	Operation Sequence	Operation Description	Department	Resource Sequence	Resource
<input type="checkbox"/>	Show	1		TrainingEstimate1	POLE-AG2/002	MaintWAC	10	Mechanical fitting	Mechanical	10	Fitter
<input type="checkbox"/>	Show	1		TrainingEstimate1	POLE-AG2/002	MaintWAC	10	Mechanical welding	Mechanical	10	Welder
<input type="checkbox"/>	Show	1		TrainingEstimate1	POLE-AG2/002	MaintWAC	10	Mechanical welding	Mechanical	10	Welder
<input type="checkbox"/>	Show	1		TrainingEstimate1	POLE-AG2/002	MaintWAC	10	Mechanical fitting	Mechanical	10	Fitter

8. You can optionally perform these actions:

- **Delete Row(s)** - Select the rows that you want to delete from the work order and then click this button.
- **Export** - Select the rows that you want to export and then click this button.
- **Sort** - Click this button to sort the rows based on the **Group Rows By** field.

9. Optionally enter the **Operation Sequence** to indicate at which operation step the specific work order should be executed.

The default value for the operation sequence comes from the activity.

10. Optionally select the Parent Work Order check box to create a parent work order for the construction estimate work orders.

Optionally enter a value for these fields:

- Parent Work Order Description
 - WIP Accounting Class
 - Asset Number
 - Project
 - Task
 - Status
11. If you want to link these work orders to an existing work order, enter a value in the Parent Work Order field.

The screenshot shows a software interface titled "Parent Work Order Details". It contains several input fields and a checkbox. On the left, there is a checkbox labeled "Create Parent Work Order" which is checked, and a text field labeled "Parent Work Order" below it. In the center, there are three fields: "Parent Work Order Description" with the value "Training Estimates", "WIP Accounting Class" with the value "MaintWAC", and "Asset Number" with the value "FOLE-AG2/002". To the right of these fields are three more fields: "Project", "Task", and "Status" (which is a dropdown menu showing "Draft"). Each of these three fields has a magnifying glass icon to its right. At the bottom of the form, there are five buttons: "Select Activities", "Estimate Costs", "Save", "Cancel", and "Create Work Order(s)".

12. Click the Create Work Order(s) button when you are satisfied with the work order estimate.
13. The system generates the work orders.

Note: You cannot enter Descriptive Flexfields (DFFs) for Work Orders in the Construction Estimate Workbench. To enter DFFs, query the individual work order using the Work Order pages.

Using the Construction Estimate Workbench

You can use the Estimation Workbench to:

- Search and view the costs association with a construction estimate.
- View work order details associated with the construction estimate.
- Add components to the model work order such as work orders, work order

sequence, asset number, WIP Accounting Classes, resources, resource descriptions, items and their required quantity, and so on.

To use the Estimate Workbench:

1. Navigate to the Maintenance Super User responsibility, enter EM1 in the Organization field, and then click the **Go** button.
2. Click the Construction Units tab, and then click the Construction Estimates link.
The Construction Estimates page appears.
3. Enter the Name of the construction estimate that you want to view.
If you want to view a list of all the construction estimates associated with the current organization, leave the Name field blank.
4. Click the **Go** button.
5. View the details associated with the construction estimate such as:
 - Estimate Costs
 - Attachments
 - Work Order Details
6. Optionally click the **Update Estimate** button to make changes to the construction estimate.
7. Save your changes.

Capitalizing Actual Costs Associated with Construction Estimates

Work executed using construction units results into the creation of new assets or value addition to the existing assets. This feature enables you to collect the costs on such work orders and post them for capitalization in Fixed Asset (FA) module through mass update.

If eAM asset numbers are not associated with FA serial numbers until work order completion, you can generate the asset numbers in the FA module and use them during capitalization.

Use the Work Order Capitalization process to capitalize the costs associated with construction estimates.

Before you can capitalize the costs associated with the construction estimate, you must first set up the EAM: FA Book Type profile. This profile enables the system to select the appropriate book when new fixed asset numbers are created.

To capitalize actual costs associated with a construction estimate:

1. Navigate to the System Administrator responsibility, and click the Define Profile Options link.

The Profiles page appears.

2. Click the Search icon (Flashlight).
3. Select the EAM: FA Book Type Code option, and then click the **OK** button.
4. Make sure that the Hierarchy Type is set to Organization.
5. Enter a beginning effective date.
6. Click the **Save** button.

Capitalizing Work Order Costs for Construction Estimates

You can capitalize the work order costs associated with a construction estimate.

To capitalize work order costs for a construction estimate:

1. Navigate to the Find Work Orders form in the Enterprise Asset Management responsibility (Billing and Capitalization > Work Order Capitalization).
2. Enter an Estimate Number to select a work order associated with a construction estimate.

Find Work Orders (EM1)

Work Order: V-FA1-WO1
 Estimate Number: V-FA1
 Asset Group: V-FA1
 Asset Number: V-FA1/001
 Asset Activity:
 Start Date: -
 Completion Date: -
 Owning Department:
 Project:
 Task:

Work Request:

Status:
☒ Closed
☒ Complete - No Charges
☒ V-COMP-NO CHANGE

☐ Previously Billed
 Reference Invoice:
☐ Internal Customer
 Customer:

Work Orders

Work Order	Estimate Number	Asset Group	Asset Activity	Status	Project	Task
V-FA1-WO1	V-FA1	V-FA1		Complete - No C		

3. Click the **Find** button.
4. Click the Capitalize Work Order button.
5. View the capitalized costs associated with the construction estimate.
6. Save your work.

Google Maps Integration

This chapter covers the following topics:

- Google Maps Integration Overview
- Google Maps Integration with EAM
- Viewing Assets on Google Maps
- Entering and Viewing Geocode Information Using the EAM Responsibility

Google Maps Integration Overview

Oracle Enterprise Asset Management can integrate with the web based source map viewer of Google Maps. Oracle Enterprise Asset Management assets can be geocoded and displayed in the map viewer based on user entered search criteria.

Note: Only those assets that have geocode information associated to them will display on the map.

You cannot geocode asset routes or non-serial rebuildables.

Google Maps Integration with EAM

From the Maintenance Super User responsibility, when the user selects any asset icon on the map viewer, details such as asset number, description, asset group, owning department, asset location and geocodes will be displayed in a popup window. You can also access other pages to perform the following actions:

- Create a work order.
- Create a work request.
- View open work orders.

- View open work requests.
- View the graphical asset hierarchy for the asset.

Entering Geocodes for EAM Assets:

1. Navigate to the Maintenance Super User responsibility, and click the Assets tab.
2. Enter EM1 in the Organization field and then click the Go button.
3. Click the Mass Geocode Entry sub-tab.
4. Enter search criteria to retrieve the assets, and click the Go button.

ORACLE[®] Asset Management

Home Logout Preferences Personalize Page Diagnostics

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis Construction Units

Capital Rebuildable Inventory Mass Meter Readings **Mass Geocode Entry**

Maintenance Organization: EMO

Cancel Save Apply

Mass Asset Geocode Entry

Simple Search

Note that the search is case insensitive

Asset Number Asset Group

Asset Category Address

Go Clear

Update/Enter Asset Geocodes

Asset Number	Asset Description	Asset Group	Asset Category	Address	Latitude				Longitude				Delete
					Degrees	Minutes	Seconds	Direction	Degrees	Minutes	Seconds	Direction	
PP50000	Punch Press 50000	Production Machine	Production.PPress Machine	3455 108th Ave,,,King,98101,US	47	37	32.88	N	122	22	13	W	
PP500001	Punch Press 500001	Production Machine	Production.PPress Machine	3455 108th Ave,,,King,98101,US	47	37	32.29	N	122	22	12.5	W	

Add 10 Rows

5. In the Update/Enter Asset Geocodes region, enter values such as
 - Latitude values for the asset:
 - Degrees - Enter a numeric value, do not use decimals, and you can enter a negative value.
 - Minutes - Do not use decimals.
 - Seconds - Enter a numeric value and you can use decimals.
 - Direction - Select N (north) or S (south)
 - Longitude values for the asset:
 - Degrees - Enter a numeric value, do not use decimals, and you can enter a negative value
 - Minutes - Do not use decimals.

- Seconds. Enter a numeric value and you can use decimals.
- Direction - Select E (east) or W (west)

If the geocode information already exists for the queried asset, the information can be modified or deleted.

- Click one of these buttons:
 - **Cancel** - to discard any changes you have made
 - **Save** - to save the changes and stay on the current page
 - **Apply** - to save your changes to the system, and the system returns you to the Mass Asset Entry Geocode page

Viewing Assets on Google Maps

If a responsibility has the appropriate roles and security, users can view the geospatial locations of EAM assets by using the map viewer functionality that is built into Google maps.

Note: If you want to view more than 100 assets on a Google map at one time, use the Asset Search page to query for those assets. It is recommended that you do not view more than 50-100 assets on a Google map at one time.

To view EAM assets on Google maps:

1. Navigate to the Maintenance Super User responsibility, and click the Assets tab.
2. Enter a value in the Asset Number or Asset Category fields, and click the Go button.

The Asset Numbers Search page appears.

ORACLE® Asset Management Diagnostics Home Logout Preferences Personalize Page

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Capital Rebuildable Inventory Mass Meter Readings Mass Geocode Entry Maintenance Organization EMO

Asset Numbers Text Search Save Search

Simple Search

Note that the search is case insensitive

Asset Number

Category

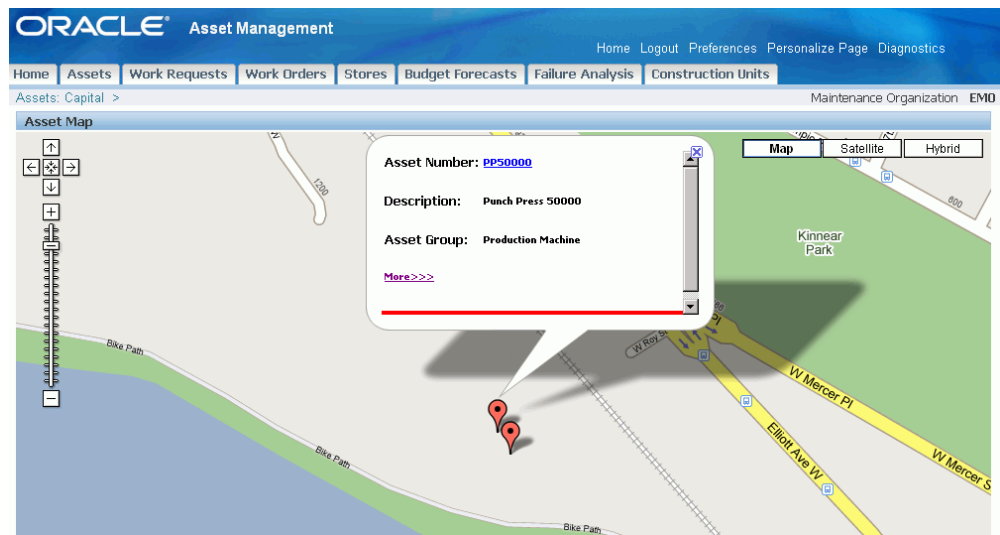
Asset Route

Select Asset Number: View

Select	Asset Number	Description	Asset Group	Category	Area	Owning Department	Criticality	Check In	Out
<input checked="" type="radio"/>	PP50000	Punch Press 50000	Production Machine	Production.PPress Machine	Prod PPress	Prd Maint	Normal		
<input type="radio"/>	PP500001	Punch Press 500001	Production Machine	Production.PPress Machine	Prod PPress	Prd Maint	Normal		

- Click the **Map All** button.

The Asset Map page appears, displaying the retrieved assets on a Google map using a map viewer.



- Click an asset (balloon) icon to view asset details such as Asset Number, Description and Asset Group.
- Click the More>>> link to view additional details such as:
 - Address of where the asset is located
 - Owning Department
 - Latitude

- Longitude
6. You can also access these other pages from the More>>> link to perform additional actions for the selected assets:
 - Create Work Order
 - Create Work Request
 - View Open Work Orders
 - View Open Work Requests
 - Graphical Hierarchy - to view the asset hierarchy
 7. Optionally click the Asset Number links at the bottom of the page to view additional asset details, such as latitude and longitude.

Entering and Viewing Geocode Information Using the EAM Responsibility

You can also enter and view geocode information using the EAM responsibility.

To enter or view geocode information using the EAM responsibility:

1. Navigate to the Enterprise Asset Management responsibility.
2. Click the Asset Numbers link and the Asset Numbers page appears.
3. Enter the search criteria for the asset to which you want to add or view geocode information.
4. Click the **Find** button.

The Define Asset Numbers page appears.

Define Asset Number (EM0)

Asset Number	Production Machines	Injection Molding and Punch Press
Asset Group	Production Equipment	Oil & Gas Production Equipment
Asset Serial Number	Production Machines	
Asset Category		
Organization	EMD	Asset Type Capital [...]

Main Location Others

Subinventory Locator

Location Code ...

Address 3455 108th Ave,,,King,98101,US

Production Organization		Degrees	Minutes	Seconds	Direction
Equipment Item		Latitude			
Equipment Serial Number		Longitude			

Attributes Resource Usage Meters Associate Activity

5. Enter or view the geocode information of the asset in the Location sub-tab.

ESRI Integration

This chapter covers the following topics:

- ESRI Integration Overview
- ESRI Integration with Oracle Enterprise Asset Management
- Setting Up the ESRI Profile
- Selecting the ESRI Default Service
- Defining the ESRI Functions
- Entering Geocode Information for EAM Assets
- Locating and Viewing Assets Using the ESRI Map Viewer
- Viewing and Transacting Work Using ESRI

ESRI Integration Overview

You can integrate Oracle Enterprise Asset Management with ESRI to view assets and work spatially on an ESRI map viewer. You can also perform various actions on the assets.

Important: You must purchase a license from ESRI to use this feature.

By using the ESRI map viewer, you can:

- Search and locate geocoded assets on a map.
- Locate work orders associated with assets on a map.
- Perform actions on work orders located on a map.

Important: Mozilla Firefox is the recommended browser to use with the

ESRI integration feature.

ESRI Integration with Oracle Enterprise Asset Management

Prerequisites

- ☐ You must perform the following setup tasks before you can view and transact work using ESRI:

1. Purchase a license from ESRI for online or server access.
2. Set up the ESRI profiles using the System Administrator responsibility.
3. Enter the geocode information for assets.

You can add the geocode information using one of the following options:

- Mass Geocode Entry page (Maintenance Super User > Assets > Mass Geocode Entry)
- Define Asset Numbers page (Enterprise Asset Management > Asset Numbers > Asset Numbers > Define Asset Number)
- Mass Geocode Import API

Related Topics

For more information regarding the Mass Geocode Entry API, see Import Geocode API, eAM Open Interfaces and APIs, *Oracle Enterprise Asset Management Implementation Guide*.

Setting Up the ESRI Profile

Perform the following steps to setup the ESRI profile. You must perform this step in order to use the ESRI map viewer.

Important: You must purchase a license to use the online or server version of the ESRI map viewer to use this feature.

Important: Mozilla Firefox is the recommended browser to use with the ESRI integration feature.

To set up the ESRI profile value:

1. Navigate to the System Administrator responsibility, and access the Find System Profile Values page (System Administrator > System Profiles Values > Find System Profile Values).
2. Perform a query to search for <CSI%MAP%.

The screenshot shows a window titled "Find System Profile Values". Inside, there is a "Display" section with several checkboxes: ☒ Site, ☐ Application, ☐ Responsibility, ☐ Server (B), ☐ Organization, ☒ User, and ☒ Profiles with No Values. To the right of the "User" checkbox is a text box containing the word "OPERATIONS". Below the "Display" section is a "Profile" label followed by a text box containing "%CSI%MAP%". At the bottom right of the window are two buttons: "Find" and "Clear".

3. Select the CSI:Mapviewer Name profile option name.
The System Profile Values page appears.
4. Select the ESRI value in the User column.
By default the profile is updatable only at the seed level. You can use the Application Developer responsibility to set the profile as updatable at the User and Responsibility levels.
5. Click the **Save** button.

Setting up the ESRI service

You will need to set up:

- CSI: ESRI Default Service profile option. See Oracle Installed Base System Profile Options and Debug Information, *Oracle Installed Base Implementation Guide*.

- The ESRI function name.

Selecting the ESRI Default Service

Follow these steps to specify the ESRI default service.

Selecting the CSI: ESRI Default Service

After you have set up the CSI: ESRI Default Service profile option, you must associate the profile to your site, responsibility or user.

1. Navigate to the System Administrator responsibility, and access the Find System Profile Values page (System Administrator > System Profiles Values > Find System Profile Values).

The screenshot shows a window titled "Find System Profile Values". Inside, there is a "Display" section with several checkboxes and input fields. The "Site" checkbox is checked. Below it are checkboxes for "Application", "Responsibility", "Server (B)", and "Organization", all of which are unchecked. The "User" checkbox is checked, and its corresponding input field contains the text "UTILMGR". At the bottom of the "Display" section, the "Profiles with No Values" checkbox is also checked. Below the "Display" section, there is a "Profile" label followed by an input field containing the text "CSI%ESRI%". At the bottom right of the window, there are two buttons: "Find" and "Clear".

2. Perform a query for CSI%ESRI%.
The System Profile Values page appears.

Profile Option Name	Site	Application	Responsibility	User
CSI:ESRI Default Service				OPERATIONS

3. Select STREET MAP in the User column. This is the seeded service delivered with the application.

Profile Option Name	Site	Application	Responsibility	User
CSI:ESRI Default Service				STREET MAP

4. Save your work.

Defining the ESRI Functions

Follow these steps to define the ESRI functions.

Defining the ESRI Function Information:

Use the FND functions to register the different services offered by ESRI with Oracle EAM and Oracle Asset Tracking.

1. Navigate to the System Administrator responsibility, and access the Find Functions page (System Administrator > Application > Function).

The Form Functions page appears.

2. Enter a Function Name and User Function Name, such as CSI_ESRI_URL_1.
3. Add a Description for the function.

Function	User Function Name	Description
CSI_ESRI_SERVICE_UR	STREET MAP	ESRI STREET MAP ONLINE SERVICE
CSI_ESRI_SERVICE_UR	STREET MAP - North America	ESRI STREET MAP LOCAL - NA ONLINE SERVICE

- Click the Web HTML tab, and enter the ESRI service URL in the HTML Call field.

Function	HTML Call	MDS Reference Path
CSI_ESRI_SERVICE_UR	http://server.arcgisonline.com/ArcGIS/rest/services/ESRI_Stree	
CSI_ESRI_SERVICE_UR	http://devijay-pc:8399/arcgis/rest/services/StreetMap_NA/MapS	

- Click the Properties tab, and define the function as 'Rest Service.'

Function	Type	Maintenance Mode Support	Context Dependence
CSI_ESRI_SERVICE_UF	REST service	None	Responsibility
CSI_ESRI_SERVICE_UF	REST service	None	Responsibility

- Click the Region tab, and associate the function to the object, ESRI Service Links.

Function	Object	Region Application	Region Code
CSI_ESRI_SERVICE_UF	ESRI SERVICE LINKS		
CSI_ESRI_SERVICE_UF	ESRI SERVICE LINKS		

- Save your work.

Entering Geocode Information for EAM Assets

You can enter geocodes for EAM assets by using:

- Mass Geocode Entry page (Maintenance Super User > Home > Assets).
See Entering Geocodes for EAM Assets, page 23-1.
- Define Asset Numbers page (Enterprise Asset Management > Asset Numbers > Asset Numbers > Define Asset Number).
See Entering and Viewing Geocode Information Using the EAM Responsibility,

page 23-5.

- Mass Geocode Import API

See Import Geocode API, eAM Open Interfaces and APIs, *Oracle Enterprise Asset Management Implementation Guide*

Locating and Viewing Assets Using the ESRI Map Viewer

Use the Asset Numbers page to locate and map assets using the ESRI map viewer.

To locate and map assets using the ESRI map viewer:

1. Navigate to the Maintenance Super User - Home page.
2. Select an organization, and then click the **Go** button.
3. Click the Assets tab, and then click the Capital link.
The Asset Numbers page appears.
4. Search for assets that have geocoded location information.
5. Click the **Map All** button.

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Capital Rebuildable Inventory Mass Meter Readings Mass Geocode Entry

Maintenance Organization UTE

Asset Numbers

Text Search Save Search

Simple Search

Note that the search is case insensitive

Asset Number SS101

Category

Asset Route No

Go Clear

Advanced Search

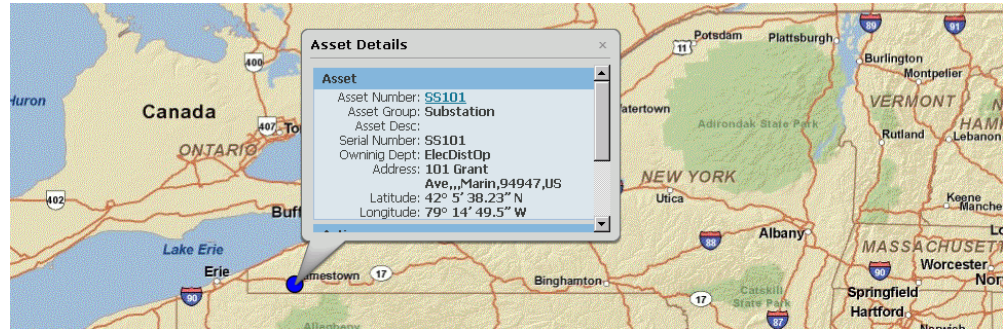
Select Asset Number: View Work Requests View Work Orders View Asset Operational Log Go Map All Export

Select Asset Number	Description	Asset Group	Category	Area	Owning Department	Criticality	Check In Out
SS101		Substation	Distribution.Station	East	ElecDistOp		

A map is rendered with all the assets that met your search criteria. Assets appear as blue colored icons.

6. Double-click near an asset to zoom in.
7. Click an asset icon to view additional information.

You can view additional asset information by clicking the asset number link.



8. Click the vertical scroll bar to access additional pages to perform actions such as:

- Create Work Order
- View Open Work Orders
- Create Work Request
- View Open Work Requests
- Graphical Hierarchy

Viewing and Transacting Work Using ESRI

You can view and transact work when using the ESRI map viewer.

Important: The assets associated with the work orders must have geocoded information in order to map the locations of the work orders using the ESRI map viewer.

You can perform the following tasks on work orders using the ESRI map viewer:

- View asset details.
- View work details.
- Update work orders
- Debrief work orders.
- Assign employees based on operations.

To view and transact work using the ESRI map viewer:

1. Navigate to the Work Orders page (Maintenance Super User > Home> Work

Orders).

2. Select the appropriate organization, and then click the **Go** button.
3. Search for work orders that you want to display using an ESRI map viewer.
The Work Orders - All page appears.
4. Click the **Map All** button.
All the work orders associated with geocoded assets are rendered on a map.
5. Click a work order icon to view additional information.
Work orders displayed on the map are displayed in a table form below the map.
You can view additional work order information by clicking the work order link.
6. Click the vertical scroll bar and select the Assign Employee link for an operation.
The Assign Employee page appears.
7. Select an employee to assign to the operation.
8. Click the Assign Enabled check box.
9. Save your work.
A confirmation message appears that indicates that the employee has been successfully assigned to the work order.
10. You can also update and debrief work orders, and view asset and work order details.

GIS Integration: Custom Mapviewer

This chapter covers the following topics:

- GIS Integration: Custom Mapviewer Overview
- Setting Up the Custom Mapviewer
- Setting Up the Custom Mapviewer Profile Value

GIS Integration: Custom Mapviewer Overview

In addition to using Google maps or ESRI to display assets in Oracle Enterprise Asset Management or Oracle Asset Tracking, you can also use a custom web-based HTML map viewer.

By using this custom map viewer, you can:

- Display geocoded assets on a map.
- Display work orders on a map (work orders must be associated with geocoded assets).
- Transact work orders using the mapviewer, for example, view and create work orders, view and create work requests.

Related Topics

Appendix A: CSI Integration, Implementing the Custom Mapviewer, *Oracle Enterprise Asset Management Implementation Guide*

Setting Up the Custom Mapviewer

Prerequisites

- ☐ You must perform the following setup tasks before using the custom mapviewer to display assets and transact work using the custom mapviewer.
- 1. Set up the profile value for the custom mapviewer using the System Administrator responsibility.
- 2. Define the CSI: Customized Mapviewer Class. See Appendix A: CSI Integration, Implementing the Custom Mapviewer, *Oracle Enterprise Asset Management Implementation Guide*.
- 3. Enter geocode information for the assets that you want to display on the mapviewer. See Entering Geocodes for EAM Assets, page 23-1 or Entering and Viewing Geocodes Using the EAM Responsibility, page 23-5.

Setting Up the Custom Mapviewer Profile Value

Follow these steps to define the profile value to use with the custom map viewer.

1. Navigate to the System Administrator responsibility, and access the Find System Profile Values page (System Administrator > System Profiles Values > Find System Profile Values).
2. Perform a query to search for <CSI%MAP%>.
3. Select the CSI:Mapviewer Name profile option name.
The System Profile Values page appears.
4. Select the Custom value in the User column.
5. Save your work.

Stores

This chapter covers the following topics:

- Stores
- Delivering Material from Stores to a Work Order
- Returning Material to Inventory

Stores

Material issue to work orders and returns to inventory are typical store room functions and can be performed by using the Maintenance Super User - Stores tab.

There are two activities involved in delivering material from stores to a work order.

1. A Material Issue Request is generated to request the material to a work order. This process is automated upon work order release by selecting a check box in the Enterprise Asset Management Parameters (See: Defining eAM Parameters, page 2-11).
2. The Material Issue Verification is generated when you access the Stores tab and select material for a work order, based on available, unprocessed move orders.

Note: A one-step material issue is a substitute for these two activities; a request is not created.

There are two primary methods used to issue material to a work order:

- One Step Issue method - Used to issue one-off or ad hoc material to a work order. This method does not involve the prior requesting of material and can be executed for both planned and unplanned material.
- Two Step Issue method involves two steps:

1. The maintenance planner or user requests material from store.
2. The stores room person delivers the material to the work order.

You can return material to inventory from a maintenance work order. If excess or defective material is issued to a work order, it needs to be returned.

The section includes the following topics:

- Delivering Material from Stores to a Work Order, page 26-2
- Returning Material to Inventory, page 26-13

Delivering Material from Stores to a Work Order

There are two activities involved in delivering material from stores to a work order. First, a Material Issue Request is generated (Move Order in Oracle Inventory) to request the material to a work order. You may automate this process upon work order release by selecting the *Enable Material Issue Requests* check box in the Enterprise Asset Management Parameters (See: Defining eAM Parameters, page 2-11). You may override this setting at the work order level. The *Auto Request Material* check box is located in the Material Requirements window. (See: Routine Work Orders, page 3-3). The second activity involves Material Issue Verification (Move Order in Oracle Inventory), and is generated when you access the Stores tab and select material for a work order, based on available, unprocessed move orders. A one-step material issue is a substitute for these two activities; a request is not created.

If the Material Issue Request process is not automated, you can perform a manual request within the Request all Materials page, located on the Work Orders tab.

You can also run the Work Order Component Pick Release, page 26-4 concurrent program to perform the material allocation for a group of work orders.

To perform the required setup steps for the two-step material delivery process:

Prerequisites

1. Define a *Default Pick Slip Grouping Rule* within the WIP Parameters window.

This information is used when pick slips are created for the material issue requests, detailing subinventory and locator information.
2. Decide if your organization will allocate serial numbers.

If No, then the quantity of the material issued is allocated and no serial numbers are allocated. The picker then enters the picked serial numbers from the available serial numbers.

If Yes, then the serial numbers are allocated during the material request, and

therefore, are not available for any other transaction.

1. Navigate to the Work In Process Parameters window.
2. Select the Other tab.

Work in Process Parameters

Work in Process Parameters (007)

Discrete Repetitive Move Tran... Backflush ... Intraoperati... Outside Pr... Scheduling Mobile Serial Other

Component ATP Rule LSCRULE1

Default Overcompletion Tolerance % 10

Default Pick Slip Grouping Rule Cluster Picking ...

☒ Default Plan Tasks

[]

3. Select a Default Pick Slip Grouping Rule. This information is used when pick slips are created for the material issue requests, detailing subinventory and locator information.
4. Save your work.
5. Navigate to the Organization Parameters window.
6. Select the Revision, Lot, Serial tab.

Organization Parameters

The screenshot shows the 'Organization Parameters (007)' window with several tabs: 'Inventory Pa...', 'Costing Info...', 'Revision, L...', 'ATP, Pick, ...', 'Inter-Org Inf...', and 'Other Accou...'. The 'Lot Control' section includes a 'Starting Revision' field set to '0', a 'Uniqueness' dropdown set to 'None', a 'Generation' dropdown set to 'At item level', an unchecked 'Zero Pad Suffix' checkbox, a 'Prefix' text field, and a 'Total Length' field set to '30'. The 'Serial Control' section includes a 'Uniqueness' dropdown set to 'Within inventory model and items', a 'Generation' dropdown set to 'At organization level', a 'Prefix' text field, a 'Starting Serial Number' field, and an 'Allocate Serial Numbers' dropdown set to 'No'.

7. Select an Allocate Serial Numbers value. If you select No, the quantity is allocated, but individual serial numbers are not. If you select Yes, you can allocate serial numbers when material requests are created. These serial numbers are not available to any other transaction.

Organizations typically select No, enabling the picker to enter the picked serial numbers. In most cases, the requestor is not partial to specific serial numbers.

8. Save your work.

Running the Work Order Component Pick Release Concurrent Program: Prerequisites

The work orders must meet the following criteria:

- Work order has a status of Released.

- The Enable Material Issue Requests option is selected at the work order level.
There is an open quantity for the material requirements.
- The Auto Request Material option is selected for the material requirement lines.
The concurrent program will select only the material requirement lines from work orders that have the Auto Request Material option set to Yes.

Using this concurrent program enables you to perform material allocation for work orders that were released earlier with insufficient on-hand material, but now have sufficient on-hand quantity for the material allocation.

Follow these steps to run the Work Order Component Pick Release concurrent program:

1. Navigate to Enterprise Asset Management > Work Orders > Work Order Component Pick Release.

2. Select the work orders to which you want to perform material allocations.

Only work orders with a status of Released, and that have open material quantity are available for selection.

The following list of parameters will be used to select work orders to perform material requirement allocations:

Parameter	Type	Default Value	Field/LOV
Days forward	Mandatory	1	To enter Number of days
Pick slip grouping rule	Mandatory	Default rule specified in WIP parameters (PICKSLIP_GROUPING_RULE_NAME in WIP_PARAMETERS_V)	Pickslip grouping rules LOV (PICK_SLIP_RULES in WSH_PICK_GROUPING_RULES
Print Pick slips	Optional	Yes	LOV values 'Yes' and 'No'

Example

Days forward : The number of days into the future to consider material requirements for the pick release.

If the Days forward value is entered as 3, then the program selects the work order

material lines whose Date Required is less than or equal to the 'sys date + 3'.

3. Click the **Submit** button.

To generate a Material Issue Verification:

Assuming that you have set the eAM Parameters to automatically create a Material Issue Request upon work order release, the following procedures execute the Material Issue Request; they physically allocate material to a work order.

1. Navigate to the Stores tab (Maintenance Super User: Stores tab).

Material Issue

ORACLE Asset Management

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Material Issue One Step Material Issue Return Material To Inventory

Current Organization : EM1

Material Issue

Save Search

Simple Search

Search for Material Allocations by Material Request Number or other fields. Advanced Search

Material Request Number Work Order Material Subinventory

Go Clear

Material with no Lot or Serial Control

Select	Details	Material	Description	Order	Work	Material Request Number	Material Request Line Number	Allocated Qty	Issue Qty	Reason	Reference	Delete Remaining Allocation	Replaced Rebuild Details	Delete
			No search conducted.											

Material with Lot or Serial Control

Select	Details	Material	Description	Order	Work	Material Request Number	Material Request Line Number	Allocated Qty	Delete
			No search conducted.						

Save Search

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2. The system defaults the Simple search mode. Enter at least one of the following fields in both the Simple and Advanced search modes.
 - Optionally enter a Material Request Number to narrow your results to that request.
 - Optionally enter a Work Order Number to narrow your results to only requests belonging to one work order.
 - Optionally enter a specific Material to narrow your results to only Material Issue Requests requiring that Material.
 - Optionally enter a Subinventory to narrow your results to a specific Subinventory.

- Using the Advanced search mode (Advanced button), optionally enter a material request Line Number to narrow your results to only specified lines on a request.
 - Optionally enter an Operation number to narrow your results to only requests belonging to a specific operation on a work order.
 - Optionally select a value from the Add Another list of values, and then choose Add.
 - Optionally enter a Locator if a Subinventory was selected and requires a Locator.
 - Optionally entered a Created By value. This is the person that created the material request.
3. Choose Go to display Material Issue Request information in the Results region.
The results region is divided between *Material with no Lot or Serial Control* and *Material with Lot or Serial Control*.
 4. The Issue Qty value defaults from the material requirements. You can update it.
 5. Optionally select a Reason for the Material Issue.
 6. Optionally enter a Reference.
 7. Optionally select the Delete Remaining Allocation check box to delete the remaining, unissued quantity, if the Issue Qty is lower than the allocated amount within the material requirements. Otherwise, it will save.
 8. For results within the *Material with no Lot or Serial Control* region, optionally select the Replace Rebuild Details pencil icon to specify a Serialized Rebuildable to issue to the current work order. This icon is enabled if the associated work order is for Rebuildable Inventory maintenance. After selected, you can indicate the following within the Replaced Rebuild Details page:
 - *Rebuild Item* - defaults as the current Rebuild Item; you can update it.
 - *Rebuild Serial Number* - optionally enter if you know what serial number is coming out (for serialized rebuilds only).
 - *Rebuild Activity* - the activity you want to associate with the created rebuild work order
 - *Rebuild Work Order* - the name of the work order created for the replaced Rebuildable Item

If you specify a replaced rebuildable item, a work order generates for the replaced rebuildable item because it is most likely problematic and you can have it repaired. If a serial number is provided for the replaced Rebuildable Item, it is removed from the asset's hierarchy and the configuration history is updated.

If nothing is specified within the Replaced Rebuild Details page, the replaced rebuild defaults as the same rebuild item that you are issuing. A work order is created for the replaced rebuild item.

9. Optionally select the Delete icon to delete the current material allocation. You might want to use this feature if you wish to free material and use it within the One-Step process.
10. Optionally for results within the *Material with Lot or Serial Control* region, select the Enter Serial Numbers pencil icon to specify a specific serial number to issue to the current work order.
11. Select the Select check box on the rows that you want to verify (allocate the material to the current work order), then choose Export. The material is now available for the work order.

Note: Ensure that the requested material is available in subinventories that are enabled for picking. Enabled subinventories might be governed by picking rules. See: *Defining Picking Rules, Oracle Inventory User's Guide*

To perform a one step material issue:

A one-step material issue is a substitute for the Material Issue Request and Material Issue Verification activities; a separate request is not created. This is performed if the Enable Material Issue Requests check box is not selected in the eAM Parameters (See: *Defining eAM Parameters*, page 2-11).

1. Navigate to the Stores tab.
2. Select the One Step Material Issue sub-tab.
3. Select the work order that you wish to issue material. It must be enabled for material issue requests. See: *Routine Work Orders*, page 3-3.

Click the **Go** button.

One Step Material Issue

Oracle Asset Management

Home Logout Preferences Help Personalize Page Diagnostics

Material Issue | **One Step Material Issue** | Return Material To Inventory

Current Organization : **EM1**

One Step Material Issue

Personalize "Issue Material"

* Work Order: WO102907 Material:

Operation:

Go Clear

Personalize "EAM Issue Material Result Table"

Select Material(s): Issue

Select All | Select None | Show All Details | Hide All Details

Select Details	Material	Operation	Qty	UOM	Qty	On Hand Details	Subinventory	Locator	Lot	From Serial	To Serial	Rev
<input type="checkbox"/> Show	10-40W Oil	1	1	QT	0							
<input type="checkbox"/> Show	Oil Filter	1	2	Ea	0							
<input type="checkbox"/> Show	IGL3	1	2000	Kg	0							

- You can perform one-step material issues to work orders in different unit of measures (UOMs).

Click the UOM field for the specific material issue. All other UOMs defined for that material will be available for selection.

If the default UOM is changed, then the Issued Qty field will display the default issued quantity *converted* to the new UOM.

- Click the Show/Hide link for the material to view material details.

Details associated with the default UOM appear.

The converted quantity based on the transaction (new) UOM displays in the Required Qty, Allocated Qty, and Open Qty fields.

- Click the icon in the On Hand Details column to view the on-hand quantity details for the material.

On Hand Details			
On Hand Details For Material: Oil Filter (Ea)			
Personalize Header Personalize Table			
<div> Previous 1-10 Next 10 </div>			
Subinventory	Description	Available Qty	On Hand Qty
FleetStore	Fleet Services Maintenance Stores	194	194
FklftStore	Fork Lift Maintenance Stores	98	98
AC Lot Inv	For testing bug	0	0
AbhiStore	AbhiStore Locator	0	0
FGI	Finished Goods Stores	0	0
FacStores	Facilities Maintenance Stores	0	0

The system displays on hand quantity for the material issue in the user-selected transaction UOM.

Close the popup window.

Enter values for the sub-inventory, locator, lot, serial information, and so on.

7. You can search to add inventory items by using one of these options:

- Item
- Description
- Cross Reference
- Cross Reference Description
- Manufacturer
- Manufacturer Part Number

Search and Select: Material

Cancel

Select

Search

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By

Manufacturer

Go

Results

Personalize "Material LOV"

Previous

1-10

Next 10

Select	Quick Select	Material	Description	Cross Reference Type	Cross Reference	Cross Reference Description	Manufacturer	Manufacturer Part Number
<input type="radio"/>		CM32546	Battery - NIHM					
<input type="radio"/>		Wheel Assembly - Goodyear	Wheel Assembly: Goodyear Eagle GA P205/65R15				Standard Textile	00014
<input type="radio"/>		Wheel Assembly - Michelin	Wheel Assembly: Michelin LTx LT215/85R16				Standard Textile	10071

Click the Select radiobutton for the item to be added.

Click the **Select** button.

8. Optionally select the specific Operation to view results on existing one step material issues that were issued to that operation. Only operations existing within the selected work order are available.
9. Optionally select a specific Material if your query is to view the existing one step material issues.
10. Choose Go. All planned material appears in the Select Material(s) region. Planned material is material that exists in the work order's material requirements. See: Defining Inventory Material Requirements, page 3-36.
11. Within the Select Material(s) region, optionally select unplanned Material (material not part of the work order's material requirements) to issue to the current work order.
 - Select an Operation to which to issue the material. The UOM defaults to the current Material's UOM.
12. Select the Quantity of the material that you are issuing to the work order.
13. Optionally select a Subinventory to pull the material from in Inventory.
14. If you previously selected a Subinventory requiring a Locator, select a Locator.
15. If the current material is lot controlled, select a Lot.

16. If the current material is serial controlled, select From and To Serial numbers.
17. Optionally select a Revision.
18. If the material is Rebuildable Inventory, optionally click the Replaced Rebuild Details button to specify the replacement Rebuildable Item information for the current Rebuildable Item. After selected, you can indicate the following within the Replaced Rebuild Details page:
 - *Rebuild Item* - defaults as the current Rebuild Item; you can update it.
 - *Rebuild Serial Number* - optionally enter if you know what serial number is coming out (for serialized rebuilds only).
 - *Rebuild Activity* - the activity you want to associate with the created rebuild work order
 - *Rebuild Work Order* - the name of the work order created for the replaced Rebuildable Item

If you specify a replaced rebuildable item, a work order generates for the replaced rebuildable item because it is most likely problematic and you can have it repaired. If a serial number is provided for the replaced Rebuildable Item, it is removed from the asset's hierarchy and the configuration history is updated.

If nothing is specified within the Replaced Rebuild Details page, the replaced rebuild defaults as the same rebuild item that you are issuing. A work order is created for the replaced rebuild item.

19. Optionally select the Details Show/Hide toggle button.
 1. Optionally select a Reason for the current issue.
 2. Select the Date required for the material to the work order. Today's date and time defaults.
 3. Optionally enter a Reference.
20. Select the Select check box next to the lines you are issuing to the current work order.
21. Choose Issue.

One Step Material Issue Confirmation

ORACLE Asset Management

Close Window Preferences Diagnostics

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis

Material Issue | **One Step Material Issue** | Return Material To Inventory

Current Organization : EM1

Confirmation

1. 1 material lines were successfully issued.
2. OPERATION : 10, MATERIAL : Shop Rags, QUANTITY: 1 has been issued. An overissue of quantity 1.0 happened.

One Step Material Issue

* Work Order EM181738 Material

Operation

Go Clear

Select Material(s): Issue

Select All Select None Show All Details Hide All Details

Select	Details	Material	Operation	Qty	Issued Qty	UOM	Subinventory	Locator	Lot	From Serial	To Serial	Revision	Replaced Rebuild Details
<input type="checkbox"/>	Show	Fork Lift Battery	10	1	0	Ea	Bat Rchrg						
<input type="checkbox"/>	Show	Shop Rags	10	4	0	Ea	FkiftStore						
<input type="checkbox"/>	Show												
<input type="checkbox"/>	Show												
<input type="checkbox"/>	Show												
<input type="checkbox"/>	Show												
<input type="checkbox"/>	Show												
<input type="checkbox"/>	Show												

Add 5 Rows

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Related Topics

Overview of Move Orders, *Oracle Inventory User's Guide*

Returning Material to Inventory

You can return material to Inventory from a maintenance work order. If excess or defective material is issued to a work order, it needs to be returned. Only material issued to work orders can be returned to Inventory. The quantity returned cannot exceed the quantity issued; it must be 1 if the material is serial controlled.

To return material to Inventory:

1. Navigate to the Stores tab.
2. Select the Return Material To Inventory sub-tab.
3. Optionally select a work order to narrow your results to one work order.
4. Optionally select a Material value to narrow your results to all Work Orders containing it as a material requirement.
5. Optionally select a Lot Number to narrow your results to all work order containing the previous Material with the current Lot Number.

6. Optionally select a specific Operation contained in the previously selected work order.
7. Optionally select a Serial Number to narrow your selection criteria to only work orders containing it as part of their material requirements.
8. Click the **Go** button.

Return Material To Inventory

Personalize "Return Material To Inventory"

Only materials issued to work orders are available for return. Quantity to return can never exceed quantity issued and has to be 1 if the material is under serial control.

Work Order: Operation:

Material: Serial Number:

Lot Number:

Personalize Default Single Column

Personalize "Return Material To Inventory"

Select Material / Materials:

Select All | Select None

Work Select Order	Op	Material	Description	Serial	Lot	Revision	Qty	Issued Qty	UOM	Subinv	Locator	Date	Reason	Ref	Delete Allocation And Material Requirement
<input checked="" type="checkbox"/>	EM181738	10	Shop Rags for Clean up				2		Ea			16-May-2013			<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	EM181738	10	Fork Lift Batteries used for electric Fork Lifts	Battery1000			1		Ea			16-May-2013			<input checked="" type="checkbox"/>

9. Enter the return Quantity for each work order.
10. Select the Subinventory to which to return the material.
11. If the previous Subinventory requires a Locator, select a Locator.
12. Optionally select a Date to return the material. The default value is the current system date and time.
13. Optionally select a Reason code to indicate the reason the material is not needed.
14. Optionally enter Reference information.
15. Enable the Select check box to include the work order rows from which material is being returned.
16. The Delete Allocation & Material Requirements check box for the material line of the work order indicates that you want to delete all the outstanding (unused) material allocation. The default for this check box is selected.

This check box enables the following actions to occur when the return to inventory process is performed:

- Deletes the open and unused material allocation of the work order.

- Updates the material requirement quantity of the work order to reflect the net issued quantity (Qty Issued - Qty Returned).

Optionally clear (unselect) this check box if you do not want to perform these functions.

17. Click the **Return to Inventory** button.

Safety Management

This chapter covers the following topics:

- Safety Management Overview
- Using Safety Management with EAM
- Creating Lockout Device Codes
- Defining Positional Assets
- Defining an Isolation Status
- Defining Isolation Types
- Creating Isolations
- Updating Isolations
- Viewing Isolations
- Using the Isolation Approval Workflow
- Defining Work Clearance Statuses
- Creating Work Clearances
- Updating Work Clearances
- Associating Work Orders with a Work Clearance
- Viewing Work Clearances
- Using the Work Clearance Approval Workflow
- Defining Work Permit Statuses
- Defining Work Permit Types
- Creating a Work Permit
- Updating a Work Permit
- Associating Work Orders to a Work Permit
- Viewing Work Permits

- Printing Work Permits
- Using the Work Permit Approval Workflow

Safety Management Overview

Use safety management to create work permits mandated by regulatory authorities. You can also create, view and update isolations and work clearances. You can also associate work permits with work clearances.

Note: The phrases "work permit" and "safety permit" are used interchangeably.

By using safety management, you can:

- Create, update, and view isolations.
- Create, update, view and copy work clearances.
- Associate work orders with a work clearance.
- Use the Work Clearance workflow to approve the work clearance status be changed to Released.
- Create a work permit.
- Using the Create Permit or Update Permit pages, create work permits or associate existing work permits to a work order or work clearance.
- Print work permits.
- Use the Work Permit Workflow to route a work permit for approval.

Related Topics

See Oracle Workflow User's Guide

Using Safety Management with EAM

Before you can use safety management, you must perform these setup tasks.

Prerequisites

- ☐ You must perform the following setup tasks before you can use safety management with EAM:

- Verify that the Enable Workflow for Safety option on the eAM Parameters page has been selected. See Defining eAM Parameters, page 2-11.
- Verify that the Enable Workflow for Workorders option on the eAM Parameters page has been selected. See Defining eAM Parameters, page 2-11.
- Create lockout device codes.
- Define asset numbers as positional assets or lockout devices.
- Associate lockout codes with asset numbers, asset groups, and rebuildable and serial-controlled numbers.
- Define isolation statuses and types.
- Define permit statuses and types.
- Define work clearance statuses and types.
- Create approval groups and approval rules for isolations, work permits and work clearances, if you are using workflow. See *Oracle Workflow User's Guide*.

Creating Lockout Device Codes

When you change the normal operating position of a positional asset, you must ensure that it remains in that position until the repair work is completed and the maintainable asset is safe to work on. Use lockout devices to secure the positional assets in proper positions so that they are not accidentally changed while asset is still under maintenance.

Lockout device codes indicate what type of lockout device would be used to lock this positional asset. This helps to identify that a certain type of positional asset requires a certain type of lockout device.

Create lockout device codes that can be used to associated with asset groups, asset numbers including rebuildable (and capital) and serial controlled items.

Important: A positional asset cannot be a lockout device, and a lockout device cannot be a positional asset.

To create lockout device codes:

1. Navigate to the Manufacturing Lookups page (Enterprise Asset Management > Lookups).

The Manufacturing Lookups page appears.

2. Click the New button.
3. Enter the Type, Meaning, Application, and Description of the lockout codes such as:
 - Type = EAM_LOCKOUT_DEVICE
 - Meaning = EAM_LOCKOUT_DEVICE
 - Application = Enterprise Asset Management
 - Description = eAM Safety Lockout Devices
4. Enter values in the Code sequence, Meaning, Description, Tag (optional) and beginning Effective Date fields.
5. Click the Enabled button to indicate that you want users to be able to use these lockout codes.

The screenshot shows the 'Manufacturing Lookups' window. It has a top section for defining a new lookup and a bottom table for existing ones.

Top Section Fields:

- Type: EAM_LOCKOUT_DEVICE
- Meaning: EAM_LOCKOUT_DEVICE
- Application: Enterprise Asset Management
- Description: eAM Safety Lockout Devices
- Access Level: ☒ User, ☐ Extensible, ☐ System
- Effective Dates: From: 17-FEB-2011, To: (empty)
- Enabled: ☒

Table Section:

Code	Meaning	Description	Tag	From	To	Enabled
1	PADLOCK	Padlock		17-FEB-2011		<input checked="" type="checkbox"/>
2	VALVE COVER	Valve Cover		17-FEB-2011		<input checked="" type="checkbox"/>
3	SEAL	Seal		17-FEB-2011		<input checked="" type="checkbox"/>

6. Save your work.

Defining Positional Assets

You can indicate if an asset number is a positional asset or a lockout device to be used in safety management.

Positional assets represent the equipment used to change the operational status of a maintainable asset to isolate it from its surroundings or energy sources.

For example, in the normal operating conditions of a boiler, the inlet valve is open and the drain valve is closed. To isolate a boiler before it is repaired, the inlet valve is closed and the drain valve is opened. In this example, the maintainable asset is the boiler, and the positional assets are the inlet and drain valves. Therefore, the boiler is not physically isolated, but the positions of the valves, switches, and other positional assets are altered in order to isolate the boiler from its surroundings.

Define positional assets during asset number creation.

To define positional assets:

1. Navigate to the Define Asset Numbers page (Enterprise Asset Management > Assets > Asset Numbers > New).

The Define Asset Numbers page appears. For more information on defining assets, see Defining Asset Numbers, page 2-74

2. Click the Safety tab.

The screenshot shows the 'Define Asset Number (EM1)' form with the 'Safety' tab selected. The form contains the following fields and options:

- Asset Number: MDE-PO-100
- Asset Group: MDE-POS-ASSET
- Asset Serial Number: MDE-PO-100
- Asset Category: (empty)
- Organization: EM1
- Asset Type: Capital

The 'Safety' tab is active, showing the following options and fields:

- ☒ Positional Asset
 - Operating Position: CLOSE
 - Operating Tag: GREEN
 - Shutdown Position: OPEN
 - Shutdown Tag: RED
 - Lockout Device: PADLOCK
- ☐ Lockout Device
 - Lockout Device: (empty)

At the bottom of the form, there are four buttons: Attributes, Resource Usage, Meters, and Associate Activity.

3. Select the Positional Asset check box.
4. Select the appropriate values for the Operating Position, Operation Tag, Shutdown Position, Shutdown Tag, and Lockout Device fields.
5. You can select the Lockout Device check box to indicate that this asset is a lockout device.

A lockout device uses a positive means such as a lock, either key or combination type, to hold an energy isolating device in the safe position and prevent the energizing of a machine or equipment. Lockout devices are defined during asset creation using the Define Asset Numbers or Define Rebuildable Asset Numbers forms.

Important: A positional asset cannot be a lockout device, and a lockout device cannot be a positional asset.

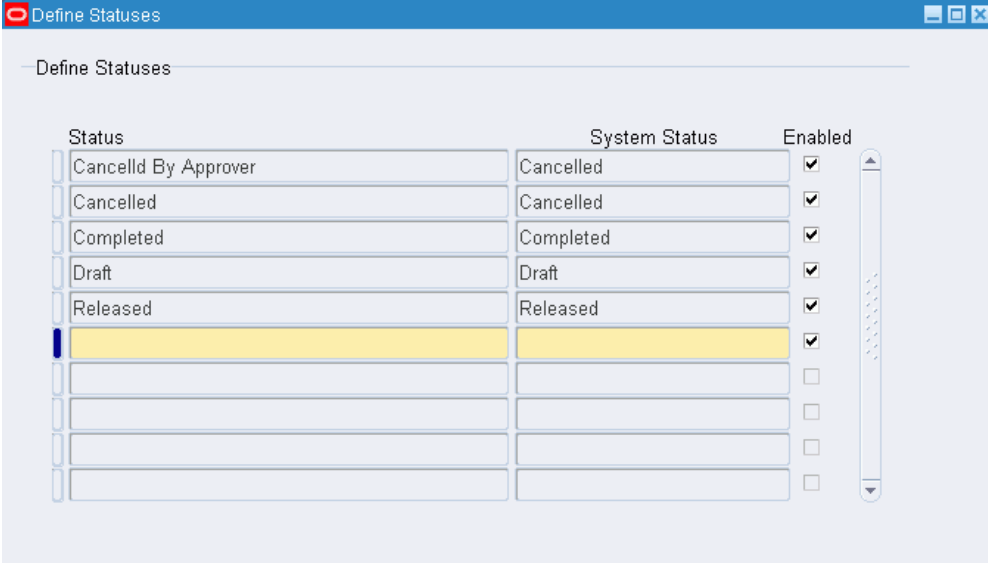
Defining an Isolation Status

Isolation statuses must be defined before you create an isolation. Seeded (predefined) isolation statuses are Draft, Released, Complete and Cancelled. You can define new statuses that are mapped to these seeded statuses.

To define an isolation status:

1. Navigate to the Define Status page (Enterprise Asset Management > Setup > Isolation Statuses).

The Define Statuses page appears.



Status	System Status	Enabled
Cancelled By Approver	Cancelled	<input checked="" type="checkbox"/>
Cancelled	Cancelled	<input checked="" type="checkbox"/>
Completed	Completed	<input checked="" type="checkbox"/>
Draft	Draft	<input checked="" type="checkbox"/>
Released	Released	<input checked="" type="checkbox"/>
		<input checked="" type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

2. Enter a name for the new isolation status.

The System Status default value appears.

3. Select the **Enabled** check box if you want users to be able to use the new isolation status.

4. Save your work.

Defining Isolation Types

Follow these steps to define isolation types.

To define isolation types:

1. Navigate to the Manufacturing Lookups page (Enterprise Asset Management >

Lookups).

The Manufacturing Lookups page opens in the add mode.

Manufacturing Lookups page

Manufacturing Lookups

Type: EAM_ISOLATION_TYPE
Meaning: EAM ISOLATION TYPE
Application: Enterprise Asset Management
Description: EAM ISOLATION TYPE

Access Level:
☒ User
☐ Extensible
☐ System

Effective Dates: From To Enabled

Code	Meaning	Description	Tag	From	To	Enabled
01	ELECTRICAL	ELECTRICAL ISOLATION		23-MAR-2011		<input checked="" type="checkbox"/>
02	MECHANICAL	MECHANICAL ISOLATION		23-MAR-2011		<input checked="" type="checkbox"/>
03	HAZARDOUS	HAZARDOUS		24-MAR-2011	24-MAR-2011	<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

2. In the Access Level group box, select the User value.
3. In the Type field, enter the name of the isolation type, EAM_ISOLATION_TYPE.
4. In the Meaning field, enter EAM Isolation Type.
5. In the Application field, enter Enterprise Asset Management.
6. In the Description field in the header, enter EAM Isolation Type.
7. In the Code field, enter the code number to be associated with the isolation type such as 10.
8. Enter the Meaning such as Electrical.
9. Enter the Description such as Electrical Isolation.
10. Enter the Effective Dates for the isolation type.
You must enter a date in the From field. You can leave the To date blank.
11. Select the Enabled check box if you want to enable users to select this isolation type.
12. Save your work.

Creating Isolations

You use isolations with a status of Draft or Released to copy their associated steps to a new isolation. In addition, you can use a work clearance with a status of Released or Complete to copy its steps to the new isolation.

Use these steps to create an isolation of equipment or an area.

To create an isolation:

1. Navigate to the Create Isolation page (Maintenance Super User > Safety Management > Create Isolation).
The Create Isolation page appears.
2. You can optionally accept the system generated value or enter a specific name Isolation number field.
3. Enter a value in the Description field.
4. Select a value from the Isolation Type drop-down list.
5. Optionally select an existing isolation in the Copy From Isolation field to create a new isolation.
6. Optionally select an existing work clearance from which you want to copy the isolation steps to this new isolation.
7. The state of the Permit Required check box (unselected/selected) comes from the isolation, if you selected a value in the Isolation field. You can unselect or select this option, and it is used for informational purposes only.
8. Optionally select a Status; the default value is Draft.
9. Enter a date in the Effective From field; the default value is the current system time and date.
10. Optionally select a value in the Context Value field.

This field may contain descriptive flexfields (DFFs). These values can be configured by your organization and can be used to capture additional information regarding the isolation. If you select a DFF, then the appropriate fields will appear where you will be required to enter information.

For information regarding defining DFFs, see *Oracle Applications Flexfields Guide*.

ORACLE Asset Management

Home Logout Preferences Personalize Page Diagnostics

Safety Management: Isolation > Maintenance Organization : EM1

Create Isolation

* Indicates required field
Time = hours

Isolation: 22003
* Isolation Type: MECHANICAL
Copy From Isolation: MDE-ISO-01
Copy From Work Clearance:
* Effective From: 10-May-2011 17:38:44

Description:
Isolation Type Description:
Permit Required: ☐
Status: Draft
Effective To:

Attachments:
Context Value: Isolation Info
* Isolation Info1:
* Isolation Info2:

Establishment Sequence

Select Row: Copy Re-Establishment Sequence Ascending Order Descending Order

Sequence Select Number	Positional Asset	Asset Description	Establishment Description	Tag Position	Safety Tag	Lockout Device	Department	Resource
80	MDE-SN-200	MDE-SN-200						
40	MDE-SN-200	MDE-SN-200						

Add

11. Click the Establishment Sequence region to optionally enter information for an establishment sequence for the assets to be included in the isolation.

Enter values in any of the fields. You can also copy the list from the Establishment Sequence region by clicking the **Ascending** or **Descending** buttons.
12. Optionally enter a value in the Sequence Number, Positional Asset, Tag Position, Establishment Description fields.

The values available in the Positional Assets field are based on the assets created and associated with the organization. See Defining Positional Assets, page 27-4.
13. Save your work if you want to add Attachments or Flexfields to the positional assets in the Establishment Sequence region.

You can also add attachments or flexfields (DFFs) during the update process.
14. You can optionally click the **Attachments** button to add a desktop file, text, or URL.
15. Optionally click the **Flexfields** button to select a DFF.
16. Optionally enter information in the Re-Establishment Sequence region. This region contains information relating to the equipment after the isolation has expired.

Enter values in any of the fields. You can also copy the list from the Establishment Sequence region by clicking the **Ascending** or **Descending** buttons.
17. Select the Isolated Assets to be included in the isolation.

You can select additional information such as the effective dates, comments, attachments, and descriptive flexfields.

Re Establishment Sequence

Select Row: Copy Establishment Sequence

Ascending Order

Descending Order

Sequence	Positional Asset	Asset Description	Re Establishment Description	Tag Position	Safety Tag	Lockout Device	Department	Resource
<input type="radio"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="radio"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Add

Isolated Assets

Previous

1-3 of 5

Next 2

Isolated Asset	Asset Description	Effective From	Effective To	Comments	Flex Fields
MDE-AN-1221-300	MDE-AN-1221-300	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
MDE-AN-1221-300	MDE-AN-1221-300	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Add

- Click the **Save** button.

Updating Isolations

You can update various isolation information.

To update an isolation:

- Navigate to the Update Isolation page (Maintenance Super User > Safety Management > Search).

Search for the isolation that you want to update, and then click the **Update** button. The Update Isolation page appears.

ORACLE Asset Management

Home

Logout

Preferences

Personalize Page

Diagnostics

Home

Assets

Work Requests

Work Orders

Stores

Budget Forecasts

Failure Analysis

Construction Units

Safety Management

Safety Management: Isolation >

Maintenance Organization : EM1

Update Isolation: 7002

* Indicates required field

Time = hours

Isolation

Isolation Type

Copy From Isolation

Copy From Work Clearance

Effective From

7002

MECHANICAL

01-Apr-2011 07:18:40

Description

Isolation Type Description

Permit Required

Status

Effective To

Caustic Pump Isol

MECHANICAL ISOLATION

☐

Released

01-Apr-2011 07:18:40

Cancel

Save

Apply

☐ Pending

Attachments

Context Value

None

Add

Establishment Sequence

Select Row: Copy Re-Establishment Sequence

Ascending Order

Descending Order

Sequence	Positional Asset	Asset Description	Establishment Description	Tag Position	Safety Tag	Lockout Device	Department	Resource
<input type="radio"/>	10	InletValve-001	turn 90 degrees to close	CLOSED	RED	PADLOCK	Fac Maint	MaintTech
<input type="radio"/>	20	OutletValve-002	turn 90 degrees to close	CLOSED	RED	PADLOCK	Prd Maint	PrdMaint
<input type="radio"/>	30	DrainValve-003	turn 90 degrees to open	OPEN	GREEN	SEAL	Prd Maint	PrdMaint

Add

- Update any of the available fields on the page.

You can add attachments and descriptive flexfields (DFFs) to the positional assets in the Establishment and Re-establishment Sequences and to the Isolated Assets.

For more information to define DFFs, see *Oracle Applications Flexfields Guide*.

Re Establishment Sequence									
Select Row: Copy Establishment Sequence Ascending Order Descending Order									
Sequence Select Number	Positional Asset	Asset Description	Re Establishment Description	Tag Position	Safety Tag	Lockout Device	Department	Resource	
C 40	DrainValve-003		turn towards 90 degrees to cl	CLOSED	RED	SEAL	Prd Maint		PrdMaint
C 50	OutletValve-002		turn towards 90 degrees to o	OPEN	GREEN	PADLOCK	Prd Maint		PrdMaint
C 60	InletValve-001		turn towards 90 degrees to o	OPEN	GREEN	PADLOCK	Fac Maint		MaintTech
<input type="button" value="Add"/>									

Isolated Assets							
Isolated Asset	Asset Description	Effective From	Effective To	Comments	Attachments	Flex Fields	Delete
TF-PS-01	Thermic fluid circulation pump unit 001			Isolation of Pump unit 001			
<input type="button" value="Add"/>							

3. Save your work.

Viewing Isolations

You can view isolations by following these steps.

To view an isolation:

1. Navigate to Maintenance Super User > Safety Management and search for an isolation.
2. Click the link for the isolation that you want to view.
3. The View Isolation page appears.
View the associated isolation details.
4. You can also click the **Update** button to make changes to the isolation.

Using the Isolation Approval Workflow

The Isolation Approval Flow is initiated when a user changes the status of isolation to Released.

The conditions under which you can use the approval workflow are organization code and isolation type.

Before you can use the Isolation workflow:

1. Verify that the Enable Workflow for Safety option on the eAM Parameters page has

been selected. See *Defining eAM Parameters*, page 2-11.

2. Create approval groups and approval rules for isolations.

See *Oracle Workflow User's Guide*.

Defining Work Clearance Statuses

You must define work clearance statuses before you can create a work clearance. Seeded (predefined) work clearance statuses are Draft, Released, Complete, and Cancelled. You can define new statuses that are mapped to these seeded statuses.

To define work clearance statuses:

1. Navigate to the Define Statuses page (Enterprise Asset Management > Setup > Work Clearance Statuses).

The Define Statuses page appears.

2. Enter the name of the new work clearance status.
3. Select the Enabled check box if you want users to be able to use the new work clearance status.
4. Save your work.

Creating Work Clearances

You can add work orders and work permits during work clearance creation.

Note: You must first create and save a work clearance before you can add attachments.

Follow these steps to create a work clearance.

To create a work clearance:

1. Navigate to the Create Work Clearance page (Maintenance Super User > Safety Management > Work Clearance > Create Work Clearance).
2. Enter a value in the Work Clearance field or accept the system-generated number.
3. Optionally enter a description.
4. Optionally select a value in the Isolation field.

You can use an existing isolation to copy the isolation sequences (establishment and

re-establishment steps) to the work clearance. Isolations must have a status of Released before they are available for selection.

You can add additional isolations using this field. You can manually add and delete isolation sequences, or change the order of the steps.

5. Enter a value in the Scheduled Establishment Start Date and Scheduled Establishment End Date fields (required).

The default values are the system date and time, but you can change these values.

6. Enter a value in the Scheduled Re-Establishment Start Date and Scheduled Re-Establishment End Date fields (required).

The default values are the system date and time, but you can change these values.

7. The Permit Required check box is associated with the isolation, if selected.

You can unselect or select this option, and it is used for informational purposes only.

The screenshot shows the Oracle Asset Management interface for creating a work clearance. The top navigation bar includes links for Home, Logout, Preferences, Personalize Page, and Diagnostics. Below this is a breadcrumb trail: Home > Assets > Work Requests > Work Orders > Stores > Budget Forecasts > Failure Analysis > Construction Units > Safety Management. The main title is 'Safety Management: Work Clearance >'. The 'Create Work Clearance' form contains the following fields and sections:

- * Work Clearance:** Text field with value '13005'.
- Isolation:** Text field with a search icon.
- * Scheduled Establishment Start Date:** Date field with value '18-Apr-2011 11:06:01'.
- * Scheduled Establishment End Date:** Date field with value '18-Apr-2011 11:06:01'.
- * Scheduled Re-Establishment Start Date:** Date field with value '18-Apr-2011 11:06:01'.
- * Scheduled Re-Establishment End Date:** Date field with value '18-Apr-2011 11:06:01'.
- Permit Required:** Check box, currently unchecked.
- Attachments:** Text field.
- Description:** Text field.
- * Status:** Dropdown menu with value 'Draft'.
- Context Value:** Dropdown menu.
- Buttons:** Cancel, Save, Apply.
- Establishment Sequence:** Section header for a list of sequences.
- Re-Establishment Sequence:** Section header for a list of sequences.

8. Optionally select a value in the Context Value field.

This field includes any descriptive flexfields (DFFs) that have been defined for your organization. These values can be used to capture additional information regarding the work clearance. If you select a DFF value, then the appropriate fields will appear where you will be required to enter information.

9. The values in the Establishment Region are populated from the Isolation number, if one is selected.

You can override these values and add sequences. You can add contingent workers as resources. See Creating Isolations, page 27-8.

10. The values in the Re-Establishment Region are populated from the Isolation Number, if one is selected.

You can override these values and add sequences. You can add contingent workers as resources. See Creating Isolations, page 27-8.

11. Click the Work Orders region to add a work order.

You can add the following in this region; all other fields are view only:

- **Work Order**
- **Attachments:** Click this button to access the Add Attachments page where you can add a desktop file, text, or URL.
- **Flexfields:** Optionally click the Flexfields icon to add a descriptive flexfield (DFFs).

DFFs can be defined to capture additional information specific to your organization. When you select a DFF, additional fields may be required.

For information regarding defining DFFs, see *Oracle Applications Flexfields Guide*.

12. Click the Permits region to add work permits to the work clearance.

You can add the following in this region; all other fields are view only:

- **Work Permit**
- **Attachments:** Click this button to access the Add Attachments page where you can add a desktop file, text, or URL.
- **Flexfields:** Optionally click the Flexfields icon to add a descriptive flexfield (DFFs).

DFFs can be defined to capture additional information specific to your organization. When you select a DFF, additional fields may be required.

For information regarding defining DFFs, see *Oracle Applications Flexfields Guide*.

13. Save your work.

Updating Work Clearances

1. Navigate to the Work Clearance Report page (Maintenance Super User > Safety > Work Clearance).
2. Enter the search criteria for the work clearance that you want to update, and then click the Go button.

Click the **Update** button for the appropriate work clearance, and the Update Work Clearance page appears.

3. You can optionally add attachments by clicking the **Add** button.

Use the **Add Attachment** page to attach a desktop file, text, or URL to the work clearance.

4. You can optionally select a value in the Context Value field.

This field may contain descriptive flexfields (DFFs). These values can be configured by your organization and can be used to capture additional information regarding the isolation. If you select a DFF, then the appropriate fields will appear where you will be required to enter information.

For more information to define DFFs, see *Oracle Applications Flexfields Guide*.

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Isolation | **Work Clearance** | Permit

Safety Management: Work Clearance > Maintenance Organization: FAC

Update Work Clearance: 2001

Cancel Copy Work Clearance Save Apply

Work Clearance: 2001
 Isolation: 6001
 Scheduled Establishment Start Date: 18-Apr-2011 06:43:03
 Scheduled Re-Establishment Start Date: 18-Apr-2011 06:43:03
 Permit Required: ☐
 Prepared By: Stock, Ms. Pat
 Prepared Date: 18-Apr-2011 06:43:25
 Attachments: None Add...

Description:
 Status: Released
 Scheduled Establishment End Date: 18-Apr-2011 06:43:03
 Scheduled Re-Establishment End Date: 18-Apr-2011 06:43:03
☐ Pending
 Approved By Context Value:

Establishment Sequence

Select Establishments Mass Complete: Go

Select All | Select None

Sequence	Select Number	Positional Asset	Description	Establishment Description	Tag Position	Safety Tag	Lockout Device	Lock Number	Department	Resource
<input type="checkbox"/>	10	KA-PA01	Positional Asset	Isolation Initiation	ON	RED	VALVE COVER		Safety	SafetyEng
<input type="checkbox"/>										
<input type="checkbox"/>										

Add

5. Revise the fields as required.

Positional assets are the asset numbers which are defined as positional assets in Asset Numbers form. Only positional assets are available for selection. In addition, only lockout devices are available for selection in the Lockout Device field.

The Resource field will show only People resources and the Instance field will show Persons. This is because these resources are the actual people who perform the task given in the work clearance.

You can add attachments and descriptive flexfields (DFFs) to the positional assets in the Establishment and Re-establishment Sequences.

Re-Establishment Sequence

Select Re-Establishments Mass Complete:

[Select All](#) | [Select None](#)

Sequence	Positional Asset	Description	Re-Establishment Description	Tag Position	Safety Tag	Lockout Device	Lock Number	Department	Resource
<input type="checkbox"/>	10 Drain-Valve-TF-01	Drain valve attached to TF-PS-01	Turn 90 degrees to close	CLOSED	RED	PADLOCK		W-Maint	FltMed
<input type="checkbox"/>	20 Outlet-Valve-TF-01	Outlet valve attached to TF-PS-01	Turn -90 degrees to open	OPEN	GREEN	PADLOCK		W-Maint	FltMed
<input type="checkbox"/>	30 Inlet-Valve-TF-01	Inlet valve attached to TF-PS-01	Turn -90 degrees to open	OPEN	GREEN	PADLOCK		W-Maint	FltMed

Work Orders

Work Order	Work Order Description	Asset Number	Asset Number Description	Status	Scheduled Start Date	Schedule Completion Date	Attachments	Flexfields	Delete
WO-TF-PS-01-2	Inspected TF-PS-01, found leakage in thermic fluid circulation system. Need emergency repair.	TF-PS-01	Thermic fluid circulation pump unit 001	Draft	12-Apr-2011 06:19:00	12-Apr-2011 06:19:00			
<input type="text"/>									
<input type="text"/>									

- You can optionally copy the work clearance by clicking the **Copy Work Clearance** button.

Permits

Permit	Permit Description	Permit Type	Status	Valid From	Valid To	Attachments	Flexfields	Delete
15018	Permit to work on Pump TF-PS-01	Hazardous Work	Draft	12-Apr-2011 06:20:39	14-Apr-2011 05:21:18			
<input type="text"/>								
<input type="text"/>								

- Save your work.

Associating Work Orders with a Work Clearance








You can associate work order with a work clearance by using the Work Clearances or Work Orders pages. The work orders and work clearances must have a status of Draft or Released.

To associate work orders with a work clearance:

1. Navigate to the Update Work Clearances page (Maintenance Super User > Safety Management > Work Clearances).
2. Enter the search criteria for the work clearance that you want to update and then click the Go button.

The Update Work Clearance page appears.

3. Expand the Work Orders region of the page.
4. Select the work orders that you want to associate with this work clearance.

Work Orders								
Work Order	Work Order Description	Asset Number	Asset Number Description	Status	Scheduled Start Date	Schedule Completion Date	Attachments	Flexfields Delete
ka-wo20		L400	Backhoe ID#400	Draft	18-Apr-2011 06:50:00	18-Apr-2011 06:50:00	 	
<input type="text" value="ka-wo40"/> 		L400	Backhoe ID#400	Draft	18-Mar-2010 07:05:20	18-Mar-2010 09:05:20	 	

5. You can add attachments and descriptive flexfields (DFFs) to the positional assets in the Establishment and Re-establishment Sequences.
6. Save your work.

Viewing Work Clearances

1. Navigate to the View Work Clearances page (Maintenance Super User > Safety Management > Work Clearances).
2. Enter the search criteria for the work clearance that you want to view and then click the Go button.

The View Work Clearance page appears where you can view associated details such as:

- Work Clearance and Description
 - Establishment Start and End Dates
 - Establishment and Re-Establishment details
3. You can optionally perform the following tasks by clicking the appropriate button:
 - Copy Work Clearance - copy to create a new work clearance
 - Update - to access the Update Work Clearance page to make revisions to the work clearance

Using the Work Clearance Approval Workflow

The Work Clearance Approval Workflow is initiated when a user changes the status of the work clearance to Released.

The conditions under which you can use the approval workflow are organization code, isolation type, and work clearance number.

Before you can use the Work Clearance Approval Workflow:

1. Verify that the Enable Workflow for Safety option on the eAM Parameters page has been selected. See *Defining eAM Parameters*, page 2-11.
2. Create approval groups and approval rules for work clearances.

See *Oracle Workflow User's Guide*

Defining Work Permit Statuses

Follow these steps to define a work permit status.

To define a work permit status:

1. Navigate to the Define Status page (Enterprise Asset Management > Setup > Permit Statuses).
2. Click the **New** button to add a new work permit status.
The Define Statuses page appears.
3. Enter the name of the new permit status.
4. Select a System Status value to associate to the new work permit status (required).
5. Select the **Enabled** check box if you want users to be able to use the new work permit status.
6. Save your work.

Defining Work Permit Types

Follow these steps to define a work permit type.

To create work permit types:

1. Navigate to the Manufacturing Lookups page (Enterprise Asset Management > Lookups).

The Manufacturing Lookups page opens in the add mode.

2. In the Access Level group box, select the **User** value.
3. In the Type field, enter the name of the permit type, WORK_PERMIT_TYPES.
4. In the Meaning field, enter Work Permit Types.
5. In the Application field, enter Enterprise Asset Management.
6. In the Code field, enter the name of the code to be associated with the permit type such as HAZARD.
7. Enter the Meaning for the permit type such as Hazardous Work.
8. Enter the Description for the permit type such as Hazardous Work.
9. Enter the Effective Dates for the permit type.

The From (beginning) date will default to the system date, but you can override this value. The To (ending) date is optional.

10. Select the **Enabled** check box if you want to enable users to select this permit type.

The screenshot shows the 'Manufacturing Lookups' application window. The form at the top has the following fields:

- Type: WORK_PERMIT_TYPES
- Meaning: Work Permit Types
- Application: Enterprise Asset Management
- Description: (empty)
- Access Level: ☒ User, ☐ Extensible, ☐ System

Below the form is a table with the following columns: Code, Meaning, Description, Tag, Effective Dates (From, To), and Enabled. The table contains three rows of data:

Code	Meaning	Description	Tag	From	To	Enabled
HAZARD	Hazardous Work	Hazardous Work		14-JUN-2010		<input checked="" type="checkbox"/>
HOT	Hot Work	Hot Work		14-JUN-2010		<input checked="" type="checkbox"/>
HIGH	High Work	High Work		14-JUN-2010		<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

11. Save your work.

Creating a Work Permit

Use the Create Permit page to create a new work permit.

To create a new work permit:

1. Navigate to the Safety Permits page (Maintenance Super User > Home > Safety Management > Permits).
2. Click the **Create Permit** button and the Create Permit page appears.

The screenshot displays the 'Create Permit' page in the Oracle Asset Management application. The page has a blue header with the Oracle logo and 'Asset Management' text. Below the header is a navigation bar with tabs: Home, Assets, Work Requests, Work Orders, Stores, Budget Forecasts, Failure Analysis, Construction Units, and Safety Management. The 'Safety Management' tab is active, and the sub-tab 'Permits' is selected. The page title is 'Create Permit'. There are three buttons at the top right: Cancel, Save, and Apply. The form contains several fields: Permit (with value 262), Description, Permit Type (dropdown), Permit Status (dropdown with value Draft), Valid From (with value 14-Jun-2010 11:21:02), Valid To, and Context Value (dropdown). There are also checkboxes for 'Valid From' and 'Valid To'. At the bottom, there is a section for 'Work Order' which is currently collapsed. There are also 'Cancel', 'Save', and 'Apply' buttons at the bottom right.

3. Enter a permit number or accept the default number in the **Permit** field.
4. (Optional) Enter a description for the work permit.
5. Select a work permit type (required).
6. Select a work permit status (required).

All new work permits are automatically created in the Draft status, but you can change this value.
7. Enter a date in the **Valid From** and **Valid To** fields (both are required fields).

The default value in the **Valid From** field is the system date and time that you are creating the work permit, but you can override this value.
8. (Optional) Click the **FlexFields** button to select a flexfield to add to the page.

See eAM Descriptive Flexfields, *Oracle Enterprise Asset Management Implementation Guide* and *Oracle Applications Flexfields Guide*.
9. Click the Work Order collapsible section to add work orders to the work permits.
10. Select the work orders to add.

You can add attachments and descriptive flexfields (DFFs) to the positional assets in the Establishment and Re-establishment Sequences.

See Updating a Work Permit, page 27-21 for information regarding adding work orders to a work permit.

11. Click the **Apply** button.
12. You can add attachments to the work permit after you have saved the work permit.
Click the **Attachments** button to add attachments.

Updating a Work Permit

Use the Update Work Permit page to update a safety permit.

1. Navigate to the Safety Permits page (Maintenance Super User > Home > Safety Management > Permits).
2. Click the **Update Permit** button for the safety permit that you want to update.

The Update Permit page appears.

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Safety Management: Permits > Maintenance Organization : EM1

Update Permit: 58002

* Indicates required field
Time = hours

Permit: 58002
Description: 58002
Permit Type: Confined Space
Permit Status: XB3 Released
Attachments: None Add...

Valid From: 23-Jun-2010 16:50:00
Valid To: 24-Jun-2010 16:50:00
Prepared By: Moll, Mr. Joe
Prepared Date: 23-Jun-2010 16:53:25
Approved By: Moll, Mr. Joe
☐ Pending
* st3 58002

Cancel Copy Permit Save Apply

Work Order

Work Order	Work Order Description	Asset Number	Asset Number Description	Status	Date	Scheduled Start Date	Schedule Completion Date	Attachments	Flex Fields	Delete
WO385948		XB3-AN-100	XB3-AN-100	Draft	23-Jun-2010 16:49:00		23-Jun-2010 16:49:00			

Add 3 Rows

3. Revise the permit details.

You can revise the following information:

- Description
- Permit Status

If you update a work permit to a status of Released (or a user-defined equivalent), a workflow notification is triggered upon save. The Completed status will open a new field in which you can enter the completion date and time.

- Attachments (add)
- Valid From and Valid To dates

4. Click the Work Order collapsible section to add work orders to the work permits.
5. Select the work orders to add.
6. (Optional) Click the **Flexfields** button to select additional flexfields to add to the page.

See eAM Descriptive Flexfields, *Oracle Enterprise Asset Management Implementation Guide* and *Oracle Applications Flexfields Guide*

7. Click the Work Clearance region to associate a work clearance to the work permit.
8. You can click one of these buttons to perform other actions:
 - **Cancel:** To return to the Safety Permits page without saving any changes.
 - **Copy Permit:** To copy the current work permit to a new permit.
 - **Save:** To save your changes and remain on the Update Permit page.
 - **Apply:** To save your changes and return to the Safety Permits page.

Associating Work Orders to a Work Permit

You can add (associate) existing work orders to a work permit when you create the work permit or when you update the work permit.

Important: You cannot create a new work order through the work permit.

To associate (add) a work order to a work permit:

1. Navigate to the Safety Permits page (Maintenance Super User > Home > Safety Management > Permits).
2. Click the **Update Permit** button for the safety permit to which you want to add a work order.

The Update Permit page appears.
3. Enter the work order number in the Work Order field, or click the search button.
4. Search and select the appropriate work order to add.

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Safety Management: Permits >

Maintenance Organization : EM1

Update Permit: Documentation

* Indicates required field
Time = hours

Permit Description:

Permit Type: **Hazardous Work**

Permit Status: **Draft**

Attachments: **None**

Valid From:

Valid To:

Prepared By: **Stock, Ms. Pat**

Prepared Date: **14-Jun-2010 11:31:39**

Approved By:

☐ Pending

Context Value:

Work Order

Work Order	Work Order Description	Asset Number	Asset Number Description	Status	Scheduled Start Date	Schedule Completion Date	Attachments	Flex Fields	Delete
VB-WO-05		FL1010	Fork Lift 1010	Released	06-May-2010 00:49:03	06-May-2010 00:49:03			

- Repeat these steps to add additional work orders to the safety permit. Click the **Flexfields** button to add additional flexfields to the page.

See eAM Descriptive Flexfields, *Oracle Enterprise Asset Management Implementation Guide* and *Oracle Applications Flexfields Guide*.

- You can click one of these buttons to perform additional tasks on the safety permit:
 - Cancel:** To return to the Safety Permits page without saving any changes.
 - Copy Permit:** To copy the current work permit to a new permit.
 - Save:** To save your changes and remain on the Update Permit page.
 - Apply:** To save your changes and return to the Safety Permits page.
- Save your work.

Viewing Work Permits

Use the View Work Permits page to view existing safety permits.

- Navigate to the Safety Permits page (Maintenance Super User > Home > Safety Management > Permits).
- Click the link for the safety (work) permit that you want to view.
The View Permit page appears.
- View the permit details.

4. You can click one of these buttons to perform other actions:
 - **Cancel:** To return to the Safety Permits page.
 - **Update Permit:** To make changes to the permit.
 - **Copy Permit:** To copy the current work permit to a new permit.

Printing Work Permits

You can print work permits.

1. Navigate to the Safety Permits page (Maintenance Super User > Home > Safety Management > Permits).
2. Click the **Print Permit** button for the work permit that you want to print.

The Permit Report page appears.

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Permits

Safety Management: Permits >

Warning
Low-level Diagnostic Logging is turned on. This may temporarily reduce performance.

Permit Report

Select Entire Search Result

Select All | Select None

Select Permit	Description	Permit Type	Status	Valid From	Valid To	Attachments
<input checked="" type="checkbox"/> Documentation		Hazardous Work	Draft	14-Jun-2010 11:21:02	28-Jun-2010 11:32:16	

Select Parameters

☒ Work Orders ☒ File Attachments

Template: Permit To Work Locale: English: (*) Format: HTML

(*) Default Template

Run

3. Select the report parameters that you want to include such as Work Orders and File Attachments.
4. Select a template (if applicable).
5. The Locale defaults to the template (if applicable), and this describes the language in which you want the permit to be printed.
6. Select one of the following report formats:
 - Excel
 - HTML
 - PDF

- RTF
7. Click the **Run** button to print the work permit.
 8. View the printed work permit.

HTML Work Permit

ORACLE Enterprise Asset Management – Permit To Work
 Page | 1

Permit Name	Documentation	Permit Status	Draft
Permit Description		Permit Type	Hazardous Work
Prepared Date	14-JUN-2010 11:31:39	Prepared By	Stock, Ms. Pat
Valid From	14-JUN-2010 11:21:02	Valid To	28-JUN-2010 11:32:16

Approvers

Work Order Details

Work Order Name	Asset Number	Description	Scheduled Start Date	Scheduled Completion Date
-----------------	--------------	-------------	----------------------	---------------------------

File Attachment

File Name	Description	Category
-----------	-------------	----------

Using the Work Permit Approval Workflow

You can use Oracle Workflow to use the Work Permit Workflow.

The conditions include permit status, permit type, and organization code.

Before you can use the Work Permit Workflow:

1. Verify that the Enable Workflow for Workorders option on the eAM Parameters page has been selected. See *Defining eAM Parameters*, page 2-11.

This option will enable the Work Permit Workflow to be triggered for work permits. See

2. Create approval groups and approval rules for work permits. See *Oracle Workflow User's Guide*.

Related Topics

See Oracle Applications Workflow for more information about adding approval groups.

Failure Analysis

This chapter covers the following topics:

- Failure Analysis Overview
- Defining Failure Codes and Sets
- Collecting Failure Information
- Analyzing Failure Information

Failure Analysis Overview

Failure Analysis enables you to track an asset failure from the time it is reported until its resolution. Statistics from your collected failure data provide you with information on why an event occurs and causes your asset failure. You can then take the necessary steps to eliminate that event. Additionally, you can use the failure statistics, among others, to help you formulate your Reliability-Centered Maintenance (RCM) program. Failure hierarchies that support multiple-level failure reporting provide effective root cause and reliability analysis. For specific asset groups or rebuildable items, each failure (problem) has a defined number of root causes, with each root cause having a defined number of resolutions (remedies).

When failure is reported, each work order represents one single failure occurrence (event) for the asset specified on the work order. The cost to repair an asset that fails to a normal, operational state is assumed to be the charges accumulated in the work order that is associated with the failure. If the repair is outsourced to an external party and requisitioned on a purchase order, a work order must be created to collect the repair costs for Failure Analysis to pick it up.

Failure Analysis topics include the following:

1. Defining Failure Codes and Sets, page 28-2
2. Collecting Failure Information, page 28-5
3. Analyzing Failure Information, page 28-5

Defining Failure Codes and Sets

A work order represents one single failure occurrence (event) for the asset specified on the work order. There are three main Failure Code Types: Failure Code, Cause Code, and Resolution Code. When creating a work order, these failure codes are specified on the work order, such as Compressor Shaft Damage (Failure), Vibration (Cause), and Replacement and Re-calibration (Resolution), respectively.

Note: You can optionally update these codes' meanings. See: Failure Code Types, page 2-46.

User-defined Failure codes, Cause codes and Resolution codes are organized into multiple tree structures called Failure Code Sets, which are then assigned to asset groups. Each set provides asset group-specific information on the possible failures of an asset group, the possible causes of each failure, and the possible resolutions for each cause. Assets within an asset group inherit the assigned Failure Code Set. At the work order level, Failure Tracking codes are entered to report a failure, its cause, and resolution. The assigned Sets provide a disciplined methodology to collect failure data on assets. Inquiries on failure data are performed, based on user-entered criteria, such as date range, asset groups or assets, departments, or areas. Mean Time Between Failure (MTBF) and Mean Time To Repair (MTTR) are calculated with each inquiry.

To define failure codes:

1. Navigate to the Failure Sets page (Maintenance Super User: Failure Analysis > Failure Tracking Setup).

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Failure History Failure Analysis Failure Tracking Setup

Current Organization : EM1

Failure Sets

Save Search

Simple Search

Note that the search is case insensitive

Name

Asset Group

Go Clear

Create Failure Set Define Failure Codes

Name	Description	End Date	Update
No search conducted.			

Save Search

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2. Choose Define Failure Codes.
3. Select the appropriate Code Type, such as Failure Code (See: Failure Code Types, page 2-46).

4. Enter the Code, for example, Mechanical.
5. Enter the Code's Description, for example, Mechanical Parts Failure.
6. Optionally enter an End Date, to apply an expiration for the current code.

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Failure History Failure Analysis Failure Tracking Setup

Failure Analysis: Failure Tracking Setup > Current Organization : EM1

Define Failure Codes

Save Search

Simple Search

Note that the search is case insensitive

Failure Code Description

Code Type Include Inactive Codes

Go Clear

Cancel Save Apply

Code Type	Code	Description	End Date	Delete
Failure Code	Mechanical	Mechanical Parts Failure	<input type="text"/>	<input type="text"/>
Cause Code	Lub System Failure	Lubrication System Failure	<input type="text"/>	<input type="text"/>
Resolution Code	Auto-Lub Correction	Auto-Lubrication System	<input type="text"/>	<input type="text"/>

Add 3 More rows

Cancel Save Apply

Save Search

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7. Optionally choose Save to create the codes and remain on the current page.
8. Click the **Apply** button to create the codes and return to the previous page.

To define a failure set:

1. Navigate to the Failure Sets page.
2. Choose Create Failure Set.

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Failure History Failure Analysis Failure Tracking Setup

Failure Analysis: Failure Tracking Setup > Current Organization : EM1

Create Failure Set

* Indicates required data

* Name: MAIN End Date:

Description: Main Failure Set

Cancel Save Apply

Failure Codes

Copy From Failure Set: Go

Export

Failure	Description	Cause	Description	Resolution	Description	End Date	Clear	Delete
Mechanical	Mechanical Parts Failure	Lub System Fa	Lub System Failure	Auto-Lub Corrector	Auto-Lubrication System Correction			

Add 3 More rows

Assign Asset Groups

Asset Group	Description	Failure Code Required	Delete Assignment
Lexus ES300	2002 Make Lexus ES300 Car Fleet Maint. Group	Yes	
		Yes	
		Yes	

Add 3 More rows

3. Enter the Name for the failure set.
4. Optionally enter a Description for the failure set.
5. Optionally enter an End Date, to apply an expiration for the current failure set.
6. Optionally select an existing failure set from the *Copy From Failure Set* list of values.
If the failure set that you are creating is similar to an existing failure set, you can copy failure codes from an existing failure set, aiding in multiple failure set entry. To copy the failure hierarchy from another failure set, you can use the *Copy From Failure Set* field. The list of values includes active failure sets. Click the **Go** button and the failure combinations of the selected failure set appear. You can delete any unwanted combinations.
7. Select a Failure code. The code's Description defaults.
8. Select a Cause code. The code's Description defaults.
9. Select a Resolution code. The code's Description defaults.
10. Optionally enter an End Date, to apply an expiration for the current group of codes.
11. Assign the current failure set to an Asset Group or Rebuildable Item.
Asset numbers or rebuildable serial numbers within an asset group or rebuildable item, respectively, inherit the assigned Failure Code Set.

1. Select an asset group from the list of values.
The asset group's Description defaults from its definition.
2. Select whether Failure Code entry is required on work orders created for assets within the current asset group.
For example, select Yes from the *Failure Code Required* list of values to ensure that Failure Codes are entered when creating work orders for assets within the current asset group. The *Failure Code Required* value defaults to the work order, but you can optionally change it.
12. Optionally click the **Save** button to create the failure set and remain on the current page.
13. Click the **Apply** button to create the failure set and return to the previous page.

Collecting Failure Information

Failure reporting for an asset is performed by entering failure tracking codes, when creating the failure work order or when completing it. Asset failure history is available after the work order is completed. This information assists in the maintenance management decisions and provides data for reliability analysis.

Related Topics

Creating Work Orders, page 21-37

Completing Work Orders, page 21-68

Analyzing Failure Information

You can analyze failures that are reported against assets with the Failure History and Failure Analysis pages. The Failure History page displays detailed failure data, reported at the work order level. The Failure Analysis page aggregates failure data, based on the user-selected View By and displayed measures, such as Mean Time Between Failures (MTBF), and Mean Time To Repair (MTTR).

The three main measurements for asset maintainability and reliability are:

1. Mean Time Between Failures (MTBF): the average elapsed time between failures. MTBF is the duration in days between an asset's two failure dates, and is a reliability metric indicating how often an asset fails.
2. Mean Time To Repair (MTTR): the average time between when an asset fails (reported failure date) and when it is repaired to its normal operating condition (actual work order completion date). MTTR is a maintainability metric, indicating

how fast repair is completed after a failure is reported.

3. Mean Time Between Repairs (MTBR): the average duration when an asset is in acceptable functional condition. The calculation is as follows:

$$\text{MTBR} = \text{MTBF} - \text{MTTR}$$

Note: Only completed work orders are included in Failure History and Failure Analysis.

To analyze failure history information:

1. Navigate to the Failure History page (Failure Analysis tab > Failure History sub-tab).

Oracle Asset Management

Home Logout Preferences Diagnostics

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis

Failure History Failure Analysis Failure Tracking Setup

Current Organization : EM1

Failure History

Save Search

Simple Search

Note that the search is case insensitive

Asset Number: LX0003

From Failure Date:

To Failure Date: (example 28-Jul-2006 11:34:53)

Go Clear

Display Readings from Meter:

Meter associated to Asset Failures

Advanced Search

Mean Values

MTBF (Days) 265.5

MTTR (Hours) 10.8

Frequency (per Day) 0.004

Export

Show All Details Hide All Details

Asset Number	Failure Cause	Resolution Date	Time Between Failure (Days)	Work Order	Time To Repair (Hours)	Meter	UOM	Reading Between Failure	Correlation
Show LX0003	Mechanical Lub System Failure	Auto-Lub System Correction 28-Jul-2006 00:00:00	265.5	WO200607	10.8				

Save Search

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis Home Logout Preferences Diagnostics

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2. Enter an Asset Number (or Rebuildable Serial Number).
3. Optionally enter a range of failure reporting dates.
4. If there is a Primary Failure Meter specified for the Asset, its readings automatically appear in the Search Result table.

However, you can select any Required meters that are associated with the asset from the *Display Readings from Meter* list of values, to have the selected meter's readings appear in Failure History. This field is enabled only for the Simple Search, with a specified Asset Number.

5. Click the **Go** button.

Note: When calculating Mean Costs to Repair, all work orders that are associated with the failure results are included, if their costs are in the same currency. An asset can move between organizations if work orders have multiple currencies. All work order costs that are expressed in a currency that is different than the current maintenance organization's primary currency are excluded. A warning icon appears, informing you that there are repair costs that are not included because they are not in the current maintenance organization's currency.

To analyze failure information:

Based on your search criteria, work order failure data is filtered for analysis. The *View By* selection determines how the failure data is aggregated for the MTBF, MTTR, and Mean Cost To Repair calculations. If there is a Primary Failure meter or if a Required meter is selected, the Mean Readings Between Failures are also calculated. You can compare MTBF, frequency, and MTTR calculations by Asset Number, Asset Group, Asset Category, or Failure.

1. Navigate to the Failure Analysis page (Maintenance Super User: Failure Analysis tab > Failure Analysis sub-tab).

ORACLE Asset Management Home Logout Preferences Diagnostics

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis

Failure History Failure Analysis Failure Tracking Setup Current Organization : EM1

Failure Analysis Save Search

Simple Search Advanced Search

Note that the search is case insensitive

Asset Number

Asset Group

Asset Category

Include Children ☐ No

View By Selected Criteria is displayed in First Column

Display Readings from Meter

Failure

From Failure Date

To Failure Date

Meter associated to Asset Failures

Compute Repair Costs ☐ No

Average

Failure Count **1**

MTBF (Days) **265.5**

MTTR (Hours) **10.8**

Frequency (per Day) **0.004**

Asset Number	Failure Count	MTBF (Days)	Frequency	MTTR (Hours)	Meter	Meter UOM	MTBF (Meter Unit)	Frequency (per Unit)
LX0003	1	265.5	0.004	10.8				

Home Assets Work Requests Work Orders Stores Budget Forecasts Failure Analysis Home Logout Preferences Diagnostics

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2. Optionally enter an Asset Number (or Rebuildable Serial Number).
3. Optionally enter an Asset Group (or Rebuildable Item).
4. Optionally select an Asset Category of the selected Asset Group/Rebuildable Item that is assigned to the current organization
5. The Include Children option indicates whether children assets should also be included within the inquiry results, even if they do not fit the search criteria.
6. Optionally select a *View By* value. You can view failure information by Asset Number, Asset Group, Asset Category, or Failure Code.

Note: Use Advanced Search if you want to search by other criteria such as Area. You cannot add additional View By values.
7. Optionally select a *Display Readings from Meter* value to display meter readings from a non-primary meter.

Meters that are associated with the selected asset, having the Required check box selected, and that are identified as a non-primary meter, are available for selection. By default, readings from the primary meter, if it exists, appear. This field is enabled only for the Simple Search, with a specified Asset Number and if you *View By* Asset Number.
8. Optionally select a failure code to further narrow your failure results by code.

9. Optionally enter a range of failure reporting dates.
10. Click the **Go** button. The number of failure occurrences appear. A link from the Failure Count value provides a drill down to the Failure History information.

Reports and Processes

This chapter covers the following topics:

- Activity Cause Report
- Department Actual Cost Report
- PAC EAM Estimates Versus Actuals Report
- Work Order Cost Report
- EAM Weekly Schedule Report
- Load Production Equipment Maintenance Downtime
- Maintenance Work Order Detail Report
- Maintenance Work Order Report With Summary
- Maintenance Work Order Update PO/requisition Need-by Date (SRS)
- Material Issue Request Pick List Report
- Retrieve Timecard Data from OTL to EAM
- Simulate Transfer Shop Floor Invoice Variance
- Shop Floor Invoice Variance Report

Activity Cause Report

Use the Activity Cause Report to report on reasons for your assets' failures, reported by Department, or Asset Number. An Activity Cause is a reason for an asset's failure, for example, Preventive, Normal Wear, Rework, and Breakdown. This information enables you to understand the dynamics that affect an asset's ability to perform. They establish critical data that can be used for reporting and analysis of asset failure causes and the frequency of such conditions. Asset Cause Codes are referenced when setting up an Activity (See: Defining Activities, page 2-90 and Activity Causes, page 2-32).

Report Submission:

1. In the Submit Requests window, select Activity Cause Report from the Name list of values.

Report Parameters

Report Type

Select By Department or By Item Type (Capital Asset or Rebuildable Inventory) to indicate whether the report displays information relative to the Owning Department or Asset Group, respectively.

Period From

Enter the beginning period, for a data range, to indicate the starting point of time for which the report encompasses information. See: *Period Types, Oracle General Ledger User's Guide*, *Defining Period Types, Oracle General Ledger User's Guide*, and *Adding Periods to a Calendar, Oracle General Ledger User's Guide*.

Period To

Enter an ending period, for a data range, to indicate the ending point of time for which the report encompasses information. See: *Period Types, Oracle General Ledger User's Guide*, *Defining Period Types, Oracle General Ledger User's Guide*, and *Adding Periods to a Calendar, Oracle General Ledger User's Guide, Oracle General Ledger User's Guide*.

Currency

Select the Currency. See: *Defining Currencies, Oracle General Ledger User's Guide*.

Exchange Rate

Select the Exchange Rate. See: *Understanding Multiple Reporting Currencies, Oracle General Ledger User's Guide*.

Department From

Optionally, select a beginning department, for a data range, to indicate the beginning department for which the report encompasses information. This parameter is enabled if you selected By Department in the Report By parameter.

Department To

Optionally, select an ending department for a data range to indicate the ending department for which the report encompasses information. This parameter is enabled if you selected By Department in the Report By parameter.

Item Type

Select an Item Type. Valid values are Asset Items only, Rebuild Items only, and Asset and Rebuild Items.

Maintained Item From

Optionally select the Maintained Item From field to display a System Items window that provides Low and High fields. You can enter the Asset Item data range within the Low and High fields, which populates the Asset Item From and Asset Item To fields, respectively.

Maintained Item To

Optionally select the Maintained Item To field to display a System Items window that provides Low and High fields. You can enter the Asset Item data range within the Low and High fields, which populates the Maintained Item From and Maintained Item To fields, respectively.

Maintained Unit From

Optionally, select a beginning Maintained Group, for a data range, to indicate the beginning Maintained Group for which the report encompasses information.

Maintained Unit To

Optionally, select an ending Maintained Group, for a data range, to indicate the ending Maintained Group for which the report encompasses information.

2. Choose OK.
3. Choose Submit.

Related Topics

Submitting a Request, *Oracle Applications User's Guide*

Department Actual Cost Report

Use the Department Actual Cost Report to determine the actual costs charged to an Owning Department for a specified period of time.

Report Submission:

1. In the Submit Requests window, select EAM Weekly Schedule report from the Name list of values.

Report Parameters

Report Type

Select Summary or By Department Total.

- *Summary:* The one report total reflects the actual cost for all Departments within the selected Department data range (Department From and Department To

fields). If Departments were not selected within the Department From and Department To fields, the report total reflects the actual cost for all Departments.

- *Department Total:* The report reflects actual cost totals for all Departments, separately, within the selected Department data range (Department From and Department To fields). If Departments were not selected within the Department From and Department To fields, the report totals reflect the actual costs for all Departments.

Department From

Optionally select a beginning department, for a data range, to indicate the beginning department for which the report encompasses information.

Department To

Optionally select an ending department for a data range to indicate the ending department for which the report encompasses information.

Period From

Enter the beginning period, for a data range, to indicate the starting point of time for which the report encompasses information. See: *Period Types, Oracle General Ledger User's Guide*, *Defining Period Types, Oracle General Ledger User's Guide*, and *Adding Periods to a Calendar, Oracle General Ledger User's Guide*.

Period To

Enter an ending period, for a data range, to indicate the ending point of time for which the report encompasses information. See: *Period Types, Oracle General Ledger User's Guide*, *Defining Period Types, Oracle General Ledger User's Guide*, and *Adding Periods to a Calendar, Oracle General Ledger User's Guide*.

Include OSP

Select No or Yes. If you select Yes, Outside Service Processing information is included in the report.

Currency

Select the Currency. See: *Defining Currencies, Oracle General Ledgers User's Guide*.

Exchange Rate

Select the Exchange Rate. See: *Understanding Multiple Reporting Currencies, Oracle General Ledger User's Guide*.

2. Choose OK.
3. Choose Submit.

Related Topics

Submitting a Request, *Oracle Applications User's Guide*

PAC EAM Estimates Versus Actuals Report

Use the PAC EAM Estimates Versus Actuals Report to determine the estimated costs charged to a Legal Entity for a specific cost type, cost group, specific job or range of jobs.

Report Submission:

1. In the Submit Requests window, select PAC EAM Estimates Vs Actual Report from the Name list of values

Report Parameters

Legal Entity

Select the appropriate legal entity that you want to use.

Cost Type

The default cost type value associated with the legal entity appears in the field.

Cost Group

Select the appropriate cost group. The default cost group appears in the field.

Job Selection Option

You can choose one of these options:

- **All jobs**
 - **Range of jobs:** If you select this option, the Job From and To fields are available for entry.
 - **Specific job:** If you select this option, the Job field is available for entry.
2. Click the **OK** button.
 3. Click the **Submit** button.

Work Order Cost Report

Use the Work Order Cost Report to determine the costs charged to Work Orders for a specified period of time, and optionally, a Department range.

Report Submission:

1. In the Submit Requests window, select Work Order Cost Report from the Name list of values.

Report Parameters**Report Type**

Accept the default, High Cost Work Orders.

Department From

Optionally select a beginning department, for a data range, to indicate the beginning department for which the report encompasses information.

Department To

Optionally select an ending department for a data range to indicate the ending department for which the report encompasses information.

Cost Ceiling

Optionally enter an amount to indicate a work order cost limit for which the report encompasses.

Period From

Enter the beginning period, for a data range, to indicate the starting point of time for which the report encompasses information. See: *Period Types, Oracle General Ledger User's Guide*, *Defining Period Types, Oracle General Ledger User's Guide*, and *Adding Periods to a Calendar, Oracle General Ledger User's Guide*.

Period To

Enter an ending period, for a data range, to indicate the ending point of time for which the report encompasses information. See: *Period Types, Oracle General Ledger User's Guide*, *Defining Period Types, Oracle General Ledger User's Guide*, and *Adding Periods to a Calendar, Oracle General Ledger User's Guide*.

Include OSP

Select No or Yes. If you select Yes, Outside Service Processing information is included in the report.

Currency

Select the Currency. See: *Defining Currencies, Oracle General Ledger User's Guide*.

Exchange Rate

Select the Exchange Rate. See: *Understanding Multiple Reporting Currencies, Oracle General Ledger User's Guide*.

2. Choose OK.

3. Choose Submit.

Related Topics

Submitting a Request, *Oracle Applications User's Guide*

EAM Weekly Schedule Report

Use the EAM Weekly Schedule Report to display Work Order details, by specific owning department, within your crew's calendar week's starting dates. This report includes details, such as Work Order number, status, work description, start date, operation, department, resources, instance, priority, duration, estimated completion date, and the distribution of hours on a weekly basis.

Report Submission:

1. In the Submit Requests window, select EAM Weekly Schedule report from the Name list of values.

Report Parameters

Owning Department

Select an Owning Department to report for one Owning Department. This is the department that owns the responsibility for the Asset Number. This parameter is mandatory.

Assigned Department

Optionally, select an Assigned Department to narrow selection criteria to schedule information for one Assigned Department. This is the department that is currently assigned to the Asset Number.

Week Starting

Optionally select the starting date from which the user requires this report. The report displays information for seven days from the selected date. If this parameter is left blank, the report displays information starting from the first date of the current week.

Area

Optionally select an Area to narrow selection criteria to where a Asset Number is located.

Asset

Optionally select an Asset to narrow selection criteria to only the Work Orders that are assigned to the selected Asset.

Rebuild Item

Optionally select a serialized Rebuildable Item to narrow selection criteria to only Work Orders that are assigned to the selected Rebuildable Item.

Shutdown Type

Optionally select a Shutdown Type to narrow selection criteria to only Work Orders that have the selected Shutdown Type required for its operations.

Resource

Optionally select a resource associated with the operations of the current Work Order. This parameter is optional.

Instance

The Person or Equipment used as the resource for an operation. This parameter is optional.

Sort By

Select a Sort By value to indicate how you want to display your schedule information. If you select Workorder, for example, the report displays scheduling information, sorted by Work Order number.

2. Choose OK.
3. Choose Submit.

Related Topics

Submitting a Request, *Oracle Applications User's Guide*

Load Production Equipment Maintenance Downtime

Enterprise Asset Management (eAM) integrates with Process and Discrete Manufacturing, enabling your maintenance environment to identify Enterprise Asset Management asset relationships with production equipment. This feature associates an asset or many assets to the production equipment located in an Outside Processing organization. After establishing, you can view the resource usage (maintenance Work Orders, batches, or FPOs) emanating from production, associated with a maintainable asset. You can also use the Load Production Equipment Maintenance Downtime process to view or purge your maintenance production equipment downtime.

Report Submission:

1. In the Submit Requests window, select Load Production Equipment Maintenance Downtime from the Name list of values.

Report Parameters

Simulation Set

Select a valid Simulation Set.

Run Option

Select a Run Option. Valid values are Load Maintenance Downtime and Purge Maintenance Downtime.

- *Load Maintenance Downtime:* The process reports all production equipment downtime.
- *Purge Maintenance Downtime:* The process purges all production equipment downtime records from the appropriate tables.

Include Unreleased Maintenance Orders

Select Yes or No. If you select Yes, the report process includes Work Orders at an Unreleased Status when reporting or purging production equipment downtime records.

Firm Maintenance Work Orders Only

Select Yes or No. If you select Yes, only Work Orders that are firm (the dates on the Work Order cannot automatically re-schedule) are considered.

Department

Optionally, select an Owning Department. Only Work Orders belonging to the selected Department are considered.

Resource

Optionally select a Resource. Only Work Orders containing the selected Resource are considered.

2. Choose OK.
3. Choose Submit.

Related Topics

Submitting a Request, *Oracle Applications User's Guide*

Maintenance Work Order Detail Report

Use the Maintenance Work Order Detail Report to view and analyze all information related to a maintenance work order. You can create a report that displays user-defined values. For example, you can view all unreleased work orders for a specified date

range, or see material requirements for work orders in a specified area. You can filter reporting information according to work orders, start and end dates, assigned department, assigned planner, work statuses, asset area, and asset. You can display details on the report, including operations, resources, employees, materials, direct items, work requests, meters, and attachments.

Important: The quality information relating to the work order does not appear on the report.

Report Submission:

1. In the Submit Requests window, select Maintenance Work Order Detail Report from the Name list of values.

Report Parameters

All report parameters are optional.

Work Order From

Enter the starting work order number to display a range of work orders.

To

Enter the ending work order number to display a range of work orders.

Scheduled Start Dates From

Enter the beginning scheduled date for a data range. This is the starting point to calculate the scheduled end date and duration for allocated resources and materials.

To

Enter the ending date for a date range. This indicates the requested end by date of the work. The scheduling process uses this date as a starting point to calculate the scheduled start date and duration for allocated resources and materials.

Work Order Status

Enter the status of the work order. Only work orders at this status appear on the report.

Assigned Department

Enter the assigned department (crew). This is the department associated with the asset on the work order.

Asset Area from

Enter the beginning asset area for a range of areas.

Asset Area to

Enter the ending asset area for a range of areas.

Asset Number

Enter an asset if you want to view only work order information associated with a specific asset.

Operations to be displayed

No - Operation level information does not appear.

Yes - Operation level information appears.

Resources to be displayed

No - Resource level information does not appear.

Yes - Resource level information appears.

Employee to be displayed

No - Employee specific information does not appear.

Yes - Employee specific information appears.

Materials to be displayed

No - Material level information does not appear.

Yes - Material level information appears.

Direct Items to be displayed

No - Material level information does not appear.

Yes - Material level information appears.

Work Request to be displayed

No - Work orders' associated work requests do not appear.

Yes - Work orders' associated work requests appear.

Meters to be displayed

No - Assets associated meters do not appear.

Yes - Assets associated meters appear.

Attachments to be displayed

No - Attachments do not appear.

Yes - Attachments appear.

2. Click the **OK** button.

3. Choose Submit.

Related Topics

Submitting a Request, *Oracle Applications User's Guide*

Maintenance Work Order Report With Summary

Use the Maintenance Work Order Report With Summary to print a summary of all the work orders selected.

Report Submission:

1. Navigate to Maintenance Super User > Work Orders page, and search for work orders.
2. Click the **Print Work Orders** button.
3. Select the work orders that you want to include in the summary report.
4. Select any of these options to be included in the summary report.
 - Operations
 - Inventory Items
 - Resources
 - Direct Items
 - Work Requests
 - Meters
 - Short Text Attachments
 - Long Text Attachments
 - File Attachments
 - Asset BOM
 - Permits
 - Clearances
5. Select if you want to include Quality Plans; values are null (blank), Mandatory only, and All.
6. Select a locale.
7. Select a format for the report; values are Excel, HTML (default), PDF, and RTF.

8. Click the **Run** button to generate the report.

Maintenance Work Order Update PO/requisition Need-by Date (SRS)

Use the Maintenance Work Order Update PO/requisition Report to view and analyze all PO and requisition updates related to a maintenance work order.

Report Submission:

1. Maintenance Work Order Update PO/requisition Need-by Date (SRS) report in the Name field.

Report Parameters

Project Number

Select a value in the Project Number field.

Task Number

Select the appropriate task number.

Days Forward From and Days Forward To

You can optionally indicate a numerical value in these fields.

2. Click the **OK** button.
3. Click the **Submit** button.

Material Issue Request Pick List Report

Stocked inventory items may be necessary to perform work on maintenance Work Orders. Use the Material Issue Request Pick List Report to display all reserved stock for maintenance Work Orders, so that you can easily retrieve the necessary material.

Report Submission:

1. In the Submit Requests window, select Material Issue Request Pick List Report from the Name list of values.

Report Parameters

All report parameters are optional.

Request Number From

Optionally select a beginning Request Number, for a data range, to indicate the beginning Request Number for which the report encompasses information.

Request Number To

Optionally select an ending Request Number, for a data range, to indicate the ending Request Number for which the report encompasses information.

Date Required From

Optionally select a beginning date, for a data range, to indicate the starting date for which the report encompasses information.

Date Required To

Optionally select an ending date, for a data range, to indicate the ending date for which the report encompasses information.

Source Subinventory

Optionally select a Source Subinventory to indicate an exact subinventory for which to issue the material.

Source Locator

If you previously selected a subinventory that contains a Locator, select a Source Locator to indicate an exact Locator from which to issue the material.

Work Order

Optionally select a Work Order to indicate a specific Work Order for which to issue material.

Material

Optionally narrow your selection criteria by selecting a Material.

Requestor

Optionally select a Requestor.

Sort By

Optionally select a Sort By option to indicate how the report is sorted. Valid values are Request Number and Date Required.

2. Choose OK.
3. Choose Submit.

Related Topics

Submitting a Request, *Oracle Applications User's Guide*

Retrieve Timecard Data from OTL to EAM

Oracle Time and Labor (OTL) is the repository in which time is entered by employees working in a particular organization. Employees working on Oracle Enterprise Asset

Management (eAM) Work Orders enter their time using OTL Self-Service. Information collected is stored in OTL Time Store, and is composed of a series of business rules and processes. eAM extracts information from the Time Store and charges eAM work orders for the time spent by employees that work on them.

There are multiple steps within the integration flow. First, timecard information is entered for a specific Work Order, within Oracle Time Store (a piece of Oracle Time and Labor). That information is then extracted from Oracle Time Store to Oracle Enterprise Asset Management. This extraction dynamically creates a resource transaction within Oracle Enterprise Asset Management. Finally, the Cost Manager process is executed. This process charges the resource transaction. After this process executes, you can view the actual costs for the period that you charged, within the Work Order.

The Retrieve Timecard Data from OTL to EAM process is the process that extracts timecard information, entered within OTL for specific Work Orders, from OTL to eAM.

Report Submission:

1. In the Submit Requests window, select Retrieve Timecard Data from OTL to EAM from the Name list of values.

Report Parameters

All report parameters are optional.

Start Date

Optionally select a beginning date, for a data range, to indicate the starting date for which the process retrieves information.

End Date

Optionally select an ending date, for a data range, to indicate the ending date for which the process retrieves information.

Organization

Optionally, select an OTL Organization to determine only one organization for which the process retrieves information.

Asset Group

Optionally select a Asset Group.

Asset Number

Optionally select a Asset Number.

Project

Optionally select a Project, if the selected organization is a Project Manufacturing organization.

Task

If you previously selected a Project, you can optionally select a Task.

Resource

Optionally select a Resource.

Employee/Worker

Optionally select an employee or contingent worker.

Owning Department

Optionally select an Owning Department.

Work Order

Optionally select a Work Order.

Operation

If you previously selected a Work Order, you can optionally select a specific Operation.

Change Department

Optionally select a Change Department.

Process Code

Optionally select a Process Code.

2. Choose OK.
3. Choose Submit.

Related Topics

Oracle Time and Labor Integration Setup, page 2-206

Submitting a Request, *Oracle Applications User's Guide*

Simulate Transfer Shop Floor Invoice Variance

You can transfer variances between purchase order price and invoice price, back to a maintenance work order, from your user-defined, adjustment account. This enables you to value your maintenance costs at the actual costs.

You can generate the Simulate Transfer Shop Floor Invoice Variance report to display the details of each invoice variance and a summary total of the variance amount that may transfer. The report format is similar to the Shop Floor Invoice Variance Report. You can view this report to determine whether or not you are executing the variance transfer. You should complete this task before you run the Shop Floor Invoice Variance Report (See: Shop Floor Variance Report, page 29-18).

Report Submission:

1. Navigate to the Shop Floor Invoice Variance window.
2. Select Simulate Transfer Shop Floor Invoice Variance from the Name list of values.

Report Parameters**Transfer Description**

Optionally enter a description for the invoice transfer.

Specific Work Order

You can view the variance transfer details for a specific work order by selecting a work order. Maintenance work orders with statuses of Cancelled, Closed, and Complete - No Charges are not available.

IPV Item Type

You can transfer invoice variances for:

Direct Shop Floor Delivery items only

Outside Processing and Direct Shop Floor Delivery items

Outside Processing items only

Item Range

If you chose Outside Processing items only as the value for the IPV Item Type parameter, you can specify an item range for your transfer.

Specific Item

If you chose Outside Processing items only as the value for the IPV Item Type parameter, you can specify an item for your transfer.

Category Set

If you chose Outside Processing items only as the value for the IPV Item Type parameter, you can specify a Category Set for your transfer.

Specific Category

If you chose Outside Processing items only as the value for the IPV Item Type parameter and a value in the Category Set parameter, you can specify a specific category from the previously chosen category set.

Specific Project

You can choose to transfer invoice variances only for items associated to a specific project.

Adjustment Account

You can enter an adjustment account from which the invoice variance is

transferred.

Invoice Cutoff Date

Enter a date. Approved and posted invoices through this date are included in your transfer.

3. Choose OK.
4. Choose Submit.

Related Topics

Transferring Invoice Variances to Maintenance Work Orders, page 6-17

Submitting a Request, *Oracle Applications User's Guide*

Shop Floor Invoice Variance Report

You can transfer invoice variances from your specific adjustment account to maintenance work orders (See: Transferring Invoice Variances, page 6-18). For each invoice variance transfer processed successfully, you can use the Shop Floor Invoice Variance Report to view the invoice variance transferred into your maintenance work orders. This report displays the adjustment account and the summary total amount transferred. It also displays the detail information for each work order, item, purchase order line, and invoice included in the transfer.

Report Submission:

1. Navigate to the Shop Floor Invoice Variance window.
2. Select Simulate Transfer Shop Floor Invoice Variance from the Name list of values.

Report Parameters

Batch Date

Enter a date to filter out batches that you do not want to select. Only batches processed on or after this date are included in the Batch Id parameter's list of values.

Batch Id

Enter the identifier for the batch you would like to report on. The list of values displays the parameters entered when you run your transfer process, such as description, work order number, item number, etc.

3. Choose OK.

4. Choose Submit.

Related Topics

Transferring Invoice Variances to Maintenance Work Orders, page 6-17

Submitting a Request, *Oracle Applications User's Guide*

Windows and Navigation Paths

This appendix covers the following topics:

- Windows and Navigation Paths
- Default Navigation Paths for Standard Application Windows

Windows and Navigation Paths

This appendix provides the default navigator paths for the windows used in the Oracle Enterprise Asset Management. The following table provides the default navigation paths. Brackets [] indicate a button.

Default Navigation Paths for Standard Application Windows

eAM-Related Windows and Navigation Paths

Window Name	Navigation Path
Activity and Asset Number/Rebuildable Association	Enterprise Asset Management: Asset Activities > Asset Activity Association
Activity Workbench	Enterprise Asset Management: Activities > Activity Workbench
Advanced Pricing (Price Lists)	Order Management: Pricing > Price Lists > Price List Setup
Area	Enterprise Asset Management: Setup > Area
Asset Genealogy Import	Interfaces > Import Asset Genealogy

Window Name	Navigation Path
Asset Meter	Enterprise Asset Management: Meters > Asset Meter Association
Asset Number Import	Interfaces > Import Asset Number
Asset Status	Enterprise Asset Management: Assets > Asset Statuses
Bills of Material (Activity BOM)	Enterprise Asset Management: Asset Activities > Maintenance BOM
Bills of Material (Asset BOM)	Enterprise Asset Management: Assets > Asset BOM
Bills of Material (Rebuildable BOM)	Enterprise Asset Management: Rebuildables > Rebuildable BOM
Categories	Enterprise Asset Management: Setup > Category > Category Codes
Category Sets	Enterprise Asset Management: Setup > Category > Category Sets
Close Rebuild Work Order	Enterprise Asset Management: Work Orders > Close Rebuildable Work Orders
Close Work Order	Enterprise Asset Management: Work Orders > Close Work Orders
Collection Elements	Quality Manager: Setup > Collection Elements
Collection Plans	Quality Manager: Setup > Collection Plans
Define Asset Number	Enterprise Asset Management: Assets > Asset Numbers
Define Asset Route	Enterprise Asset Management: Assets > Asset Route
Define Rebuildable Serial Number	Enterprise Asset Management: Rebuildables > Rebuildable Serial Numbers

Window Name	Navigation Path
Departments	Enterprise Asset Management: Setup > Routing > Departments
Department Approvers	Enterprise Asset Management: Setup > Department Approvers
Descriptive Flexfield Segments	Enterprise Asset Management: Setup > Flexfields > Descriptive > Segments Order Manager: Setup > Flexfields > Descriptive > Segments
EAM Asset Documents	Enterprise Asset Management: Assets > Asset Numbers > Documents
EAM Work Order Documents	Enterprise Asset Management: Work Orders > Documents
Electronic Records	ERES Administrator: Setup
Enter Meter Readings	Maintenance Super User: Assets tab > Mass Meter Readings sub-tab
Enter Quality Results	Enterprise Asset Management: Quality > Results > Entry > Enter Quality Results
Enterprise Asset Management Parameters	Enterprise Asset Management: Setup > Parameters
Failure History	Maintenance Super User: Failure Analysis tab > Failure History sub-tab
Failure Sets	Maintenance Super User: Failure Analysis tab > Failure Tracking Setup sub-tab
Financials Options	Purchasing Manager: Setup > Organizations > Financial Options
Find Asset Number	Enterprise Asset Management: Assets > Asset Numbers > Asset Number field > [Find] icon

Window Name	Navigation Path
Find Category Associations	Enterprise Asset Management: Setup > Category Associations
Find Meter Readings	Enterprise Asset Management: Interfaces > Pending Meter Readings
Find Pending Work Orders	Enterprise Asset Management: Interfaces > Pending Work Orders
Find Preventive Maintenance Schedules	Enterprise Asset Management: Preventive Maintenance > Schedule Template Definition
Find Projects	Project Manufacturing Manager: Projects > Project Definition > Projects
Find Project Status	Project Manufacturing Manager: Project Status > Project Status Inquiry
Find Rebuild Work Orders	Enterprise Asset Management: Work Orders > Rebuild Work Orders
Find Requests (PRC: Refresh Project Summary Amounts)	Project Manufacturing Manager: Other > Requests > Run OR View menu > Requests
Find Requisition Lines	Enterprise Asset Management: Purchasing > AutoCreate
Find Resource Transactions	Enterprise Asset Management: Work Order Transactions > View Resource Transactions
Find Work Orders	Enterprise Asset Management: Work Orders > Work Orders Enterprise Asset Management: Billing > Work Order Billing
Forecasts	Maintenance Super User: Forecasts tab
Generate Preventive Maintenance Work Orders	Enterprise Asset Management: Preventive Maintenance > Generate Work Orders

Window Name	Navigation Path
Import Items	Enterprise Asset Management: Interfaces > Import Items
Import Jobs and Schedules	Enterprise Asset Management: Interfaces > Import Work Orders or Import Meter Readings
Interface Managers	Enterprise Asset Management: Inventory > Setup > Transactions > Interface Managers
Item Costs Summary	Enterprise Asset Management: Inventory > Items > Master Items > (M) Tools, Item Costs
Launch MRP	Enterprise Asset Management: Material Planning > MRP > Launch
Load Production Equipment Maintenance Downtime	Enterprise Asset Management: Work Order Planning > Production Equipment Downtime
Maintenance Workbench	Enterprise Asset Management: Work Order Planning > Maintenance WorkBench
Maintenance Work Orders	Enterprise Asset Management: Work Orders > Work Orders
Maintenance Work Order Value Summary	Enterprise Asset Management: Work Orders > Work Orders > [Costs] > [Value Summary]
Mass Time Entry	Maintenance Super User: Work Orders tab > Mass Time Entry sub-tab
Master Demand Schedules	Enterprise Asset Management: Material Planning > MDS > Names
Master Item	Inventory: Items > Master Items

Window Name	Navigation Path
Material Requirements Note: This menu function is available for those users with responsibilities and roles that include function, EAM_WO_DETAILS_MODE, with their associated menu. See: <i>Implementing Function Security, Oracle Applications System Administrator's Guide - Security</i> .	Enterprise Asset Management: Work Order Details > Material Requirements
Meters	Enterprise Asset Management: Meters > Meter Definition
Meter Reading	Enterprise Asset Management: Meters > Meter Readings
Miscellaneous Documents	Enterprise Asset Management: Setup > Miscellaneous Documents
MRP Names	Enterprise Asset Management: Material Planning > MRP > Names
My Work Queue	Maintenance User Workbench: sign in
Operations Note: This menu function is available for those users with responsibilities and roles that include function, EAM_WO_DETAILS_MODE, with their associated menu. See: <i>Implementing Function Security, Oracle Applications System Administrator's Guide - Security</i> .	Enterprise Asset Management: Work Order Details > Operations
Organization	Enterprise Asset Management: Inventory > Setup > Organizations > Organizations > [New]
Organization Parameters	Enterprise Asset Management: Inventory > Setup > Organizations > Parameters

Window Name	Navigation Path
Oracle Manufacturing Lookups	Enterprise Asset Management: Setup > Lookups
Pending Asset Number	Enterprise Asset Management: Interfaces > Pending Asset Numbers
Pending Meter Reading	Enterprise Asset Management: Meters > Meter Readings > Pending Meter Reading
Personal Profile Values	Enterprise Asset Management: Setup > Profiles > Personal
Plan Options	Enterprise Asset Management: Material Planning > MRP > Options
Purchase Orders	Purchasing Manager: Purchase Orders > Purchase Orders
Preferences	Time and Labor Administration: Preferences
Preventive Maintenance Schedules	Enterprise Asset Management: Preventive Maintenance > Schedule Definition
Project Parameters	Project Manufacturing Manager: Projects > Project Definition > Project Parameters
Rebuild Completion	Maintenance Super User or Maintenance User Workbench: Work Orders tab Enterprise Asset Management: Work Order Planning > Maintenance Workbench
Rebuild Work Orders	Enterprise Asset Management: Work Orders > Rebuildable Work Orders
Note: This menu function is available for those users with responsibilities and roles that include function, EAM_WO_DETAILS_MODE, with their associated menu. See: Implementing Function Security, <i>Oracle Applications System Administrator's Guide - Security</i> .	

Window Name	Navigation Path
Requisitions	Enterprise Asset Management: Purchasing > Requisitions > Requisitions
Resource Requirements	Enterprise Asset Management: Work Order Details > Resource Requirements
Note: This menu function is available for those users with responsibilities and roles that include function, EAM_WO_DETAILS_MODE, with their associated menu. See: Implementing Function Security, <i>Oracle Applications System Administrator's Guide - Security</i> .	
Resource Usage	Enterprise Asset Management: Assets > Asset Numbers > Asset Numbers
Routings	Enterprise Asset Management: Asset Activities > Maintenance Routings
Run AutoInvoice	Order Manager: Receivables > Interfaces > AutoInvoice
Select Work Order	Enterprise Asset Management: Work Order Details > Operations, Material Requirements, or Resource Requirements
Service Request	Service: Service Requests > Find Service Requests
Service Request Types	Service: Setup > Definitions > Service Request Type
Scheduler Workbench	Enterprise Asset Management: Work Order Planning > Scheduler WorkBench
Set Name	Preventive Maintenance > Set Name Definition
Shop Floor Invoice Variance	Enterprise Asset Management Cost > Work Order Shop Floor Invoice Variance

Window Name	Navigation Path
Submit Request	Enterprise Asset Management: Reports
Supply/Demand	Enterprise Asset Management: Material Planning > MRP > Workbench > [Supply/Demand] > [Find]
Time	Self-Service Time and Expenses: Time Entry
Transaction Sources	Order Manager: Receivables > Setup > Transactions > Sources
Users	System Administrator: Security > User > Define
View Operations	Enterprise Asset Management: Work Order Details > View Operations
View Material Requirements	Enterprise Asset Management: Work Order Details > View Material Requirements
View Resource Requirements	Enterprise Asset Management: Work Order Details > View Resource Requirements
View Resource Transactions	Enterprise Asset Management: Work Order Transactions > View Resource Transactions > [Find]
View Work Order	Enterprise Asset Management: Work Order Details > View Work Orders
Work In Process Parameters	WIP Manager: Setup > Parameters
Work Order Capitalization	Enterprise Asset Management: Billing and Capitalization > Work Order Capitalization
Work Order Completion	Maintenance Super User or Maintenance User Workbench: Work Orders tab > Complete Work Order drop-down list Enterprise Asset Management: Work Order Planning > Maintenance Workbench

Window Name	Navigation Path
<p>Work Order</p> <p>Note: This menu function is available for those users with responsibilities and roles that include function, EAM_WO_DETAILS_MODE, with their associated menu. See: <i>Implementing Function Security, Oracle Applications System Administrator's Guide - Security</i>.</p>	Enterprise Asset Management: Work Orders > Work Orders
Work Orders	Maintenance Super User or Maintenance Workbench role: Work Orders tab

Glossary

activity

Identifies a maintenance activity for an asset. An oil change is an activity for a car. An activity is often pre-planned and can be used repetitively to create work orders that require similar maintenance on Assets.

area code

User-defined lookup that can be utilized to logically sort assets by where they are physically located or typically maintained.

asset attributes

Unique information that describes the characteristics of an asset. Each asset can have unlimited asset attributes.

asset bills of material

A "parts list" of items and rebuildable spares that make up a particular asset item, and can be defined for each asset group. The items defined on an asset BOM are standard inventory items (set up in the Master Item window).

asset category

A standard naming convention that defines assets with familiar terms and establishes how to classify assets for reporting and analysis.

asset group

Represent the classification of equipment. Examples include Trucks, Pumps, Towers, Buildings, Storage Tanks, and Turbines. Assets that have similar physical configurations and maintenance requirements should belong to a single asset group.

asset hierarchy

A single structure that depicts assets and their constituent elements in parent/child relationships, as maintained by the maintenance organization. It provides information that enables a user to quickly identify the relationship via an Asset Navigator that displays appropriate asset details.

asset maintenance bill of material

BOM used to list all items and rebuildable spares needed to perform a particular asset activity, and can be defined for each asset activity. For example, you may have an asset activity titled, Oil Change. The items necessary to perform this activity include a filter, oil, etc. As maintenance BOMs are created, they are associated to an asset activity.

asset number

A unique number that represents an asset or piece of equipment on which maintenance will be performed. An example of an asset number would be a Pump-101, or Toyota Truck 01.

asset route

A "virtual asset" that enables multiple assets to be associated to a single work order. It eliminates the need for creating multiple work orders for the same activity.

base interval

The minimum of a space of time (90 days), or meter reading (7,500 miles) between when PM activities included in one PM schedule should be performed. It can be considered a common denominator among the multiple activities included in one PM schedule that share a common base interval.

breach based maintenance

Work generated by violating established tolerances, based on asset specifications. This can include changes to pressure, flow rates, or temperature. These violated tolerances can automatically generate work requests for further service.

CMMS (computerized maintenance management system)

A computerized system to assist with the effective and efficient management of maintenance activities through the application of computer technology. It generally includes elements, such as a computerized work order system, as well as facilities for scheduling Routine Maintenance Tasks, recording and storing work orders, Bill of Material and Application parts lists, as well as other numerous features.

craft

Personnel performing maintenance tasks, such as "hands on tools". Personnel may include mechanics, electricians, instrumentation technicians, machinists, utilities and facilities workers, etc. For personnel performing both operation and maintenance functions (for example, roll grinder, boiler room, or air compressors) include in the numbers that percentage of time spent maintaining. Contract employees that are on-site, full time are included.

crew

A group of employees that work together, usually under one supervisor. Sometimes a

crew is in charge of a specific area and may have the same craft, such as general mechanics or they may have mixed crafts, such as electricians, and instrumentation technicians.

component (See: rebuildable spare)

A section, piece, or part of an asset that is removable, can be rebuilt or repaired, and interchangeable with other standard components (for example, engine).

condition based maintenance

The result of an assets's meter readings that may reflect the current condition of an asset. The results of such readings will affect the sequence of preventive maintenance work orders. Condition of an Asset can also be tracked by tracking its Quality Results.

current cycle

The current execution cycle of a Preventive Maintenance cycle for an asset. This field is automatically updated by the system when preventive maintenance work orders generated out of a given schedule are completed.

current interval count

The current execution interval within a current running cycle. This field is automatically updated by the system when preventive maintenance work orders generated out of a given schedule are completed. It is advisable not to change the current cycle and current interval count after initial definition, unless really required to do so. These fields can be disabled for edit by users through function based menu exclusions.

cycle

A complete round of maintenance activities performed on an asset that share a common base interval of a meter or time period, or both, or a multiple of the shared intervals. Once the cycle of activities is completed, the cycle should start over.

cycle interval

The duration of time or meter readings to complete the entire cycle.

dependent steps

Operations can be dependent upon another operation; you cannot uncomplete the operation's dependency if the current operation is complete. For example, operation 20 is dependent on operation 10 completing. You cannot uncomplete operation 10 once operation 20 has been completed.

direct items

Represent items with infrequent use or criticality; they are not included in the internal catalog as stocked items. These items are contrived as "one off", bought directly from a vendor for a specific work order and Operation.

downtime

Specifies the time the asset was unavailable to production due to maintenance.

duration (hours)

Identifies the total elapsed time of the work order. It has a unit of measure in hours. It is manually entered, or is calculated as the difference between the Estimated Start Date and Estimated End Date.

easy work order

Referred to as an unplanned work order, it enables quick entry of a work order; it is automatically created at a Released status, enabling you to execute work immediately.

equipment

All items of a durable nature, capable of continuing or repetitive utilization by an individual or organization, defined to the level at which maintenance is to be managed.

fixed asset

Identifies Accounting's Asset ID for reporting.

forecast

Projected work that is or will be required within a user defined period of time.

handover

Enables a supervisor to re-assign an operation to another supervisor, for the continuation of incomplete work.

intervals per cycle

The number of base intervals that comprise the complete cycle. For example, 12 monthly intervals would comprise a 1-year cycle, and four 7,500 miles base intervals would comprise a 30,000-mile cycle.

labor

Assignment of work to repair, inspect, or resolve a problem. It is expressed in hours, and can be divided by crafts or skills.

maintained group

Represents an Asset Group or Rebuildable Item.

maintained number

Represents an Asset Number or Serialized Rebuildable.

maintenance schedule

A list of planned maintenance tasks to be performed during a given period of time, together with the expected start times and duration of each of these tasks. Schedules can apply to different time periods (for example, Daily Schedule, Weekly Schedule, etc.).

maintenance user

An internet-based user interface for both maintenance and operations personnel. It provides an easy approach to entering and searching for information from any browser, and designated for the casual user (for example, tradespeople, such as fitters, mechanics, and electricians), in a plant or facility.

meters

Used to measure asset usage and periodically service the asset, based on the measurement. For example, an odometer. Another example is a pipe may start out at 12 millimeters, but when it wears to only four millimeters, it needs to be replaced.

non-stock items

These items are included in the internal catalog, but the decision has been made to not maintain them in an inventory balance or ordering policy, other than to purchase or make them as required.

operation completion

The completion of tasks/steps within a work order.

organization

A distinct entity in a company. It may include separate manufacturing facilities, warehouse distribution centers, and branch offices. Organizations often define boundaries within information sharing.

owning department

Identifies the role responsible for owning the work outlined within a work order.

planned work

Maintenance work for which a detailed work order has been written. All materials have been made available before the work order starts. The equipment to be maintained has been taken out of service, cleaned, and prepared, before the work starts, if required. Special tools, equipment, resources, and services have been scheduled for this work order. The work order must appear on a plan before the start of the period in which the work is to be carried out.

preventive maintenance

Maintenance carried out periodically, or by usage (throughput), that is intended to

reduce the probability of failure or degradation of physical condition of an asset. This can be based on a meter or time.

preventive maintenance (PM) work order

A work order referencing a maintenance activity, sometimes referred to as a PM work order, and is created by the PM Scheduling process.

RCM (reliability centered maintenance)

The predictive approach to maintenance that trends an asset's performance and captures data. This data will help the maintenance organization to better strategize their Preventive Maintenance programs.

rebuildable item

Represents the classification of serialized or non-serialized rebuildables.

routine maintenance work order

These are the work orders that result from inspection, requests, etc. There are two types: work orders referencing a maintenance activity but created manually, and work orders created manually and not referencing a maintenance activity.

scheduled start date

This date is manually entered and is used to communicate to the system the scheduled date for the current work order.

serialized items

Typically tracked, and are often times rebuilt and issued properly. They are tracked with a history of failure and repair data, that is maintained for each serialized instance, regardless of their location.

serialized or non-serialized rebuildable (See: component)

Items that are installed, removed, and refurbished. Examples of rebuildables include, motors, control boxes, and computer boards. These items are not assets, however, they need to be associated with work orders for maintenance purposes. They are inventory items, and can be serialized. They are also referenced as portables or "components".

shutdown type

Indicates if a shutdown is required of the asset when performing the work order. If it is associated with an asset activity, it will inherit the value from the asset activity.

stock items

Items for which either the frequency of use or equipment criticality/lead time to obtain replacement parts, mandates that they be stocked in Inventory. Therefore, they utilize planning parameters to generate replenishment orders.

tagout required

Indicates that the asset needs to be secured before carrying out the work order, usually for safety reasons. Tags are generally printed and placed on an asset, warning workers that the asset is shutdown and should not be started. This field is intended for future use in eAM.

work in process (WIP) accounting class

A set of accounts that you use to charge the production of an assembly. You assign accounting classes to discrete jobs, and repetitive schedules. Each accounting class includes distribution accounts and variance accounts, and they are used in cost reporting.

work order

A plan that defines the resources and material equipment needed to conduct work, and then associated start and end dates.

work order closure

A work order that is unavailable for charges or any type of transaction. Closing a work order calculates final costs and variances, creating history for the work order.

work order completion

The completion of the entire work order. The operations within a work order do not need to be complete in order to complete the work order.

work order duration

The duration of the work order. The difference between completion date and start date.

work order operation

Operations (also known as tasks/steps) that prepare the instructions to perform a single activity, within the context of the work order.

work request

A request to have work performed on a maintainable asset.

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