# SCM Cloud

## Getting Started with Service Logistics Implementation

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# Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

## Get Help in the Applications

Some application pages have help icons to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

## Get Training

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

## Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

## Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to *oracle_fusion_applications_help_ww_grp@oracle.com*.

Thanks for helping us improve our user assistance!

# 1 About This Guide

## Purpose and Scope

This guide helps you set up the data that you require to use Oracle Fusion Service Logistics.

### Scope of This Guide

This guide covers the minimum set of tasks required to configure Oracle Fusion Service Logistics for your business requirements. You will learn how to:

- Enable Service Logistics and create users.
- Set up stocking locations.
- Assign stocking locations to field service technicians.
- Manage billing types.
- Set up service activities.
- Define return routing rules.
- View and edit lookups.
- Manage profile options.
- Set up the Service Logistics parts search program.
- Set up other Cloud products in order to order parts, create debrief, and post charges.
- Set up depot repair and preventive maintenance of customer assets.

### References and Help

This guide has references to other guides wherever required. Unless otherwise specified, you can access help from the Oracle Applications Help portal or from the Oracle Cloud Documentation Library.

For more information about the full implementation of the Service Logistics offering and implementing advanced features within the offering, see the Integrating Service Logistics with Field Service and the Using Service Logistics guides.

For more information about subscribing to an Oracle Cloud Service trial, see the Getting Started with Oracle Cloud guide.

> **Note:** With release 20A (11.13.20.01.0), "Oracle Engagement Cloud" is now known as Oracle CX Sales and Oracle Fusion Service. Existing Oracle Engagement Cloud users will retain access to Oracle CX Sales and Fusion Service features under their preexisting licensing agreements. Any new users created within your current Oracle Engagement Cloud license count will also retain the same access to Oracle CX Sales and Oracle Fusion Service. To obtain additional features or manage your subscription, refer to your Oracle Cloud Applications Console. This document describes features available to users under Oracle CX Sales, Oracle Fusion Service, and Oracle Engagement Cloud licensing agreements.

# How to Use This Guide

This section explains the prerequisites for getting started with your implementation.

## Prerequisites

Before performing the steps in this guide, you must set up the common enterprise structure objects. To get started, you also require access to Oracle Identity Management and Oracle Fusion Applications.

For more information, see the Implementing Common Features for Oracle SCM Cloud guide.

## Assumptions

You must have a valid user name and password to sign in to the application and access the work areas.

# Find Guides, Release Readiness Documents, and Other Resources

Watch video

The Oracle Help Center (https://docs.oracle.com) has guides, videos, release readiness documents, and other resources for Oracle Applications Cloud.

- Guides give you cumulative information about all features in each cloud service, for example how to use, set up, and extend them.
- Release readiness documents tell you what's new or changed in a particular release update. This material is published before the update happens, to help you prepare for it.

In the application, when you click links in help windows, most of the time you open a specific guide in the Help Center. From there, you can search or browse to find other content. Or, if you're on the oracle.com site, open the main menu and select **Documentation** in the Product Help menu group to get to the Help Center. It's a good idea to bookmark the Help Center.

Let's take a look at how you can move around and find what you're looking for in the Help Center.

## Browse for Cumulative Content About a Cloud Service

Here's how you find guides, videos, and other resources:

1. From anywhere in the Oracle Help Center, open the main menu and click **Cloud Applications**. Or, click **Cloud Applications** on the Help Center home page.
2. On the Cloud Documentation page, browse the cloud services which are organized in categories.
3. Click the name of your cloud service.
4. On the main page for the cloud service, select a release update if you don't want to see the latest content.

5. Use the navigation pane to get to a specific guide, video, or other resource. Here are some examples of where you might go:
    - Books or Videos: Get all the videos or guides for the cloud service.
        - On the Videos or Books page, you can use the **View** list to filter by category.
        - Most guides are available in multiple formats, for example HTML and PDF.
    - Tasks: Click a task category and then a specific, common task to go straight to information that will help you with that task.
    - REST API: Get reference information about REST APIs.

**Tip:** Use the breadcrumbs to get to other parts of the Help Center.

## Search Within or Across Guides

The scope of the search in the global header of the Oracle Help Center depends on the page you're on. For example, on the Cloud Documentation page, you search across guides for all cloud services. On the pages for a specific cloud service, you search only within that service, which gives you more targeted results. If you want to search within one guide, use the Search tab in the guide.

From the search results, find the entry you want and click one of the two links for that entry:

- The first link takes you to the beginning of the relevant chapter.
- The second link takes you directly to the part of the chapter that has the summary text that you see in the search result.

## Review Release Readiness Documents

Let's find the release readiness material that can help you prepare for your next quarterly update:

1. On a page in the Oracle Help Center for your cloud service, click **Cloud Readiness / What's New** in the navigation pane.
2. On the main page in Oracle Cloud Readiness for your service, find the What's New subsection under the Essential Content section.
3. Click **HTML** or **PDF** to open a What's New document in a new browser tab.
4. Click the release update you want to review.
5. In the table of contents, click **Feature Summary** to see which features are enabled or disabled by default. You need to take action to make disabled features available to your users.
6. If you see an Opt In Expiration tab, click it to see when disabled features will become enabled by default.
7. Click the tab for your release update to go back and see the details about specific features.
8. Return to the browser tab with the main page for your cloud service to explore other release readiness content. From there you can also jump over to other cloud services.

# 2 Get Started With Your Implementation

## Overview of Service Logistics

Service Logistics delivers field service capability and supply chain functionality enabling users to source and order parts for field service and parts only service, review debrief lines and submit charges for parts, labor, and expenses incurred.

Using the Service Logistics work area, you can order parts for service requests and work orders that are created in Oracle Fusion Service UIs. You can also order parts for third party service requests and work orders. You can set up various field stocking locations and manage the trunk stock of these stocking locations and the inventory of field service technicians. Service Logistics also offers depot repair functionality so that you can manage the repair and return of broken parts.

Service Logistics is part of Oracle Fusion Supply Chain Management Cloud and interacts with Oracle Fusion Service and other Supply Chain Management cloud products to support customer and field service and manage preventive maintenance work on customer-owned assets.

### Dependencies on other SCM Cloud Products

Using Service Logistics, you can source and order customer replaceable and technician replaceable parts, and capture customer part returns. Service Logistics depends on data set up in various other Supply Chain Management products such as Oracle Fusion Inventory Management, Oracle Order Management Cloud Service, Oracle Fusion Pricing, Oracle Fusion Global Order Promising, Oracle Maintenance Cloud, Oracle Subscription Management Cloud, and Oracle Product Master Data Management to offer this functionality.

For information on the dependencies and the data that must be set up to use Service Logistics, see: Setting Up Related Products.

### Interaction with Fusion Service

As a Fusion Service user, you can source and order service parts, and start part returns, exchanges and depot repair if your job role has the required Service Logistics, Inventory, and Order Management privileges. These are included in the predefined Fusion Service job roles.

For information on the roles and privileges required to enable this functionality, see the Fusion Service topic in the Related Oracle Cloud Products chapter.

### Support for Third Party Service Requests and Work Orders

Using Service Logistics, you can create and manage part requirements for third party service requests and work orders. Field Service Administrators can also review the debrief information for third party work orders and submit charges to generate sales invoices.

### Integration with Oracle Field Service Cloud

You can also choose to download and set up the integration of Service Logistics with Oracle Field Service, from the Customer Experience offering. This integration synchronizes field service technicians, their stocking locations, and corresponding inventory balances to Oracle Field Service. It allows field service technicians to search for, order, and

receive parts from Supply Chain Cloud and upload parts, labor, and expense debrief transactions back to the Supply Chain Cloud for billing, costing, and updating inventory and the installed base asset configuration.

For information on setting up the integration of Service Logistics with Field Service, see the Integrating Service Logistics with Field Service guide.

# Enable the Functional Areas for Service Logistics Implementation

To access the setup tasks for Service Logistics, enable Service Logistics as a functional area for the Manufacturing and Supply Chain Materials Management offering.

1. Click the Navigator, and then click **Setup and Maintenance**.
2. On the Setup page, select the **Manufacturing and Supply Chain Materials Management** offering from the drop-down list.
3. On the Setup Manufacturing and Supply Chain Materials Management, click **Change Feature Opt In**.
4. On the Opt In: Manufacturing and Supply Chain Materials Management page, select the checkbox in the **Enable** column for the functional area: Service Logistics.
5. Click **Done**.

# Enable Service Logistics Functionality for Users

You can create users for the functionality that you plan to use.

> **Note:** You should create your own unique job roles and enable only the functionality that you plan to use. For more information see the Advisory Note on Subscription Impact in the Security Reference for Manufacturing and Supply Chain Materials Management guide.

## Overview of Assigning Privileges and Data Security Policies to Job Roles

When you create job roles you'll assign privileges to decide the pages and functions that the job role can access. You'll also assign data security policies (DSPs) to give the role access to the data that has data security.

Service Logistics has some established DSPs for its predefined job roles, however, you must create your own DSPs when you create your unique roles. This is different than the predefined privileges, which you'll simply need to associate with the roles that you create. For more details see the Enable Service Logistics Functionality by Assigning Privileges for Users and Assign Data Security Policies to Job Roles topics.

> **Note:** Use the Security Console to manage job roles, privileges, and data security policies. For more information see the Securing SCM guide.

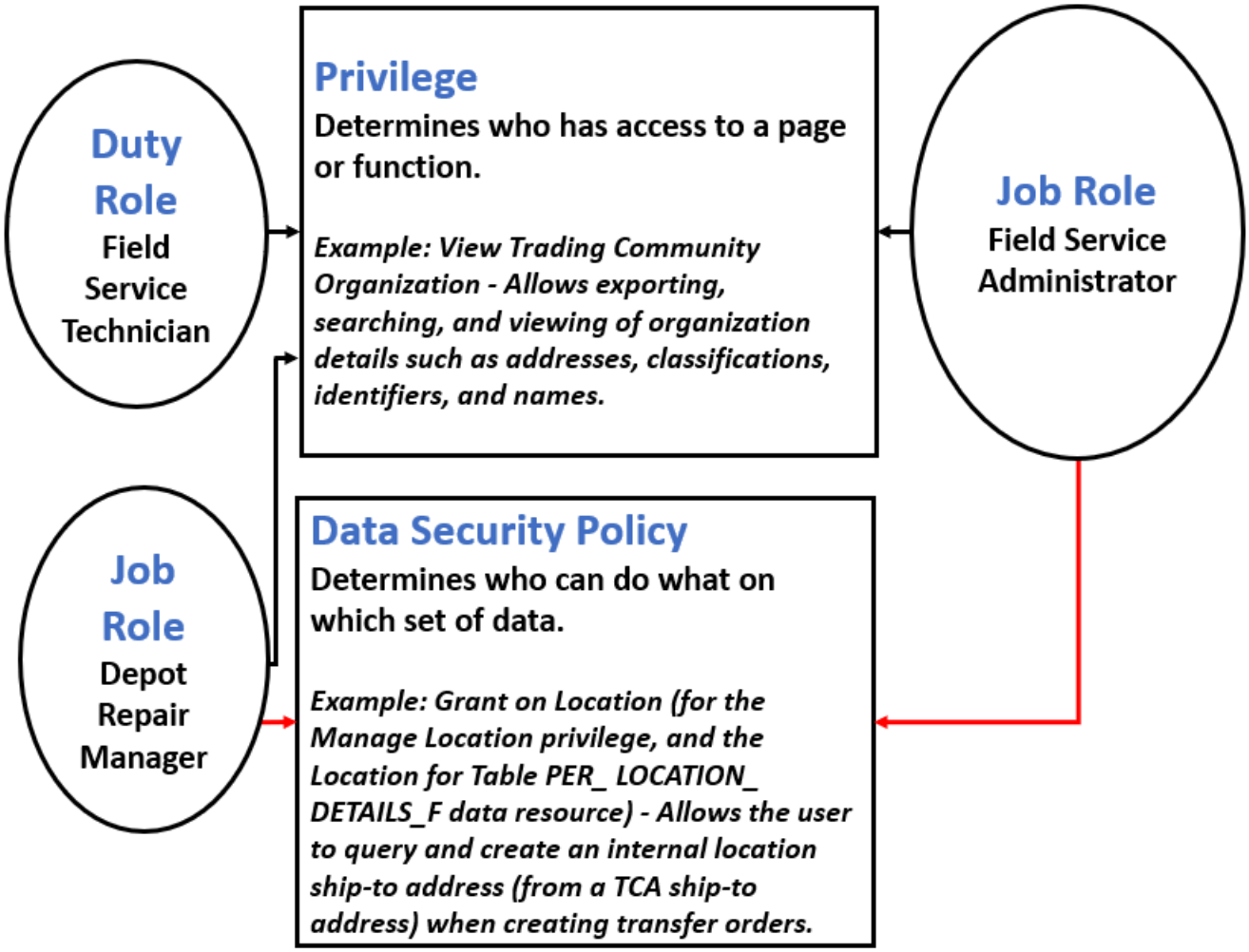
**Privileges, Data Security Policies, and Job Roles Example**: The following describes how an organization might assign privileges and data security policies to job roles:

- An organization might have a field service technician duty role, a field service administrator job role, and a depot repair manager job role.

- The organization might assign each role the privilege that allows exporting, searching, and viewing of organization details such as addresses, classifications, identifiers, and names (View Trading Community Organization privilege).
- The organization might only assign the field service administrator and the depot repair manager the data security policy that allows the user to query and create an internal location ship-to address (from a TCA ship-to address) when creating transfer orders (Grant on Location data security policy, Location for Table PER_LOCATION_DETAILS_F data resource).

This example is shown in the chart that follows:

## Privileges, Data Security Policies, and Job Roles Example




## Enable Service Logistics Functionality by Assigning Privileges for Users

Service Logistics offers the following predefined job roles:

- Field Service Administrator
- Depot Repair Manager

- Field Service Technician Duty (CRM offers a predefined job role called Field Service Technician, for which Service Logistics has predefined duty roles).

The following table shows the privilege names and the predefined job roles that are associated with them.

**Note:** You should use these privileges to create your own unique job roles.

### *Available Roles and Privileges*

| Role | Privilege Name | Code/Technical Name | Functionality Enabled |
|---|---|---|---|
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Access Activities Using Web Service | RCL_ACCESS_ACTIVITIES_BY_SERVICE | Allows the user to access activities using a service. |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Access Addresses Using Web Service | RCL_ACCESS_ADDRESSES_BY_SERVICE_PRIV | Allows the user to access customer addresses using a service.<br>Redwood |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Access AI Assist | RCL_ACCESS_AIACCESS | Allows users to access AI Assist features.<br>Redwood |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Access Asset Hierarchy Using Web Service | RCL_ACCESS_ASSET_HIERARCHIES_BY_SERVICE | Allows the user to access the asset hierarchy using a service. |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Access Billing Types Using Web Service | RCL_ACCESS_BILLING_TYPES_BY_SERVICE_PRIV | Allows the user to access billing types using a service. |
| Field Service Administrator | Access Create Charges and Estimates | RCL_CREATE_CHARGES_ESTIMATES | Allows the user to create charges and estimates from the Manage Work Orders and Charges page. |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Access Debrief Page | RCL_PORTAL_VIEW_DEBRIEF | Allows the user to access the Manage Charges and Estimates page. |
| Depot Repair Manager | Access Depot Repair for Depot Repair Manager | RCL_DEPOT_DETAILS_PRIV | Allows the depot repair manager to manage RMA lines, which includes |

| Role | Privilege Name | Code/Technical Name | Functionality Enabled |
|---|---|---|---|
| | | | creating repair orders and transfer orders, and adding and editing charges. |
| Depot Repair Manager | Access Depot Repair Manager Infolets | RCL_DEPOTMGR_INFOLETS | Allows the user to access Depot Repair Manager infolets. |
| Depot Repair Manager | Access Depot Repair KPI for Depot Manager | RCL_RMA_DEPOT_KPI | Allows the user to access the depot repair KPI on the Service Logistics landing page.<br><br>Redwood |
| Depot Repair Manager<br><br>Field Service Administrator<br><br>Field Service Technician Duty | Access Depot Repair Order Details Using Web Service | RCS_VIEW_UNITS_OF_MEASURE_LOV_WEB_SERVICE | Allow viewing units of measure list of values by web service.<br><br>Redwood |
| Depot Repair Manager | Access to Depot Repair Page for Depot Repair Manager | RCL_DEPOT_DETAILS | Allows a depot repair manager to take actions required for an RMA line, including the creation of repair order, transfer order, and to add and edit charges. |
| Depot Repair Manager | Access Depot Repair Search | RCL_DEPOT_REPAIR_SEARCH_PRIV | Allows user to search for a return material authorization (RMA). |
| Depot Repair Manager<br><br>Field Service Administrator<br><br>Field Service Technician Duty | Access Estimates | RCL_ACCESS_ESTIMATES_PRIV | Allows the user to access estimates.<br><br>Used in Estimates UI.<br><br>Redwood |
| Depot Repair Manager | Access Estimates in Progress KPI for Depot Manager | RCL_ESTIMATES_SUMMARY_DEPOT_KPI | Allows the user to access the Estimates in Progress KPI on the Service Logistics landing page.<br><br>Redwood |
| Field Service Technician Duty | Access Estimates in Progress KPI for Field Service Technician | RCL_ESTIMATES_SUMMARY_TECH_KPI | Allows the user to access the Estimates in Progress KPI on the Service Logistics landing page.<br><br>Redwood |
| Depot Repair Manager<br><br>Field Service Administrator<br><br>Field Service Technician Duty | Access Estimates PDF | RCL_ESTIMATE_PDF_PRIV | Allows the user to access a PDF copy for estimates.<br><br>Redwood |

| Role | Privilege Name | Code/Technical Name | Functionality Enabled |
|---|---|---|---|
| Field Service Administrator | Access Estimates Summary KPI | RCL_ESTIMATES_SUMMARY_PRIV | Allows the user to access the Estimates KPI on the Service Logistics landing page.<br><br>Redwood |
| Depot Repair Manager<br><br>Field Service Administrator | Access Field Parts Inventory Search for Administrator | RCL_ADMIN_FIELD_PARTS_INV_SEARCH_PRIV | Allows the administrator to search for field parts inventory in the search page.<br><br>Redwood |
| Field Service Technician Duty | Access Field Parts Inventory Search for Technician | RCL_FSTECH_FIELD_PARTS_INV_SEARCH_PRIV | Allows the field service technician to search for field parts inventory in the search page.<br><br>Redwood |
| Depot Repair Manager<br><br>Field Service Administrator<br><br>Field Service Technician Duty | Access Field Parts Inventory Transfer Using Web Service | RCL_ACCESS_FIELD_PART_TXN_TYPES_PRIV | Allows the user to access fieldPartTransactionActions Type in the field parts inventory Transfer UI using a service.<br><br>Redwood |
| Depot Repair Manager<br><br>Field Service Administrator<br><br>Field Service Technician Duty | Access Field Parts Inventory Using Web Service | RCL_ACCESS_FIELD_PARTS_INVENTORY_BY_SERVICE_PRIV | Allows the user to access field parts inventory using a service.<br><br>Redwood |
| Depot Repair Manager<br><br>Field Service Administrator<br><br>Field Service Technician Duty | Access Field Parts Reservations Using Web Service | RCL_ACCESS_FIELD_PARTS_RESERVATION_BY_SERVICE_PRIV | Allows the user to access field parts reservations using a service. |
| Field Service Technician Duty | Access Field Service Technician Infolets | RCL_TECHNICIAN_INFOLETS | Allows the user to access the field service technician infolets. |
| Field Service Administrator | Access Field Service Administrator Infolets | RCL_FSADMIN_INFOLETS | Allows the user to access the field service administrator infolets. |
| Depot Repair Manager<br><br>Field Service Administrator<br><br>Field Service Technician Duty | Access Items Using Web Service | RCL_ACCESS_ITEMS_BY_SERVICE | Allows the user to access items using a service. |
| Depot Repair Manager<br><br>Field Service Administrator<br><br>Field Service Technician Duty | Access Manual Adjustments Basis Using Web Service | RCL_ACCESS_MANUAL_ADJUSTMENTS_BASIS_BY_SERVICE | Allows the user to access the manual adjustments basis using a service. |

| Role | Privilege Name | Code/Technical Name | Functionality Enabled |
|---|---|---|---|
| Field Service Administrator | Access Part Requirements Details for Administrator | RCL_ADMIN_PART_ REQUIREMENTS_DETAILS_PRIV | Allows the field service administrator to access the Part Requirements details page.<br><br>Redwood |
| Field Service Technician Duty | Access Part Requirements Details for Technician | RCL_FSTECH_PART_ REQUIREMENTS_DETAILS_PRIV | Allows the field service technician to access the Part Requirements details page.<br><br>Redwood |
| Field Service Administrator | Access Part Requirements Header for Administrator | RCL_ADMIN_PART_ REQUIREMENTS_HEADER_PRIV | Allows the field service administrator to access the Part Requirements header pages.<br><br>Redwood |
| Field Service Technician Duty | Access Part Requirements Header for Technician | RCL_FSTECH_PART_ REQUIREMENTS_HEADER_PRIV | Allows the field service technician to access the Part Requirements header pages.<br><br>Redwood |
| Field Service Administrator | Access Parts Requirements Search for Administrator | RCL_ADMIN_PARTS_ REQUIREMENTS_SEARCH_PRIV | Allow field service administrator to search for parts requirements. |
| Field Service Technician Duty | Access Parts Requirements Search for Technician | Access Parts Requirements Search for Technician | Allows field service technician to search for parts requirements. |
| Depot Repair Manager<br><br>Field Service Administrator<br><br>Field Service Technician Duty | Access Parts Shipping Methods Using Web Service | RCL_ACCESS_PARTS_ SHIPPINGMETHODS_BY_SERVICE | Allows the user to access parts shipping methods using a service. |
| Depot Repair Manager<br><br>Field Service Administrator<br><br>Field Service Technician Duty | Access Profile Values Using Web Service | RCL_ACCESS_PROFILE_VALUES_ BY_SERVICE | Allows access to rclProfiles REST API. |
| Depot Repair Manager | Access Reverse Logistics Dispositions | RCL_ACCESS_REVERSE_ LOGISTICS_PRIV | Allows the user to access a reverse logistics dispositions page to manage actions for customer returns.<br><br>Redwood |
| Depot Repair Manager<br><br>Field Service Administrator<br><br>Field Service Technician Duty | Access Service Activities Using Web Service | RCL_ACCESS_SERVICE_ ACTIVITIES_BY_SERVICE_PRIV | Allows the user to access service activities using a service. |

| Role | Privilege Name | Code/Technical Name | Functionality Enabled |
|---|---|---|---|
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Access Service Logistics Landing Page | RCL_PORTAL_ACCESS_LANDING_PAGE | Allows the user to access Service Logistics Landing page. |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Access the Service Logistics Redwood Landing Page | RCL_REDWOOD_LANDING_PAGE_PRIV | Allows the user to access the Redwood Service Logistics landing page.<br><br>Redwood |
| Field Service Administrator<br>Field Service Technician Duty | Access Standalone Parts Ordering Page | RCL_PARTS_ACCESS_STANDALONE_PAGE | Allows the user to access the Standalone Parts Requirement page. |
| Field Service Administrator<br>Field Service Technician Duty | Access Stocking Location Details Using Web Service | RCL_ACCESS_STOCK_LOC_DETAILS_BY_SERVICE | Allows access to stockingLocations REST API. |
| Depot Repair Manager<br>Field Service Administrator | Access Subinventories Using Web Service | RCL_ACCESS_SUBINVENTORIES_BY_SERVICE_PRIV | Allows the user to access subinventories using a service. |
| Field Service Administrator<br>Field Service Technician Duty | Access Trunk Stock Details Using Web Service | RCL_ACCESS_TRUNK_STOCK_DETAILS_BY_SERVICE | Allows access to trunkStocks REST API. |
| Field Service Administrator | Access Work Order Charges by Status KPI | RCL_WORK_ORDER_CHARGES_STATUS_PRIV | Allows the user to access the Work Order Charges KPI on the Service Logistics landing page.<br><br>Redwood |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Access Work Order Charges Search Page | RCL_WORK_ORDER_CHARGES_PRIV | Allows the user to search for work orders with existing debrief headers on the Work Order Charges Search page.<br><br>Redwood |
| Field Service Administrator | Access Work order Charges Details for Administrator | | |
| Field Service Administrator | Access Work Order Charges Details Page for Administrator | RCL_ADMIN_CREATE_EDIT_DEBRIEF_DETAILS_PRIV | Allows an administrator to view and update work order transactions on the Work Order Charges detail page.<br><br>Redwood |

| Role | Privilege Name | Code/Technical Name | Functionality Enabled |
|---|---|---|---|
| Field Service Technician Duty | Access Work Order Charges Details Page for Technician | RCL_FSTECH_CREATE_EDIT_DEBRIEF_DETAILS_PRIV | Allows a technician to view and update work order transactions on the Work Order Charges detail page.<br><br>Redwood |
| Field Service Administrator | Access to Work Order Charges Header for Administrator | RCL_ADMIN_CREATE_EDIT_DEBRIEF_HEADER_PRIV | Allows an administrator to create debriefs for work orders on the Work Order Charges header page.<br><br>Redwood |
| Field Service Technician Duty | Access to Work Order Charges Header Page for Technician | RCL_FSTECH_CREATE_EDIT_DEBRIEF_HEADER_PRIV | Allows a technician to create debriefs for work orders on the Work Order Charges header page.<br><br>Redwood |
| Field Service Technician Duty | Access Work Orders Ready to Post KPI for Field Service Technician | RCL_WORK_ORDER_CHARGES_STATUS_FSTECH | Allows the user to access the Orders Ready to Post KPI on the Service Logistics landing page.<br><br>Redwood |
| Depot Repair Manager<br><br>Field Service Administrator<br><br>Field Service Technician Duty | Create Debrief Transactions Using Web Service | RCL_PORTAL_CREATE_DEBRIEF_TRANSACTIONS_BY_SERVICE | Allows access to the Debrief REST API. |
| Field Service Administrator<br><br>Field Service Technician Duty | Create Item Structure | EGP_CREATE_ITEM_STRUCTURE_PRIV | Allows access to create item structure action from regional task pane. |
| Depot Repair Manager<br><br>Field Service Administrator<br><br>Field Service Technician Duty | Create Maintenance Work Orders by Service | MNT_CREATE_WORK_ORDERS_BY_SERVICE | Allows ability to call Create SCM Work Order and Operations REST API. |
| Field Service Administrator<br><br>Field Service Technician Duty | Create Parts Return List | RCL_CREATE_PARTS_RETURN_LIST | Allows the submission of the process that creates field service parts return list. |
| Depot Repair Manager<br><br>Field Service Administrator<br><br>Field Service Technician Duty | Create Sales Order Requests Using REST Services | FOM_SALES_ORDER_REQUEST_REST_POST_PRIV | Allows the user to send request Create Sales Orders in REST API resource Sales Orders for Order Hub Requests.<br><br>Used in the Depot Repair UI.<br><br>Redwood |

| Role | Privilege Name | Code/Technical Name | Functionality Enabled |
|---|---|---|---|
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Create Sales Orders Using REST Services | FOM_SALES_ORDER_REST_POST_PRIV | Allows the user to create sales orders using REST Services.<br>Used in the Depot Repair UI.<br>Redwood |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Delete Sales Orders Using REST Services | FOM_SALES_ORDER_REST_DELETE_PRIV | Allows the user to delete sales orders using REST Services.<br>Used in the Depot Repair UI.<br>Redwood |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Edit Price | RCL_EDIT_PRICE | Allows access to Price Manual Adjustment dialog. |
| Field Service Administrator | Edit Service Request | SVC_EDIT_SR_PRIV | Allows editing of a service request. |
| Field Service Administrator<br>Field Service Technician Duty | Edit Service Work Order | SVC_EDIT_SERVICE_WORK_ORDER_PRIV | Allows editing of a service work order. |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Get Project List Using Service | PJF_GET_PROJECT_LIST_PRIV | A privilege that allows integrations with Projects. |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Get Project Setups | PJF_GET_PROJECT_SETUPS_PRIV | A privilege that allows integrations with Projects. |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Get Project Tasks Service | PJF_VIEW_PROJECT_TASK_SERVICE_PRIV | A privilege that allows integrations with Projects. |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Get Sales Orders Using REST Services | FOM_SALES_ORDER_REST_GET_PRIV | Allows users to get sales orders using REST Services.<br>Used in Depot Repair UI.<br>Redwood |

| Role | Privilege Name | Code/Technical Name | Functionality Enabled |
|---|---|---|---|
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Get Work Definitions by Service | WIS_GET_WORK_DEFINITIONS_SERVICE | Allows to access the REST Service workDefinitions to show the Work Definitions LOV.<br><br>Redwood |
| Field Service Administrator<br>Field Service Technician Duty | Import Approved Requisition | POR_IMPORT_APPROVED_REQUISITION_PRIV | Allows users to create approved requisitions through the requisition import program.<br><br>Used in the Parts Requirements UI to cancel purchase requisitions.<br><br>Redwood |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Import Order | FOM_IMPORT_ORDER | Required by service request to create a sales order. |
| Field Service Administrator | Manage Auto Processing Rule | RCL_AUTO_PROCESSING_RULES | Allows the ability to manage the auto processing rule. |
| Depot Repair Manager<br>Field Service Administrator | Manage Customer Assets | CSI_MANAGE_CUSTOMER_ASSETS | Allows the creation and update of customer assets, related configurations, and structures. |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Manage Customer Assets by Service | CSI_MANAGE_CUSTOMER_ASSETS_BY_SERVICE | Allows the creation and update of customer assets, related configurations, and structures. |
| Depot Repair Manager | Manage Depot Repair | RCL_DEPOT_REPAIR | Allows the user to access to the Project Tasks LOV REST service to view the list of project tasks. |
| Depot Repair | Manage Depot Repair Order Details | SVC_MANAGE_DEPOT_REPAIR_ORDER_DETAILS_PRIV | Allows the user to manage depot repair order details. |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Manage Estimates | RCL_MANAGE_ESTIMATES | Allows the user access to Manage Work Orders and Charges, Manage Estimates (New), Create Charges, and Edit Charges.<br><br>Redwood |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Manage Estimates Using Web Service | RCL_MANAGE_ESTIMATES_BY_SERVICE_PRIV | Allows the user to manage estimates using a service.<br><br>Used in Estimates UI.<br><br>Redwood |

| Role | Privilege Name | Code/Technical Name | Functionality Enabled |
|---|---|---|---|
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Manage HCM Non-Person Note | ORA_HRT_MANAGE_HCM_NON_PERSON_NOTE | Views and manages HCM notes that aren't person notes. |
| Depot Repair Manager<br>Field Service Administrator | Manage Interorganization Parameter | INV_MANAGE_INTERORGANIZATION_PARAMETER_PRIV | Allows configuration of interorganization parameters to define accounting information and relationships that exist between a shipping organization and a destination organization. |
| Depot Repair Manager<br>Field Service Administrator | Manage Interorganization Parameter | INV_MANAGE_INTERORGANIZATION_PARAMETER_DATA | Allows configuration of interorganization parameters to define accounting information and relationships that exist between a shipping organization and a destination organization. |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Manage Inventory Reservation and Picks | INV_MANAGE_INVENTORY_RESERVATION_AND_PICKS | Allows the management of inventory reservations and picks. |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Manage Part Requirements using Web Service | RCS_VIEW_UNITS_OF_MEASURE_LOV_WEB_SERVICE | Allow viewing units of measure list of values by web service.<br><br>Redwood |
| Depot Repair Manager | Manage Maintenance Work Order Operations | MNT_MANAGE_MAINTENANCE_WORK_ORDER_OPERATIONS | Allows the addition and update of work order operations. |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Manage Manual Price Adjustments Using Web Service | RCL_MANUAL_PRICE_ADJUSTMENTS_BY_SERVICE | Allows the user to manage manual price adjustments using a service. |
| Field Service Administrator<br>Field Service Technician Duty | Manage Part Requirement Headers Using Web Service | RCL_PART_REQUIREMENT_HEADERS_BY_SERVICE_PRIV | Allows the user to manage part requirement headers using a service.<br><br>Redwood |
| Field Service Administrator<br>Field Service Technician Duty | Manage Part Requirements Using Web Service | RCL_MANAGE_PART_REQUIREMENTS_BY_SERVICE | Allows access to partRequirementLines REST API. |
| Depot Repair Manager<br>Field Service Administrator | Manage Preventive Maintenance of Customer Owned Assets | RCL_PREVENTIVE_MAINTENANCE | Allows the submission of the process that creates preventive maintenance tasks for customer-owned assets. |

| Role | Privilege Name | Code/Technical Name | Functionality Enabled |
|---|---|---|---|
| | | | |
| Depot Repair Manager<br><br>Field Service Administrator | Manage Resource to Item Mapping | RCL_RESOURCE_ITEM_MAPS | Allows the ability to manage resource to item mapping. |
| Depot Repair Manager | Manage Return Dispositions Using Web Service | RCL_MANAGE_RETURN_ DISPOSITION_BY_SERVICE | Allows the user to manage return dispositions using a service.<br><br>Redwood |
| Depot Repair Manager<br><br>Field Service Administrator | Manage Return Routing Rules | RCL_MANAGE_RETURN_RULES | Allows access for Return Routing Rules Import/Export SOAP service. |
| Depot Repair Manager<br><br>Field Service Administrator | Manage Return Routing Rules Using Web Service | RCL_MANAGE_RETURN_RULES_ BY_SERVICE | Allows access to Manage Return Routing Rules using a service. |
| Depot Repair Manager | Manage Shipment Web Service | WSH_MANAGE_SHIPMENT_WEB_ SERVICE_PRIV | Allows access to Web service to manage shipments. |
| Depot Repair Manager<br><br>Field Service Administrator | Manage Supplier Warranty Contracts by Service | MNT_MANAGE_SUPPLIER_ WARRANTY_CONTRACTS_BY_ SERVICE_PRIV | Allow the creation and update of supplier warranty contracts using a service. |
| Depot Repair Manager<br><br>Field Service Administrator<br><br>Field Service Technician Duty | Manage Supply Orchestration Web Services | DOS_MANAGE_SUPPLY_ ORCHESTRATION_WEB_SERVICES | Required by Work Orders to create an internal material transfer. |
| Field Service Administrator<br><br>Field Service Technician Duty | Manage Trading Partner Item Reference | EGP_MANAGE_TRADING_ PARTNER_ITEM_REFERENCE_PRIV | Allows access to manage trading partner item references for items.<br><br>Redwood |
| Field Service Administrator | Mapping Internal and External Locations Using Web Service | RCL_INT_EXT_LOC_MAPPINGS_ DETAILS_BY_SERVICE | Allows the user to access internal and external locations mapping using a service. |
| Depot Repair Manager<br><br>Field Service Administrator | Post Charges | RCL_POST_CHARGES | Allows the user to post charges. |
| Field Service Technician Duty | Post Charges with Rule Check | RCL_POST_CHARGES_RULE_ CHECK | Allows the user to post charges with rule check. |
| Depot Repair Manager<br><br>Field Service Administrator<br><br>Field Service Technician Duty | Price Sales Transactions | QP_PRICE_SALES_TRANSACTIONS | Required by Service Request and Work Order to price the parts requirement. |

| Role | Privilege Name | Code/Technical Name | Functionality Enabled |
|---|---|---|---|
| | | | |
| Field Service Administrator<br><br>Field Service Technician Duty | Reassign Requisition | POR_REASSIGN_REQUISITION_PRIV | Allows users to reassign requisitions entered by others.<br><br>Used in the Parts Requirements UI to cancel purchase requisitions.<br><br>Redwood |
| Depot Repair Manager<br><br>Field Service Administrator<br><br>Field Service Technician Duty | Receive Parts | RCL_PORTAL_RECEIVE_PARTS | Allows access to Receive Parts page. |
| Field Service Administrator<br><br>Field Service Technician Duty | Report Maintenance Material Transactions by Service | MNT_REPORT_MATERIAL_TRANSACTIONS_BY_SERVICE | Allows the ability to create material transactions using SCM Work Order REST API. |
| Field Service Administrator<br><br>Field Service Technician Duty | Report Maintenance Resource Transactions by Service | MNT_REPORT_RESOURCE_TRANSACTIONS_BY_SERVICE | Allows the ability to create resource (labor) transactions using SCM Work Order REST API. |
| Depot Repair Manager<br><br>Field Service Administrator | Setup Billing Types | RCL_BILLING_TYPES_SETUP | Allows access to the Manage Billing Types page. |
| Depot Repair Manager<br><br>Field Service Administrator | Setup Service Activities | RCL_SERVICE_ACTIVITIES_SETUP | Allows access to the Manage Service Activities page. |
| Field Service Administrator | Setup Stocking Location | RCL_STOCKING_LOC_SETUP | Allows access to Manage Stocking Locations page. |
| Field Service Administrator | Setup Technician | RCL_TECHNICIAN_SETUP | Allows access to the Manage Field Service Technicians page. |
| Field Service Administrator<br><br>Field Service Technician Duty | Submit Automatic Posting of Debrief Charges | RCL_AUTOPROCEES_DEBRIEF_CHARGES | Allows submission of the process that automatically posts debrief charges. |
| Field Service Technician Duty | Technician Access Charges and Estimates | RCL_FSTECH_CHARGES_ESTIMATES | Allows the technician the ability to create charges and estimates from the Manage Work Orders and Charges page. |
| Field Service Technician Duty | Technician Access for Field Parts Inventory | RCL_FSTECH_PARTS_INVENTORY | Allows the technician access to the Field Parts Inventory page. |
| Field Service Technician Duty | Technician Access for Manage Part Requirements | RCL_FSTECH_MANAGE_PART_REQ | Allows the technician access to the Manage Part Requirements page. |

| Role | Privilege Name | Code/Technical Name | Functionality Enabled |
|---|---|---|---|
| | | | |
| Field Service Technician Duty | Technician Access for Receive Parts | RCL_FSTECH_RECEIVE_PARTS | Allows the technician access to the Receive Parts page. |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Update Maintenance Work Orders by Service | MNT_UPDATE_WORK_ORDERS_BY_SERVICE | Allows the ability to call update for the SCM Work Order REST API to update the status. |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Update OTBI Layout for Service Logistics Landing Page | RCL_CONFIGURE_OTBI_REPORTS_LANDING_PAGE_PRIV | Allows the user to configure the Oracle Transactional Business Intelligence (OTBI) reports on the Service Logistics landing page.<br><br>Redwood |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Update Sales Orders Using REST Services | FOM_SALES_ORDER_REST_PATCH_PRIV | Allows the users to update sales orders using REST Services.<br><br>Used in the Depot Repair UI.<br><br>Redwood |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Use Location Service | PER_USE_LOCATION_SERVICE | Allows the use of the location service. |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Use REST Service - Guided Journeys Read Only | ORA_PER_REST_SERVICE_ACCESS_GUIDED_JOURNEYS_RO | Allows the user to call the GET method associated with the Guided Journeys REST service. |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | Use REST Service - Guided Journey Responses | ORA_PER_REST_SERVICE_ACCESS_GUIDED_JOURNEY_RESPONSES | Allows the user to call all methods associated with the Guided Journey Responses REST service. |
| Field Service Administrator | Use REST Service to Edit Service Request | SVC_EDIT_SR_USING_REST_PRIV | Allows editing a service request using REST API. |
| Field Service Administrator<br>Field Service Technician Duty | Use REST Service to View Service Request | SVC_VIEW_SR_USING_REST_PRIV | Allows viewing of service requests using REST API. |
| Depot Repair Manager<br>Field Service Administrator | View Customer Assets | CSI_VIEW_CUSTOMER_ASSETS | Allows the user to query and view customer assets, related configurations, and structures. |

| Role | Privilege Name | Code/Technical Name | Functionality Enabled |
|---|---|---|---|
| Field Service Technician Duty | | | |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | View Global Inventory Organizations List of Values by Web Service | RCS_GLOBAL_VIEW_INV_ORG_LOV_WEB_SERVICE_PRIV | Allows viewing the global set of inventory organizations list of values by web service. |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | View Item Lot and Item Serial List of Values by Web Service | INV_VIEW_LOT_SERIAL_LOV_WEB_SERVICE_PRIV | Allows viewing lot and the serial number list of values using web service.<br><br>Redwood |
| Field Service Administrator<br>Field Service Technician Duty | View Inventory Transaction List of Values by Web Service | INV_VIEW_INVENTORY_TRANSACTION_LOV_WEB_SERVICE_PRIV | Allows viewing inventory transaction account, inventory transaction reason, inventory account alias, and inventory transaction type list of values using web service.<br><br>Redwood |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | View Maintenance Work Orders by Service | MNT_GET_WORK_ORDERS_BY_SERVICE | Allows the ability to get details about existing SCM work orders using REST API. |
| Field Service Administrator<br>Field Service Technician Duty | View Orders | FOM_VIEW_ORDERS_PRIV | Allows the users to view orders. |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | View Planning Supply Availability | MSP_VIEW_PLANNING_SUPPLY_AVAILABILITY | Required by Service Request and Work Order to use Global Order Promising to source the parts. |
| Depot Repair Manager<br>Field Service Administrator<br>Field Service Technician Duty | View Receivables Invoice | AR_VIEW_RECEIVABLES_INVOICE | Allows access to view a receivables invoice. |
| Depot Repair Manager<br>Field Service Administrator | View Requirement Lines | RCL_PARTS_REQ_VIEW | Allows access to Parts Requirement region for the Fusion Service work order creation page, and the Manage Parts Requirement page. |
| Field Service Administrator | View Requisition | POR_VIEW_REQUISITION | Allows users to view requisition details.<br><br>Redwood |

| Role | Privilege Name | Code/Technical Name | Functionality Enabled |
|---|---|---|---|
| Field Service Administrator<br><br>Field Service Technician Duty | View Requisition – All | POR_VIEW_REQUISITION_ALL_PRIV | Allows users to create approved requisitions through the requisition import program.<br><br>Used in the Parts Requirements UI to cancel purchase requisitions.<br><br>Redwood |
| Depot Repair Manager | View Reverse Logistics Lines | RCL_REVERSE_LOGISTICS_LINES_SERVICE | Allows the user to view reverse logistics using a service.<br><br>Redwood |
| Field Service Administrator<br><br>Field Service Technician Duty | View Service Request | SVC_VIEW_SR_PRIV | Allows viewing of service requests. |
| Field Service Administrator<br><br>Field Service Technician Duty | View Service Work Order | SVC_VIEW_SERVICE_WORK_ORDER_PRIV | Allows viewing of service work orders. |
| Depot Repair Manager | View Spares Item Status | RCL_SPARES_ITEM_STATUS_SERVICE | Allows the user to view an item status.<br><br>Redwood |
| Depot Repair Manager<br><br>Field Service Administrator<br><br>Field Service Technician Duty | View Subscription Adjustments | RCL_VIEW_SUBSCRIPTION_ENTITLEMENTS_BY_SERVICE | Allows access to subscription entitlements for contract discounts in the Charges and Parts Requirement page. |
| Depot Repair Manager<br><br>Field Service Administrator<br><br>Field Service Technician Duty | View Subinventory and Locator List of Values by Web Service | INV_VIEW_SUBINVENTORY_LOCATOR_LOV_WEB_SERVICE_PRIV | Allows viewing subinventory and locator list of values using web service.<br><br>Redwood |
| Depot Repair Manager<br><br>Field Service Administrator<br><br>Field Service Technician Duty | View Subscription Entitlements | OSS_VIEW_SUBSCRIPTION_ENTITLEMENTS | Allows the ability to change the subscription user status. |
| Depot Repair Manager<br><br>Field Service Administrator<br><br>Field Service Technician Duty | View Technician Portal Work Orders | RCL_PORTAL_VIEW_WO | Allows access to the Manage Work Orders and Charges page. |
| Depot Repair Manager | View Trading Community Organization | HZ_VIEW_TRADING_COMMUNITY_ORGANIZATION | Allows exporting, searching, and viewing of organization details |

| Role | Privilege Name | Code/Technical Name | Functionality Enabled |
|---|---|---|---|
| Field Service Administrator<br><br>Field Service Technician Duty | | | such as addresses, classifications, identifiers, and names. |
| Field Service Administrator | View Trunk Stock | RCL_PORTAL_VIEW_TRUNK_PARTS | Allows the user view access to the Manage Field Parts Inventory page. |
| Depot Repair Manager<br><br>Field Service Administrator<br><br>Field Service Technician Duty | View Units Of Measure List of Values by Web Service | RCS_VIEW_UNITS_OF_MEASURE_LOV_WEB_SERVICE | Allow viewing units of measure list of values by web service.<br><br>Redwood |

# Assign Data Security Policies to Job Roles

You must set up the data security policies (DSP) for the job roles that you create. A DSP policy is a permission that allows access to a particular set of data.

> **Note:** For specific instructions on how to create a DSP in the Security Console, see the Adding Data Security Policies topic in the Create Roles in the Security Console section of the Securing SCM guide.

The following table shows which DSPs are needed to perform Service Logistics functionality. For some of these data security policies, you must also set up the user data access:

1. When you're creating a job role, you'll need to add the desired data security policies in the Edit Role page.

***Data Security Policies***

| Job Roles | Policy Name | Policy Description | Data Resource | Privilege | Condition | Functionality | Is the User Data Access Setup Required? |
|---|---|---|---|---|---|---|---|
| Depot Repair Manager<br><br>Field Service Administrator | Grant on Application Reference Data Set | Allows user to manage a location. | SetID Set | Manage Location; | All values | Allows the user to query and create an internal location ship-to address (from a TCA ship-to address) when creating transfer orders. | No |
| Depot Repair Manager | Grant on Business Unit | Allows user to view receivables | Business Unit | View Receivables Activities; | Access the business units for | Allows the user to drill down to the | Yes |

| Job Roles | Policy Name | Policy Description | Data Resource | Privilege | Condition | Functionality | Is the User Data Access Setup Required? |
|---|---|---|---|---|---|---|---|
| Field Service Administrator | | activities for the business units for which they're authorized. | | | which you're authorized. | Invoice Details page from the Manage Charges and Estimates page. | |
| Field Service Administrator | Grant on Cost Organization | Allows user to view work order costs. | Cost Organization | View Work Order Costs; | All values | Allows access to the work order cost data in Oracle Transaction Business Intelligence (OTBI). | No |
| Field Service Administrator | Grant on Cost Organization | Allows user to view a cost organization. | Cost Organization | View Cost Organization; | All values | Allows access to the cost data for OTBI. | No |
| Field Service Administrator | Grant on Cost Organization | Allows user to view a COGS event for the cost organizations for which they're authorized to view. | Cost Organization | View COGS Event; | All values | Allows access to the unit cost data in OTBI. | No |
| Depot Repair Manager<br><br>Field Service Administrator | Grant on Installed Base Asset | Allows user to manage an installed base asset. | Installed Base Asset | Read; Manage Installed Base Asset; Update; Delete; | All values | Allows access to the Asset UI to make updates from the Manage Work Orders and Charges page. | No |
| Depot Repair Manager | Grant on Inventory Organization | Allows user to manage an inventory reservation for | Inventory Organization | Manage Inventory Reservation; | Access the inventory organization parameter | Allows the user to add and delete reservations | Yes |

| Job Roles | Policy Name | Policy Description | Data Resource | Privilege | Condition | Functionality | Is the User Data Access Setup Required? |
|---|---|---|---|---|---|---|---|
| Field Service Administrator | | the inventory organizations for which they're authorized. | | | for table INV_ORG_ PARAMETERS for the inventory organizations for which you're authorized. | in the Service Logistics UIs:<br><br>Manage Field Parts Inventory UI Reservations dialog.<br><br>Access Service Work Order Parts Details tab PR Table **X** icon.<br><br>Create and Edit Part Requirements UI PR Table **X** icon.<br><br>Create debrief lines.<br><br>Post charges. | |
| Depot Repair Manager | Grant on Inventory Organization | Allows user to manage a maintenance organization for the inventory organizations for which they're authorized. | Inventory Organization | Manage Maintenance Organization Data; | Access the inventory organization parameter for table INV_ORG_ PARAMETERS for the inventory organizations for which they're authorized, | Allows the user to create and update maintenance work orders. | Yes |
| Field Service Administrator | Grant on Inventory Organization | Allows user to manage a maintenance organization for the | Inventory Organization | Manage Maintenance Organization Data; | Access the inventory organization parameter for table | Allows the user to post field service charges. | Yes |

| Job Roles | Policy Name | Policy Description | Data Resource | Privilege | Condition | Functionality | Is the User Data Access Setup Required? |
|---|---|---|---|---|---|---|---|
| | | inventory organizations for which they're authorized. | | | INV_ORG_ PARAMETERS for the inventory organizations for which they're authorized. | | |
| Depot Repair Manager | Grant on Inventory Organization | Allows user to manage shipment for the inventory organizations for which they're authorized. | Shipment | Manage Shipment Data; | Access for the inventory organizations in which they can operate. | Allows the user to access the shipmentLines Rest API in the Manage Reservation drawer, which is accessed from Depot Repair UI. | Yes |
| Depot Repair Manager<br><br>Field Service Administrator | Grant on Location | Allows user to manage a location. | Location for Table PER_ LOCATION_ DETAILS_F | Manage Location; | All values | Allows the user to query and create an internal location ship-to address (from a TCA ship-to address) when creating transfer orders. | No |
| Depot Repair Manager | Grant on Location | Allows user to manage a location. | Location for Table PER_ LOCATIONS | Manage Location; | All values | Allows the user to query and create an internal location ship-to address (from a TCA ship-to address) when creating transfer orders. | No |

| Job Roles | Policy Name | Policy Description | Data Resource | Privilege | Condition | Functionality | Is the User Data Access Setup Required? |
|---|---|---|---|---|---|---|---|
| Depot Repair Manager | Grant on Orchestration Order | Allows user to manage Orchestration Order for the business units for which they're authorized. | Allows user to manage Orchestration Order for the business units for which they're authorized. | Manage Orchestration Order Data | Manage Orchestration Order Data | Enables the user to read and update the sales orders. | Yes |
| Field Service Administrator | Grant on Orchestration Order | Allows user to manage Orchestration Order for the business units for which they're authorized. | Orchestration Order | Manage Orchestration Order Data | Manage Orchestration Order Data | Enables the user to read and update the sales orders. | Yes |

2. Set up the user's data access in the Manage Data Access for Users page.

   **Note:** Duty roles aren't visible in the Manage Data Access for Users page.

For a listing of the data security policies that are associated with a job role, see the Roles chapter in the Security Reference for Manufacturing and Supply Chain Materials Management Guide.

# Enable Support for Third Party Work Objects

To manage parts logistics and field service debrief and charges for third party objects:

Set up the document type lookup for the third party service request or work order in the Service Logistics lookup ORA_RCL_SOURCE_DOC_TYPE. For details, see the Managing Service Logistics Lookups chapter.

# Enable Support for Business Intelligence Publisher

You must set up Business Intelligence Publisher (BI Publisher) to create PDFs for estimates.

You can verify the template or change it based on your requirements. For detailed information on setting up BI Publisher, see the Oracle Business Intelligence Publisher User's Guide.

## Verify the Template

Verify the predefined template in the Service Logistics folder.

To go to the Service Logistics folder, select **Tools** > **Reports & Analytics** > **Browse Catalog** > **Shared Folder** > **Supply Chain Management** > **Service Logistics**.

## Change the Existing Template

Change the existing templates based on your requirements, by copying the Supply Chain Management folder.

To go to the Supply Chain Management folder, select **Shared Folder** > **Custom** > **Supply Chain Management**.

# Set Up the Navigator to Access the Landing Page

You can specify whether you see the Redwood landing page or the ADF landing page when you open Service Logistics.

To access the Redwood landing page you must set the ORA_RCL_LANDING_PAGE_REDWOOD_ENABLED profile to Yes. Otherwise, the default is the ADF landing page.

- **Redwood**: Go to the **Order Management** group and select the **Service Logistics** app to access the Service Logistics landing page in Redwood.
- **ADF landing page**: Go to the **Order Management** group and select the **Order Management** app to access the Service Logistics landing page in ADF.

# 3 Stocking Locations

## How Do We Use Stocking Locations

Stocking locations are used to stock inventory and spare parts. In Service Logistics, you can set up various stocking location types, such as manned, unmanned, site dedicated stocking locations and technician stocking locations.

You'll then assign these stocking locations to all the field service technicians that can use parts from them. Each field service technician must be assigned one default usable and defective trunk stock location. Service agents order parts from central warehouses and ship them to the field stocking locations where the parts will be used by the field service technicians. Field service administrators can also transfer parts from one stocking location to another to replenish the warehouse or the inventory of field service technicians. You can also use field stocking locations to track both usable and defective parts.

## Set Up Your Stocking Locations

Set up a stocking location:

1. In **Setup and Maintenance**, select the Manufacturing and Supply Chain Materials Management offering, and then click **Service Logistics.** See the list of tasks displayed for Service Logistics on the right-hand pane. Click **Manage Stocking Location**.
2. On the Manage Stocking Location page, click the **Add** icon (**Plus** icon).
3. In the Add Stocking Location window:
    - Select the organization from the list of valid inventory organizations.
    - Select a subinventory from the list of subinventories that appear for the selected organization. Note that the word subinventory is the industry term for warehouse.
    - Select the type of field parts stocking location. The four predefined values are **Technician, Manned, Unmanned**, and **Site Dedicated**.
    - The condition as either **Usable** or **Defective**.

    > **Note:** Field parts stocking locations must have been set up as Inventory Organizations and Subinventories site before they can be set up as Service Logistics stocking locations.
4. Save your record.
5. When you set up a site-dedicated stocking location, you can add or remove party site addresses to it. On the Manage Stocking Locations page, you'll see an icon in the Address column against each site-dedicated location. Click the icon to access a Details window. You can add the site addresses here.
6. Follow the same process to set up another stocking location.

*Related Topics*

- Create Parts Return List

# 4 Field Service Technicians

## Overview of Field Service Technicians Setup

*Overview of Field Service Technicians Setup* Field service technicians must be set up as person parties in Oracle Trading Community Architecture (TCA) with the usage code Field Service Technician. Field service technicians must also be assigned an address. To do this:

1. Go to the Customer Data Management cloud application and click **Persons**.
2. In the Persons page, select the employee that must be set up as field service technician.
3. Click the person name to access the Edit Person page.
4. To add an address, go to the Addresses section in this page. Click the + (Add) icon to add an address.
5. Next, click the Usage Assignment tab.
6. Click **Actions**, **Add** and then select **Field Service Technician** from the **Usage** drop-down list.

Note that if you haven't assigned the Field Service Technician usage code, then the first time a stocking location is assigned to a technician, the usage type of Field Service Technician is assigned to the person party.

After you set up the field service technicians you can see their information in the Manage Field Service Technicians page in Service Logistics. You can also assign stocking locations to the field service technicians.

1. Click **Setup and Maintenance**, then in the Manufacturing and Supply Chain Materials Management offering, click **Service Logistics**, and then click **Manage Field Service Technicians**.
2. To find the field service technician, use the following search fields:
    - Technician = List of values displays TCA person parties with the Field Service Technician usage.
    - Organization = List of values displays all organizations that have at least one subinventory defined.
    - Subinventory = List of values displays all the subinventories defined for the selected organization.
3. Click **Search**. The field service technician details will appear in the search results table.

In the next section, you'll learn how to assign stocking locations to field service technicians to enable them to stock and manage the parts or items that they require to fulfill a work order. These stocking locations represent the technician's trunk stock. Stocking locations set up as the technician's default usable and defective subinventory default into transfer order destinations and can be used in the parts debrief process. Note:

- You can assign multiple stocking locations to field service technicians.
- Every technician must be assigned one default usable and defective stocking location.

Field service administrators use the Manage Trunk Stock page in Service Logistics to monitor the stocking levels of each item in the technician's trunk stock. Field service administrators can create transfer orders to replenish the technician's trunk stock when the item levels fall below the minimum level and receive parts shipped to a technician.

*Related Topics*

- Create Parts Return List

# Assign Stocking Locations To Technicians

Assign a stocking location to a field service technician:

1. On the Manage Field Service Technicians page, use the search fields to find a field service technician.
2. Click the **Add** icon (**Plus** icon) in the search results table to add a stocking location to the field service technician.
3. In the Add Stocking Location window:
    - Select an organization from the list of valid organizations.
    - Select a subinventory from the list of valid subinventories that appear for the selected organization.
    - Check **Enable** to ensure the technician can use the selected subinventory.
    - Check **Default** to make this the default subinventory of the technician.
    - Check **Allow Parts Orders** to assign privileges to the field service technician to order parts. Don't select this checkbox if you only want the field service technician to create the part requirement but not order the part. You might want to do this when the part requirements raised by the field service technician must first be approved by the field service administrator or parts coordinator.
4. Click **Save and Create Another** to save the details you've entered and open the Add Stocking Location window to assign another stocking location to the field service technician.
5. Enter the required information. Click **Save and Close**.

# Edit Stocking Locations Assigned to Technicians

To edit the stocking locations assignment and preferences for a selected field service technician:

1. In **Setup and Maintenance**, select the Manufacturing and Supply Chain Materials Management offering. Click Service Logistics and then click **Manage Field Service Technicians** in the setup task list.
2. On the Manage Field Service Technician page, select a technician in the **Technician** field, and click **Search**.
3. From the list of stocking locations assigned to the technician that appears, select the row you want to edit.
4. Click the **Edit** icon.
5. On the Edit Stocking Location page, you can select to check or clear the following:
    - **Enabled**: When selected, the specified subinventory is available for the technician's use. Clear the checkbox to make this subinventory unavailable for the technician's use.
    - **Default**: When selected, the specified subinventory will be the default subinventory of the technician. Clear the checkbox to remove this subinventory as the default one for the technician.
6. Click **Save and Close**.

# 5 Billing Types

## Overview of Billing Types

To enable billing types for ordering parts, debriefing parts, entering labor and expenses and for creating fixed charges, you must assign billing types to items in the item master.

For more information on updating the Item Master with the billing type see Item Specifications and Attributes: Explained, in the Using Product Master Data Management guide.

### How are Billing Types used in Service Logistics?

When you set up service activities for your organization, you'll need to associate billing types with service activity codes (SACs) to define which items in the Item Master will be used for the selected service activity. Service activity codes are entered when a user creates a part requirement for a service request and decides whether the resulting sales order is for a shipment or a return order line. The association of the service activity code with the billing type controls which items or parts can be selected in the part requirements user interfaces. Note that SACs aren't required for work order part requirements as the service activity code is entered later when creating the parts debrief line. SACs are also used in field service debrief.

You can also use billing types and service activity codes to define subscription coverage for calculating charges.

Billing types also decide the list of service activities that are displayed when creating part, labor, and expense debrief transactions and the service activity required to add fixed charge items to a work order. Billing types help filter the list of items available for selection.

You can associate multiple billing types with a service activity code. For example, a service activity of type Installation can be used for both parts and labor debrief.

## Assign Billing Types to Billing Categories

In this section, you'll learn how to assign billing types to billing categories.

There are four predefined billing types in Service Logistics: Material, Consumable, Labor, and Expense. You can create your own billing types using the lookup EGP_MATERIAL_BILLING_TYPE.

The billing category decides which SACs and items are displayed in the Manage Debrief and Charges page through the billing type assigned to the items and SACs. There are four nonextensible billing categories predefined in Service Logistics: Labor, Expense, Fixed Charge, and Material. Note that you can't create your own billing categories.

To assign billing types to the billing categories:

1. Click **Setup and Maintenance**, then in the Manufacturing and Supply Chain Materials Management offering, click **Service Logistics**, and then click **Manage Billing Types**.
2. On the Manage Billing Types page, select the billing type and then select a billing category to assign it to.
3. You can click the **Add** icon (**Plus** icon), to add another billing type.

# 6 Service Activities

## Understand Service Activities

Service agents select a service activity when they create a service request part requirement for customer replaceable parts. Service Activities:

- Filter the item list of values. Only items with billing types associated with the selected service activity code are displayed in the list of values.
- Decide the transaction category, whether the resulting sales order line will be a shipment order line or a return order line.
- Decide the order line type for the part requirement that will drive the correct orchestration process to be launched after the sales order is created. Order line types that drive the order orchestration and accounting processes are set up in Order Management.
- Specify if and how to create the underlying charge line, and if the corresponding charge lines should be submitted to Order Management.

Service activity codes are also selected during field service debrief where they're used to calculate charges for both field service and parts only service billing. Service activities filter the list of items when creating part, labor, and expense debrief transactions through the billing types associated with the service activity. You'll also select the service activity to filter fixed charge items.

You must set up at least one service activity code for shipping parts to customers and one service activity code for returning defective or excess parts. You must also set up service activity codes for parts exchange, field service, and depot repair.

You'll then associate at least one billing type to each service activity code. For information on how the billing type and service activity code association controls the service items that can be selected when creating a part requirement, see: Billing Types: Overview.

> **Note:** If you don't need to create sales orders, then you can skip the order-related setups in the Set Up Service Activities section that follows.

## Set Up Service Activities

To set up service activities:

1. In **Setup and Maintenance**, select the Manufacturing and Supply Chain Materials Management offering. Click **Service Logistics** and then click **Manage Service Activities**.
2. Click the **Add** icon (**Plus** icon) to add a new Service Activity.
3. In the **Service Activity Code** field, enter a unique code for the service activity you're defining.
4. In the **Service Activity** field, enter a name for the service activity you're defining, for example, Customer Return.
5. In the **Description** field, enter a description for the service activity, for example, returned from customer.

6. For **Transaction Category**, depending on the service activity you're defining, select from the values:
    - **Order**
    - **Return goods**
7. For **Business Process**, depending on the service activity you're defining, select from the values:
    - **Customer support**: Select to set up service activities related to parts sales and returns
    - **Parts Exchange** : Select to set up service activities for parts exchange (broken part is returned by customer and replacement part is shipped as part of the same transaction)
    - **Field service**: Select to set up service activities related to field service debrief
    - **Depot Repair**: Select to set up service activities related to depot repair debrief
    - **Depot Repair Logistics**: Select to set up service activities for depot repair return and shipment
8. For **Order Type,** select from the drop-down list. List of values is derived from the lookup ORA_DOO_ORDER_TYPES. This will be the default sales order type for the corresponding service activity.

    > **Note:** The **Order Type** field isn't required. If you don't need to create sales orders, then confirm that the Create Order checkbox isn't selected. This ensures that the **Order Type** and **Order Line Type** fields aren't required.

9. For **Order Line Type**, select from the values that appear depending on the transaction category you've selected.
10. Select a **Resource Activity** to map your service activity code to the work order resource activity code. This applies to field service and depot repair only. See topic Map Work Order Resource Activities to Service Logistics Activities in Chapter 7 for information about how this mapping works.
11. Select the **Create Order** checkbox to control which charge lines created in Service Logistics are passed to Order Management. If this checkbox is selected, the charge line is passed to Order Management so that customers can be invoiced accurately. Don't select this checkbox if you want the order orchestration process to be carried out in a third-party Order Management application.
12. Select the **Zero Charge** checkbox if you don't want to charge customers for parts covered by warranty or a contract, or for added labor or extra parts that weren't planned for the original repair.
13. Select the **Update Cost** checkbox to control whether costs are updated when you post charges.
14. **Enabled** is checked by default.
15. Click **Save**.
16. To associate the service activity you set up to a billing type, in the Billing Type region, click the **Add** icon (**Plus** icon).
17. Select the appropriate billing type for the service activity.
18. Click **Save and Close** to save the changes and close the Manage Service Activities page.

# 7 Charges Posting Rules

## Explain Charges Posting Rules

There are two ways to post charges in Service Logistics. You can post them manually or you can set them up to post automatically.

You can either manually post or automate the posting of charges for generic, OFSC and third-party work orders. You must opt-in for the Automatically Post Charges feature.

- **Manual Posting**

  For manual posting of charges:

  - Review the debrief lines and post the charge lines manually using the Post Charges option in the Manage Charges and Estimates page (for field service debrief).

    This field service debrief and posting functionality is enabled and ready to use.
  - Confirm the Post Charges or Post Charges with Rules privileges have been assigned to users so they can see the **Post Charges** button in the Manage Charges and Estimates page.

    Users who don't have these privileges assigned see the **Complete Debrief** button in the Manage Charges and Estimates page. When they click this button, the debrief line status is updated to the Needs Review status or the Posted status based on the auto processing rule check. When the charge line is in Needs Review status, the field service administrator will review the debrief line and post charges.
- **Automatic Posting**

  For automatic posting of charges:

  - Set up automatic processing rules for charges. If the debrief lines meet the criteria specified in the rule, the rule check processes. If the rule check runs successfully, the charges are posted and the sales order is created. If there are errors, the debrief status updates to Needs Review. The field service administrator must then review the debrief and post charges.

    This feature is useful in large-scale businesses that have hundreds of debrief transactions from work orders. For example, you could set up a rule to:

    - Find debrief charges for business unit ABC.
    - Automatically post debrief charge lines for amounts less than 2500 USD.
    - Manually review and post debrief charges that are greater than 2500 USD.

**Note:** The Service Logistics landing page has a Needs Review infolet. When a field service administrator reviews these debrief lines, they see the reason a charge line wasn't posted along with any conditions that failed a rule check.

*Related Topics*

- Auto Process Debrief Charges

# Extend Charges Posting Rules

You can define custom processing rules to post charges in Service Logistics.

Service Logistics uses the event subscription model, which lets you to define an integration in the Oracle Integration Cloud. This integration executes custom rule processing for the Debrief Header Updated event. If the custom rule checking fails, the integration calls the Update one debrief REST API to update the debrief header status to Needs Review. If the custom rule check passes, the integration submits the Auto Process Debrief Charges ESS job with the debrief header ID and POSTCHARGESCUSTOM integration.

You can set the rule posting to use the custom rules, or a combination of both custom rules and the rules you define in the Auto Processing Rules UI. If you define any processing rules using the Auto Processing Rules UI, the Post Charges process executes a combination of the custom rules you've implemented and the auto processing rules.

Here's an overview of how Service Logistics processes the custom rules:

- Custom rules processing works when a user clicks **Post Charges and Close** in the Service Logistics UIs.
- If the feature is enabled, the Debrief Header Updated event is published when users with the Post Charges with Rule Check privilege post charges.

  > **Note:** There isn't a rule check for users with the Post Charges privilege.

- After the event is published, the charges posting process stops further processing and exits.

You'll need to confirm the following setups to extend charges posting rules:

- Opt in to the Automatically Post Charges feature.

  > **Note:** If you've already opted in to this feature, you don't have to opt in again.

- Set the value of the Enables Custom Rule Processing when Posting Charges profile to Yes.
- Define a custom integration in Oracle Integration Cloud and the Debrief Header Updated event is raised.

> **Note:** See the Integrating Service Logistics with Field Service guide for more information.

- The Auto Process Debrief Charges ESS job executes rules defined using the Auto Processing Rules UI, if such rules exist. If some rules fail, the debrief header and lines are set to the Needs Review status. If the rule check succeeds, the charges post.

# Set Up Charges Posting

In this section, you'll learn how to set up rules to post charges in Service Logistics.

Following are the setups to automatically post charges.

**Opt in for the Automatically Post Charges Feature**

1. Click the **Navigator** then select the **Setup and Maintenance** work area.

2. In the Setup page, select the **Manufacturing and Supply Chain Materials Management** offering.
3. From the list of functional areas, select **Service Logistics**.
4. Click the **Actions** drop-down button, and then click **Change Feature Selection**.
5. Enable the **Automatically Post Charges** feature.

**Define the Automatic Processing Rules**

1. In the Setup and Maintenance work area, go to the **Manage Auto Processing Rule** task:
    - Offering: Manufacturing and Supply Chain Materials Management
    - Functional Area: Service Logistics
    - Task: Manage Auto Processing Rule
2. The Manage Auto Processing Rules for Charges page contains the following regions:
    - Rules search criteria
    - Rule names results table
    - Qualifiers
    - Conditions
3. To create a new rule, click the **Add rule (+)** icon in the Search Results table.
4. Enter the rule name and description.
5. Notice that the value of the Enabled field is set to **Yes** by default.
6. Define the qualifiers and conditions for the rule. There are predefined qualifiers and conditions that you can use.
    - Qualifiers: Customer, Business Unit, Technician, Document Type, Work Order Type, Service Request Category
    - Conditions: Labor Hours, Expense Amount, Charge Line Amount, Total Charge Amount, Actual Over Estimates %
7. After you've defined the qualifiers and conditions, click **Save**.
8. Note the following:
    - The rule name should be unique.
    - It isn't required to specify a qualifier. When a specific attribute isn't assigned to a qualifier, the rule applies for all the business qualifiers.
    - The same qualifier (for example, Business Unit) can be selected multiple times in a rule (in different lines) to assign the rule to multiple values of the same qualifier (for example, rule R1 can be assigned to three Business Units BU1,BU2 and BU3).
    - The same qualifier and qualifier value should not be entered again.
    - At least one condition is required for a rule to be saved.
    - Either the lower limit or upper limit is required for a condition line to be saved successfully.

After you've set up the rules, you can view, edit, and update these rules in the Manage Auto Processing Rules for Charges page.

- You can update the existing qualifiers and conditions of a rule.
- You can add new qualifiers and conditions to the rule.
- You can delete existing qualifiers and conditions. You must retain at least one condition to retain the rule itself.
- To suspend the rule, select **No** in the **Enabled** field.

- To delete a rule, select the rule at the rule header region and click the **Delete** button in the results table.

# 8 Return Routing Rules

## What's Return Routing?

When customers, field service technicians, and field parts stocking location administrators return defective parts, they must be transferred to the appropriate warehouse or repair location.

Excess parts in a field stocking location or a technician's trunk stock must also be returned to the best warehouse.

As a field service administrator, you can set up return routing rules to automatically decide the warehouse to which these parts must be returned. Routing rules are a combination of values such as zone or stocking location, item category, and item number that are applied to select a destination warehouse. These rules are used in the Add Part and Return Part windows of the Service Logistics application. In the next section, learn how to create return routing rules for your organization.

## Create and Manage Return Routing Rules

You can create the following types of return routing rules using the Manage Return Routing Rules page in Service Logistics:

- Return routing rules for defective parts returned by the customer.
- Return routing rules for defective and excess parts returned from field stocking locations and field technicians.
- Return routing rules for parts with supplier warranty coverage.

### Set up Return Routing Rules (ADF)

To create the return routing rules:

1. Click **Setup and Maintenance**, then in the Manufacturing and Supply Chain Materials Management offering, click **Service Logistics**, and then click **Manage Return Routing Rules**.
2. You'll see the Manage Return Routing Rules page with a **Search** header and results region. Here you can query for the return routing rules for your organization after you've set them up.
3. To add a new rule, click the **Add (Plus)** icon in the Search Results region. You'll see the Add Return Routing Rule window.
4. Add values for the new rule:
    - Select a **Return Source Type**. This can either be **Zone** or **Organization and Subinventory**. Use Zone to create a return routing rule for a customer return. Use Organization and Subinventory to create the rule for all field service returns.
    - **Source Organization** and **Source Subinventory**: Enabled only if the return source type is **Organization and Subinventory**. List of values includes all inventory organizations and subinventories with a stocking location type of **Field Technician**.
    - **Zone**: Enabled only if return source type is Zone. Includes all zones set up in the Manage Shipping Zones page using the zone type defined in the Service Logistics Profile Option (Return Routing Zone Type). When a customer returns a part, a TCA API runs to decide the applicable return routing zone based on

the customer's address. The zone decides which return routing rule is applied to default the destination subinventory.

- **Return Type**: Defective, Excess, or Supplier Warranty.
- **Item Catalog** and **Item Category**: Helps to filter the item list of values if you're going to set up return routing rules for specific items. You can create return routing rules at just the item category level.
- **Item**: LOV displays all items with billing type tied to the Material billing category and, if entered, the item category.
- **Destination Organization**: The inventory organization.
- **Destination Subinventory**: All subinventories in the destination organization selected.
- **Enabled**: Select **Yes** or **No** to indicate whether this rule should be enabled for your organization or not.

5. Click **Add**.

## Set up Return Routing Rules (Redwood)

To create the return routing rules:

1. Click **Setup and Maintenance**, then in the Manufacturing and Supply Chain Materials Management offering, click **Service Logistics**, and then click **Return Routing Rules**.
2. You'll see the Return Routing Rules search page. You can use this search page to search for return routing rules.

   The Return Routing Rules page includes the:
   - Search bar
   - Filter Chips suggestion bar

     > **Note:** Click **Filters** to open a side drawer with more search parameters.

   - Magnifying Glass icon
   - Reverse Logistics Disposition results table

   These are described in the following table:

   ***Return Routing Rules Search***

| Field Name | Description |
|---|---|
| Search bar | The search bar opens with filter chips, which you can add or delete depending on your search needs. The selectable filter chips include:<br>- Return Source Type (LOV)<br>- Source Organization (LOV)<br>- Source Subinventory (LOV)<br>- Zone (LOV) |

| Field Name | Description |
|---|---|
| | ○ Filters<br>**Note:** Click **Filters** to open a side drawer with more search parameters:<br>- Return Source Type<br>- Source Organization<br>- Zone<br>- Return Type<br>- Item Catalog<br>- Destination Organization<br>You can also enter free text, which will search the following estimates attribute:<br>○ Item<br>Because the application supports autocomplete and fuzzy logic, you can partially type your search terms. |
| Filter Chips suggestions bar | The filter chips appear in the Search bar and provide suggestions for filtering your results set. For example, you might see a filter suggestion for a source organization. You can select this filter chip to filter your results.<br>When you select one of the filter chips in the suggestions bar, it's added to the Search bar and filters the results table. |
| Magnifying Glass icon | You can use the Magnifying Glass icon to search for the attributes selected in the search bar. |
| Reverse Logistics Disposition results table | The Return Routing Rules results table lists the items based on your search criteria and filters. You can also sort your results by selecting the arrows next to the column headers. When you first open the page, the estimates are sorted by the estimate number.<br>From the search results, you can begin to add, edit, or delete new return routing rules.<br>To add a rule:<br>○ Select a **Return Source Type**. This can either be **Zone** or **Organization and Subinventory**. Use Zone to create a return routing rule for a customer return. Use Organization and Subinventory to create the rule for all field service returns.<br>○ **Source Organization** and **Source Subinventory**: Enabled only if the return source type is **Organization and Subinventory**. List of values includes all inventory organizations and subinventories with a stocking location type of **Field Technician**.<br>○ **Zone**: Enabled only if return source type is Zone. Includes all zones set up in the Manage Shipping Zones page using the zone type defined in the Service Logistics Profile Option (Return Routing Zone Type). When a customer returns a part, a TCA API runs to decide the applicable return routing zone based on the customer's address. The zone decides which return routing rule is applied to default as the destination subinventory.<br>○ **Return Type**: Defective, Excess, or Supplier Warranty.<br>○ **Item Catalog** and **Item Category**: Helps to filter the item list of values if you're going to set up return routing rules for specific items. You can create return routing rules at just the item category level. |

| Field Name | Description |
| --- | --- |
| | ○ **Item**: LOV displays all items with billing type tied to the material billing category and, if entered, the item category.<br>○ **Destination Organization**: The inventory organization.<br>○ **Destination Subinventory**: All subinventories in the destination organization selected.<br>○ **Enabled**: Select **Yes** or **No** to indicate whether this rule should be enabled for your organization or not.<br>○ Select **Add** to add the rule.<br>To edit a rule:<br>○ Select the **Edit** icon. This opens the Edit return routing rule drawer.<br>○ Select **Update** to submit your changes. |

**Note:** Users assigned a job role with the Return Routing Rules (RCL_MANAGE_RETURN_RULES_PRIV) privilege can access this feature.

# 9 Service Logistics Lookups

## List of Service Logistics Lookups

See the table for a list of the lookups that Service Logistics uses. You can only view and edit the extensible lookups in the Manage Service Logistics Lookups UI.

| Name/Code | Description | Predefined Values | Extensible? |
|---|---|---|---|
| EGP_MATERIAL_BILLABLE_TYPE | Identifies items used in Service Logistics debrief and parts ordering. | CONSUMABLE, LABOR, MATERIAL, EXPENSE | Yes |
| ORA_RCL_ADDRESS_TYPE | Categorizes the shipping address into different address types. | CUSTOMER, TECHNICIAN, WAREHOUSE | No |
| ORA_RCL_BILLING_CATEGORY | Identifies the item as Labor, Material, Expense, or a Fixed Charge item. | EXPENSE, LABOR, MATERIAL, FIXCHARGE | No |
| ORA_RCL_BUSINESS_PROCESS | Identifies the type of service being provided to the customer. All service activity codes are assigned to one of these business processes. | FLDSRV (Field Service), CUSTSUPPORT (Customer Support), DEPOTREPAIR (Depot Repair), EXCHANGE (Parts exchange), DRLOGISTICS (Depot Repair Logistics). | No |
| ORA_RCL_COST_ORG_PRF_VAL | Specifies whether to default the cost organization from the asset operating organization or the field technicians default subinventory in the Manage Charges page and API. | ASSET, TECHNICIAN | No |
| ORA_RCL_DEBRIEF_STATUS | Defines the status of a debrief line. | NEW, POSTED, ERROR | No |
| ORA_RCL_ESTIMATE_STATUS | Indicates whether the estimated charges are new, awaiting approval, approved, rejected, or canceled. | NEW, AWAITING_ APPROVAL, APPROVED, REJECTED, CANCELED | No |
| ORA_RCL_ESTIMATE_TYPE | Decides the charges to be invoiced when the actual charges are posted for a document. | NOT_TO_EXCEED, BINDING, NON_ BINDING | No |
| ORA_RCL_IMT_STATUS | Indicates the status of a material transfer. | SHIPPED, NOTSHIPPED, SHIPPEDLATE, NOTSHIPPEDLATE, SUBMITTED, SUPPLY_REQUEST, CANCEL_SUBMITTED | No |

| Name/Code | Description | Predefined Values | Extensible? |
|---|---|---|---|
| ORA_RCL_PART_SOURCING_CS | Defines part search methods and sequences for customer support part requirements. | MANNED, GOP | No |
| ORA_RCL_PART_SOURCING_FS | Defines part search methods and sequences for field service parts requirements. | SITE_DDCTD (Site Dedicated), TECHNICIAN, UNMANNED, MANNED, GOP (Global order promising sourcing method), REPLENISH (Inventory replenishment rules) | No |
| ORA_RCL_QUANTITY_LEVEL | Indicates the quantity level of items or parts in the technicians' trunk stock. | SHORTAGE, EXCESS | No |
| ORA_RCL_REASON_STATUS | Indicates the reasons for changing the estimate status. | None. | Yes |
| ORA_RCL_RET_RULE_SRC_TYPE | Identifies the source type for the return routing rules. | INV (organization and subinventory), ZONE (zone) | No |
| ORA_RCL_RETURN_TYPE | Identifies the return routing rule type. | DEFECTIVE, EXCESS, SUPPLIER WARRANTY | No |
| ORA_RCL_SOURCE_DOC_TYPE | Identifies the Service Logistics source document type, for example, whether it's a service work order or service request from the Fusion Service UIs or a third party work order or service request.<br><br>**Note:** See the Use the Document Type Lookup to Create Custom Document Types section that follows for more information. | • EC_SR (Engagement Cloud Service Request)<br>• EC_WO (Engagement Cloud Work Order)<br>• REPLENISHMENT (Replenish Technician Trunk Stock)<br>• REPL_WAREHOUSE (Replenish warehouse) | Yes |
| ORA_RCL_STOCK_LOC_CONDITION | Identifies whether the stocking location is good/usable or defective. | GOOD, DEFECTIVE | No |
| ORA_RCL_STOCK_LOC_TYPE | Identifies the stocking location type. | TECHNICIAN, UNMANNED, MANNED, SITE_DDCTD (Site Dedicated Warehouse) | No |
| ORA_RCL_USAGE_CODE | Identifies how a part is used to resolve the work order. | USED, UNUSED, DOA (defective on arrival) | No |
| ORA_RCL_WORK_AREA | Identifies the work areas on Fusion Service work orders and | None. | Yes |

| Name/Code | Description | Predefined Values | Extensible? |
|---|---|---|---|
| | Oracle Field Service Cloud (OFSC) activities. The lookup meaning must match the work area string on the Fusion Service work order.<br><br>Used as a filter on the Service Logistics landing page and the Manage Work Orders and Charges page when searching for Fusion Service work orders.<br><br>Used as a filter in the Manage Part Requirements page.<br><br>Used to default the FS Tech inventory organization in the Add Part window when parts are added to a work order before a field technician has been assigned to the Fusion Service work order. The default destination inventory organization is entered for each work area in the Tag column of the lookup.<br><br>OFSC Work Areas<br><br>We're using the work area lookup when setting a value for the profile Default Parent Resource Name. The value from this profile is used to assign a parent node when creating technician and truck resources in OFSC. The lookup code should be equal to the External ID in OFSC. The parent resource must already exist. It isn't possible to create a resource without a parent through REST services.<br><br>Work Area is another type of resource in OFSC. The resource type has the role Bucket. The resource name is passed to the Fusion Service work order and is stored on the work order (must match the work area lookup meaning in Service Logistics). | | |
| ORA_RCL_YES_NO | Indicates a yes or no condition. | Y, N | No |

## Use the Document Type Lookup to Create Custom Document Types

You can also use the document type lookup (ORA_RCL_SOURCE_DOC_TYPE) to create custom document types. The following table shows the predefined document types that you can use and the tag information you'll need for your custom document types. These tags decide where your custom lookups appear within Service Logistics.

### *Document Type Lookup*

| Document Type | Tag | Predefined | Where does this document type appear? | Where's this document type stored? |
|---|---|---|---|---|
| Replenish Technician Trunk Stock<br><br>Lookup Code: REPLENISHMENT | Null | Yes | Manage Part Requirements (display only)<br><br>Create/Edit Part Requirement (LOV value) | Part Requirement Header |
| Replenish Warehouse<br><br>Lookup Code: REPL_ WAREHOUSE | Null | Yes | Manage Part Requirements (display only)<br><br>Create/Edit Part Requirement (LOV value) | Part Requirement Header |
| Return Material Authorization<br><br>Lookup Code: RMA | Null | Yes | Depot Repair page (display only)<br><br>Depot Repair in Redwood UI | Debrief Header |
| Service Request<br><br>Lookup Code: EC_SR | Null | Yes | Manage Part Requirements (display only)<br><br>Create/Edit Part Requirement (LOV value)<br><br>Part Requirements Search page in Redwood UI (filter chip)<br><br>Part Requirements Header Page in Redwood UI (LOV value)<br><br>Part Requirement Detail page in Redwood UI (display only) | Part Requirement Header |
| Work Order<br><br>Lookup Code: EC_WO | Null | Yes | Manage Part Requirements (display only)<br><br>Create/Edit Part Requirement (LOV value)<br><br>Part Requirements Search page in Redwood UI (filter chip)<br><br>Part Requirements Header page in Redwood UI (LOV value)<br><br>Part Requirement Detail page in Redwood UI (display only) | Part Requirement Header<br><br>Debrief Header |

| Document Type | Tag | Predefined | Where does this document type appear? | Where's this document type stored? |
|---|---|---|---|---|
| | | | Manage Work Orders and Charges (display only)<br><br>Manage Charges and Estimates, Edit (display only)<br><br>Manage Charges and Estimates, Create (LOV value)<br><br>Work Order Charges Search page in Redwood UI (filter chip)<br><br>Work Order Charges Header page in Redwood UI (LOV value)<br><br>Work Order Charges details page in Redwood UI (display only) | |
| Customer-defined Service Request | EC_SR | No | Manage Part Requirements (display only)<br><br>Create/Edit Part Requirement (LOV value)<br><br>Part Requirements Search page in Redwood UI (filter chip)<br><br>Part Requirements Header Page in Redwood UI (LOV value)<br><br>Part Requirement Detail page in Redwood UI (display only) | Part Requirement Header |
| Customer-defined Work Order | EC_WO | No | Manage Part Requirements (display only)<br><br>Create/Edit Part Requirement (LOV value)<br><br>Part Requirements Search page in Redwood UI (filter chip)<br><br>Part Requirements Header page in Redwood UI (LOV value)<br><br>Part Requirement Detail page in Redwood UI (display only) | Part Requirement Header<br><br>Debrief Header |

| Document Type | Tag | Predefined | Where does this document type appear? | Where's this document type stored? |
|---|---|---|---|---|
| | | | Manage Work Orders and Charges (display only)<br><br>Manage Charges and Estimates, Edit (display only)<br><br>Manage Charges and Estimates, Create (LOV value)<br><br>Work Order Charges Search page in Redwood UI (filter chip)<br><br>Work Order Charges Header page in Redwood UI (LOV value)<br><br>Work Order Charges details page in Redwood UI (display only) | |

# Manage Service Logistics Lookups and Lookup Codes

To manage the lookups for Service Logistics:

1. Under **Setup and Maintenance**, select the Manufacturing and Supply Chain Materials Management offering. Click **Service Logistics**, and then click **Manage Service Logistics Lookups**.
2. The lookups available for Service Logistics are displayed on the Manage Service Logistics Lookups page.
3. To edit a lookup, select **Edit** from Actions, or click the **Edit** icon or click on the lookup name.
4. The Standard Lookup Type region gives information on the meaning, description, the module the lookup is used by, whether it's extensible, and REST access secured.
5. The Lookup Codes region displays the lookup codes associated with the lookup. For existing lookup codes, you can edit the display sequence to specify the order in which the lookup codes are available for selection.
6. To add a lookup code, select **New** from Actions, or click the **Add** icon (**Plus** icon).
7. In the **Lookup Code** field, enter a value for the lookup code you want to add. This is a required field.
8. Optionally, in the **Display Sequence** field, enter a value to specify the sequence of how the lookup code will appear in the list of values.
9. The **Enabled** checkbox is selected by default.
10. In the **Start Date** field, enter a starting date for the use of this lookup code.
11. In the **End Date** field, enter the end date for the use of this lookup code.
12. In the **Meaning** field, enter a value for the lookup code that would be visible for selection in the list of values. This is a required field.
13. Optionally, in the **Description** field, enter a description for the lookup code.
14. Optionally, in the **Tag** field, enter a tag for the lookup code.
15. Click **Save and Close**.
16. Click **Done** to close the Manage Service Logistics Lookups page and return to the Service Logistics Tasks list.

# 10 Service Logistics Profile Options

## List of Service Logistics Profile Options

As a field service administrator, you can view and manage the profile options for Service Logistics, using the following profile options:

- ORA_RCL_CUSTOM_RULE_PROCESSING: To enable or disable custom rule processing when posting charges. Custom rule processing is disabled by default.
- ORA_RCL_DEF_COST_ORG: To specify that field service costs for parts, labor, and expenses are assigned to the inventory and maintenance organization of the field service technician who debriefed the transactions.
- ORA_RCL_DEF_DEPOT_SAC_OSP: To specify the default service activity used for outside processing items of depot repair order.
- ORA_RCL_DEF_SAC_ESTIMATE_TYPE: To specify the default item for the fixed charge line creation based on whether the estimate type is binding or not to exceed.
- ORA_RCL_DEPOT_REPAIR_REDWOOD_ENABLED: To enable the Redwood Depot Repair page.
- ORA_RCL_ESTIMATES_REDWOOD_ENABLED: To enable the Redwood Estimates page.
- ORA_RCL_FIELD_PARTS_INVENTORY_REDWOOD_ENABLED: To enable the Redwood Field Parts Inventory page.
- ORA_RCL_ITEM_STRUCTURE: To specify the Service BOM Item Structure Name.
- ORA_RCL_LANDING_PAGE_REDWOOD_ENABLED: To enable the Redwood landing page.
- ORA_RCL_PART_REQUIREMENTS_REDWOOD_ENABLED: To enable the Redwood Part Requirement page.
- ORA_RCL_WIP_ACCOUNTING: To enable the WIP checkbox on maintenance work order transactions.
- ORA_RCL_WORK_ORDER_CHARGES_REDWOOD_ENABLED: To enable the Redwood Work Order Charges page.
- RCL_DEF_DEPOT_SAC_ISSUE: To specify the default service activity used for parts issued to depot repair order.
- RCL_DEF_DEPOT_SAC_RECOVER: To specify the default service activity used for parts recovered from depot repair order.
- RCL_DEF_DESTINATION_ORGANIZATION: To specify the default destination organization where parts will be shipped when a part requirement is created for a work order and before a field service technician has been assigned to the work order.
- RCL_DEF_EMPLOYEE_NAME: To specify the default employee to be used as the preparer name and deliver-to name while creating a transfer order.
- RCL_DEF_FS_FALLBK_ASSET: To specify the fallback asset when an asset wasn't captured in the debrief header. The fallback asset is used by the Post Field Service Charges program to create the maintenance work order that updates inventory, installed base, and cost accounting.

  This profile is only for posting Field Service charges. It isn't relevant for Depot Repair.
- RCL_DEF_PARENT_RESOURCE: To specify the default parent resource name from Oracle Field Service which is used when downloading technicians, stocking locations, and inventory balances to Oracle Field Service.
- RCL_DEF_RETURN_ORGANIZATION: To specify the default return organization where the part returned by the customer is to be received, set the profile option Default Return Organization. The organization is selected by

default in the Create Return Line in the Service Request Parts Tab. This profile is used when no Return Routing Rule has been set up that covers the customer or inventory return.

- RCL_DEF_WORK_ORDER_AREA: To specify the default work order area displayed when the user launches the Service Logistics landing page.
- RCL_RETURN_ROUTING_ZONE_TYPE: To specify the zone type used by the Service Logistics Manage Return Routing Rules setup UI.

# Manage Service Logistics Profile Options

To view and manage profile options:

1. Click **Setup and Maintenance**, then under the Manufacturing and Supply Chain Materials Management offering, click **Service Logistics**, and then click **Manage Service Logistics Profile Options**.
2. The Manage Service Logistics Profile Options page lists the profile options used by the product. To view details of a profile option, click on the profile option name.
3. The Search Results: Profile Option region displays details of the profile option code, the profile display name, the application and its module that uses the profile option, the start and end dates, and the description of the profile option.
4. The Profile Values region displays the profile level set for the profile option. You can only edit a profile option to select a profile level for it.
5. To edit the profile level for a profile option, you can select **Edit** from Actions, or click the **Edit** icon.
6. In the **Profile Level** field, select from **Site** or **User**. This is a required value.
7. Optionally in the **Profile Value** field, select an organization from the list of values.
8. Click **Save and Close**.
9. Click **Done** to close the Manage Service Logistics Profile Options page and return to the Service Logistics Task list.

# 11 Service Logistics Parts Search Program

## Configure Parts Search

To use automatic and interactive parts sourcing, you must configure the parts search program parameters and the interactive Parts Search page.

**Configure the Parts Search Program and Parts Search Page**: Service Logistics provides two lookups that will let you configure how the parts search program is executed.

1. Go to the Service Logistics Lookups page and query:
    - `ORA_RCL_PART_SOURCING_CS`: Configure parts search for customer support (service request parts sales and parts exchange)
    - `ORA_RCL_PART_SOURCING_FS`: Configure parts search for field service
2. Use the following information to configure the lookups:
    - **Lookup Code**: Identifies the stocking location type or source type. Note that **Replenish** refers to inventory replenishment rules.
    - **Display Sequence**: Decides the sequence or order in which the search is executed
    - **Enabled** : Select which sourcing options will be used in automatic search and in the interactive Parts Search UI

Here's some other information about the various search or sourcing options work.

**Sourcing options available only for field service work orders:**

| Sourcing Option | Details |
|---|---|
| Technician | • Part is sourced from the technician's trunk stock subinventories that can supply the ship-to address zone (set up in the Manage Transit Times page).<br>• When you choose to source from a technician's trunk stock subinventory, no part order or reservation is created as the part is available with the field service technician. |
| Site Dedicated | • Part is sourced from the site-dedicated stocking locations (subinventories) associated with the customer ship-to address in the Service Logistics Manage Stocking Locations page.<br>• No parts order or reservation is created as the part is assumed to be available at or near the customer site. |
| Unmanned | • Part is sourced from unmanned warehouses that can supply to the ship-to address zone as set up in the Manage Transit Times page.<br>• No parts order or reservation is created as the field service technician needs to pick up the parts. It's required that you define a shipping method in the Manage Transit Times page but it's not used in this case. |
| Inventory Source | • Search program uses inventory replenishment rules to find stocking locations that can resupply a field stocking location which is usually the technician's trunk stock. The inventory sources can be defined for combinations of inventory organization, subinventory, and item. |

| Sourcing Option | Details |
| --- | --- |
| | • If you select this sourcing option, a transfer order is created without a shipping method or arrival date and time as inventory sourcing rules don't include shipping methods. |

**Sourcing options available for service requests and field service work orders:**

| Sourcing Option | Details |
| --- | --- |
| Manned | • Part is sourced from manned warehouses that can supply to the ship-to address zone (set up in the Manage Transit Times page). The search program calculates the Arrival date and time for each shipping method based on the transit times defined in the Manage Transit Time page and then filters out the ship methods that can't meet the need-by date.<br>• If you're sourcing for a work order, a transfer order is created to ship the parts to the technician subinventory. If you're sourcing for a service request, a sales order is created to ship the parts directly to the customer. |
| Global Order Promising | Select to use the GOP sourcing process. |

# 12 Related Oracle Cloud Products

## Overview

You must set up certain attributes in other Cloud applications so that Service Logistics users can order parts, create debriefs, and post charges.

Here's a list for your reference. The individual application setup is discussed in detail in the sections that follow.

| Cloud Application | Configuration | Page |
|---|---|---|
| Fusion Service | 1. Service Request Parts Orders<br>2. Service Request Work Order Parts Orders<br>3. Service Work Order Charges and Estimates<br>4. Assign Privileges | 1. Opt In: Service (Setup and Maintenance)<br>2. Opt In: Service (Setup and Maintenance)<br>3. Opt In: Service (Setup and Maintenance)<br>4. Security Console |
| Manufacturing and Supply Chain Materials Management | 1. Item Master Organizations<br>2. Inventory Organizations<br>3. Maintenance Organizations<br>4. Default Inventory Organization<br>5. Interorganization Parameters<br>6. Subinventories<br>7. Stocking Locations<br>8. Locators<br>9. Geographies<br>10. Zones<br>11. Internal Locations<br>12. Carriers<br>13. Transit Times<br>14. Inventory Replenishment Rules<br>15. Shipping Parameters | 1. Manage Inventory Organizations<br>2. Manage Inventory Organizations<br>3. Manage Inventory Organizations<br>4. Manage Service Logistics Profile Options<br>5. Manage Interorganization Parameters<br>6. Manage Subinventories<br>7. Manage Stocking Locations<br>8. Create Subinventories, Manage Items and Manage Inventory Organization Parameters<br>9. Manage Geographies<br>10. Manage Zone Types<br>11. Manage Locations, Manage Subinventories, Manage Inventory Organizations<br>12. Manage Carriers<br>13. Manage Transit Times<br>14. Manage Subinventories, Manage Item Subinventories, Manage Items, Manage Inventory Organizations<br>15. Manage Shipping Parameters |
| Product Master Data Management | 1. Service Items: Labor, Expense, and Parts<br>2. Unit of Measure<br>3. Item Configuration<br>4. Item Index Configuration | 1. Manage Items<br>2. Manage Units of Measure<br>3. Manage Items<br>4. Index Management |
| Maintenance Management | 1. Unit of Measure for Maintenance<br>2. Maintenance Organization<br>3. Maintenance Organization Parameters<br>4. Maintenance Organization Relationships<br>5. Resources<br>6. Work Areas<br>7. Work Centers | 1. Manage Units of Measure<br>2. Manage Organization Parameters<br>3. Manage Plant Parameters<br>4. Manage Maintenance Organization Relationships<br>5. Manage Maintenance Resources<br>6. Manage Maintenance Work Areas |

| Cloud Application | Configuration | Page |
|---|---|---|
| | 8. Maintenance Assets | 7. Manage Maintenance Work Centers<br>8. Manage Assets |
| Pricing Administration | 1. Unit of Measure for Pricing<br>2. Customer Pricing Profile<br>3. Pricing Segment<br>4. Pricing Strategy<br>5. Price Lists (Labor, Expense, and Part Items Pricing)<br>6. Pricing Strategy Assignments | 1. Manage Units of Measure<br>2. Manage Customer Pricing Profiles<br>3. Manage Pricing Segments<br>4. Manage Pricing Strategies<br>5. Manage Price Lists<br>6. Manage Pricing Strategy Assignments |
| Subscription Management | 1. Service Contract Adjustments<br>2. Assets Coverage | 1. Manage Standard Coverage<br>2. Subscription Coverage Level |
| Global Order Promising | 1. ATP Rules<br>2. Sourcing Rules | 1. Manage ATP Rules<br>2. Manage Sourcing Rules |
| Order Management | 1. Order Line Types<br>2. Orchestration Processes<br>3. Process Assignment Rules<br>4. Pretransformation Rules | 1. Manage Order Lookups<br>2. Manage Orchestration Process Definitions<br>3. Manage Orchestration Process Assignment Rules<br>4. Manage Pretransformation Defaulting Rules |

**Note:** The setups related to parts search are covered in Chapter 10.

# Fusion Service

Use Fusion Service to access Service Logistics pages to order parts for service requests and service work orders.

Fusion Service has the following integrations with Service Logistics.

- Parts tab on Service Request UI where users can start the sale, return, exchange, or repair of service parts.
- Parts region and tab on the Work Order UI where users can order parts for field service work orders.
- Button on Service Request Parts tab that opens the Depot Repair page.
- Button on the Work Order UI that opens the Debrief and Charges UI.

Review the following setups.

1. To open the Service Logistics UI from Fusion Service, you must opt in to the following:

    a. Sign in as a setup user and go to Setup and Maintenance.
    b. Select **Service** as functional area from the **Setup** drop-down list, and click **Change Feature Opt In**.
    c. Click the **Features** (pencil icon) for Service. Click the **Enable** icon (pencil icon) for **Service Logistics Parts Order**.

    Select **Service Request Parts Order, Service Request Work Order Parts Order,** and **Service Work Order Charges and Estimates**. Save and close.

2. To order parts in Fusion Service, you must have the Manage Part Orders SVC_MANAGE_PART_ORDERS_PRIV privilege or the Parts region will be read-only in both the Service Request and Work Order pages.
3. To see the **Charges** button on the Fusion Service Work Order UI, which opens the Manage Charges and Estimates page, you must have the Manage Work Order Debrief and Estimates SVC_MANAGE_WORK_ORDER_DEBRIEF_AND_ESTIMATES_PRIV privilege.
4. To see the **Post Charges** button on the Manage Charges and Estimates page, which you access from the Fusion Service Work Order page, you must have the Post Charges for Service Logistics SVC_POST_CHARGES_PRIV privilege or the Post Charges with Rule Check for Service Logistics SVC_POST_CHARGES_RULE_CHECK_PRIV privilege. Without one of these privileges, you'll only see the **Complete Debrief** button.

For more information about opting in to installed base assets, see the Implementing Fusion Service guide.

# Manufacturing and Supply Chain Materials Management

You must complete setups in Manufacturing and Supply Chain Materials Management, including organizations and subinventories for reverse logistics and your repair and parts supply chain.

The reverse logistics and parts supply chains include geographies, zones, locations, carriers, transit times, shipping networks and replenishment rules.

Use the following guidelines to set up your master organizations, inventory organizations, maintenance organizations, default inventory organization, interorganization parameters, subinventories, stocking locations, locators, geographies, zones, internal locations, carriers, transit times, inventory replenishment rules, and shipping parameters for reverse logistics and your repair and parts supply chain.

1. Item Master Organizations: Use the Manage Inventory Organizations page to set up master and reference organizations so that you can define part and product item numbers and attributes, such as UOM, weight and so on.
2. Inventory Organizations: Use the Manage Inventory Organizations page to create inventory organizations for the warehouses and stocking locations in your parts and reverse logistics supply chains. You'll typically set up an inventory organization for each physical stocking location including warehouses, storage lockers, field offices and returns warehouses and repair depots. You'll also need to set up inventory organizations for your field service technician trunk stocks locations, typically by region or district, for example, Los Angeles Tech Trunk Stock.
3. Maintenance Organizations: Use the Manage Inventory Organizations page to create maintenance organizations for each repair depot and for capturing field service costs. Select the Organization Performs Maintenance Activities checkbox. The field service cost organization is captured on the Manage Charges and Estimates page.
4. Default Inventory Organization Profile (INV_DEFAULT_ORG_ID): Use the Manage Service Logistics Profile Options page to define this profile, which defaults and filters the Item LOVs. You'll typically set this option to an item master organization but you can set it to other organizations to restrict a user's access to certain items.
5. Interorganization Parameters: Use the Manage Interorganization Parameters page to enable parts and products to be shipped between the inventory organizations in your parts and reverse logistics supply chains. You must set it up for any organization that will ship material to a parts supply chain organization and the organizations that will receive parts from the field service organization for return or repair.
6. Subinventories: Use the Manage Subinventories page to create subinventories for your parts and reverse logistics supply chain inventory organizations. These subinventories must also get set up in the Service Logistics Manage Stocking Locations page where they get classified as usable and defective, manned, unmanned, site-dedicated, or technician. You'll typically create at least one usable and one defective

subinventory in each inventory organization. You must also set up a usable and defective subinventory for each field technician trunk stock.

7. Intersubinventory Parameters: Use the Manage Intersubinventory Parameters page to create transfer orders from subinventories. You must define the organization, the destination type, the destination subinventory, the source subinventory, and the inventory destination transfer type. For the inventory destination transfer type, use the direct type if you want the transfer order to be automatically received into the field technician subinventory or use the transit inventory destination transfer type if want the technician to receive the transfer order and complete the debrief process.
8. Stocking Locations: Use the Manage Stocking Locations page to add stocking locations (subinventories) to the parts supply chain by assigning the stocking location type (technician, site-dedicated, manned, and unmanned) and condition (usable or defective) to the parts and reverse logistics supply chains.
9. Locators: Use the Create Subinventories, Manage Items and Manage Inventory Organization Parameters pages to set up locators for items and subinventories if a stocking location requires locator-level inventory tracking. Service Logistics supports locator-level inventory tracking and transactions including parts debrief, transfers and returns.
10. Geographies: Use the Manage Geographies page to set up geographies to define your shipping and returns zones. Complete the following steps:

    a. After defining the geography hierarchy, specify the geography validations for the country. The geography hierarchy is your geography master, typically bought from a third party provider. You must set up geography validation for those geography elements that you plan to use. For example, if you've set up zones by state, make sure that geography validation is set up for the State geography type.
    b. After you set up all the components of your geographies (geography structure, geography hierarchy, and geography validation), run the Validate Geographies of Addresses Against Master Geographies ESS job with the values:

        - Location Table Name = HZ_LOCATIONS
        - Run Type = ALL
        - Usage Code = GEOGRAPHY

        This ESS job creates a mapping between the addresses and the geography hierarchy or master. This mapping is used by the parts search program to find the geographies and hence the zones, where the ship-to address resides.
11. Zones: Use the Manage Shipping Zones page to set up zones for parts sourcing transit times and for return routing rules. Parts search, parts sourcing and return routing use the customer address to identify the zone.
12. Internal Locations: Use the Manage Locations page to create internal locations. You must set up internal locations and assign them to all the stocking locations (inventory organizations and subinventories) in your parts and reverse logistics supply chains. Internal locations are used when you're shipping and returning parts to a stocking location and when you're calculating arrival times while sourcing parts. Use the Manage Subinventories page to assign internal locations to subinventories. Use the Manage Inventory Organizations page to assign internal locations to inventory organizations.
13. Carriers: Use the Manage Carriers page to create carriers and their ship methods and then assign the ship methods to source inventory organizations for use.
14. Transit Times: Use the Manage Transit Times page to set up transit times by mapping origin internal locations to destination zones along with the available ship methods and their transit times (days).

    The parts search program looks for parts at internal locations mapped to the ship-to address destination zones. Internal locations are internal addresses (HR_Location) assigned to inventory stocking locations

(inventory organizations or subinventories). You must define which zones each of your manned, unmanned, and technician stocking location can supply.

> **Note:** The Manage Transit Times page supports many other types of origins and destinations that aren't available in the parts search program.

For each source or origin location that can supply a destination zone, you must also set up at least one shipping method in the Shipping Methods section of the Manage Transit Times page. Transit times can be defined as a fraction of a day for shipping methods like courier and pickup that are time-based (less than a day).

15. Inventory Replenishment Rules: Use the Manage Subinventories page, Manage Item Subinventories page, Manage Items page, Manage Inventory Organizations page to set up inventory replenishment rules. In the Parts Search window, when you select the **Inventory Source** option, you're selecting the rules that identify the source inventory for your parts search. Inventory replenishment rules are used in automatic parts search. Inventory replenishment rules are also used to create transfer orders for field service parts when the required items are unavailable (backorders).
16. Shipping Parameters: Use the Manage Shipping Parameters page to decide whether a default shipping method is required to create a transfer order by selecting the **Enforce Shipping Method** checkbox. Shipping methods are defined when transit times are defined. We recommend that you don't select the **Enforce Shipping Method** checkbox. If you select it, you must set up transit times between all your source and destination organizations to successfully create transfer orders.

For details on how to set up these attributes, see the Implementing Manufacturing and Supply Chain Materials Management guide.

# Product Master Data Management

You must complete setups in Product Master Data Management for the items that you use for parts ordering and exchange, debrief, depot repair, and maintenance.

> **Note:** You must properly configure substitute and supersession relationships between items in the Manage Item Relationships page of Product Information Management. This affects how the parts search program looks for substitutes and supersession parts when the original part isn't available. Specifically, when you select the **Alternates** checkbox in the Parts Search page.

1. Create all the service items: labor, parts, expense, and fixed charges.

   > **Note:**
   > - You must set up serviceable products/item numbers (products for which you can create an SR) in both the SCM item master and the CRM catalog.
   > - Service Logistics doesn't support creating sales orders for items with the Subscription product type.

2. Define the unit of measure (UOM) for the items that you create:
   - Labor Items
     - **UOM Class**: Must set up with **UOM** from the **Time UOM Class**.
     - **UOM Name**: **Hours** or **Minutes** (only need to set up the **Primary UOM** as it's the only one used by Service Logistics).

        - Set up the **Hours UOM** profile (**ORA_RCS_HOUR_UOM**) for your labor items. You must use this value in the next step, where you define the conversion between this value and the labor item's primary UOM.
        - **UOM Conversion**: Set up **Primary UOM** to **Hours UOM** (**Hours UOM profile**), for example, 60 Minutes = 1 Hour or 1 Hour = 1 Hour.
    - Expense Items
        - **UOM Class**: You must set up with UOMs from the **Currency UOM Class**.
        - **UOM Name**: You must set up expense items with UOMs for every currency that the field service technicians might report their expenses, for example **USD**, **CAD**, **EUR**.
        - **UOM Conversion**: Not needed
    - Part Items
        - **UOM Class**: You must set this up with a UOM from the **Quantity UOM Class**.
        - **UOM Name**: Examples include **Each**, **Meters**, **Gallons**.
        - **UOM Conversion**: If required
    - Fixed Charge Items
        - **UOM Class**: Any
        - **UOM Name**: You should set up fixed charges with **UOM Each** or with a **Currency UOM**.
        - **UOM Conversion**: Not applicable

3. Configure item attributes for specific business needs according to the following details:

**Item configuration for parts ordering:** Use this list to assign item attributes to all the service items and consumables used for part requirement.

- Items used in SR Parts Tab: Return SAC
    a. **Stock enabled**: **Yes**
    b. **Transactions enabled**: **Yes**
    c. **Returnable**: **Yes**
    d. **Item Organization**: **Default Inventory Org Profile (INV_DEFAULT_ORG_ID)**
    e. **Material billable**: **M**
- Items used in SR Parts Tab: Shipment SAC
    a. **Stock enabled**: **Yes**
    b. **Transactions enabled**: **Yes**
    c. **Customer Orderable**: **Yes**
    d. **Item Organization**: **Default Inventory Org Profile (INV_DEFAULT_ORG_ID)**
    e. **Material billable**: **M**

- Items used in Work Order Parts Region or Tab
    a. **Stock enabled**: **Yes**
    b. **Transactions enabled**: **Yes**
    c. **Internal Orderable**: **Yes**
    d. **Item Organization** must match the **Destination Org**, or it must match the **Default Inventory Org Profile (INV_DEFAULT_ORG_ID)**.
    e. **Material billable**: **M**
    f. Define how a part is sourced with the **Part Sourcing** LOV.
        - **Buy Only**: Part isn't stocked and is only purchased when it's needed for a work order. In this case a purchase requisition is automatically created and the part is shipped directly to the customer site or field technician.
        - **Inventory then Buy**: Part is purchased when it's out of stock and needed for a work order.
        - **Inventory Only**: Part is sourced from inventory. If an **Inventory Only** item is out of stock, a transfer order is created as a back order.
        - **Null**: Works the same as **Inventory Only**.

**Item Configuration for Debrief and Charge Items**: Items must have the following attributes for use in debrief.

- Part Items
    a. Map the item billing type to the billing category of **Material**.
    b. You must assign the item to the same organization as the selected subinventory.
    c. For project enabled organizations, you must enable the **Allow Use of Common Supply** attribute for the item.

    This provides the option to issue the item from the common inventory when you create a debrief transaction for the part, rather than the project-specific inventory.
- Labor Items
    a. Map the item to the service activity code to the billing category of **Labor.**
    b. Associate the item to the inventory organization from the technician's default subinventory.
- Expense Items
    a. Map the item to the service activity code to the billing category of **Expense**.
    b. Associate the item to the inventory organization from the technician's default subinventory.
- Fixed Charge Items
    a. **Stock enabled**: **No**
    b. **Transaction enabled**: **No**
    c. **Reservable**: **No**
    d. **Inventory Item**: **No**
    e. **Shippable**: **No**
    f. **Customer Ordered**: **Yes**
    g. **Customer Orders Enabled**: **Yes**
    h. **Invoiced**: **Yes**
    i. **Invoice Enabled**: **Yes**
    j. **Billing Type**: User-defined billing type that you associate with the Service Logistics **Fixed Charge** billing category.

**Asset item configuration for maintenance work orders**: Create maintenance work orders to perform depot repair. Also create maintenance work orders when you post field service charges. You must have an asset to create these maintenance work orders.

- Field service: While you can add the asset to the service request or service work order, you must capture the asset on the debrief header.
- Depot repair: While you can add the asset in the service request and Add Part Requirements pages, you must capture the asset when you create the repair work order (Maintenance Work Order).

The items associated with these assets must have the following:

- Select the following two parameters for the item in the Asset region in the Specifications tab:
    a. **Enable Asset Tracking**: **Full Lifecycle**
    b. **Enable Asset Maintenance**: **Yes**
- Configure the attribute for serial number generation:
    - **Generation**: **Dynamic entry at inventory receipt**

**Item configuration for Service BOM filter**: When you create part requirements for service requests and service work orders (Fusion Service), you can filter the **Item** list of values (LOV) with only the valid parts for the product that you're servicing (SR Product Item). Specifically, this setup enables the BOM filter on the **Item** LOV in the Fusion Service Parts pages. To use this filter, you first must set up an item structure to use as the Service BOM to define the valid parts. To do this:

1. First create the item structure name or type in the Manage Item Structure Type Details page. To access this page, click **Setup and Maintenance**, then in the **Product Management** offering, select **Structures**, and then select **Manage Item Structure Type Details**.
2. After you create the **Item Structure** name, go to Service Logistics, then go to the Manage Service Logistics Profile Options page. Click the profile option **ORA_RCL_ITEM_STRUCTURE** and add the item structure name.
3. In Product Information Cloud, go to the Manage Items page and query the item for which you want to create an item structure.
4. Click the item to go to the Edit Item page.
5. Click the **Structures** tab.
6. Click the **Actions** drop-down list and then click **Create**.
7. See the Create New Item Structure page. Here you select the item structure name that you created for Service Logistics and add the required information.
8. Define your service BOM for this item by adding the applicable items to the item structure.

**Item relationship configuration for alternate parts**: When you search for alternate parts in the Part Search page, the parts search program uses the superseded and substitute relationships that you define in the Manage Item Relationships page.

To access, click **Product Information Management**, then in **Item Management** select **Manage Items**. The Advanced Search page appears where you can query an item and open the Edit Item page.

1. Select the **Relationships** tab.
2. Select the **Create** icon in the **Related Items** tab.
3. In the **Create Related Item Relationship** page, select an item to use as the superseded or substitute part in the **To Item** field.
4. Select **Superseded** or **Substitute** in the **Type** list of values.
5. Select the **Reciprocal** checkbox if the item relationship is reciprocal.
6. Click **OK** to return to the Edit Items page.
7. Confirm that the item appears in the **Related Items** table.

8. **Save**.

For more information, see the Implementing Product Management guide.

**Enable the Item Index to Search for Items by Description or Item Number**: To enable searches for items based on an item description or item number in the Service Logistics Redwood UIs, you must enable the item index for Service Logistics.

To enable the index item search:

1. Navigate to Product Management. Click **Product Management** to open the Product Management page and click the **Indexes** link.
2. On the Index Management page, open the **Item** card.
3. On the **Item** page, select **Enable attribute sets** from the action drop-down list. This opens the Enable attribute sets drawer.
4. Enable the Service Logistics application and click **Apply**.
5. On the Item page, select **Rebuild** from the action drop-down list. The rebuild process starts. A schedule process ID will be provided.

> **Note:** You'll also need to set up your item classes and the data security for item classes. See the following topics in the Implementing Product Management guide:
> - Item Classes
> - Set Up Data Security for Item Classes
>
> For more information about the Product Management search, see the Overview of Product Management Search topic in the Implementing Product Management guide.

*Related Topics*

- Manage Item Relationships
- Item Classes
- Set Up Data Security for Item Classes
- Overview of Product Management Search

# Maintenance Management

Service Logistics and Maintenance have three integrations, one for field service and two for depot repair.

- **Field Service**: When you post Field Service charges, you create a maintenance work order (MWO) to update Inventory, Asset Tracking, and Costing (or you update the MWO in the Preventive Maintenance flow).
- **Depot Repair**: Service Logistics and Maintenance have a couple of integrations in the Depot Repair process. MWOs used to process the repair are created in the Service Logistics Manage Depot Repair page. Service charges are created from these MWOs in the Charges tab of the Depot Repair page.

**Field Service**

The following setups are required to create the MWOs when you post field service charges. These setups are organized by the order these fields appear on the Manage Charges and Estimates page.

### *Field Service Setups*

| Field | Setup Steps |
|---|---|
| **Asset** | This is a required field on the Debrief and Charges headers. You must select the **Allow Work Orders** checkbox and the **Maintenance Asset** checkbox in the Manage Assets page to enter an asset.<br><br>Also, the asset's operating organization must be the same as the cost organization or you must relate it to the cost organization on the Debrief and Charges header. You can do this in the Maintenance Organization Relationships page.<br><br>Although the asset isn't required for the UI or API, it's required to create the MWO. As such, you can identify an asset in the Fallback Asset profile that's to be used to create the MWO. This fallback asset has the same setup requirements as a selected or debriefed asset. |
| **Asset Item** | In order for the item on the asset to be valid for the cost organization, you must define the following in the Manage Items page:<br>• Allow Maintenance Asset: **Yes**<br>• Enable Asset Tracking: **Full Lifecycle Tracking** |
| **Cost Organization** | The organization that's used to create the MWO is included on the Manage Charges and Estimates page and API, it defaults from the asset or from the technician's default subinventory based on the Default Debrief Cost Organization profile (ORA_RCL_DEF_COST_ORG).<br><br>This organization must be maintenance-enabled, which you can do by selecting the **Organization Performs Maintenance Activities** checkbox in Manage Inventory Organizations page. It also needs to be the same as the asset's operating organization or related to it in the Manage Maintenance Organization Relationships page.<br><br>You must also set up the following Plant parameters for the cost organizations in the Manage Plant Parameters page:<br><br>• **Manufacturing Calendar**<br>• **Default Supply Subinventory**<br>• **Default Completion Subinventory** |
| **Cost Subtype** | This is a required field that defaults from the asset that you select. The work order subtypes are set up in the Maintenance Lookup ORA_MNT_WO_SUB_TYPE. |
| **Work Area** | You must create one work area for each cost organization in the Manage Maintenance Work Areas page. |
| **Work Center** | Create only one work center for the cost organization and associate it to the work area in the Manage Maintenance Work Centers page. |
| **Debrief Items** | See the Product Master Data Management section.<br><br>For each cost organization, you must map your labor and expense items to the MWO resources in the Manage Resource to Item Mapping page. These resources are used to create the MWO resource transactions to record these costs. You must also set up labor items with a primary UOM. |
| **Resources** | Set up resources for the labor and expense items that you'll use to debrief your field service activities. You must:<br>• Set up labor items and labor resources and map them, **Item** to **Resource**. |

| Field | Setup Steps |
|---|---|
| | • Set up an expense item and an expense resource for every currency/UOM that might be debriefed in Field Service, as we can't use UOM conversion for currencies.<br>• Set up expense items and expense resources for expenses not debriefed in a currency, such as each. You must set up UOM conversion if the debrief/item UOM can differ from the resource UOM.<br>• Confirm that items, resources, and the resource item mapping are set up for all cost organizations that can be entered on the Debrief UI.<br>**Note:** A debrief item (item technician debriefs) should only be mapped to one resource for each organization, otherwise the Post Costs program won't know which resource to use when it creates the MWO resource transactions. |
| **Service Activity Codes (SACs)** | In the Manage Service Activities page, you must map the Field Service Labor and Expenses SACs to the resource activities that will be used to create the MWO resource transactions. You set up resource activities in the ORA_WIS_RESOURCE_ACTIVITY lookup table. |

## Depot Repair

The following setups are required to create service charges for the parts, labor and expenses incurred to repair the product in the repair depot MWO and to create MWOs to execute depot repair for a customer RMA.

### *Depot Repair Setups*

| Fields | Setup Steps |
|---|---|
| **Resources** | You must map the resources used to create labor and expense transactions in the Depot Repair MWO pages to items so that you can create service charges. You can create service charges by selecting the **Create Charges** button in the Depot Repair page. You must create these mappings for each repair organization in the Manage Resource to Item Mapping page.<br>You must confirm that the resource UOMs are the same, or can be converted to the item's primary UOM.<br>**Note:**<br>Resources used to debrief work done on the Depot Repair MWO should only be mapped to one item (for each maintenance work order/cost organization), otherwise the Create Charges Program won't know which one to use. |
| **Resource Activities** | You must map the resource activities used to create labor and expense transactions in the MWO pages to the Service Activity Codes, so you can create service charges. You can create service charges by selecting the **Create Charges** button in the Depot Repair page. You can create these mappings in the Manage Service Activities page.<br>Set up the resource activities in the ORA_WIS_RESOURCE_ACTIVITY lookup table. |
| **Asset** | You must select an asset to create a depot repair MWO in the Create Repair Order page. This asset must have the following checkboxes selected in the Manage Assets page:<br>• **Allow Work Orders** |

| Fields | Setup Steps |
|---|---|
| | • **Maintenance Asset**<br><br>Also, the asset's operating organization must be the same or related to the repair maintenance work order organization in the Maintenance Organization Relationships page. |
| **Asset Item** | In order for the item on the asset to be valid for the MWO and cost organization, you must define the following in the Manage Items page:<br>• Allow Maintenance Asset: **Yes**<br>• Enable Asset Tracking: **Full Lifecycle Tracking** |
| **Debrief Items** | See Resources item mentioned before in the table.<br><br>See the Product Master Data Management section |

# Pricing Administration

Service Logistics uses Pricing when calculating service charges for parts orders and field service and depot repair debrief transactions. Required attributes for Pricing include the following:

1. Unit of Measure for Pricing: You must set up the predefined profile (Hour: Unit of Measure, UOM Code: User-defined, for example, HR), so that Service Logistics can calculate labor time in the labor item's Primary UOM.
2. Customer Pricing Profiles: Assign pricing profiles to customer parties in the Manage Customer Pricing Profiles page.
3. Pricing Segment: Define pricing segments in the Manage Pricing Segments page. Include conditions that match the customer profiles.
4. Pricing Strategy: Create a pricing strategy in the Manage Pricing Strategies page. Here you select the default currency and the conversion type. You also assign the Price Lists and Currency Conversion Lists to your pricing strategy.
5. Price Lists (Labor, Expense, and Parts Items Pricing): Create price lists (Manage Price Lists page) to set the price of the ordered or returned part. Use the following information:
    - Select the currency in the header region of the price list
    - Price List Type: **Segment Price List**
    - Price List Lines:
        - Select the item, the UOM, and the line type. The item validates against the business unit's item validation organization, which is set up in the Manage Pricing Parameters page.
        - Note that the price of all items used in Service Logistics must be set up in Line Type **Buy**.
        - For parts and fixed charge items: Create a price list line for every UOM that you can debrief. Note that you must set up the prices for every debrief UOM but not every billing currency.
        - For expense items: Create a price list for every debrief UOM or currency (payment currency). Expense items use the **UOM** currency type. On the Expense tab, it's **Currency**. On the Charges tab and in Price List pages, it's **UOM**. In the price list, create one price list line for each expense item with pricing UOM: currency of the price list. Price will usually be 1 unit of the Price List Currency (for example, $1).

        - For labor items: Create a price line for the labor item's primary UOM.
    - Charge Lines:
        - For each price line, there can be multiple charge lines.
        - Base Price (Expense price) should always be **1**.
        - Allow manual adjustments.
6. Pricing Strategy Assignments: Assign Pricing Strategy to Customer Pricing Segments in the Manage Pricing Strategy Assignments page. Note:
    - Use Header (Assignment Level) + Sales (Pricing Context) + Service Order (Transaction Type) as your Pricing Strategy Assignment Rule
    - Remember that Pricing Segment + Conditions = Pricing Strategy

**Extending the Pricing Component Description**

Use the service mapping functionality in Pricing to include extra pricing information such as the subscription number in the pricing components description. In Service Logistics, pricing components appear in the Amount dialog box. You can open this from the part requirements table, Manage Charges and Estimates page, and the Depot Repair page. To add the subscription number to the pricing components, do the following steps:

1. Open Pricing Administration.
2. In the Tasks panel, choose **Manage Service Mappings**.
3. Click **Sales** as Service Logistics uses the sales context.
4. Add subscription number to the **PricingTerm** entity. To do this, select the entity, and then click on the **Add(+)** button. In the PricingTerm:Details window, add the attribute **SubscriptionNo_Custom**.
5. Then, click **Services** and add this attribute to the service **priceSalesTransaction** and entity **PricingTerm**.
6. Define sources for the attribute. To do this, click **Sources**. Define the following Service Logistics sources: **ServiceOrderLine**, **View Object PricingTerm** and **SubscriptionNumber**.
7. Use the custom attribute **SubscriptionNumber_Custom** in the algorithm (service) **PriceSalesTransaction** (for the Populate Charge Component Explanation algorithm).

For more information, see the Administering Pricing guide.

# Subscription Management

To provide discounts to customers, you must set them up in Subscription Management. These discounts are applied during the calculation of service charges and affect the final prices for invoicing. Here's how:

- The Calculate Service charges program in Service Logistics retrieves all applicable adjustments for the customer and asset from Subscription Management. When pricing parts sales and exchanges, the customer and asset from the associated SR are used to get the adjustments. When pricing field service and depot repair charges, the customer and asset from the debrief header or line are used to get the adjustment.
- The discount pricing terms returned for all active contracts are then passed to the Pricing web service.

  Service Logistics charges calculation supports the following subscription coverage levels:
    - Customer Account
    - Asset
    - Party
    - Party Site

- Product

The following subscription coverage levels aren't supported:

- Asset Group
- Product Group
- Custom

- Pricing then returns all prices and charges after including the contract discounts. This discounted price is then visible in the Manage Charges and Estimates page in Service Logistics. If more than one adjustment applies to the service charge, they'll all be applied to the list price to get the final charge amount.

How to set it up?

1. Create Standard Coverage templates: You can create multiple standard coverage templates for the different service levels that you want to provide to a customer. This is set up in the Manage Standard Coverage page of the Entitlements Management section in the Subscription Configuration work area. For information, see the chapter Configure Subscriptions in the Implementing Oracle Subscription guide.

   > **Note:** In the Coverages pages, you must define at least one subscription entitlement rule for the coverage definition used in your subscription setup. Otherwise, the subscription won't be found when charges are calculated.

2. Add adjustments: Edit the standard coverage template that you've created. Go to **Adjustments**. Here you'll set up the entitlements available for the customer for the different service activities and billing types, such as labor, expense, and parts. Select **Discount** as your **Adjustment Type**.
3. Create a subscription for your customer.
4. Add a coverage product to the subscription.
5. Assign the standard coverage that you've created to the coverage product.
6. Add both parent and component assets to the Subscription coverage.

> **Note:** Include coverage for all assets: When service charges are calculated, Service Logistics uses the asset in the debrief header or in the part requirement to get the applicable subscription coverage adjustments (discounts). These assets must be listed in the Subscription Coverage Level page.

# Global Order Promising

Service Logistics parts search offers Global Order Promising (GOP) as one its parts search options. However, we recommend using the other parts search features, as GOP isn't a great fit for service parts sourcing.

You must complete the following setups for Global Order Promising:

1. ATP Rules to configure various parameters including select supply and demand types. ATP Rules must be assigned to item, organization, or item organization.
2. Sourcing Rules: Define Sourcing Rules to set up source, sourcing type, and other attributes. You must:
   a. Create Local Sourcing Rule for Transfer Order (Work Order Parts Order)
   b. Create Global Sourcing Rule for Sales Order (SR Parts Order)
   c. Assigning Sourcing Rules to Assignment Sets

For more information, see the Using Order Promising guide.

The Global Order Promising setup also depends on the following parameters being defined:

- Shipping method.
- Transit time from source to destination.
- Carriers.

For information, see the Implementing Common Features for Supply Chain Management guide.

# Order Management

Service Logistics integrates with Order Management to ship and return products and parts, and bill for field service and depot repair.

What do you need to set up in Order Management for sales order fulfillment in Service Logistics?

- **Order Types**: (Optional) Set up order types and add them to your service activity codes (SACs) so that when you create your sales order headers they'll have an order type.
- **Order Line Types**: Use order line types to control the processing and accounting of sales order lines. Order line types typically drive the assignment of DOO orchestration processes to sales order lines. The order line types that are mapped to the Service Logistics SACs in the Service Logistics Setup page appear on the sales orders lines created by Service Logistics. Sales order headers are created with the order type associated with the SAC that's used to create the first sales order line. You can use predefined order line types but we recommend that you create original ones for Service Logistics flows.

  a. Predefined order line types:

     - Buy (ORA_BUY)
     - Return for credit and return the item (ORA_RETURN)
     - Return for credit (ORA_CREDIT_ONLY)
     - Cancel the item (ORA_CANCEL)

  b. Order line types are stored in the following Order Management lookups:

     - For shipment lines: ORA_DOO_LINE_TYPES
     - For return lines: ORA_DOO_RETURN_LINE_TYPES

- **Customer Relationship Parameters**: Set the **Customer Relationship Type** to All customers in the Manage Order Management Parameters page. All customers tells Order Management to not enforce customer relationships when selecting bill-to and ship-to customers.
- **Orchestration Processes**: Order Management uses DOO orchestration processes to run sales orders lines for shipments, returns, and billing. You can reuse predefined OM orchestration processes, but usually, you must define custom orchestration processes. Perform these setups in the Manage Orchestration Process Definitions page. You can copy the following predefined orchestration processes to help you create custom orchestration processes:

  - DOO_OrderFulfillmentGenericProcess
  - DOO_BillOnlyGenericProcess
  - ReturnOrderGenericProcess
  - ShipOrderGenericProcess

To enable a custom orchestration process, you must release it and deploy it using the Action Menu on the Edit Orchestration Process Definition page.

- **Process Assignment Rules**: Use process assignment rules to assign the correct orchestration process to the sales order line. You must define them so that no sales order line satisfies more than one rule at a given time. They're typically based on the Order Line Type but you can include other criteria.
- **Pretransformation Rules**: Pretransformation rules run when you create an order. You can use them to add required and optional data to the sales order.
- **Collect Planning Data**: You must run the Collect Planning Data program for every inventory organization that you'll be using to create sales order shipment and return lines. If you don't, you'll get an error message when you try to create a sales order for part requirements.

  > **Note:** You must run the collections process when you create a new inventory organization.

  - **Enable the Organizations for Source Systems**
    i. From the Navigator, select **Manage Planning Source Systems** from the Tasks list.
    ii. Select the relevant source system row in the Source Systems work area.
    iii. Click the **Manage Organization List** button.
    iv. In the Manage Organization List window, click the **Refresh Organization List** button.
    v. Search for the organization using the search filters.
    vi. Select the **Enable for Collections** checkbox for the organization you want to enable.
    vii. Click **Save and Close**.
  - **Run the Collect Planning Data Process**
    i. From the Navigator, select **Collect Planning Data** from the Tasks list.
    ii. Select a source system in the **Source System** field.
    iii. In the Reference Data tab, select **Organizations** in the **Reference Entities** column.
    iv. Click the right-arrow button to move the value to the **Selected Entities** column.
    v. Select the **Supply Planning Data** tab.
    vi. Select **On Hand** in the **Supply Entities** column.
    vii. Click the right-arrow button to move the values to the **Selected Entities** column.
    viii. Click the **Select Collection Filters** button.
    ix. In the Select Collection Filters window, click the **Plus** icon for the **Organizations Filter for Transaction Data** field. The Select Organizations Filter for Transaction Data window appears.
    x. Select the **Include** checkbox for the organization you want to include.
    xi. Click **OK**.
    xii. In the Select Collection Filters window, click **OK** to return to the Collection Planning Data window.
    xiii. Verify that the value in the Collection Type drop-down list is **Net change**.
    xiv. Click **Submit**.

- **Parts Only Sales Order Setup**: You can create sales orders for parts sales, returns, and exchanges in the Service Request Parts tab, or in the Create or Manage Part Requirements page using service activity codes tied to the Customer Support or Parts Exchange business processes.

    a. Order Line Types: Set up order line types (or use predefined order line types) and assign them to each of your Customer Support and Parts Exchange SACs. Some predefined order line types that you might want to use include Buy and Return for credit and return the item.
    b. Orchestration Processes: Identify the DOO orchestration process for each of your business flows (Service Activities). You can use a predefined orchestration process but usually, you must create a new one.

    For Parts Sales and Exchange Shipments, we recommend that you copy the predefined process ShipOrderGenericProcess and add the Asset Management step (Task, DOO_AssetManagement) after the shipment step. This ensures that you update the installed base/asset tracking when you ship the parts. You should also remove the schedule step as Service Logistics sources the required parts before creating the order.

    For Parts Returns, we recommend you copy the predefined ReturnOrderGenericProces and add the Asset Management step (Task, DOO_AssetManagement) after the receiving step. This ensures the updating of the installed base/asset tracking when receiving the broken part into inventory.
    c. Process Assignment Rule: Define Process assignment rules to trigger the proper orchestration process for the sales order lines created from Service Logistics. You typically set up a rule to assign an orchestration process for each of your order line types. You can add other conditions besides the order line type if needed.
    d. Pretransformation Rules: Set up a pretransformation defaulting rule to get the payment terms for a sales order. For information, see chapter Business Rules in the Implementing Order Management guide. You must set up a pretransformation rule if you don't define payment terms on your customer accounts.

- **Bill Only Sales Order Setup**: You must set up bill only sales orders to create invoices for Field Service and Depot Repair.

    a. Order Line Types: Create a new order line type (for example, Bill Only) as there's no predefined order line type to drive the processing of bill only sales order lines. Assign this new order line type to your Field Service and Depot Repair SACs.
    b. Orchestration Processes: You can create a custom DOO process or use the predefined DOO_BillOnlyGenericProcess process that meets most requirements.
    c. Process Assignment Rule: Create a new process assignment rule to assign your bill only process to your sales orders lines that contain your bill only order line type.
    d. Pretransformation Rules: Set up the pretransformation defaulting rule to get the payment terms for the bill only sales order for debrief. You must set up a pretransformation rule if you don't define payment terms on your customer accounts.

- **Depot Repair Shipment Sales Order Setup**: Create sales orders to ship repaired (or replacement) parts back to customers. The depot repair shipment process is different from parts only shipments because the part to be shipped doesn't exist in inventory when creating the shipment sales order line.

    a. Order Line Types: Create a new order line type (for example, DR Shipment) for depot repair shipment order lines. Assign this new order line type to the service activity codes you set up for depot repair shipments (Depot Repair Logistics business process) in Service Logistics.
    b. Orchestration Processes: Create a custom orchestration process by copying the predefined process ShipOrderGenericProcess. Add the Asset Management step and remove the Schedule and Create Reservation steps. You must add the Asset Management step to update the installed base when shipping the repaired part back to the customer. You must remove the Schedule and Create Reservation steps so that Order Management doesn't try to source and reserve the repaired product when creating the order.

c. In addition to adding and removing orchestration steps from your custom process, you must add and remove order line and order fulfillment line statuses. You define statuses for your orchestration process on the Status Conditions tab where there are two subtabs that you must update (Orchestration Line Statuses and Fulfillment Line Statuses).

   - **Orchestration Line Statuses tab**: Add the statuses Asset Interface Completed and Not Applicable to support the Asset Management step. To do this, you must create a new Process Class with these new statuses and assign it to your custom orchestration process. This clears out all the statuses copied from the predefined process. Then you must manually re-enter them, except for the statuses that you no longer need because you've removed their steps from the custom process (Scheduled, Reserved, Manual Scheduling Required, and Manual Reservation). Remember to add the new statuses.
   - **Fulfillment Line Statuses tab**: You also must add and remove statuses on the Fulfillment Line Statuses tab. This is easier as this page provides copy functionality so you don't have to re-enter all the statuses from the predefined process.

d. Process Assignment Rule: Define assignment rules to trigger the proper orchestration process for the sales order lines created from Service Logistics. You typically set up a rule to assign an orchestration process for each of your order line types. You can add other conditions besides the order line type if needed.

- **Use Order Management Extensions to Populate Service Logistics Data to Sales Orders**: Use Order Management extensions to pull standard and flexfield data from the Service Logistics tables into Order Management. You can do this by writing a Groovy script in Order Management extensions using the Service Logistics public view objects.

  The following public view objects also include support for flexfields:
  - oracle.apps.scm.serviceLogistics.parts.publicView.PartsReqHeadersPVO
  - oracle.apps.scm.serviceLogistics.parts.publicView.PartsReqLinesPVO
  - oracle.apps.scm.serviceLogistics.parts.publicView.PartsReqLineDetailsPVO
  - oracle.apps.scm.serviceLogistics.billing.publicView.DebriefHeadersPVO
  - oracle.apps.scm.serviceLogistics.billing.publicView.DebriefLinesPVO

**Note:**

- For information on defining and assigning orchestration processes, see the Implementing Order Management guide.
- For order fulfillment the bill-to-address and bill-to-account for customers must also be set up properly in TCA.

# 13 Depot Repair

## What Do I Need to Set Up for Depot Repair?

To use the depot repair functionality in Service Logistics Cloud, you must ensure that your systems administrator has set up the following:

1. Set up an Inventory Organization for each repair depot. Depot repair organizations must be separate from the inventory organizations used to maintain internal assets. The inventory organization must also be enabled for maintenance activities.
2. Set up service activity codes (SAC) for depot repair using the following predefined business processes:
    - Depot Repair: Set up service activities for the labor and parts used during repair execution in Maintenance Cloud.
    - Depot Repair Logistics: Set up service activities to manage the depot repair return and shipment, that's when the customer asset is returned to the warehouse for repair and the repaired item is shipped back to the customer. Depot Repair Logistics SACs should be set up with a Zero Charge attribute as these lines are for the return and shipment of a customer-owned product or part.

    **Note:** See the Order Management section in Chapter 10 to set up a depot repair shipment sales order.
3. Add resource activities to your depot repair service activity codes. Service Logistics uses the resource activity captured in the work order resource transaction (for example, Depot Repair) to retrieve the required service activity code (for example, Depot_Labor_SAC). If you don't set up resource activities for depot repair, the labor service activity code is retrieved by default. In addition, no service charges will be created for nonlabor work order resource transactions.
4. Set up Service Logistics profile options to define values for:
    - the default service activity for parts issued to the depot repair order
    - default service activity for parts recovered

    These values are used when creating Service Logistics debrief and charges transactions after the technicians have created the debrief for the repair order in Maintenance Cloud.
5. Ensure that Return Routing Rules are created. If no Return Routing Rules are defined, a default return organization can be selected when a service request is created for the broken part.
6. Ensure that you've also set up:
    - Depot repair items (labor, parts, and expense) with Service Logistics billing types
    - Sales order line types (broken product RMA, ship repaired product, bill only)
    - Sales order DOO processes (broken product RMA, ship repaired product, bill only charges)
7. You can also set up work definitions to define the operations, resources (labor, tools) and parts required for the repair.
8. To include outside processing charges from the depot repair maintenance work order, set up the following:
    - Create a service activity code for outside processing against the Depot Repair business process.
        - Transaction category =Order
        - Order Line Type = Bill Only

        - Create Order = Yes
        - Enabled = Yes
    - For profile ORA_RCL_DEF_DEPOT_SAC_OSP, add this service activity as the default service activity code for the outside processing item delivered for repair work order.

    When service charges are created from the maintenance work order, the outside processing item will show up in the Parts tab of the Depot Repair page. The charges are created as material debrief charges and the price for the same can be viewed in the Charges tab.

9. To enable the Transform Repair Work Order flow, enable the Maintenance Opt-in feature, Opt-in Code ORA_MNT_ASSET_REPAIR_TO_STOCK. This allows the creation of depot repair work orders with the **Target Item** field associated.

In complex depot repair and return logistics environments, the customer asset might be transferred across several locations before it's returned to the customer, for example from a local warehouse to a distribution center and then to the repair depot. The repaired product might also need to be transferred from the repair depot back to the local warehouse before it's shipped back to the customer. To manage such a multilocation and complex depot repair process, it's important that you set up the depot repair and return supply chain properly in Oracle SCM cloud. Check that your organization, subinventories, interorganization parameters, and ship methods are defined to execute transfer orders between your source and destination organization. Shipping methods must be set up in the Manage Carriers page and assigned to your source inventory organizations.

# 14 Preventive Maintenance of Customer Assets

## Set Up Field Service Preventive Maintenance

Organizations that maintain assets deployed at their customer locations need to perform preventive maintenance activities on those assets using field service functionality.

There are two ways to perform field service preventive maintenance: through an OFSC (Oracle Field Service Cloud) activity or through a Fusion Service generic work order. Service Logistics helps the integration between Maintenance, Fusion Service, and Field Service cloud applications. This enables field service administrators to oversee preventive maintenance work on customer-owned assets using the Service Logistics application.

- Preventive maintenance work orders for the installed base assets are created in the Oracle Maintenance Cloud application.
- A scheduled process is run in Service Logistics to generate Fusion Service SR (service request) and Service Work Orders with the maintenance work order details. These service requests and service work orders are then accessible in the Fusion Service UIs, Service Logistics UIs and the Field Service application.
- Field service technicians perform these work orders and create debrief using the Field Service application.
- Field service administrators edit and create part requirements, review debrief, complete, and post charges for the work orders in Service Logistics.
- The maintenance work order is then updated to reflect the task completion.

The following steps must be completed in Maintenance Cloud to set up the preventive maintenance workflow.

1. Set Up Customer Assets: Create an Installed Base asset with customer association and set the customer address as the asset location. This address represents the location being serviced. The installed base asset should be enabled for attributes required for preventive maintenance flow:
    - Allow maintenance programs
    - Allow work orders

    > **Note:** The Operating Organization of the asset needs to be a Maintenance Organization. This is required for the preventive maintenance flow for defining the setups and generating work orders using Maintenance Cloud.

2. Define Maintenance Programs: A maintenance program consists of multiple work requirements. Based on the maintenance programs, a maintenance forecast is generated which is then used to automatically create maintenance work orders. Maintenance programs must have the following details:
    - Asset or item covered by the program
    - Preventive maintenance forecast details and scheduling pattern
    - Work definition consisting of the materials required
3. Generate Maintenance Forecast: Run the Generate Maintenance Forecast process from the Generate Maintenance Forecast page or through the **Actions** drop-down button on the Maintenance Program page. Note that you can run the scheduled process on demand or schedule it to run at a specific time interval.

4. Create Preventive Maintenance Work Orders: Run the Create Work Orders scheduled process to create the maintenance work orders based on the forecast. This can be done either on the Generate Maintenance Work Orders page or through the **Actions** drop-down button on the Maintenance Program page. The work order is initially created with the status as Unreleased. The status must be updated to Released so that it can be integrated with Fusion Service.
5. Rather than using the Create Preventive Maintenance Work Orders program, you can use the Oracle Integration Cloud Service Logistics Preventive Maintenance scheduled process. You can configure this integration process to retrieve extra details from Maintenance Cloud and provide these details to Fusion Service, for example, the work order area to use based on an asset's time zone.

For information, see chapter Maintenance Programs in the Using Maintenance guide.

*Related Topics*

- Create Service Work Orders for Preventive Maintenance

# 15 Integration With Oracle Projects

## Set Up Integration With Oracle Projects

Service Logistics users have the option of integrating with Oracle Projects so that project details can be associated with service work orders, third-party work orders, and depot repair work orders.

When a work order is associated with a project, the charges from the work order debrief lines are posted to Oracle Projects and processed as project expenditure.

To set up the integration with Oracle Projects:

1. In the Setup and Maintenance work area, opt in for the Project-Driven Supply Chain feature:
    - Navigation: **Setup and Maintenance**, **Manufacturing and Supply Chain Materials Management Setup**, **Change Feature Opt In**
    - Functional Area: Manufacturing and Supply Chain Materials Management
    - Feature: Project-Driven Supply Chain
2. Choose the **Enable inventory tracking by project** parameter for the desired inventory organization or plant:
    - Under **the Setup and Maintenance work area**, select the **Manage Inventory Organizations** task:
        - Offering: Manufacturing and Supply Chain Materials Management
        - Functional Area: Facilities
        - Task: Manage Inventory Organizations
    - Query the inventory organization.
    - Click **Manage Organization Parameters**.
    - Select the checkbox **Enable inventory tracking by project.**
3. Classify the inventory organizations or plants enabled for inventory tracking as Project Expenditure Organizations and also include them in the project hierarchy in the Oracle Project Portfolio Management Cloud application.
4. If project-specific debrief or depot repair maintenance costs will be sent to Oracle Project Financials, then you must classify the inventory organizations that are enabled for inventory tracking as Project Expenditure Organizations in Project Portfolio Management.
5. If project-specific debrief or depot repair maintenance costs aren't to be sent to Oracle Project Financials, then you should set up project types in Project Portfolio Management for exclusion from cost collections in Supply Chain Management.

# 16 Descriptive Flexfields

## Set Up Additional Information Using Descriptive Flexfields

Set up descriptive flexfields to add custom attributes to various entities in your Service Logistics application and define validation for them.

You can use these custom fields to capture other information specific to your business. Service Logistics provides the following predefined flexfields:

| Name | Flexfield Code | Description |
|---|---|---|
| Part Requirement Header Attributes | RCL_PARTS_REQ_HEADERS_DFF | Add custom fields to the part requirement header region: Create Part Requirements page. |
| Part Requirement Line Attributes | RCL_PARTS_REQ_LINES_DFF | Add custom fields to the part requirement lines region: Edit Part/Add Part dialog box. |
| Debrief Header Attributes | RCL_DEBRIEF_HEADER_DFF | Add custom fields to the debrief header region: Manage Charges and Estimates page. |
| Debrief Line Attributes | RCL_DEBRIEF_LINE_DFF | Add custom fields to the debrief lines region: Add Labor Details, Edit Labor Details, Add Part Details, Edit Part Details, Add Expense Details, Edit Expense Details, and the Estimate lines, Add Fixed Charges, Edit Fixed Charges. |

To set up descriptive flexfields:

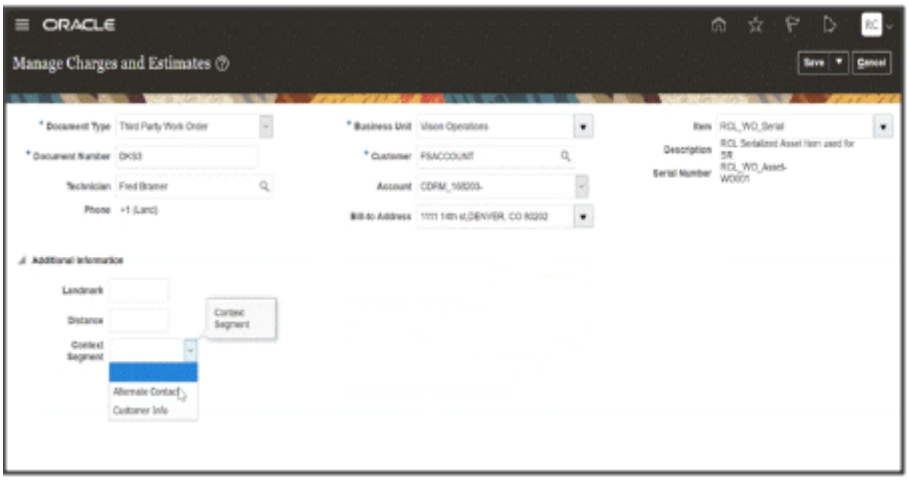
1. Go to the Setup and Maintenance work area.
2. Click the **Tasks** panel tab and then click **Search**.
3. In the Search page, query **Manage Descriptive Flexfields**.
4. From your search results, click the **Manage Descriptive Flexfields** link.
5. In the Manage Descriptive Flexfields page, type **RCL %** in the **Flexfield Code** field. Click **Search.**
6. You'll see the predefined flexfields for Service Logistics in the search results. You can edit the flexfields to add global segments that include both context segments and context-sensitive segments. Once you've set up and deployed the flexfields, the custom fields are displayed in the region where you've configured them. Let's look

at some sample configurations for Service Logistics. Note that this is for illustration purpose only and the fields that you configure will be specific to your business requirement.

Example 1: Manage Debrief and Charges page

Here you can see an example of custom entities added to the Debrief Headers Attributes flexfield.

This figure shows how custom entities are added to the Debrief Headers Attributes flexfield




There are two types of flexfields segments here:

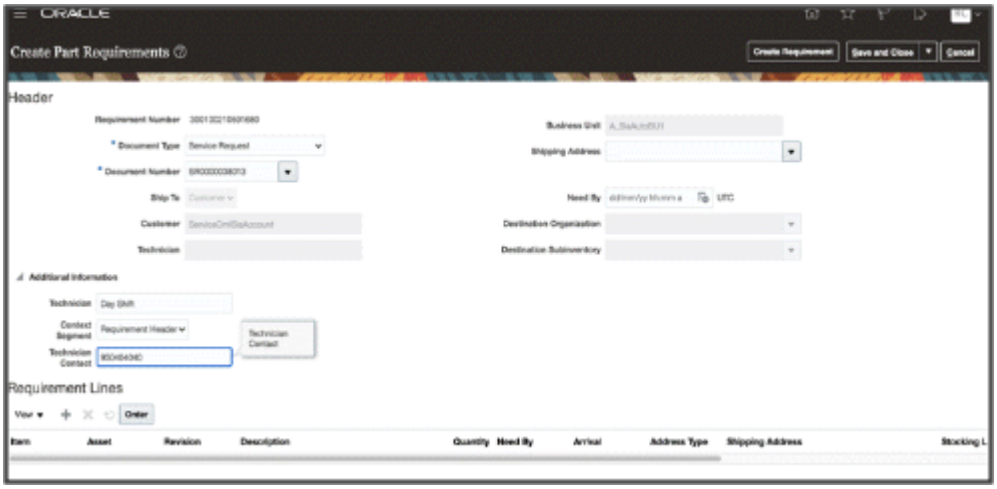
- Global Segment: These custom attributes are always displayed. In the example above, the Landmark and Distance fields are global segments.
- Context Segment: These attributes decide which context-sensitive segments will be displayed. In the example above, Alternate Contact and Customer Info are set up as context segments. When the user selects the context segment Alternate Contact, other attributes such as Customer Name and Phone

Number are displayed. These attributes are called context-sensitive segments which are displayed depending on the value of the context segment.

Example 2: Create Part Requirements page

Custom entities added to the Part Requirement Header Attributes flexfield.

This figure shows how custom entities are added to the Part Requirement Header Attributes flexfield




Note that the Technician field is a global segment. The Technician Contact field is an example of a context-sensitive segment that's displayed only when the context segment Requirement Header is selected.

7. To understand more about descriptive flexfields, click the related link.

*Related Topics*

- Overview of Descriptive Flexfields