Oracle Fusion Cloud SCM

Getting Started with Your Maintenance Implementation

23D

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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

Use help icons ⊘ to access help in the application. 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.

Get Support

You can get support at *My Oracle Support*. For accessible support, visit *Oracle Accessibility Learning and Support*.

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.

Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program*. Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

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 uses simplified setups as a basis to help you get started with the maintenance implementation quickly.

Scope of This Guide

This guide covers the minimum set of tasks required to set up the maintenance organization using the default settings. After you finish these tasks, you are ready to perform the following:

- Adding the maintenance parts list items.

- Adding the assets.

- Defining the resources and rates.

- Completing your first maintenance transaction.

This guide does not include all the tasks that are required for a full implementation of the Manufacturing and Supply Chain Materials Management offering. It does not include all setup and security tasks that are appropriate for a complete implementation.

References and Help

This guide has references to other guides wherever required. You can access help from the Oracle Fusion Applications Help Center or from the Oracle Cloud Documentation Library, unless specified otherwise.

For more information about the full implementation of an offering and implementing advanced features within the offering, see Oracle SCM Cloud Implementing Manufacturing and Supply Chain Materials Management guide.

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

How to Use This Guide

This section explains the prerequisites and other details in this guide.

Prerequisites

Before performing the steps in this guide, you must set up the common enterprise structure objects. If you have already implemented Oracle Fusion Cloud Financials on your instance, then your enterprise structure setup is complete. 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 and the Oracle Financials Cloud Implementing Common Features guide.

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Assumptions

The tasks described in this guide assume you have a valid user name and password to sign in to the application and access the work areas.

Find Guides, Readiness Material, and Other Resources

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

▶ Watch video

Here are a couple examples of what you'll find in the Help Center:

- Guides give you cumulative information about all features in each cloud service, for example how to use, set up, and extend them.
- 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 Resources menu and select **Documentation** 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 select **Fusion Applications Suite** under Cloud Applications. Or, click **Fusion Applications Suite** on the Help Center home page.
2. On the Oracle Fusion Cloud Applications Suite 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:
   - All Books or Videos: Get all the videos or guides for the cloud service.
     - On the Videos or All Books page, you can use the **View** list to filter by category.
     - Most guides are available in multiple formats, for example HTML and PDF.
   - Top Tasks: Click a task category and then a specific, common task to go straight to information that will help you with that task.
   - APIs & Schema: Get reference information about APIs and schema details.

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 Oracle Fusion Cloud Applications Suite page, you search across all guides for Fusion Applications. 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 with the guide open.

Let's take a look what we can do with the search results. In this case, the first result is a guide, but you might also see other types of resources, such as videos, reference architecture and solution playbooks, or readiness material. And they might come from places other than the Help Center, for example My Oracle Support (https://support.oracle.com), oracle.com, or YouTube.
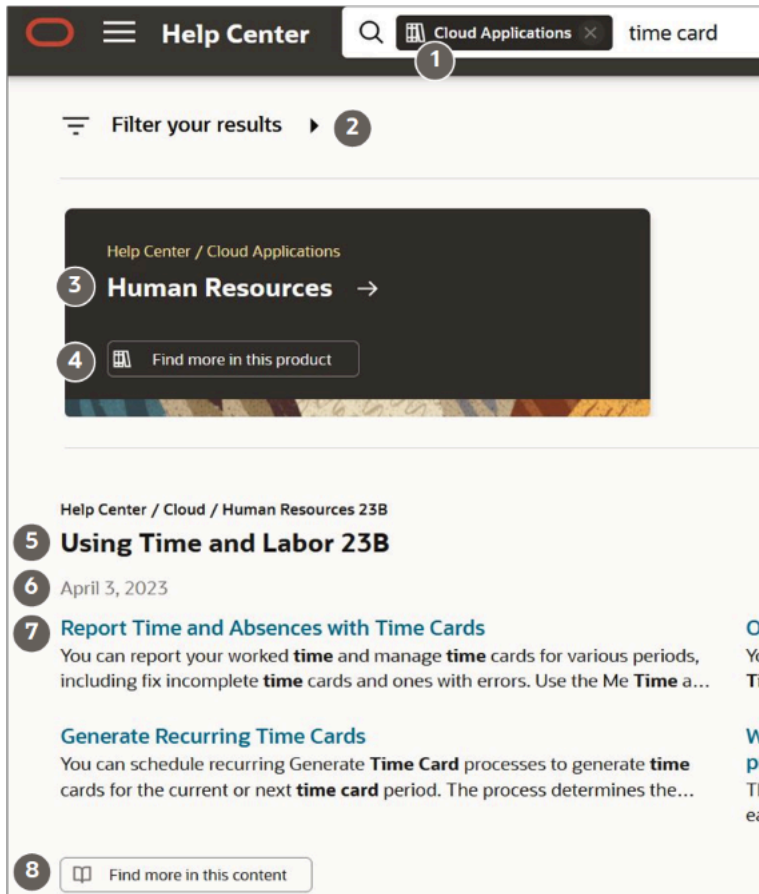
Callout Number	What You Can Do
1	Remove a filter from the search to get more results.
2	Apply more filters to narrow down your choices, for example based on publication date.
3	Open the main page page for a product that has many results that match your search.
4	See search results from this product.

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Callout Number	What You Can Do
5	Open the title page for a guide with content that matches your search terms.
6	See when this guide was published.
7	Open a specific topic in this guide.
8	Get more search results in this guide.

Review Readiness Documents

Let's find the 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 in the Essential Content section.
3. Click **HTML** 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 readiness content. From there you can also jump over to other cloud services.

Related Topics
- Get Help in the Application

2 Get Started With Your Implementation

Access the Setup and Maintenance Work Area

To start your implementation for Oracle Fusion Cloud Maintenance, you must first sign in to the application and navigate to the Setup and Maintenance work area.

The steps to access the Setup and Maintenance work area are:

1. Use the Oracle Cloud Applications URL, and sign into Oracle Cloud Applications using the user name and password that were provided to access Oracle Identity Management.
2. On the Home page, navigate to the Setup and Maintenance work area. You can access the Setup and Maintenance work area in the following three ways:
   - Click Navigator > Setup and Maintenance.
   - Click the Setup and Maintenance icon on the Home page.
   - Click the Profile icon on the Home page and select Administration > Setup and Maintenance.

Enable the Functional Areas for Maintenance Implementation

The steps to enable the functional areas applicable for Oracle Maintenance Cloud are:

1. In the Setup and Maintenance work area, select the Manufacturing and Supply Chain Materials Management offering.
2. On the Setup: Maintenance and Supply Chain Materials Management page, from the Action drop-down button, select: Change Configuration.
3. On the Configure: Manufacturing and Supply Chain Materials Management page, select Enable for Implementation for the following functional areas in Manufacturing and Supply Chain Materials Management:
   - Shipping
   - Cost and Profit Planning
   - Maintenance Management
4. Click Done.

How You Provision Roles to the Implementation User

Ensure that the implementation user has all the necessary roles to implement Oracle Fusion Cloud Maintenance.

You must add the following roles for the implementation user:

- Cost Accountant

- Employee

- Inventory Manager

- Product Data Steward

- Maintenance Manager

- Maintenance Technician

For more information about using the Application Security Console, see the Oracle SCM Cloud: Securing Oracle SCM Cloud guide.

Create Application Implementation Consultant User

You can create additional users for deployment and testing of the product. For example, you may want to create an Application Implementation Consultant. Having different users can be helpful in testing security and messaging.

The steps to create an Application Implementation Consultant user are:

1. In the Setup and Maintenance work area, select the Manufacturing and Supply Chain Materials Management offering.
2. Click the Setup button.
3. On the Setup: Manufacturing and Supply Chain Materials Management page, select the Initial Users functional area.
4. In the Initial Users region, from the Show drop-down list, select: All Tasks. All the tasks for the Initial Users functional area are displayed.
5. Click the Create Implementation Users link.
6. On the Oracle Identity Management - Self Service Welcome page, click Administration.
7. Click Create User.
8. Select from or enter values for the following required fields:

   o Last Name

   o Organization

   o User Type (For example, Full-Time Employee, Consultant)

9. Click the Save button.

How You Administer Additional Application Users and Roles

You can follow the steps discussed in the Creating Application Implementation Consultant User topic for assigning roles to the Maintenance Manager and Maintenance Technician users.

You must assign the following roles to the Maintenance Manager user:

- Employee

- Inventory Manager

- Maintenance Manager

You must assign the following roles to the Maintenance Technician user:

- Employee
- Maintenance Technician

Assets are typically managed by a user who has the Maintenance Manager or Asset Administrator roles. These roles include global grants for the Installed Base Asset data object to stripe some data conditions for customer assets.If user-defined roles are created to view, create, and edit assets, a new data security policy must be created if the Maintenance Manager, Technician, or Asset Administrator roles aren't assigned to the user.

- Create a Data Security Policy in the Data Security Policy train stop.
    - Policy Name: Grant to Asset
    - Policy Description: Grant that enables access to assets
    - Database Resource: Installed Base Asset
    - Data Set: All Values
    - Actions: Manage Installed Base Asset
- Save the Role.
- Run the scheduled process: Import User and Role Application Security Data.

Related Topics
- Create Application Implementation Consultant User

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3 Set Up Your Maintenance Organization

Create Locations for Your Maintenance Organization

A location refers to the physical address of an organization. You must associate a location with the maintenance organization. The locations that you create exist as separate structures that you can use for reporting.

The steps to create a location for the maintenance organization are:

1. In the Setup and Maintenance work area, select the Manufacturing and Supply Chain Materials Management offering.
2. Click the Setup button.
3. On the Setup: Manufacturing and Supply Chain Materials Management page, select the Enterprise Profile functional area.
4. In the Enterprise Profile region, from the Show drop-down list, select: All Tasks.
5. In the Task region, click the Manage Locations link.
6. On the Manage Locations page, in the Search Results region, click the Create icon.
7. On the Create Location page, select from or enter values for the following required fields:

   - Location Set
   - Effective Start Date
   - Name
   - Code
   - Status
   - Country
   - Address Line 1
   - City
   - State
   - ZIP Code
   - County

   | **Note:** When you enter the ZIP code, the city, state, and county are populated automatically.

8. Click the Submit button and then in the confirmation dialog box, click the Yes button to confirm that you want to continue with the request.
9. Click the OK button.
10. On the Manage Locations page, click the Done button to return to the Setup and Maintenance work area.

Note: For each maintenance organization, you must further define it using the Plant Parameters setup task. For more details, see the Maintenance chapter of the Implementing Manufacturing and Supply Chain Materials Management guide.

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Create Maintenance Organizations Using Quick Setup

The Manage SCM Common Components Quick Setup defines all required tasks and many commonly required tasks for the Maintenance Management functional area.

Using the Quick Setup, you can define the following:

- Calendar
- Units of Measure
- Inventory Organization

A maintenance organization is an inventory organization that is enabled for maintenance activity. To define a maintenance organization, you must create an inventory organization that is set up as a maintenance organization.

The steps to define a maintenance organization using Quick Setup are:

1. In the Setup and Maintenance work area, select the Manufacturing and Supply Chain Materials Management offering.
2. Click the Setup button.
3. Click the Quick Setup icon in the Facilities functional area.
4. On the Set Up SCM Common Components: Calendar page, select an existing calendar or create a new calendar.
5. Click the Next Button.
6. On the Set Up SCM Common Components: Units of Measure page, select the unit of measure classes.
7. Click the Next button.
8. On the Set Up SCM Common Components: Inventory Organizations page, create an inventory organization by selecting from or entering values for the following fields:

   - Management Business Unit
   - Existing Master Item Organization

   Note: You can also create a new master item organization by entering values for Master Item Organization Name and Master Item Organization Code fields.

9. In the Create Inventory Organizations region, click the Add icon to add a row for creating a new inventory organization.
10. In the new row, select from or enter values for the following fields:

    - Organization Name
    - Organization Code
    - Location
    - Additional Usage

    Note: To set up the organization as maintenance organization, select Maintenance from the Additional Usage drop-down list.

11. Click the Submit button. A confirmation message is displayed.

Note: You can repeat this task to define additional organizations at any time.

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Note: It is highly recommended that you define separate organizations for manufacturing and maintenance.

Set Up Data Access for Maintenance Users

To ensure that the application users have access to inventory, maintenance, and cost organizations, you must set up the data access for the users. You can grant access by user name or role.

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

Note: This task or feature is applicable only for a new installation.

The steps to set up data access for the users:

1. In the Setup and Maintenance work area, select the Manufacturing and Supply Chain Materials Management offering.
2. Click the Setup button.
3. Select the Facilities functional area.
4. In the Facilities region, from the Show drop-down list, select: All Tasks. All the tasks for the Facilities functional area are displayed.
5. In the Task region, click the Manage Inventory Organization Data Access for Users link.
6. Click Create.
7. On the Create Data Access for Users dialog box, click the Add icon to add a new row.
8. In the new row, select from or enter values for the following fields.

Field	Value
Role	Maintenance Manager
Security Context	Inventory Organization
Security Context Value	The name of the new organization created earlier using Quick Setup.

Note: For predefined roles, such as the Maintenance Manager role or Maintenance Technician role, the value for Security Context is always Inventory Organization.

9. Repeat the previous steps to add the following roles:

   o Maintenance Technician

   o Cost Accountant

10. Click the Save and Close button.

   Note: You can copy rows.

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11. Click the Done button.

Set Up Profit Center Business Unit for a Maintenance Organization

To create resource rates in a maintenance organization, you must implement the cost management. If you intend to implement the cost management, then first you must associate the profit center business unit with the maintenance organization. The profit center business unit is used as a search parameter when implementing the cost management.

The steps to set up a business unit as a profit center are:

1. In the Setup and Maintenance work area, select the Manufacturing and Supply Chain Materials Management offering.
2. Click the Setup button.
3. Select the Facilities functional area.
4. In the Facilities region, from the Show drop-down list, select: All Tasks. All the tasks for the Facilities functional area are displayed.
5. In the Task region, click the Manage Inventory Organizations link.
6. On the Manage Inventory Organizations page, search and select the newly created organization.
7. Click the Edit icon.
8. If Profit Center Business Unit field is blank, then select a value.
9. Click the Next button.
10. Confirm that the Item Master Organization is correct.
11. Click the Save and Close button.
12. On the Manage Inventory Organizations page, click the Done button.

Set Up Shipping Parameters

The shipping parameters impact the way a shipment is created and confirmed, and how Oracle Fusion Shipping interacts with Oracle Fusion Inventory Management.

The steps to set up shipping parameters are:

1. In the Setup and Maintenance work area, select the Manufacturing and Supply Chain Materials Management offering.
2. Click the Setup button.
3. Select the Shipping functional area.
4. In the Shipping region, from the Show drop-down list, select: All Tasks. All the tasks for the Shipping functional area are displayed.
5. In the Task region, click the Manage Shipping Parameters link.
6. In the Select Organization dialog box, select the newly created organization and click the OK button.
7. On the Manage Shipping Parameters page, provide values for the following required fields:

   ○ Appending Limit

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- Packing Unit Capacity Method
- Weight UOM Class
- Volume UOM Class
- Shipment Set Behavior
- Release Sequence Rule
- Pick Slip Grouping Rule
- Print Pick Slip
- Staging Subinventory

8. Click the Save and Close button.

4 Set Up Cost Accounting for Your Maintenance Organization

Set Up Cost Accounting Using Quick Setup

You can set up cost accounting to get a simple structure in place to create cost accounting distributions and accounting entries for the inventory and maintenance transactions.

The steps to set up the cost accounting using Quick Setup are:

1. In the Setup and Maintenance work area, select the Manufacturing and Supply Chain Materials Management offering.
2. Click Setup.
3. Click the Quick Setup icon in the Cost Accounting functional area.
4. On the Configure Cost Accounting Using Quick Setup page, click the Query by Example icon. In the Profit Center Business Unit column, search for the business unit that you set up as the profit center business unit for the maintenance organization. The search result displays the row with the specific profit center business unit.
5. In the row, select from or enter values for the following fields:

   - Cost Organization Code

   - Cost Organization Name

   - Cost Method

6. Select the row and click Implement.
7. Click Yes in the message dialog box to continue.
8. In the message dialog box confirming the implementation, click OK.
9. In the Implementation Details region, click the Setup Tasks tab to verify that the setup is successful.
10. Click Done.

This setup results in the following starting points in the cost management business processes:

- All prerequisite setups to start the cost planning process.

- All prerequisite setups completed to start the cost processing of inventory transactions. The users can configure the Create Cost Accounting Distributions Run Control, open the cost accounting period, and begin processing.

The following tasks are created when the cost accounting setup is implemented successfully:

- Manage Cost Organization

- Manage Cost Book

- Manage Cost Organization Relationship

- Manage Cost Element

- Manage Cost Component

- Manage Cost Component Mapping

- Manage Valuation Structures

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- Manage Cost Profiles
- Manage Default Cost Profiles

5 Define Maintenance Master Data

How You Define Maintenance Master Data

The process of defining the maintenance master data includes the following:

- **Defining Asset Items:** Assets are created based on an item. Create the items and define the key parameters and assign them to each maintenance organization. In general, every maintenance organization in which the assets can be maintained should be assigned to the item.

- **Defining Maintenance Parts List Items:** The maintenance parts list is a list of all the parts and components (items) that constitute an asset. These items may or may not be defined as assets in the maintenance organization. To define the maintenance parts list items, first you must create the parts list items. Then, assign the parts list items to the maintenance organization.

- **Creating Work Areas, Resources, and Work Centers:** A work area is a region allocated for performing maintenance activity. A resource is a labor or equipment required to perform a maintenance activity. A work center is a maintenance unit that consists of people or equipment. Every maintenance organization must have at least one work area and one work center defined.

- **Creating maintenance work definitions:** The maintenance work definition act as a template for the work order execution.

Define Asset and Parts List Items

The maintenance asset and parts list items are generally created in a master organization and then assigned to a each maintenance organization.

Defining Asset Items

When creating an asset, you need to reference an item that represents that asset. The item that's referenced by the asset must be created with the specific attribute values.

You can create the asset items manually, using REST API or by using import. Creating the items manually may provide you more insight into the items.

The steps to update the item attributes for enabling the item to represent the asset are:

1. On the Home page, click the Product Management icon and then click the **Product Information Management** icon.
2. On the Product Information Management Overview page, in the Tasks pane, click the **Create Item** link.
3. On the Create Item page, provide the values for these attributes to define an item:

Attribute	Description
Organization	The organization must be a master organization.

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Attribute	Description
Create option	The default value is Create New. However, you can also create using a copy of an existing item that's similar, which saves time and provides consistency across similar items.
Number of items	The default value is 1, which is sufficient.
Item Class	The item class is typically a root item class.
Template	Templates are defined sets of attributes that you can use over and over to create many similar items.

Select the appropriate item template from the Available List and click the Move button to move the template to the Selected List. |

4. Click **OK** to create an item.
5. On the Edit Item page, you can further define the item's description in the header region or the long description in the overview tab. You can also upload an Item image file, which will default as the asset's image.

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6. On the Edit Item page, on the Specifications tab, you can further define the item's description in the header region or the long description in the overview tab. You can also upload an Item image file, which will default as the asset's image.

- Edit Item page > Specifications tab > Service link > Asset > Enable Asset Tracking drop-down list = Full Lifecycle
- Edit Item page > Specifications tab > Service link > Asset > Enable Asset Tracking drop-down list = Yes

   Note: If you have set the Enable Asset Tracking to Customer Tracked, then you can't be able to set this attribute to Yes. An additional attribute at the asset "Allow Work Orders" further controls whether or not an Asset is maintainable.

- Edit Item page > Specifications tab > Service link > Asset > Enable Genealogy Tracking drop-down list = Yes
- Edit Item page > Specifications tab > Service link > Asset > Enable IoT drop-down list = Yes

   Note: If you're using Oracle Asset Monitoring, part of the Oracle Fusion Cloud IoT Intelligent Applications or Oracle Production Monitoring, part of the Oracle Fusion Cloud IoT Intelligent Applications.

- Edit Item page > Specifications tab > Inventory link > Material Control > Inventory Item drop-down list = Yes
- Edit Item page > Specifications tab > Inventory link > Serial > Generation = Set the Serial number control to one of these values:

   - Predefined serial number
   - Dynamic entry at inventory receipt
   - Entry at sales order, transfer order or work order issue

- Edit Item page > Manufacturing tab > Item Structure > Structure Item Type drop-down list = Standard

   Note: This value is required if you plan to manage asset physical hierarchies.

- Edit Item page > Associations tab > Associated Organizations drop-down list = Master Organization

   Note: You must define one or more organizations for an Item. First, define a master organization then you must define every child inventory organization in which you will create and manage assets. This includes the organizations not only where the asset will operate, but also those organizations that are enabled for maintenance and in which there will be maintenance work orders created to maintain the asset. Additionally, assets support cross-organization creation of work orders.

7. On the Edit Item page, click **Save**.

Creating Maintenance Parts List Items Manually

You can create the parts list items manually, using REST API, or by import. Creating parts list items manually may provide you more insight into the items. You can follow the same procedure to create the asset items, but may need to adjust certain parameters based on reviewing the suggested setup by attribute.

Mass Assigning Asset and Parts List Items to Organization

You can assign the asset and parts list items to an organization either manually or by performing mass changes using a scheduled process. If you're defining multiple inventory organizations, then you may prefer using the scheduled process.

The steps to assign items to an organization using the scheduled process are:

1. On the Home page, click the Product Management icon and then click the Product Information Management icon.
2. On the Product Information Management Overview page, on the Tasks pane, click the Manage Items link.
3. On the Manage Items page, search for and select an item, but don't click the item number.
4. Click Actions and select Manage Item Mass Changes.
5. Select Assign to Organizations.
6. In the Organizations section of the Assign Items to Organizations window, click the Select and Add icon.
7. In the Select and Add: Organizations window, search for and select an organization.
8. Click Apply and then Done.
9. In the Assign Items to Organizations window, click OK.
10. In the Process Details window, click Submit.
11. View your submission by selecting the Overview tab, and viewing Scheduled Processes.

Create Work Areas, Resources, and Work Centers

The following shows the preferred order in which the work areas, resources, and work centers are to be created:

1. Create the work areas for the maintenance organization.
2. Create the resources.
3. Create the work centers and associate each of the work centers with a work area.
4. Allocate the resources to the work centers. You can also assign shifts and maintain a work center resource calendar for each resource.

You can create, edit, and delete the maintenance work areas on the Manage Work Areas page. In the Tasks pane, click the Manage Maintenance Work Areas link to open the Manage Work Areas page.

You can create, edit, and delete the maintenance resources on the Manage Resources page. In the Tasks pane, click the Manage Maintenance Resources link to open the Manage Resources page.

You can create, edit, and delete the maintenance work centers on the Manage Work Centers page. In the Tasks pane, click the Manage Maintenance Work Centers link to open the Manage Work Centers page.

Create Maintenance Work Definitions

A maintenance work definition describes the material and resources to maintain an asset.

The steps to create a maintenance work definition are:

1. From the Home page, click Navigator > Supply Chain Execution > Maintenance Management.
2. On the Maintenance Overview page, in the Tasks pane, click Manage Maintenance Work Definitions.

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3. On the Maintenance Work Definition page, in the Search Results section, click the Add icon.
4. In the Create Maintenance Work Definition dialog box, retain the New work definition option.
5. Enter the code, name, and start date for the work definition.
6. Enter a sequence, name, and work center.
7. Click the Next button.
8. In the Create Maintenance Work Definition: Create Operations dialog box, click the Add icon to create the operations for the work definition.
9. Enter the sequence, name, and work center for the operation. You can add multiple operations for a work definition.
10. Optionally, select the Count Point check box or Automatically Transact check box. The Count Point and Automatically Transact attributes are mutually exclusive.
11. Click the Save and Edit button.
12. On the Edit Maintenance Work Definition page, click the Parts List vertical tab. Add the maintenance parts list items by dragging and dropping the asset card into the work definition region. You can also right-click the asset card and from the Actions menu, select: Assign.
13. Click the Resources vertical tab. Add the resources by dragging and dropping the resource card into the work definition region. You can also right-click the resource card and from the Actions menu, select: Assign.
14. Click the Save and Close button.
15. On the Maintenance Work Definition page, click the Done button.

Create Meter Template Definitions

The meter template enables you to:

- Control how the corresponding meter readings are recorded.

- Define specific data validation rules that can be enforced at the time of recording the meter readings.

You can create a meter for an asset in a two-step process.

1. Define meter template in which you specify the behavior and validations for the meter.

   You can create meter templates either individually using the Create Template page, or using the REST API.
2. Associate the meter template to an asset for capturing the meter readings.

   If you have an existing meter template that you want to use, then you can skip the first step and just associate an existing template.

You can associate a meter template to one or many assets that share the same type of meter. Also, you can associate multiple meters to an asset to track various parameters of an asset. When you associate a meter template to an asset, a unique relationship is created. The corresponding meter reading history of each meter association is also unique.

Item Applicability in Meter Templates

When you define or update a meter template using REST APIs, you can associate inventory items as child resources of the template using the Meter Applicability child resource.

When you create a new asset, either manually, or using services, or upload, the application searches if there a meter applicability for the asset's item. If there is a match, then the application automatically creates an asset meter for the asset. Thus, you get a seamless process for the automatic creation of asset meters and supports the standardization of asset meters across similar types of assets that share a common item.

The meter applicability is defined for the item at the master organization level. This is because items are uniquely created for the master and all its associated organizations. Therefore, defining the applicability at the master

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organization allows for any asset created in one of its associated organizations to be validated for the automatic creation of an asset meter.

> **Note:** Create the meter templates prior to creating assets so that meters can be assigned automatically during creation.

Related Topics
- How Asset Meters Get Automatically Associated

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6 Define Costing Master Data

Create Resource Rate Plans

The steps to create the resource rate plan are:

1. From the Home page, click Navigator > Supply Chain Execution > , click **Cost Accounting**.
2. In the Tasks pane, click Manage Resource and Overhead Rates.
3. On the Manage Resource and Overhead Rates page, click the Create icon.
4. In the Create Resource and Overhead Rate Plan dialog box, select from or enter values for the following required fields:

   - Inventory Organization
   - Plan Name
   - Currency
   - Purpose
   - Effective Start Date

5. Click the Save and Close button.
6. On the Manage Resource and Overhead Rates page, click Manage Resource Rates.
7. Click the Add icon to add the resources.
8. Click Create Resource Rates.
9. Click the Resource Rates icon to add rates and click the Save and Close button.
10. Enter the effective start date.

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7 Create Assets

Create an Asset

You can create assets either manually, or using REST API, or by import.

The steps to create an asset are:

1. From the Home page, click Navigator > Supply Chain Execution > Maintenance Management.
2. On the Maintenance Overview page, in the Tasks pane, click Manage Assets.
3. On the Manage Assets page, click **Create**.

   The Create Asset dialog opens.
4. You can create a new asset using one of the following methods:

   o Create New Asset

   o Copy Existing Asset
5. When creating a New Asset, enter or select values in the following required fields:

   o Asset Number

   o Description (optional)

   o Operating Organization

   o Item (optional)

   o Enable IoT

   o Competitor Asset

   o Customer (for Customer Assets only)

   o Customer Account (for Customer Assets only)

   o Location Type

   o Organization

   o Work Center

   o Location Address
6. Click **Save and Close**.

Note: The base item for an enterprise asset will usually have the attributes specified as follows:
- Edit Item page > Specifications tab > Service link > Enable Asset Tracking drop-down list = Full Lifecycle

- Edit Item page > Specifications tab > Service link > Allow Maintenance Asset drop-down list = Yes

- Edit Item page > Specifications tab > Inventory link > Generation drop-down list = Dynamic entry at Inventory Receipt

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For more information about assets, see the Assets chapter in the Using Maintenance guide.

Related Topics
- Define Asset and Parts List Items

8 Execute Your First Maintenance Work Order

Execute Maintenance Work Orders

The maintenance work orders help you initiate and manage the maintenance and repair work for the assets. The work order provides information regarding the asset being maintained, priority of the work, and relevant dates for the maintenance work. It also specifies the work definition details, operations, components, and resources required for the maintenance work.

There are two types of maintenance work orders:

- Preventive maintenance work orders: A preventive maintenance work order is a type of maintenance work order that's created to initiate the planned maintenance process for an asset.

- Corrective maintenance work orders: A corrective maintenance work order is a type of maintenance work order that's created to initiate the on-demand repair process for an asset.

You can execute a maintenance work order to report the work order operation status, and material and resource consumption.

Creating a Maintenance Work Order

The steps to create a maintenance work order are:

1. From the Home page, click Navigator > Supply Chain Execution > Maintenance Management.
2. On the Maintenance Overview page, in the Tasks pane, click the Manage Maintenance Work Orders link.
3. On the Maintenance Work Orders page, click the Add icon.
4. In the Create Maintenance Work Order dialog box, select from or enter values for the following required fields:

   - Asset
   - Type
   - Subtype

5. Click Save and Close button.

   | **Note:** You can edit the maintenance work order to add operations, operation items, and operation resources.

6. On the Maintenance Work Orders page, search for and select the maintenance work order.
7. Click the Release button.
8. Click the Done button.

Executing a Maintenance Work Order

The steps to execute a maintenance work order are:

1. On the Maintenance Overview page, in the Tasks pane, click the Review Maintenance Dispatch List link.
2. On the Maintenance Dispatch List page, search for and select the maintenance work order.
3. Click the Expand icon.
4. Click the Quick Complete button. For more information, see the Oracle SCM Cloud Using Maintenance guide.

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5. Click the Done button.

Running Scheduled Processes for Costing of Maintenance Work Orders

You must run the following scheduled processes for costing of the maintenance work orders:

- **Transfer Transactions from Production to Costing:** This scheduled process can be run on the Transfer Transactions from Production to Costing page. On the Maintenance Overview page, in the Tasks pane, click the Transfer Transaction from Maintenance to Costing link.

- **Transfer Transactions from Inventory to Costing:** This scheduled process can be run from the Scheduled Processes. To access the Scheduled Processes, click Navigation > Scheduled Processes.

- **Create Cost Accounting Distributions:** The scheduled process is available in the Cost Accounting.

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