

# **Oracle® Utilities Work and Asset Management**

User Guide

Release 1.9.0.3

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Oracle® Utilities Work and Asset Management User Guide for Release 1.9.0.3

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# Preface

This document provides you with a general overview of the documentation and how it is intended to be used. Please refer to [New Content for this Release](#) for more specific information on the current release.

## Audience

The user guide documentation is intended for general users of the Oracle Utilities Work and Asset Management system.

## Printed/Electronic User Guides

There are several User Guide sections: a system overview book and one book describing Compatible Units functionality, and one book for each of the subsystems in the application: Resource, Maintenance, Purchasing, Inventory, Customer, Enterprise and Administration. There are also supplemental guides for Business Rules, Reports, and Transaction Codes.

The overview section covers basic system features that are similar regardless of where you are in the system: operational concepts, how to find the record you need, shortcuts to different areas in the system, and similar tips. It also covers the home page, your personal workspace, where you can receive and send messages, and save searches and search results.

Each guide follows the subsystem and module organization of the application. If you have a question about a particular window, you can reference the appropriate subsystem guide, find the module, and browse through the discussion of each window.

*Note:* In order to locate text in the User's Guide that you are viewing, select Find from Acrobat Reader's Edit menu. You can also press Ctrl+F on the keyboard. In order to search for text in ALL of the User Guides simultaneously, select Search from the Edit menu and select Query from the sub-menu. You can also press Ctrl+Shift+F.

Please also use the [Table of Contents](#) and the [Index](#) to locate topics quickly.

Please also use the Table of Contents and the Index to locate topics quickly.

## Online Help

There are two types of online Help available.

- **Online User Guides** include detailed descriptions of concepts, how the various pieces of the system fit together, what important fields mean and more. To open the User Guides, select Help from the menu then select User Guides.
- **Cue Cards** are step-by-step procedures that guide you through the completion of specific tasks. To open Cue Cards, select Help from the menu then select Cue Cards.

## Context Sensitive Help

Users can also get online help based on a specific function or screen. This is referred to as context-sensitive help.




When you are viewing any window, select either User Guides or Cue Cards from the Help menu to open the online Help topics for that window. You can also use the tabs at the top of the Help window to search for the information you need.

- The **Contents** tab displays the online Help Table of Contents arranged by subsystem and major topic.
- The **Index** tab displays a searchable list of every topic in online Help.
- The **Search** tab displays a special window where you can look for keyword combinations in online Help.

In addition, most Help topics contain hypertext links to other topics. Click any underlined link to read more about these topics.






*Note:* When you are using the application, online Help is the fastest way to get information that you need. All of the information contained in printed User Guides, can also be found in online Help.

## Using Online Help

1. **Locate the topic you need help about via the Contents tab, Index tab, or Search tab.**
  - The **Contents** tab allows users to expand/collapse sections of the table of contents as needed to find a particular topic. Click on the book icons ( and ) to open/close headings. Click on the topic icon () to open it.
  - The **Index** tab allows the user to browse an index for the online help. Click on the index entry for the topic to open it.
  - The **Search** tab allows the user to search the online help for specific words. Enter the word(s) for the search in the text box and click **Go!** The search results appear beneath the text box. Click on the topic to open it.
2. The selected topic will appear in the right pane of the online help window.

## Help Icons

A number of icons appear along the top of the online help window. These icons are used for navigating the online help and other functions. These icons perform the following functions:

Icon	Description
	<b>Show Navigation:</b> Open the navigation frame. Used after opening a single help topic.
	<b>Previous:</b> Display the previous help topic.
	<b>Next:</b> Display the next help topic.
	<b>Show in Contents:</b> Expand the Contents tab to display the current topic.
	<b>Print:</b> Print the current topic.

## Related Documents

For more information, see the following documents in the Oracle Utilities Work and Asset Management Release 1.9.0.3 documentation set:

- Oracle Utilities Work and Asset Management Release Notes
- Oracle Utilities Work and Asset Management Configuration Guide
- Oracle Utilities Work and Asset Management Installation Guide

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# What's New

This section describes the major features and functionality changes in the application that were added to this documentation release.

## New Content for this Release

Changes in Release 1.9.0.3 include the following:

### Customer

- **Service Request** - Modified processing such that when a work order is created from a service request, the service history associated with the service request is also copied onto the work order.

### Inventory

- **Stock Checkout** - Added support in the Stock Checkout form to allow users to distinguish when a stock item has multiple bins. The system displays an asterisk (\*) next to the Primary Bin field name if there is an alternative bin for the stock code and storeroom related to that stock item.
- **Stock Transfer** - Added processing to open the Storeroom Setup module when the user double-clicks the "Issue Storeroom" and "Receive Storeroom" fields in the Stock Transfer module.

### Maintenance

- **Work Order History** - Modified processing to allow users to track canceled and rejected work orders using the Work Order History module. This helps if it becomes necessary to find out why a certain work order was canceled or rejected.
- **Work Order Task** - Modified processing to allow users to enter decimal values in the Requested Qty field, while [creating a checkout request from a work order task](#) to indicate partial withdrawal of items. Users can also enter negative quantities in the [Items Worksheet](#) to indicate that they would like to return items, for e.g. dismantled parts.
- **Auto-populate Component ID functionality** - Restored the auto-populate installed component functionality of the Work Order forms. This functionality can be turned on or off using [Work Order Processing Rule](#) and [Repairable Processing Rule](#).
- **Work Class and Category fields** - Added [Class and Category](#) fields to Work Order Task header and search screens. Added both fields also to Task Detail screens of Work History and Benchmark Work Order modules. In the Work Order module, added support to search the header or tasks based on work class and category.

- **PM Route Report**- Added support to allow users to Print the PM Route Report from the Work Order and Work Order Task modules. This is a listing of PM Route stops that reference the work order.
- **Cost and Closeout** - Introduced an [Actual Duration](#) field in the Task Progress view that users can use to track the actual duration (in hours) of the work done on an asset. Added support so users can also enter time in the Actual Start Date and Actual Finish Date fields.
- **Cost and Closeout** - Introduced an [Expense Code](#) field in the Direct Charges view that users can use to set an expense code against each direct charge type record.
- **Fleet Assets** - Modified processing to allow users to create and query fleet assets using the standard Asset module. However it is recommended that users use the Asset module only to [associate warranties to fleet assets](#). Failure in adhering to the recommended process could result in critical data and system processing errors.
- **Fleet Asset search screen** - Added Criticality field to Fleet Asset module search option. Users can now search for fleet assets with a criticality that falls within a specified range.
- **FMEA System** - Added the [FMEA System](#) field to the Asset, Enterprise Asset, Asset PM Control and FMEA Template modules. This field helps in grouping and performing maintenance on all similar assets within an FMEA system.

### Purchasing

- **Purchase Order** - Rearranged [views](#) in Purchase Order module to provide better visibility to more frequently used items.

### Resource

- **Employee** - Introduced the [Training \(List\)](#) view in the Employee module which shows a listing of all the training courses completed by the employee.

### System Administration

- **User-defined Fields** - Introduced a [Comment](#) field that you can use to track the purpose and usage details for each user-defined field that is being used in the system.

### System Wide

- Configure the system to use [accommodate the Indian locale numbering convention](#).
- Added a business rule option so that users can create a customized title for the Links component on the home page. Please refer to [Home Page Component Alias](#) in the Configuration Guide for details.

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