Oracle Utilities: WAM v2.2.0.4 Fundamentals Ed 1

Oracle Utilities

DURATION	MODULES	COURSE CODE
5 Days	**13 Lectures**	**—**

Course Overview

Oracle Utilities Work and Asset Management Fundamentals training is an in-depth look at core features and functions of the product.

What You Will Learn

Introduction to Work and Asset Management

- Objectives
- Introduction
- About the Course
- Course Lessons
- Acronyms
- Product Documentation
- Work and Asset Management: Overview
- Architecture
- Business Value
- Continuous Cycle of Improvement
- WAM Functional Modules
- WAM Processes
- Connecting WAM to Strategic Business Initiatives
- Delivers Value Faster Via a Unified and Innovative Platform
- Functional Overview
- Home Page
- Financials
- Assets
- Work Management
- Preventive Maintenance
- Construction Work Management
- GIS Map Viewer

- Resource Management
- Inventory
- Purchasing
- Approvals
- Practice 1-1: WAM Login
- Practice 1-2: WAM Navigation
- Summary

Framework Overview

- Objectives
- Framework: Overview
- The Anatomy of All Pages
- Application Toolbar
- Sub-Menu Options
- Page Title Area
- Object Display Area
- Dashboard
- Practice 2-1: Exploring the Page Anatomy
- Portals: Overview
- Portal Page
- Portal Preferences and Security Access
- Changing Portal Preferences
- Maintenance Portal
- Search Portal
- List Zone
- Help Portal
- Practice 2-2: Exploring Portals and Zones
- Context Menus
- Date and Time
- Go To Button
- Broadcast
- Work List
- Scroll Bars with Dynamic Height
- Sorting
- Trees
- Accordion Windows
- Practice 2-3: Exploring Standard Functions
- Batch Jobs
- Online Submission
- Tracking Batch Processes
- General Batches
- Practice 2-4: Exploring Batch Jobs
- Reports
- To Do Type and To Do Role
- Configuring To Do Type and To Do Role

- Work Distribution
- Current To Do Entry
- To Do List
- To Do Summary
- Related To Do Entries
- Supervisor To Do Summary
- Supervisor User Summary
- Supervisor Assignment
- Practice 2-5: Exploring To Dos
- Quiz
- Summary

Home Page

- Objectives
- About Home Page
- Home Page Navigation
- Configuring the Home Page and Dashboard
- Home Page: Main Page
- Example: Main Page
- Additional Home Portal Pages
- Approvals
- Work
- Inventory
- Purchasing
- Practice 3-1: Configuring Preferences
- Master Configuration: Home Page
- Master Configuration: Main Tab
- Master Configuration: Work Tab
- Master Configuration: Inventory Tab
- Master Configuration: Purchasing Tab
- Home Page Batch
- Menu and Navigation
- Example: User Profile Definitions
- Standard Actions
- Logs
- Searches
- Saved Searches
- Explorer Zone Option Menus
- Bookmarks
- Practice 3-2: User Interface
- Quiz
- Summary

Financials

- Objectives

- Financials
- About Financial Transactions
- Example: Financial Transaction
- FT Types
- Accounting Calendar
- Practice 4-1: Exploring the Accounting Calendar
- About Currency
- Practice 4-2: Exploring Currency
- GL Details
- Cost Centers
- Expense Codes
- Distribution Code
- Batch W1-GLDL Interface Process
- Practice 4-3: Exploring Financial Transactions
- About Colors
- About Cost Category
- Practice 4-4: Exploring Color and Cost Categories
- About Factors and Factor Values
- About Tax Rate Schedules
- Master Configuration: Overview
- Financial Master Configuration Business Object
- Master Configuration: Cost Center Parameters
- Master Configuration: Financial Transaction Parameters
- Master Configuration: Distribution Codes
- Financial-Related Batches
- Quiz
- Summary

Assets

- Objectives
- Asset Management
- About Organizations
- Organization Types
- Organization Levels Within WAM
- Benefits of Organizational Levels
- Organizational Definitions
- Organizational Structure
- Organizational Hierarchy is No Longer Tied to Accounting
- Organizational Hierarchies Support Operational Accounting
- Practice 5-1: Exploring Organizational Configuration
- About Contacts
- Types of Contacts
- Contact Information
- Practice 5-2: Exploring Customer Contacts
- What Is an Asset?

- Example: Asset Record
- Asset Characteristic Quick Add
- Types of Assets
- Asset Type
- Asset Types Can be Segmented by the Owning Organization
- Asset Category/Classification
- Practice 5-3: Working with Assets
- About Components
- Example: Faceplate Component
- Practice 5-4: Working with Components
- Asset Locations
- Location Types
- Assets and Asset Locations
- Asset Location/Asset Relationship Options
- Option 1: A “1” to “1” Asset/Location Relationship
- Option 2: A “1 to Many” Asset/Location Relationship
- Option 3: Asset with Associated Components
- About Asset Disposition
- Example: Asset Disposition
- Mass Asset Disposition Update
- Practice 5-5: Working with Asset Locations
- Material Disposition
- Example: Information Used to Create a Material Disposition
- Material Disposition Process
- Example: Material Disposition Record
- Example: Create a Repair Work Order from an Original Work Order
- Mass Replication
- Example: Asset Replication Activity
- About Specifications
- Specifications: Configuration Management
- Specifications: Engineering
- Example: Ford 150 Pickup Truck Specification
- Specifications: Preventive Maintenance
- Manufacturer
- Warranty Information
- Practice 5-6: Working with Specifications
- About Bill of Material
- Bill of Material
- Example: Bill of Material
- Bill of Materials Parts
- Example: Independent Part
- Practice 5-7: Bill of Materials
- About Measurement Readings
- Measurement Types
- Operational Measurements
- Operational Reading Quick Entry

- Operational Reading Alert Review
- Runtime and Operational Readings from Peer Locations
- Unit of Measure
- Practice 5-8: Working with Measurements
- About Service History
- Example: Service History
- Planned Service History
- Service History Types
- Service History Types Can Create Follow-Up Work
- Compliance-Related Follow-Up Work
- Compliance Category
- Compliance Type
- Corrective Compliance Follow-up Work Is Defined on the Service History Type
- Service History Types Can Assess the Health of an Asset
- Assessment and Inspections
- Assessment Class
- Assessment Group
- Example: Condition Assessment Class/Group/Service History Types
- Assessment Type Questions and Answers
- Asset Condition Score
- Automatic Calculation of Total Asset Health
- Condition Assessment Class Options
- Determining the Condition Rating Basis
- Practice 5-9: Working with Service History
- Asset-Related Batches
- Quiz
- Summary

Work Management test

- Objectives
- About Work Management
- About Planners
- About Permits
- Permit Features
- External and Internal Permits
- Permit Template
- Practice 6-1: Exploring Permits
- About Work Requests
- Work Request Workflow
- Example: Work Request
- Follow-Up Work Requests
- Practice 6-2: Exploring Work Requests
- About Work Orders
- Work Order Structure
- Work Order Activity Dependencies

- Work Orders Can be Planned or Unplanned
- Example: Planned Work Order
- Work Management Workflow
- Changes to a Work Order
- Work Order Status Versus Activity Status
- Approved Versus Activated
- Follow-Up Work
- Example: Work Order
- Practice 6-3: Creating a Work Order
- About Activities
- Assets
- Asset Lists
- Activity Types
- Example: Activity Type
- About Activity Checklists
- General Checklist Type
- Permit Only Checklist Type
- Managing Checklists
- Automatically Generating a Checklist
- Activity Resource Requirements
- Example: Activity Resources
- Reserving Material Resources
- Resource Costs
- Example: Revised Estimate
- About Timesheets
- Timesheet Access
- Completion Events
- Completion Event Types
- Practice 6-4: Working with Activities
- Practice 6-5: Installing a Tracked Asset Using a Work Order
- About Work Order Templates
- Template Work Order Types
- Template Work Order Types: General Template Work Order
- Template Work Order Types: Asset Location–Specific Template Work Order
- Work Order Template Activities
- Example: Asset Specific–Location Template Work Order and Template Activity
- Benefits of Planning
- Practice 6-6: Exploring Work Order Templates
- About Projects
- About Service Calls
- Example: Service Call
- Linking Service Calls
- Service Category
- Service Codes
- Practice 6-7: Exploring Service Calls
- Master Configuration Work Management: Overview

- Work Management Master Configuration: Business Object
- Work Management Master Configuration: Work Order Parameters
- Work Management Master Configuration: Work Request Parameters
- Work Management Number Generator Algorithms
- Work Management–Related Batches
- Quiz
- Summary

Preventive Maintenance

- Objectives
- Preventive Management
- Benefits of Performing Maintenance
- About Preventive Maintenance
- Maintenance Specification
- Maintenance Specification Types
- Operational Maintenance Specifications
- Practice 7-1: Maintenance Specification
- Maintenance Schedules
- Maintenance Scheduling Options
- Quick View of an Operational-Based Maintenance Schedule
- Maintenance Schedule Example: In Service and Out of Service
- Maintenance Schedule Example: Duty Cycle
- Practice 7-2: Maintenance Schedule
- Preventive Maintenance Triggers
- Types of Preventive Maintenance Triggers
- Maintenance Trigger Details
- Maintenance Forecasts
- Adjusting Maintenance Forecasts
- Managing Overdue PMs
- Preventive Maintenance Template Work Order
- More About Template Work Orders
- PM Structure Using Asset Location Template Work Orders
- Preventive Maintenance Work Activity
- Preventive Maintenance Approval Processing
- Practice 7-3: Template Work Orders
- Practice 7-4: Maintenance Triggers
- Practice 7-5: Asset Location–Specific Maintenance (PM Route)
- About Event-Based Maintenance
- Event-Based Planning Process
- Maintenance Events
- Examples of Maintenance Events
- Maintenance Plans
- Maintenance Plan Triggers
- Preventive Maintenance–Related Batches
- Quiz
- Summary

Construction Work Management

- Objectives
- About Construction Work Management
- Overview
- Construction Work Management Capabilities
- Benefits
- Construction Work Management Process
- About Compatible Units
- Example: Compatible Unit Details
- Compatible Unit Types: CU Base
- Compatible Unit Types: CU Function
- Compatible Unit Types: CU Accessory
- Estimates
- CU Contractor Bids
- Example: Contractor Bid
- CU Sets
- CU Hierarchy Zone
- Example Diagram
- Practice 8-1: Working with Compatible Units
- Construction Work Management Process: Work Design
- Quick Glance at a Work Request
- About Work Designs
- Example: Work Design
- Work Design: Estimates Tab
- Example: Design Estimate
- Work Design: Design Elements
- Design Elements: Compatible Units
- Design Elements: Resources
- Creating Work from an Approved Work Design
- Practice 8-2: Creating a Work Design
- Construction Work Management Process: CWO
- Construction Work Order Flow
- About Construction Work Orders
- Example: Construction Work Order
- About Construction Work Activities
- Example of a Work Activity Referencing an Activity Type and Service Class
- Construction Locations
- Construction Locations: Overtime Type
- Practice 8-3: Working with a Construction Work Order and Activity
- Construction Work Management Process: Reconciliation
- Construction Work Activity Reconciliation Flow
- Direct Overhead Distribution
- Indirect Overhead Distribution
- Creating the Activity Reconciliation Record
- Example: Activity Reconciliation Record

- Activity Reconciliation Record: Financial Transaction
- Creating a Fixed Asset Flat File
- Practice 8-4: Activity Reconciliation
- Quiz
- Summary

GIS Map Viewer

- Objectives
- About GIS Map Viewer
- GIS Map Viewer Overview
- General Tools Overview
- Zoom In/Zoom Out
- Home and User Default
- Zoom to Previous/Zoom to Next
- Show Map Overview
- Practice 9-1: General Navigation Features and Tools
- Dashboard Controls Overview
- Global Search
- Asset Tab
- Asset Tab: Select
- Asset Tab: Drop Pin
- Create Design Element (Map)
- Asset Tab: Clear List
- Work Tab
- Work Tab: Activity
- Work Tab: Work Request
- View In Map
- Layers Tab
- Share Tab
- Share Tab: Map Notes
- Share Tab: Select Draw Mode
- Share Tab: Email and Export Map View PDF
- About the Work List Companion
- Example: Work List Companion
- Practice 9-2: Map Viewer Dashboard Controls
- Master Configuration Overview
- Esri Maps Master Configuration
- Esri WAM Integration Master Configuration
- Esri WAM Integration Master Config: Main Zone
- Esri WAM Integration Master Config: Supplemental WAM Locations for Esri
- Esri WAM Integration Master Config: Esri Geo Processing Details
- Esri WAM Integration Master Config: Map Viewer Color Configuration
- Esri WAM Integration Master Config: Specific WebMaps for Asset Types
- Esri WAM–Related Batches
- Quiz
- Summary

Resource Management

- Objectives
- About Resource Management
- About Resources
- Employees
- Employee Craft
- Example: Employee Craft
- Employee Training
- Employee Calendar
- Example: Employee Record
- Employee Types
- Employee Unavailability
- Example: Unavailability
- Practice 10-1: Employee Records
- A Crew Is a Group of Employees
- Crew Type
- Crew Type with Craft
- Example: Scheduling Using Crew Type Without Crafts
- Example: Scheduling Using Crew Type with Crafts
- Crew Available Hours
- Planning Horizon
- Simplistic Example: Five-Day Planning Horizon
- Service Area
- Service Classes
- About Crew Shifts
- Crew Shift
- Planning Shifts
- Shifts Can be Created “On the Fly”
- Shift Types
- Example: Shift Types
- Shifts Can be Created from Scheduling Templates
- Scheduling Templates
- Common Shift Plan Template
- Example: Common Shift Plan Template
- Crew Shift Template
- Example: Crew Shift Template
- Shift Plan Template
- Crew Shift Craft Capacity
- Resources: Equipment
- Example: Equipment
- Practice 10-2: Equipment
- Practice 10-3: Crews
- Practice 10-4: Crew Shifts
- Practice 10-5: Crew Shift Templates
- About Scheduling

- Scheduling Details Between Activity and Crew
- Adding an Activity to an Active Schedule
- Adding Employee Assignments to an Active Schedule
- Break-In Activities
- Viewing Each Employee’s Total Scheduled Hours
- Practice 10-6: Scheduling Work
- About Documents
- Document Types
- Document Record
- Document Portal
- About Attachments
- Owned Attachments
- Example: Owned Attachments
- Referenced Attachments
- Resource Management Master Configuration: Overview
- Resource Management Master Configuration: Business Object
- Resource Management Master Configuration: Crew Shift Parameters
- Resource Management–Related Batches
- Quiz
- Summary

Inventory

- Objectives
- Inventory
- Storerooms and Stock Items
- About Storeroom and Out of Service Locations
- Examples of Storerooms
- Example: Storeroom
- Example: Out of Service Location
- Practice 11-1: Exploring Storerooms
- About Stock Items
- Example: Stock Item
- Stock Item Stock Item Detail
- About Stock Item Detail
- Inventory Details Portal on the Dashboard
- Stock Categories
- Commodity Codes
- Practice 11-2: Exploring Stock Items and Stock Item Details
- About Receiving
- Receiving: Forced Complete
- About Returns
- Practice 11-3: Receiving Stock Items into Inventory
- About Material Requests
- Material Issue
- Material Returns

- Material Request Templates
- Example: Material Request Template
- Practice 11-4: Exploring Material Requests
- Stock Transfers
- Practice 11-5: Exploring Stock Transfers
- Material Disposition
- Example: Material Disposition Record
- Physical Inventory and Inventory Adjustments
- Example: Physical Inventory and Adjustment
- Practice 11-6: Performing a Physical Inventory Count
- Batch Stock Reorder and Review
- Example: Batch Stock Reorder and Review
- Automatic and Manual Approval
- Mass Approval
- Automatic Reorder
- Inventory Master Configuration: Overview
- Inventory Master Configuration: Business Object
- Inventory Master Configuration: Physical Inventory Parameters
- Inventory Master Configuration: Batch Stock Reorder Parameters
- Inventory Master Configuration: Receiving Parameters
- Inventory Master Configuration: Issue Line Parameters
- Inventory-Related Batches
- Quiz
- Summary

Purchasing

- Objectives
- About Purchasing
- Procurement Life Cycle
- About Buyers
- Example: Buyer
- Purchase Commodities
- Practice 12-1: Buyers and Purchase Commodities
- About Manufacturers
- About Vendors
- Example: Vendors
- Vendor Locations
- Vendor Capability Types
- Practice 12-2: Manufacturer and Vendor Configuration
- About Purchase Requisitions
- Example: Purchase Requisition
- Purchase Requisition Line Item: Resource Types
- Direct Versus Inventory
- Purchase Requisition Flows
- Manual Purchase Requisition (PR) Flow: Initiate PR

- Manual PR Flow: Add Line Items and Cost Centers
- Automatic Store Replenishment (SR) Flow: Initiate PR
- Automatic SR Flow: Line Items and Cost Centers
- Automatic Work Order (WO) Flow: Initiate PR
- Automatic WO Flow: Line Items and Cost Center
- All Flows: Route PR for Approval
- PR to PO Creation: Post Approval Flows
- Purchase Requisition Transitions to a Purchase Order
- Practice 12-3: Purchase Requisitions
- About Purchase Orders
- Example: Purchase Order
- Purchase Order Line Items
- Purchase Order Flows
- Manual Purchase Order (PO) Flow: Initiate PO
- Manual PO Flow: Add Line Items and Cost Center
- Automatic Batch Stock Reorder Review: Initiate PO
- Automatic Batch Stock Reorder Review: Approval
- Automatic Batch Stock Reorder Review: Batch Processing Creates PR or PO
- Process Flows for Making Changes to Approved POs
- PO Approved But Not Issued Flow
- Change Order on an Issued PO
- Change Order on an Issued PO Flow
- Expediting a Purchase Order
- Example: Expedite Purchase Order
- Expediting a PO Flow
- Practice 12-4: Purchase Orders
- About Blanket Contracts
- Example: Blanket Contract
- Blanket Contracts: Status
- Blanket Contracts: Access Lists
- Example: Access List
- Blanket Contract Line Items: Resource Types
- Practice 12-5: Blanket Contracts
- Purchasing Master Configuration: Overview
- Purchasing Master Configuration: Business Object
- Purchasing Master Configuration: Purchasing Parameters
- Purchasing Master Configuration: Invoicing Parameters
- Purchasing Master Configuration: Invoice Tolerances
- Purchasing Master Configuration: Alternate Currency Exchange Rates
- Number Generator Algorithms
- Purchasing-Related Batches
- Quiz
- Summary

Approvals

- Objectives

- About Approvals
- Approvals
- About Approval Requests
- Example: Approval Request
- About Approval Profiles
- Example: Approval Profile
- Approval Profile: Classifications
- Approval Profile: Approval Types
- Approval Profile: Hierarchy
- To Do Type and To Do Role
- Example: To Do Type and To Do Role
- Approval Profile: Notification Types
- Practice 13-1: Exploring Approvals
- About the Approval Dashboard
- Example: Approval Dashboard
- Practice 13-2: Approval Dashboard
- Approval-Related Batch
- Quiz
- Summary