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RAMCO AVIATION SOLUTION

VERSION 5.8

USER GUIDE

WARRANTY MANAGEMENT

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ABOUT THIS MANUAL

This manual briefly describes the basic processes and functions in Ramco Aviation Solution.

WHO SHOULD READ THIS MANUAL

This manual is intended for users who are managing the Aviation industry processes and are new to Ramco AviationSolution. This manual assumes that the user is familiar with the Aviation Industry nomenclatures and systems based software.

HOW TO USE THIS MANUAL

Ramco Aviation Solution provides extensive Online Help that contains detailed instructions on how to use the application. Users are suggested to use this manual for specific references, along with the Online Help. This manual contains enough information to help the users perform the basic tasks and points toward the Online Help for more detailed information.

HOW THIS MANUAL IS ORGANIZED

The User Guide is divided into 4 chapters and index. Given below is a brief run-through of what each chapter consists of.

Chapter 1 provides an overview of the **Warranty Management** business process The sub processes are explained in the remaining chapters.

Chapter 2 focuses on the **Warranty Management** sub process.

Chapter 3 dwells on the **MRO Warranty** sub process.

The **Index** offers a quick reference to selected words used in the manual.

DOCUMENT CONVENTIONS

- The data entry has been explained taking into account the “Create” business activity. Specific references (if any) to any other business activity such as “Modify” and “View” are given as “Note” at the appropriate places.
- **Boldface** is used to denote commands and user interface labels.

  Example: Enter **Company Code** and click the **Get Details** pushbutton.
- Italics used for references.

  Example: *See Figure 1.1.*
- The icon is used for Notes, to convey additional information.

REFERENCE DOCUMENTATION

This User Guide is part of the documentation set that comes with Ramco Aviation Solution.

The documentation is generally provided in two forms:

- The Documentation CD in Adobe® Systems’ Portable Document Format (PDF).
- Context-sensitive Online Help information accessible from the application screens.

WHOM TO CONTACT FOR QUERIES

Please locate the nearest office for your geographical area from www.ramco.com for assistance.

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INTRODUCTION

Warranty is an approved performance level of items or services supplied by a particular supplier to a customer. A service is a repair done by a repair agency. Purchase of components, or services on various components, have warranty associated with them. The most common items an operator seeks to be covered under warranty are the new assets such as aircraft, engines, APUs, rotables and services thereupon. Other items like spares and consumables can also be covered under warranty.

The Warranty Clauses and Warranty Terms that are applicable for a particular component are identified as Warranty Coverage Information. A component warranty reference document contains the warranty clause defined for a component. Warranty terms and condition are identified as a part warranty agreement. It contains the permissible conditions within which warranty claim can be made. A claim is made when the component under warranty fails. Warranty clauses can be in terms of more than one consumption type parameter like Flying Hours (FH), Flying Cycles (FC) or Elapsed time. Whenever there is more than one parameter associated for warranty purposes, warranty clause shall normally apply to any of the parameters, whichever is falling earlier.

The **Warranty Management** business process covers the administration of warranties including claim generation, processing and settlement.

WARRANTY MANAGEMENT

The warranty management process extends support for warranty tracking and claim administration.

Warranty terms and conditions are identified as a part warranty agreement. It contains the permissible conditions within which warranty claim can be made. A component warranty claim is a document raised on a component that has failed when it is under warranty. The claim is created with reference to the warranty coverage details that include the warranty clauses and warranty terms defined for a particular component.

The component warranty claim is created with the details such as warranty reference, part failed date, the defects observed on the component, the supplier on whom the claim is raised, the work orders executed on the component and the expenses incurred on the component.

After creating, the claim is confirmed and released to the supplier for further processing. The supplier can agree for the settlement of the claim, or reject the claim.

Based on the supplier's response or feedback, the warranty claim is revised. Once the details of the claim are frozen, the claim cannot be revised. The claim document is closed after the operator receives the claim amount or the component, or both.

Warranty business component covers the administration of warranties including claim generation, processing and settlement.

Claims business component allows you to initiate a claim detailing the damages or loss information (if any) during inspection of the goods received and to register with the supplier. The claim is created with the details such as defects observed on the component, the supplier on whom the claim is raised, and the expenses incurred on the component.

2.1 SETTING OPTIONS

You can set default options for the various fields in the activities of the **Warranty** business component. You can also modify the options that are already defined.

1. Select **Set Options** under the **Warranty** business component. The **Option** Settings **Information** page appears. *See Figure 2.1.*

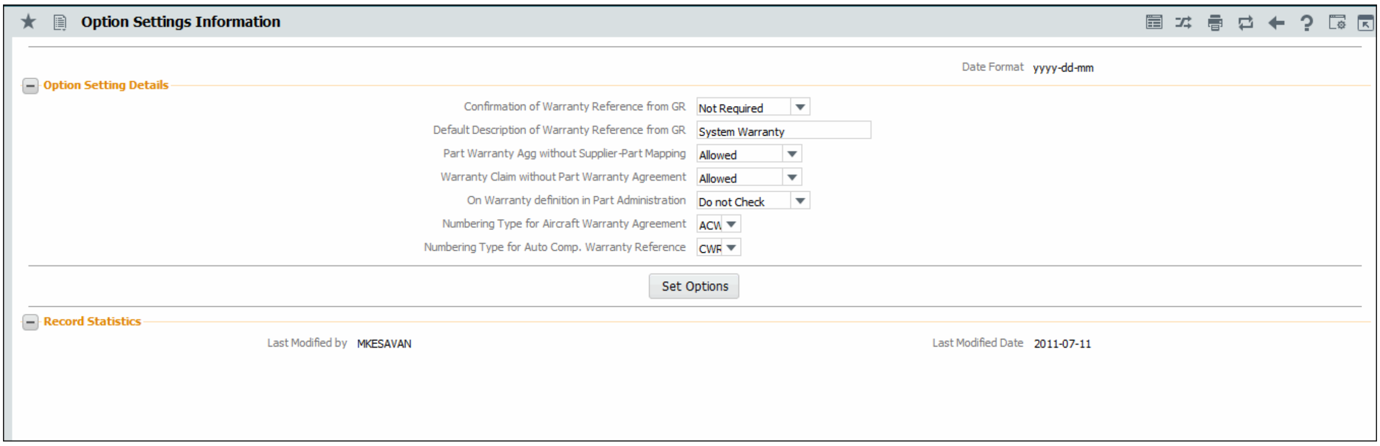


Figure 2.1 Setting options

2. Use the drop-down list box to indicate whether the confirmation of warranty reference is required in **Confirmation of Warranty Reference From GR**.
3. Enter the **Default Description of Warranty Reference from GR**.
4. Use the drop-down list box to indicate whether the part must already be associated to the supplier while creating the part warranty agreement in the **Part Warranty Agg Without Supplier –Part Mapping**.
5. Use the drop-down list box to indicate whether the component warranty claim can be created without referring the part warranty agreement in the **Warranty Claim Without Part Warranty Agreement**.
6. Use the **On Warranty definition in Part Administration** drop-down list box and select the option “Check” if the warranty definition has to be checked in the Planning information for the part in “Part Administration” business component, else, select the option “Do not Check”.
7. Use the **Numbering Type for Aircraft Warranty Agreement** drop-down list box to specify the numbering type for the aircraft warranty agreement, and the Numbering Type for Auto Comp. Warranty Reference drop-down list box to specify the numbering type for the component warranty reference generated automatically.

2.1.1 DEFINING QUICK CODES

You can create quick codes for the **Warranty** business component. The basic quick code types such as “Warranty Category”, “User Status - Part Warranty Agreement”, “Agreement Category”, “User Status - Warranty Claim”, “Claim Category”, “Suggested Action”, “Remedy”, “Reject Reason”, “Agg User Option - 1", “Agg User Option -2", "Agg User Option -3", "Agg User Option - 4", "Claim User Option - 1", "Claim User Option - 2", "Claim User Option - 3", "Claim User Option – 4”, “MRO Warranty Category”, “MRO Warranty User Status” and “MRO Warranty Program Type are defined in the system. Quick codes can be defined under each of these quick code types.

1. Select **Create Quick Codes** under the **Warranty** business component. The **Create Quick Code** page appears. *See Figure 2.2.*

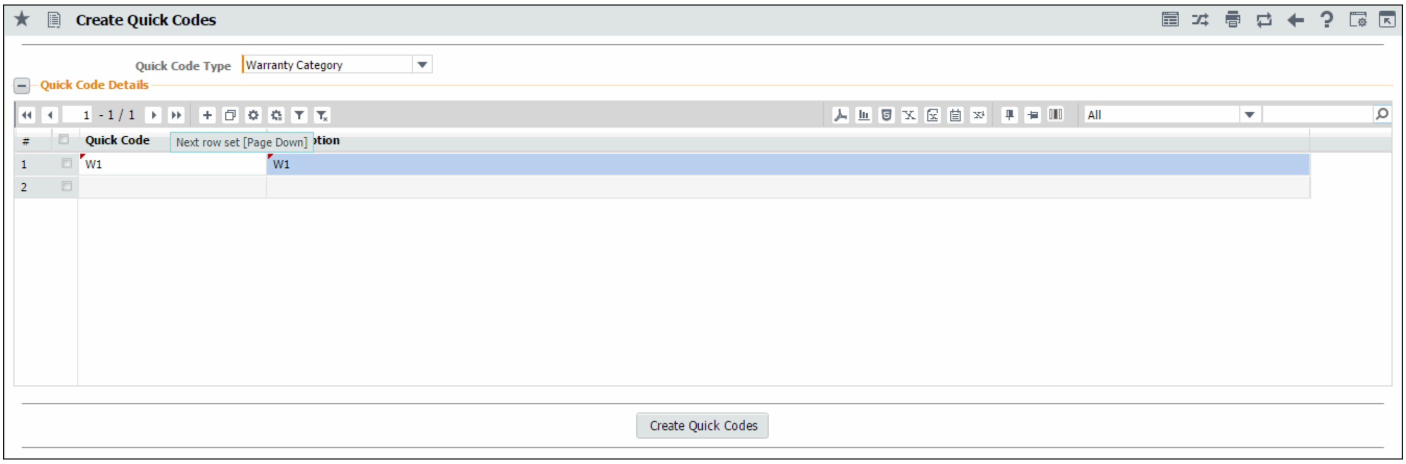


Figure 2.2 Creating quick codes

2. Select the **Quick Code Type** using drop-down list box.

3. Enter the **Quick Code** and the **Description** in the **Quick Code Details** multiline.

4. Click the **Create Quick Codes** pushbutton, to create the quick codes.

2.2 RECORDING WARRANTY COVERAGE INFORMATION

Warranty coverage information comprises both Warranty Reference document and Part Warranty Agreement. Warranty Reference document consists of warranty clause whereas warranty terms and conditions are defined in Part Warranty Agreement.

2.2.1 MAINTAINING AIRCRAFT WARRANTY DETAILS

1. Select the **Maintain Aircraft Warranty Details** link under the **Warranty** business component. The Maintain Aircraft **Warranty Details** page appears. *See Figure 2.3*

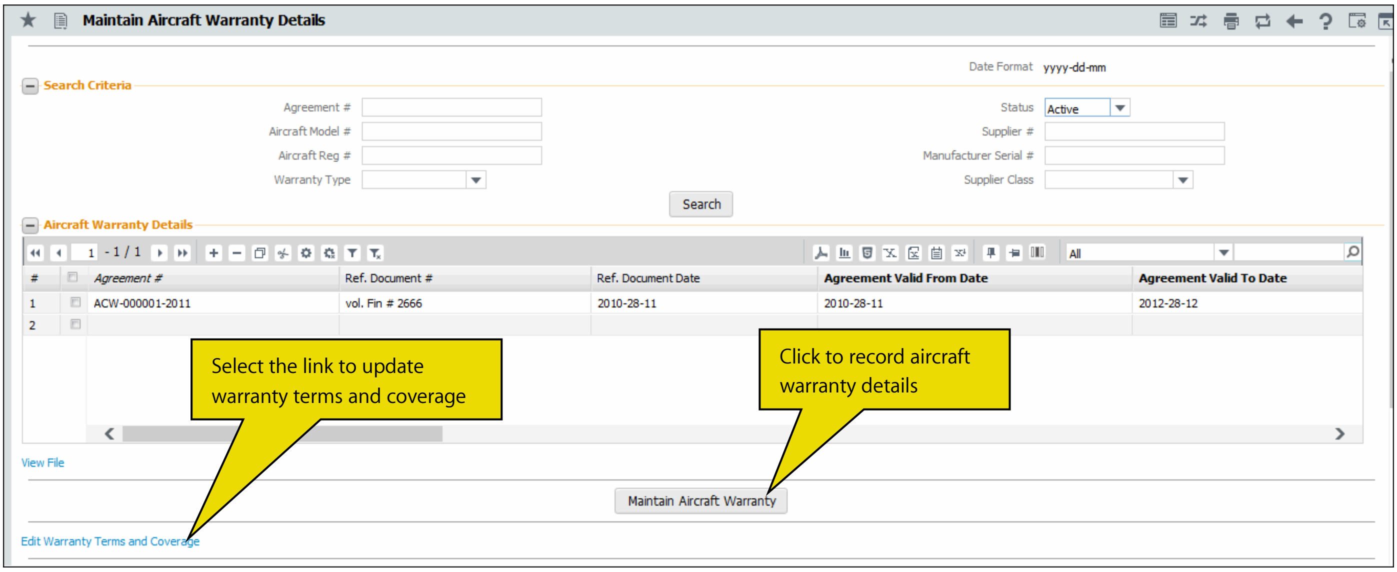


Figure 2.3 Maintaining aircraft warranty details

1. Enter filter criteria to search for the aircraft warranty and click the Search pushbutton.
2. Enter the **Ref. Document #** and **Ref. Document** Date based on which the aircraft warranty is created, in the **Aircraft Warranty Details** multiline.
3. Enter the **Agreement Valid From Date**, **Agreement Valid To Date**, **Aircraft Reg #** and **Supplier #** of the aircraft.
4. Select the category to which the agreement belongs in the **Agreement Category** field.
5. Select the **Warranty Type** as “New”, “OEM”, “Overhaul”, “Repair”, “Ultimate Life” or “Mod”.
6. Set the **Status** of the aircraft warranty agreement as “Active” or “Inactive”.
7. Click the **Maintain Aircraft Warranty** pushbutton to record the aircraft warranty details.

To provide further details,

- Select **Edit Warranty Terms and Coverage** link to update the warranty terms and coverage details.

2.2.2 UPDATING WARRANTY TERMS AND COVERAGE

You can update the warranty terms and coverage details using this page. Using this page you can associate multiple aircrafts to an agreement, once the agreement is created.

1. Select the **Edit Warranty Terms and Coverage** link in the **Maintain Aircraft Warranty Details** page. The **Edit Warranty Terms and Coverage** page appears. *See Figure 2.4.*
2. Specify the **Warranty** Applicability as “Aircraft”, “Components” or “Aircraft and Components” in the **Warranty Terms** group box.
3. Use the **Failed Part Disposition** drop-down list box and select “Scrap” to indicate that failed parts are scrapped off, “Return” to specify that the failed part is returned to the supplier, or “Hold” to specify that the failed part is kept on hold by the airline operator.

4. Select “Part Replacement” or “Credit Request” in the Default **Claim Remedy** drop-down list box, to request for part replacement or credit of claim amount from the supplier as a claim remedy for the failed part.

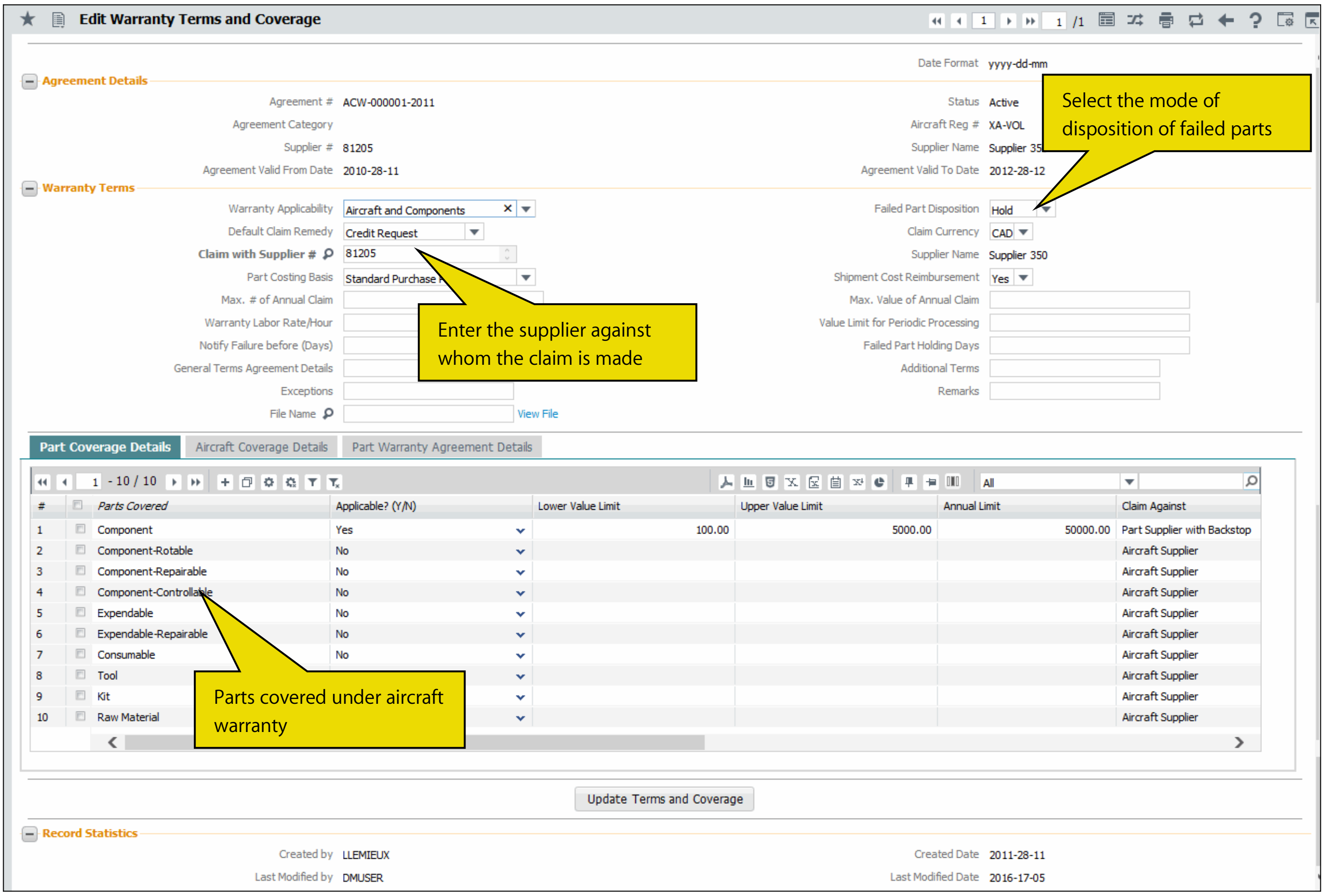


Figure 2.4 Updating warranty terms and coverage

5. Select the **Claim Currency** and enter the supplier against whom the claim is made in the **Claim with Supplier #.**

6. Use the **Part Valuation** drop-down list box and select “Standard Cost”, “Standard Purchase Price” or “Current Value”, to specify the valuation method when the failed part is claimed.

7. Select “Yes” or “No” in the **Shipping Cost Reimbursement** field, to indicate whether the supplier will remit the shipping cost or not.

8. Enter the **Max. # of Annual Claim, Max. Value of Annual Claim, Warranty Labor rate/Hour, Value Limit for Periodic Processing, Notify Failure Before (Days), Failed Part Holding Days** and **General Terms Agreement Details.**

To proceed further,

- Select the **Part Coverage Details** tab to identify the parts that are covered under the aircraft warranty agreement.

Refer to the topic “Updating part coverage details” for more details.

- Select the **Aircraft Coverage Details** tab to associate one or more aircrafts to the aircraft warranty agreement.

Refer to the topic “Updating aircraft coverage details” for more details.

- Select the **Part Warranty Agreement Details** tab to associate one or more part warranty agreements to the aircraft warranty agreement.

Refer to the topic “Updating part warranty agreement details” for more details.

9. Click the **Update Terms And Coverage** pushbutton to update the terms and coverage details provided in this page.

Updating part coverage details

Using this tab page, you can identify the parts that are covered under the parts that are covered under the aircraft warranty agreement and specify the coverage terms.

1. Select the **Part Coverage Details** tab in the **Edit Warranty Terms and Coverage** page. *See Figure 2.4.*
2. Select “Yes” in the **Applicable ? (Y/N)** drop-down list box in the multiline, to specify that the warranty is applicable for the part.
3. Enter the **Lower Value Limit**, **Upper Value Limit** and **Annual Limit** for the part for which the claim can be generated.
4. Use the **Claim Against** drop-down list box and select “Aircraft Supplier” to specify that the claim is made against the aircraft supplier, “Part Supplier” to specify that the claim is made against the part supplier or “Part Supplier with Backstop” to specify that the claim can be made against the aircraft supplier if the part supplier denies the warranty claim.
5. Enter the **Coverage Terms** of the part and **Remarks** pertaining to the part coverage details.

Updating aircraft coverage details

1. Select the **Aircraft Coverage Details** tab in the **Edit Warranty Terms and Coverage** page. *See Figure 2.5.*

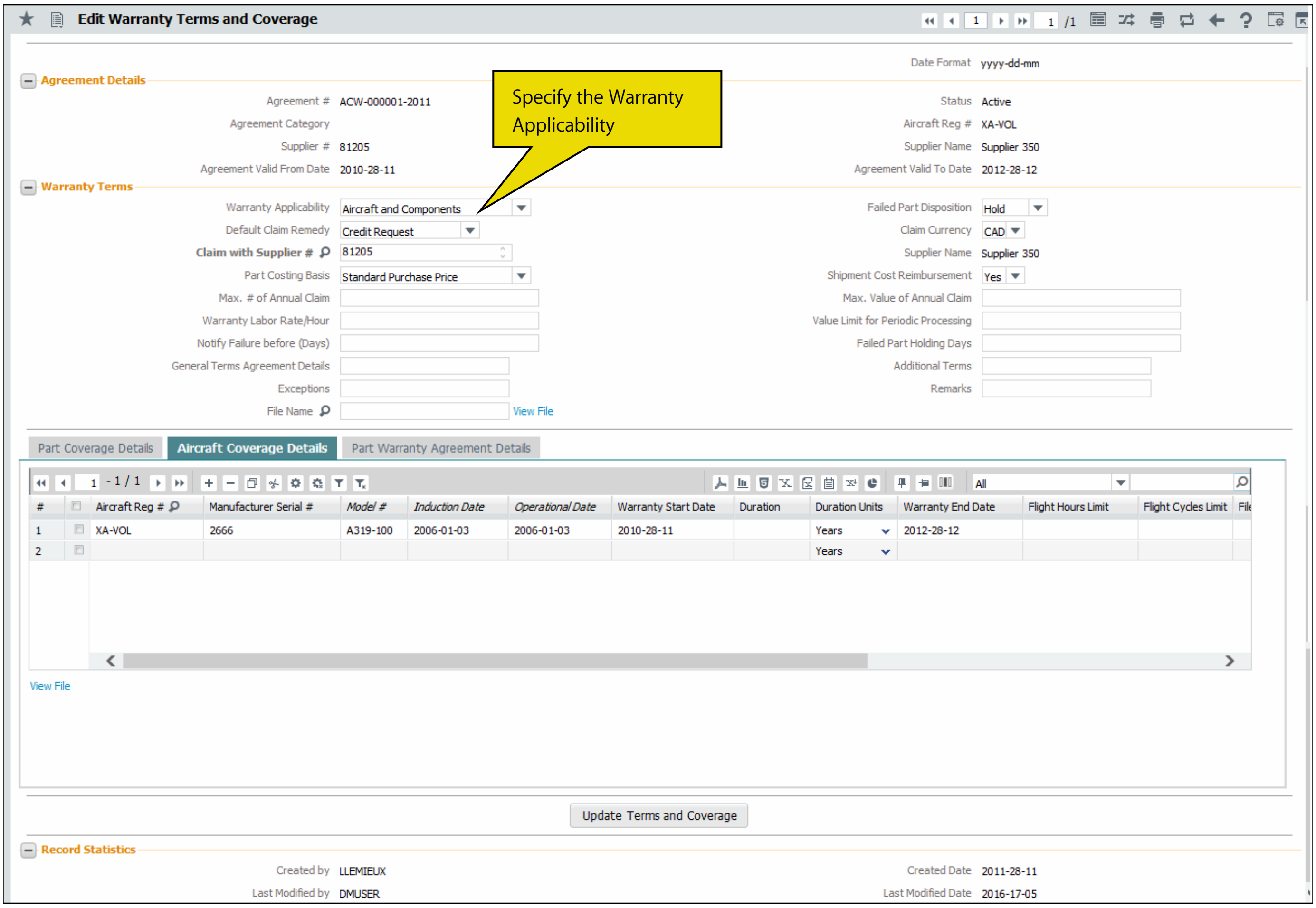


Figure 2.5 Updating aircraft coverage details

2. Enter the **Aircraft Reg #**, **Manufacturer Serial #** of the aircraft, **Warranty Start Date**, **Duration** of the aircraft warranty, **Duration Units** and **Warranty End Date**.
3. Enter the limit defined for the warranty based on flight hours and flight cycles of the aircraft, in the **Flight Hours Limit** and **Flight Cycles Limit** field**.**

Updating part warranty agreement details

1. Select the **Part Warranty Agreement Details** tab in the **Edit Warranty Terms and Coverage** page. *See Figure 2.6.*

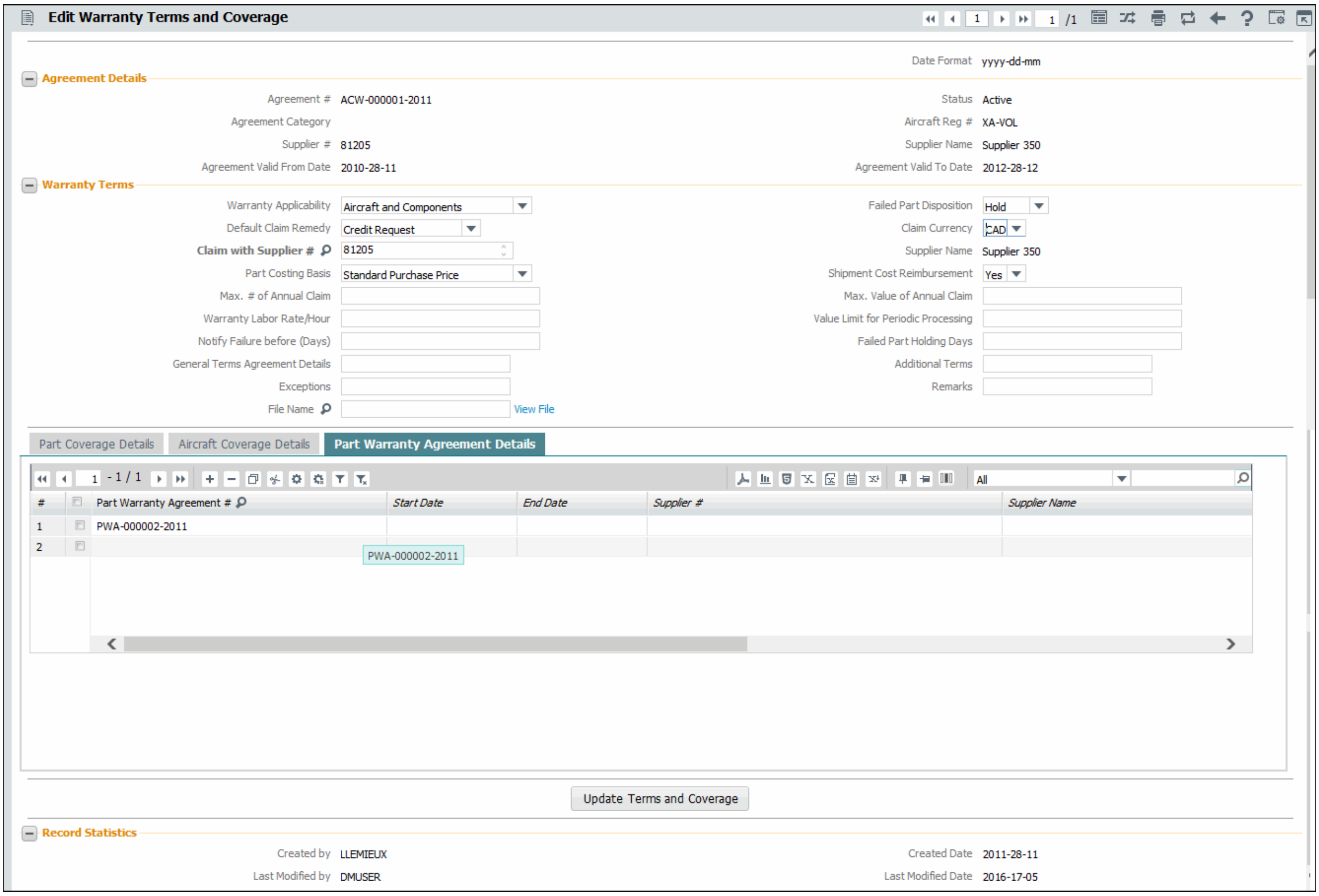


Figure 2.6 Updating part warranty agreement details

2. Enter the **Part Warranty Agreement #**.

3. Select "Yes" in the **Backstop** drop-down list to specify that the claim can be made against the aircraft supplier if the part supplier denies the claim, or select "No" if the claim can be made only from the part supplier.

2.2.3 CREATING PART WARRANTY AGREEMENT

You can create a warranty agreement that contains all the warranty terms and conditions for a part. You can also define the default warranty validity period and associate authorized repair shop for the selected part.

1. Select **Create Part Warranty Agreement** link under **Warranty** business component. The **Select Supplier** page appears.

2. Enter **Supplier** # directly and select the **Create Agreement** link provided alongside. Or, provide **Search Criteria** to search for a supplier, click the **Search** pushbutton. Click the hyperlinked **Supplier #** in the multiline. The **Create Part Warranty Agreement** page appears. *See Figure 2.7.*

3. Select the **Numbering Type** for automatic generation of part warranty agreement number.

   Note: For details on creating numbering types, refer to the section "Defining numbering types for transactions" in the "Inventory Setup" User Guide.

4. Select the **Agreement Category** and the **User Status** of the part warranty agreement in the **Agreement Details** group box.

5. Set the **Agreement Type** as "Standard Terms" to specify that only one valid agreement exists for a supplier for a particular period or "Special Terms" to specify that multiple valid agreements exist for a supplier for a particular period.

6. Select the **Agreement Coverage** as "Parts Catalogue" to indicate that the warranty agreement is created for those parts that are mapped to the supplier in the "Supplier" business component or "Specific Parts" to indicate that

the warranty agreement is created for the parts that are specified in the multiline.

7. Enter the **Start Date** and the **End Date** for the part warranty agreement.
8. Enter the **Part #**, for which the warranty agreement is created, in the **Part Terms Details** multiline.
9. Select “Yes” in the **In-House Repairable?** field, if the part can be repaired in the operator’s shop.
10. Select “Yes” in the “**Applicable On Child Parts ?**” drop-down list box to specify that the part warranty agreement is applicable to the child parts if present in the configuration.
11. Set **Insurance By** drop-down list box as “Supplier” or “Operator”, to indicate the agency that would bear the insurance cost during shipping.
12. Select “Yes” in the **Inspection Cost Reimbursement?** field to indicate that the supplier will remit inspection during preliminary inspection.

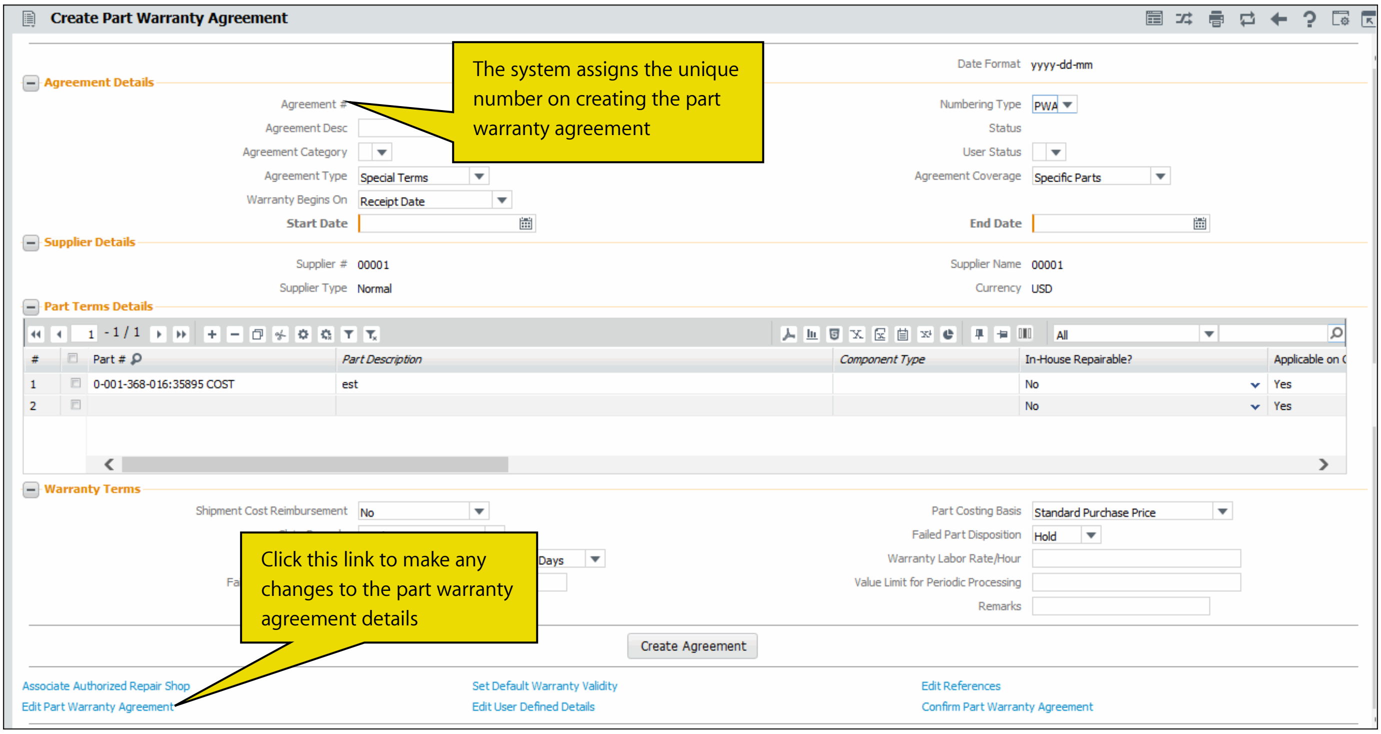


Figure 2.7 Creating a part warranty agreement

13. Enter the **Reimbursement Limit (%) Of Part Cost** with respect to part cost.
14. Enter **MTBUR, MTBF** and record any comments pertaining to the part warranty terms in Remarks field.
15. Select “Receipt Date” or “Installation Date” in the **Warranty Begins On** field to specify whether the warranty coverage for the component begins from the date of installation of part or from the date of goods receipt.
16. In the **Warranty Terms** group box, select “Yes” or “No” in the **Shipping Cost Reimbursement** field, to indicate whether the supplier will remit the shipping cost or not.
17. Specify the **Part Costing Basis** for claiming the failed part, as “Standard Cost”, “Standard Purchase Price” or “Current Rate”.
18. Select “Part Replacement” or “Credit Request” in the **Claim Remedy** drop-down list box, to request for part replacement or credit of claim amount from the supplier as a claim remedy for the failed part.
19. Use the **Failed Part Disposition** drop-down list box and select “Scrap” to indicate that failed parts are scrapped off, “Return” to specify that the failed part is returned to the supplier, or “Hold” to specify that the failed part is kept on hold by the airline operator.
20. Enter the **Notify Failure Before** as “Days” or “Months” before which the failure must be notified to the supplier.
21. Enter the **Warranty Labor Rate / Hour** that will be remitted by the supplier.

22. Enter the **Failed Part Holding Days** for holding the failed part.
23. Enter the claim value limit defined for the failed parts for a particular period, in the **Value Limit Periodic Processing** field.
24. Click the **Create Agreement** pushbutton, to create the **Part Warranty Agreement** details.

   Note: The system generates the part warranty agreement number and sets the status as "Fresh".

To provide further details,

- Select **Associate Authorized Repair Shop** link to associate authorized repair shops to the part warranty agreement.
- Select **Set Default Warranty Validity** link to record the default warranty validity details.

Associating authorized repair shop to part warranty agreement

You can identify the repair shops that are authorized by the supplier for performing the repair work on the part.

Note: Suppliers who are identified as 'Repair Agency' in the "Supplier" business component are termed as 'Repair Shop'.

1. Select the **Associate Authorized Repair Shop** link in the **Create Part Warranty Agreement** page. The **Associate Authorized Repair Shop** page appears. *See Figure 2.8.*

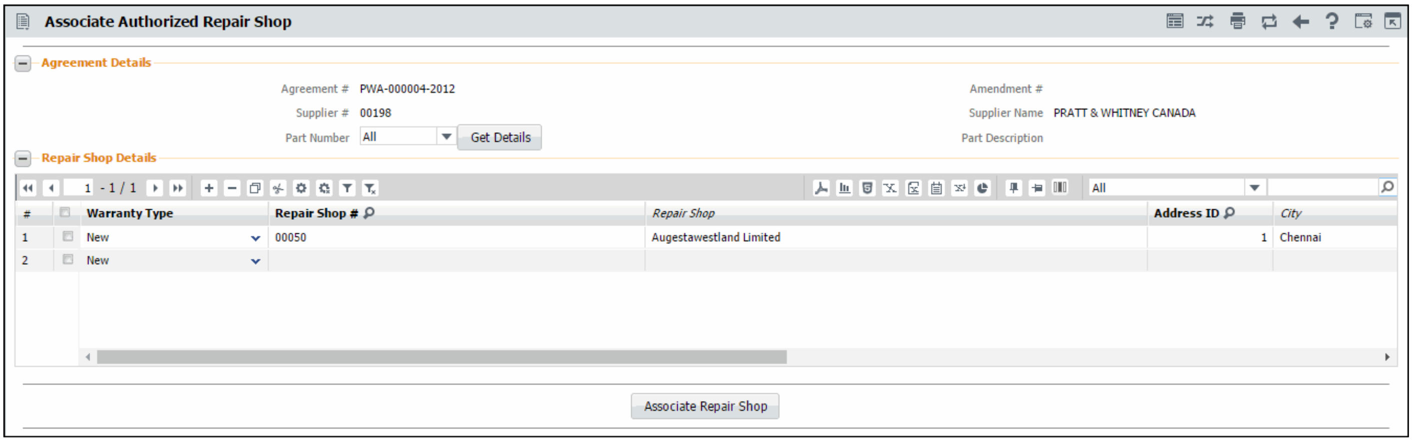


Figure 2.8 Associating authorized repair shop

2. Select the **Part #** to which the authorized repair shop must be associated.
3. Click the **Get Details** pushbutton, to retrieve the repair shop details.

   Note: The system displays the repair shop details that are already defined for the part warranty agreement, in the multiline.

4. Select the **Warranty Type** as "New", "OEM", "Overhaul", "Repair", "Mod" or "Ultimate Life" in the **Repair Shop Details** multiline.
5. Enter the **Repair Shop#** to identify the repair shop that is authorized to perform repair work on the part.
6. Enter the **Address ID** of the repair shop.
7. Click the **Associate Repair Shop** pushbutton, to associate the repair shop to the part warranty agreement.

   Note: Each part number listed in the part warranty agreement gets associated with a repair shop.

Setting the default warranty validity

You can define the default warranty validity for the parts associated to the warranty agreement. The warranty offered by the supplier on the part may be either date based or usage based, which is specified in terms of parameter values. The details can be entered for a specific part and the warranty type.

1. Select the **Set Default Warranty Validity** link in the **Create Part Warranty Agreement** page. The **Set Default Warranty** page appears. *See Figure 2.9.*

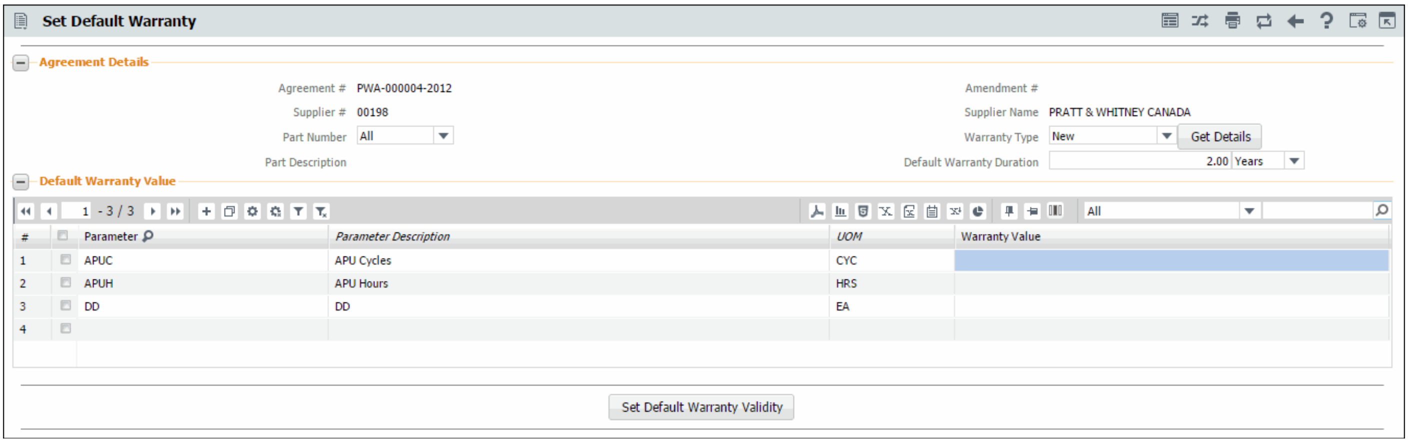


Figure 2.9 Setting default warranty details

2. Select the **Part #** for which you wish to set the default warranty validity period.
3. Select the **Default Warranty Duration** as “Years” or “Months”.
4. Select the **Warranty Type** as “New”, ”OEM”, ”Overhaul”, “Repair“, ”Mod” or ”Ultimate Life”, to specify the type of warranty for which the validity period is defined.
5. Click the **Get Details** pushbutton, to retrieve the consumption parameter information for the part.
6. Enter the **Parameter** code and the **Warranty Value**, based on which warranty is tracked, in the **Default Warranty Value** multiline.
7. Click the **Set Default Warranty Validity** pushbutton, to update the default warranty validity details.

*Note: The **Default Warranty Duration** or **Parameter** must have been entered for the selected part number.*

Entering reference document details for part warranty agreement

You can record reference information for the selected part warranty agreement. The part warranty agreement creation might involve referencing of certain documents that contain the agreement or warranty details and these details are recorded as reference information.

1. Select the **Edit References** link in the **Create Part Warranty Agreement Information** page. The **Edit References** page appears.
2. Select the **Ref. Document Type** in **Document Attachment Details** multiline.
3. Enter **Document ID** and the **File Name**.
4. Click the **Edit References** pushbutton to update the reference document details.

2.2.4 CONFIRMING OR CANCELING PART WARRANTY AGREEMENT

You can confirm or cancel the part warranty agreement in “Fresh” or “Pending Confirmation” status.

1. Select **Confirm Part Warranty Agreement** under **Warranty** business component. *See Figure 2.10.*

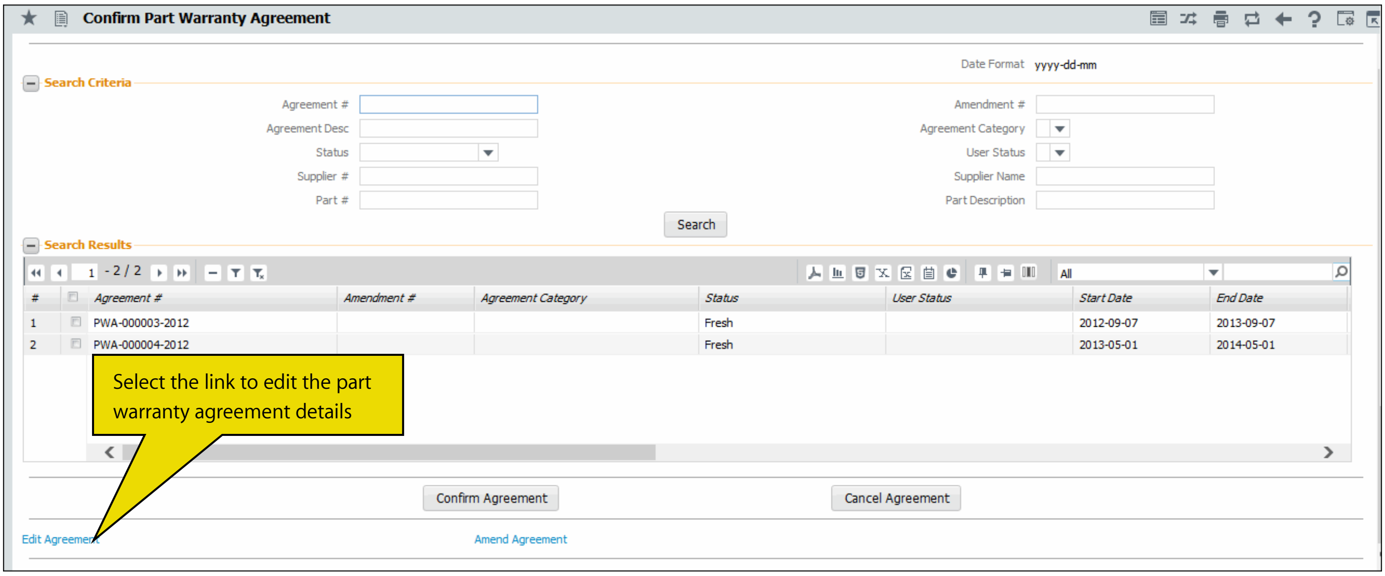


Figure 2.10 Confirming or canceling part warranty agreement

2. Enter filter criteria to search for part warranty agreement and click the **Search** pushbutton.
3. Select the **Agreement #**, which you wish to confirm, cancel or amend in the multiline.
4. You can check the **Select All** box to select all the agreement numbers listed in the multiline.
5. Click the **Confirm Agreement** pushbutton, to confirm the selected agreement.

   Note: A confirmed part warranty agreement can only be amended, it cannot be edited. The system sets the status of the agreement to “Confirmed”.

6. Click the **Cancel Agreement** pushbutton, to cancel the selected agreement.

2.2.5 AMENDING PART WARRANTY AGREEMENT

You can amend the part warranty agreement details after confirmation.

Note: The status of the agreement is set to “Pending confirmation” after the amendment.

1. Select the **Amend Part Warranty Agreement** link under the **Warranty** business component. The **Select Part Warranty Agreement** page appears.
2. Provide **Search Criteria** and click **Get Details** pushbutton to search for the part warranty agreement. Click the hyperlinked **part warranty agreement#** in the multiline.
3. The **Amend Part Warranty Agreement** page appears. *See Figure 2.11.*
4. Select the **Agreement Category** and the **User Status** of the part warranty agreement in the **Agreement Details** group box.
5. Enter the **Start Date** and the **End Date** for the part warranty agreement.
6. Enter the **Part #**, for which the warranty agreement is amended, in the **Part Terms Details** multiline.
7. Select “Yes” or “No” in the **In-House Repairable?** field if the part can be repaired in the operator’s shop.
8. Select “Yes” in the “**Applicable On Child Parts ?**” drop-down list box to specify that the part warranty agreement is applicable to the child parts if present in the configuration.
9. Set **Insurance By** drop-down list box as “Supplier” or “Operator”, to modify the agency that would bear the insurance cost during shipping.
10. Select “Yes” or “No” in the **Inspection Cost Reimbursement?** field to indicate that the supplier will remit inspection during preliminary inspection.
11. Enter the **Reimbursement Limit (%) Of Part Cost** with respect to part cost.

12. Enter **MTBUR, MTBF** and record any comments pertaining to the part warranty terms in **Remarks** field.

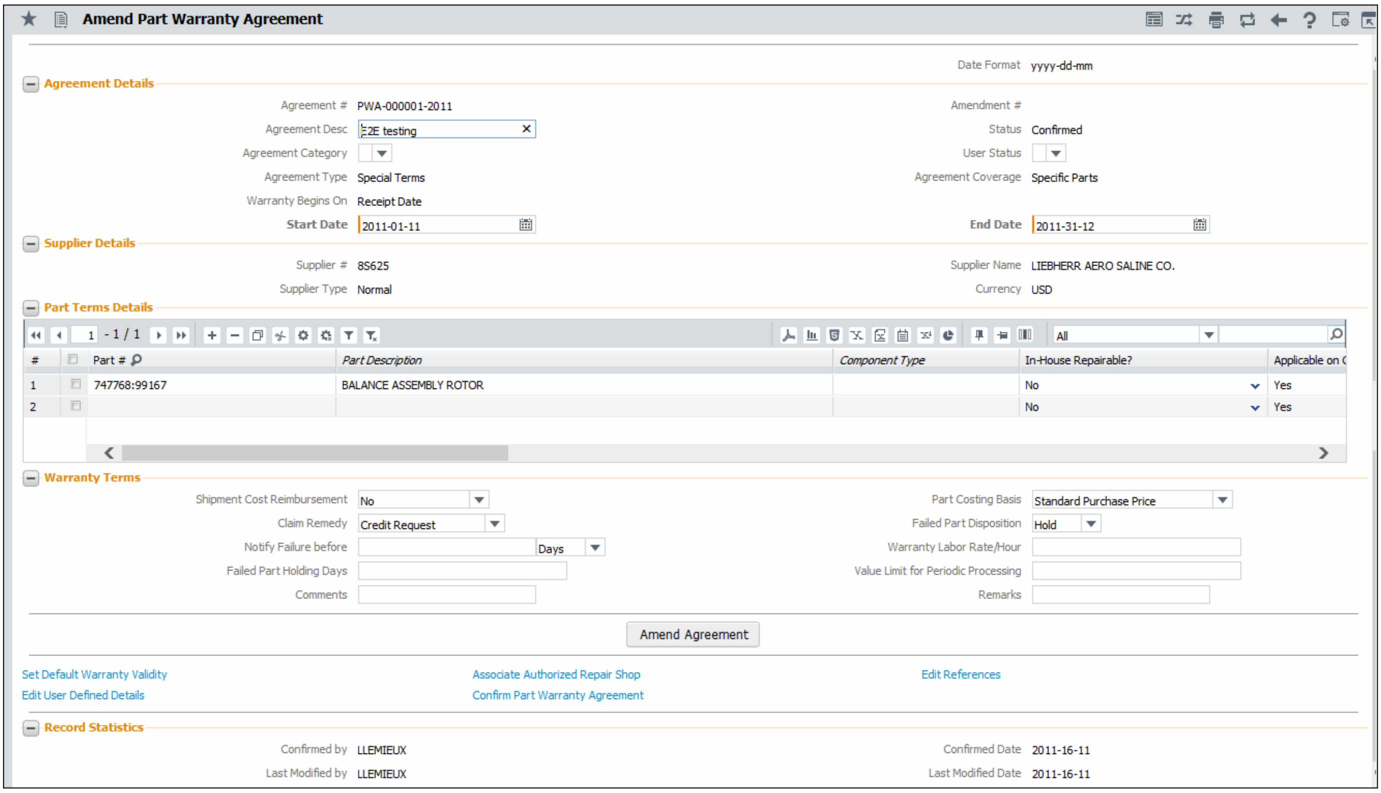


Figure 2.11 Amending part warranty agreement

13. In the **Warranty Terms** group box, select “Yes” or “No” in the **Shipping Cost Reimbursement** field, to indicate whether the supplier will remit the shipping cost or not.
14. Specify the **Part Costing Basis** for claiming the failed part, as “Standard Cost”, “Standard Purchase Price” or “Current Rate”.
15. Select “Part Replacement” or “Credit Request” in the **Claim Remedy** drop-down list box, to request for part replacement or credit of claim amount from the supplier as a claim remedy for the failed part.
16. Use the **Failed Part Disposition** drop-down list box and select “Scrap” to indicate that failed parts are scrapped off, “Return” to specify that the failed part is returned to the supplier, or “Hold” to specify that the failed part is kept on hold by the airline operator.
17. Enter the **Notify Failure Before** as “Days” or “Months” before which the failure must be notified to the supplier.
18. Enter the **Warranty Labor Rate / Hour** that will be remitted by the supplier.
19. Enter the **Failed Part Holding Days** for holding the failed part.
20. Enter the claim value limit defined for the failed parts for a particular period, in the **Value Limit for Periodic Processing** field.
21. Click the **Amend Agreement** pushbutton, to amend the **Part Warranty Agreement** details.

   Note: For details on setting default warranty validity and associate authorized repair shop, refer to the section ***Creating Part Warranty Agreement*** *in* ***Recording Warranty Coverage Information****.*

2.2.6 CREATING COMPONENT WARRANTY

You can create a component warranty reference document for the selected component.

1. Select **Create Component warranty** under **Warranty** business component. The **Select Component** page appears.
2. Provide **Search Criteria** to search for a component and click the **Search** pushbutton. Select the component for which warranty must be created and select the **Create Warranty** link. The **Create Component Warranty Information** appears. *See Figure 2.12.*

3. Select the **Numbering Type** for automatic generation of component warranty number.

   Note: For details on creating numbering types, refer to the section "Defining numbering types for transactions" in the "Inventory Setup" User Guide.

4. Select the **Source** of the component as "Aircraft" or "Component" in the **Warranty Source Details** group box.

   Note: Select "Aircraft" to indicate that the component for which the warranty is created is purchased along with an Aircraft. Select "Component" to indicate the warranty is created for a subcomponent of an Assembly. Else *choose "Blank"*

5. Enter **Aircraft Reg #,** to specify the aircraft number with which the component was purchased.

6. Enter **NHA Part #**, **NHA Serial #** of the parent part, if the source is specified as "Component".

7. Select the **Reference Document Type** as "Purchase Order", "Repair Order", "MCR" or "Others".

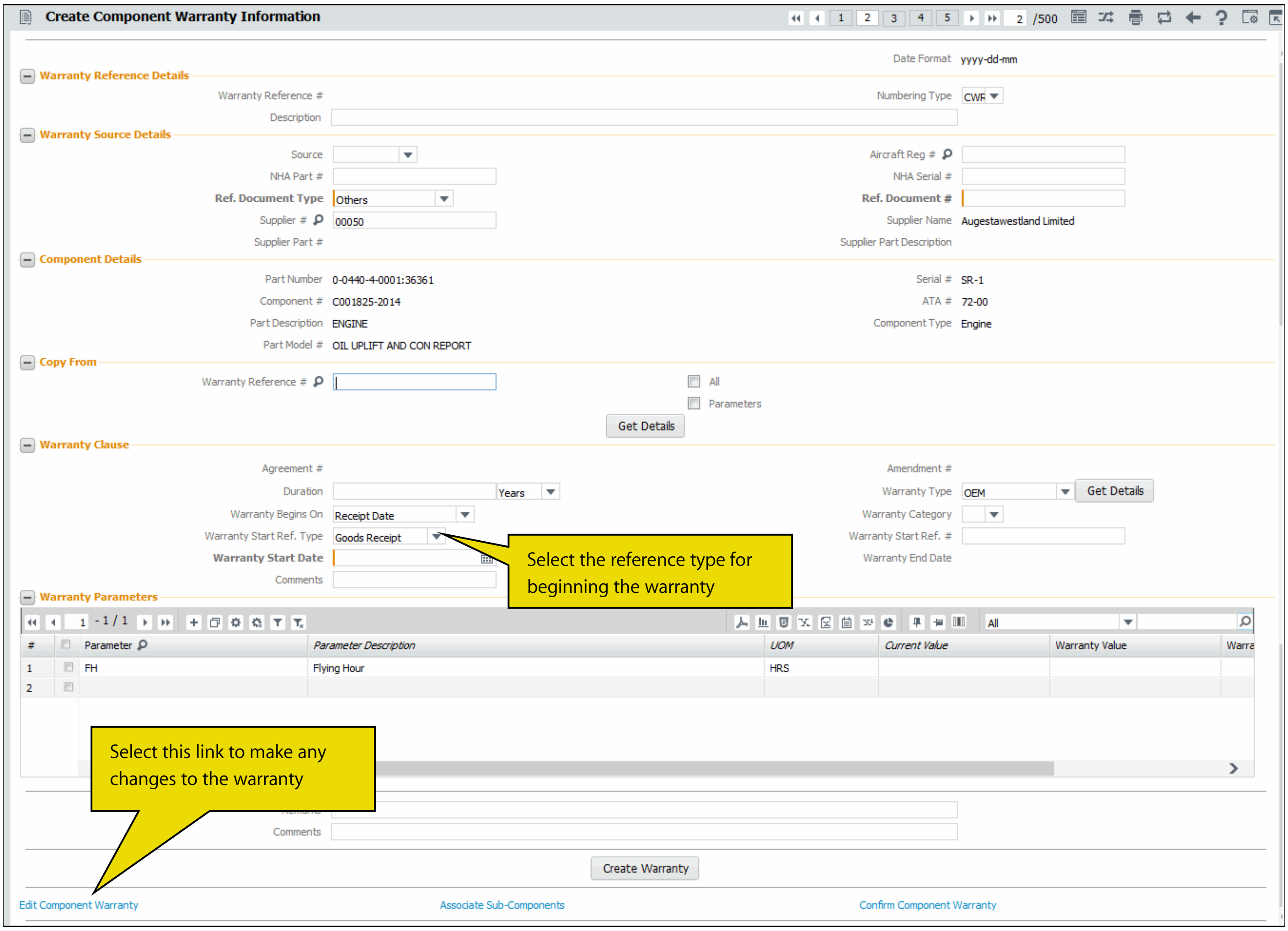


Figure 2.12 Creating component warranty information

8. Enter **Ref. Document #** to identify the purchase order or the repair order based on which the warranty is created.

9. The system displays the **Part #**, **Part Serial #**, **Component #**, **ATA #**, **Part Description**, **Component Type** and **Component Family #** in the **Component Details** group box

   Note: On clicking "Create Warranty" pushbutton, the system checks for the warranty applicability in the "Part Administration" business component if the "On Warranty definition in Part Administration" field is set as "Check" in the "Option Setting" activity of the current business component.

10. Enter **Supplier #** to identify the supplier of the component.

11. Enter the **Duration** after which the warranty elapses, in the **Warranty Clause** group box. Select the **Duration** as "Years", "Months", "Days" or "Weeks".

12. Select the **Warranty Type** as “New”, ”OEM”, ”Overhaul”, “Repair”, ”Ultimate life”, or “Mod” and click the “Get Details” pushbutton to retrieve the warranty clause details.

    Note: The warranty type can be “Mod” only when the reference document is “MCR”. It can be “New “or “OEM” only when the reference document is “Purchase Order” and it can be “Repair” or “Overhaul”, only when the reference document is “Repair Order”.

13. Select the **Warranty Category**.
14. In the **Warranty Start Ref. Type** drop-down list box, select “Component Removal”, “Goods Receipt” or “Others”, to specify the reference type for beginning the warranty.
15. Enter the **Warranty Start Date**. The system displays the **Warranty End Date**.

    *Note: Data entry in **Warranty Start Date** is mandatory, if the warranty reference is created by the warranty administrator.*

16. In the **Warranty Parameters** multiline, enter the Parameter, Warranty Value and Warranty Expiry value.

    Note: Ensure that the warranty expiry value is not less than the warranty value

17. Click the **Create Warranty** pushbutton to create the warranty reference details.

    Note: The system creates the warranty and sets the status as “Fresh”.

To provide further details,

- Select the **Edit Component Warranty** link to modify the component warranty information.
- Select the **Associate Sub-Components** link, to associate sub components to the component warranty document.
- Select the **Confirm Component Warranty** link at the bottom of the page to confirm the Warranty Reference # generated.

Associating sub-components to warranty

While defining warranty information for a component, the sub-components attached to the component can also be associated to the component warranty. The warranty terms and conditions that are applicable for the component also become applicable for the sub-components associated to it. You can enter the part number and part serial number of the sub-component and associate it to the component warranty.

1. Select the **Associate Sub-components** link in the **Create Warranty Information** page. The **Associate Sub-Component** page appears. *See Figure 2.13.*

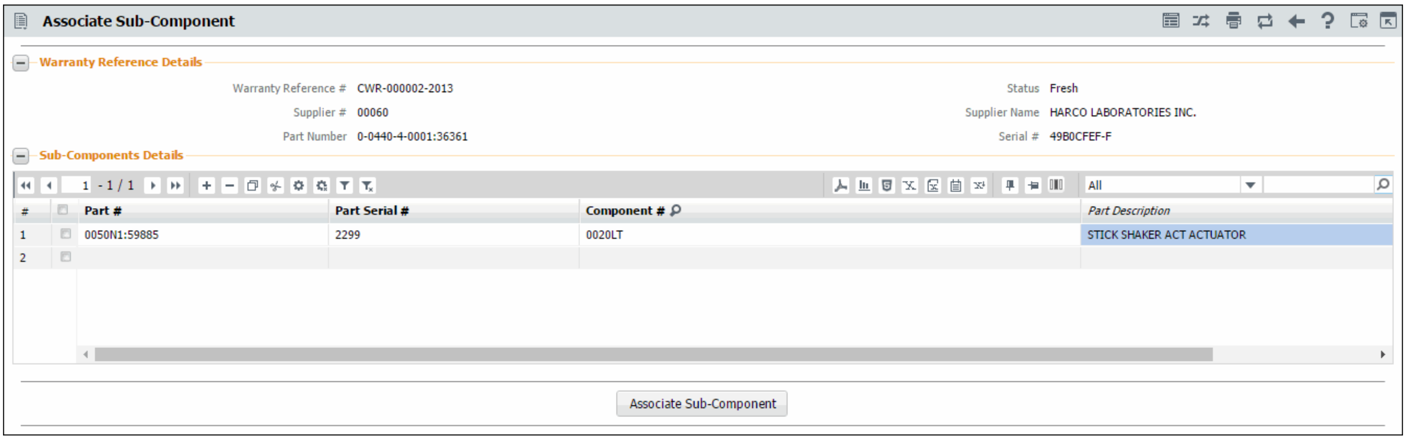


Figure 2.13 Associating sub-components

2. Enter the **Part #**, **Part Serial #** and **Component #** in the **Sub-Components Details** multiline.

    Note: The part number and serial number combination must be of type “Component”, and ensure that the combination is unique for each sub-component given in the multiline.

3. Click the **Associate Sub-Component** pushbutton, to associate sub-components to warranty.

2.2.7 CONFIRMING OR CANCELLING COMPONENT WARRANTY

1. Select **Confirm Component Warranty** activity under **Warranty** business component or select the **Confirm Component Warranty** link in the **Create Warranty Information** page. The **Confirm component warranty** page appears. *See Figure 2.14.*

2. Enter filter criteria to search for component warranty and click the **Search** pushbutton.

3. Select the **Warranty Reference #**, which you wish to confirm or cancel, in the multiline.

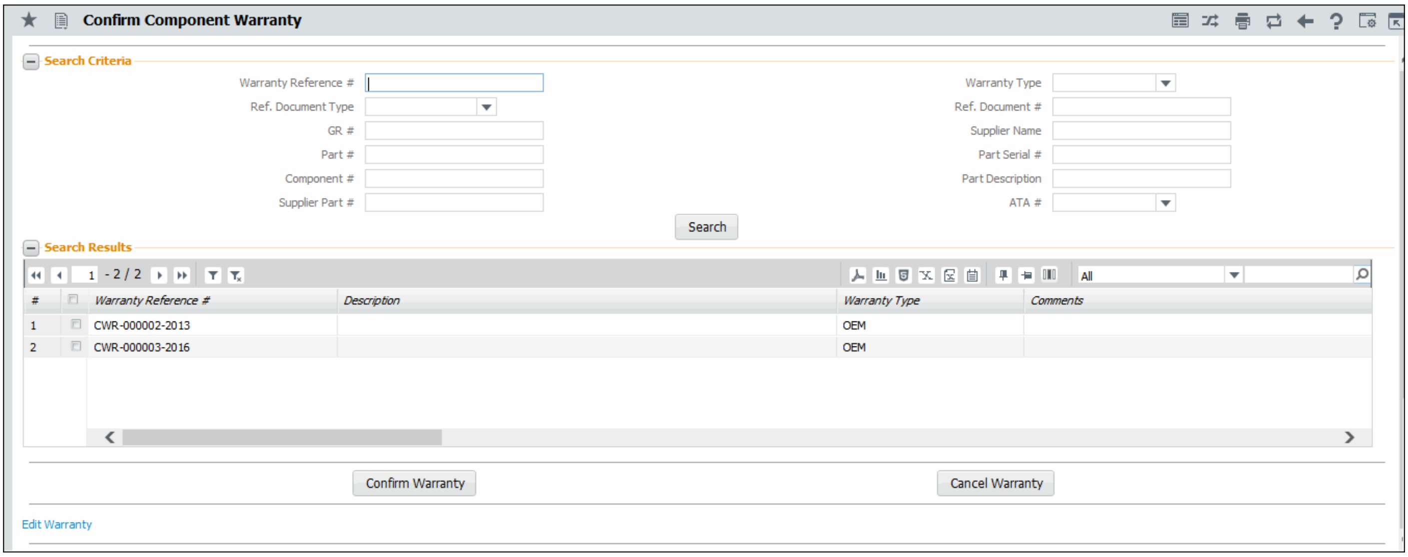


Figure 2.14 Confirming or canceling warranty agreement

4. Click the **Confirm Warranty** pushbutton, to confirm the warranty reference details.

5. Click the **Cancel Warranty** pushbutton, to confirm the warranty reference details.

*Note: Select the **Edit Warranty** link to edit the component warranty reference in "Fresh" status.*

2.2.8 EXPIRING COMPONENT WARRANTY

The component warranty can be expired when the warranty period elapses or if the value of the warranty parameter exceeds the warranty expiry value. In some cases the warranty on a component can be expired even when it in under Warranty as in "AOG" situation.

Note: Only those component warranty reference documents that are in "Confirmed" status can be expired.

1. Select the **Expire Component Warranty** link in the **Warranty** business component. The **Expire Component Warranty** page appears. *See Figure 2.15.*

2. Provide **Search Criteria** to search for the component warranty and click the **Search** pushbutton to display the results.

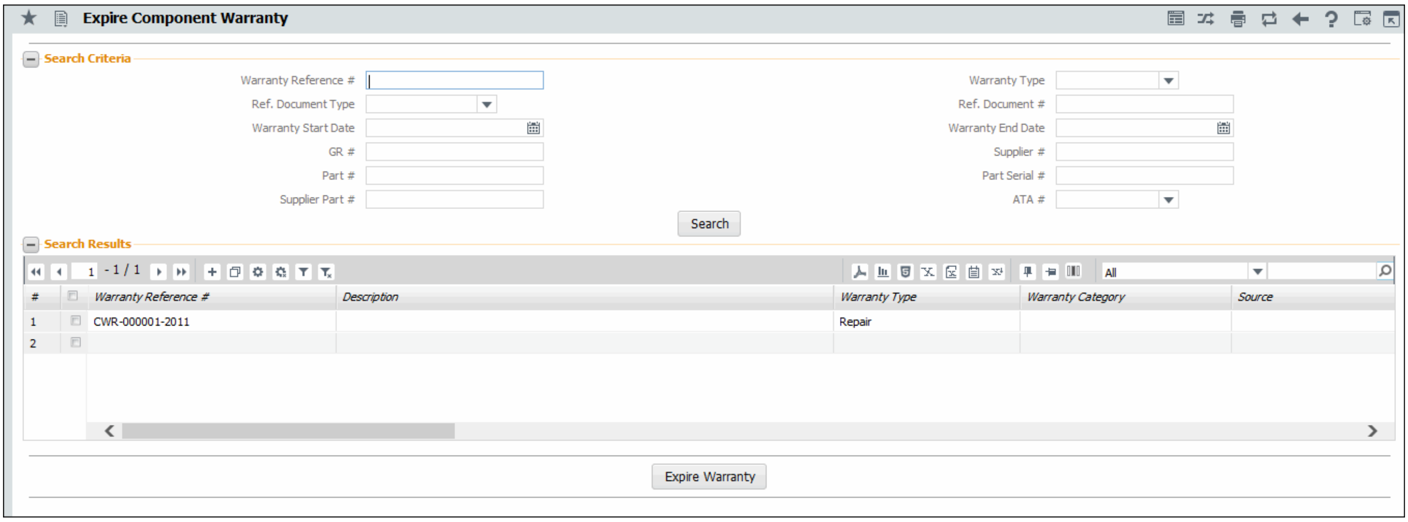


Figure 2.15 Expiring component warranty

3. Enter the **Comments** regarding the expiry of the component warranty reference in the multiline.
4. Check the box in the **Select** column of the multiline, to select the component warranty for expiration.
5. Click the **Expire Warranty** pushbutton, to expire the component warranty reference.

Note: System sets the status of the selected warranty reference(s) as "Expired".

2.3 CLAIMS

A claim is a request for payment of a loss or damage, which comes under the terms of a commercial / insurance contract. Claims are raised for the goods that are received in damaged condition or lost in transit. If the parts are not packed properly and are damaged in transit, then the claim is raised on the part supplier. If the parts are damaged or mishandled / lost in transit, then the claim is raised on the freight agency. Also, a claim can be raised on an insurance agency for general insurance or aircraft warranty or other contracts.

The claim initiation and processing is addressed by generating a claim document. The claim is recorded by the inspector who inspects the parts received or by the stores charge person, and is processed by either the claims processing in-charge or the stores charge person himself. The processing of claim includes, release to the supplier, recording acceptance or rejection of the claim by the supplier and final closure of the claim on payment receipt from the supplier.

2.3.1 SETTING OPTIONS FOR CLAIMS

1. Select the **Set Options** link under the **Claims** business component. The **Set Options** page appears. *See Figure 2.16.*

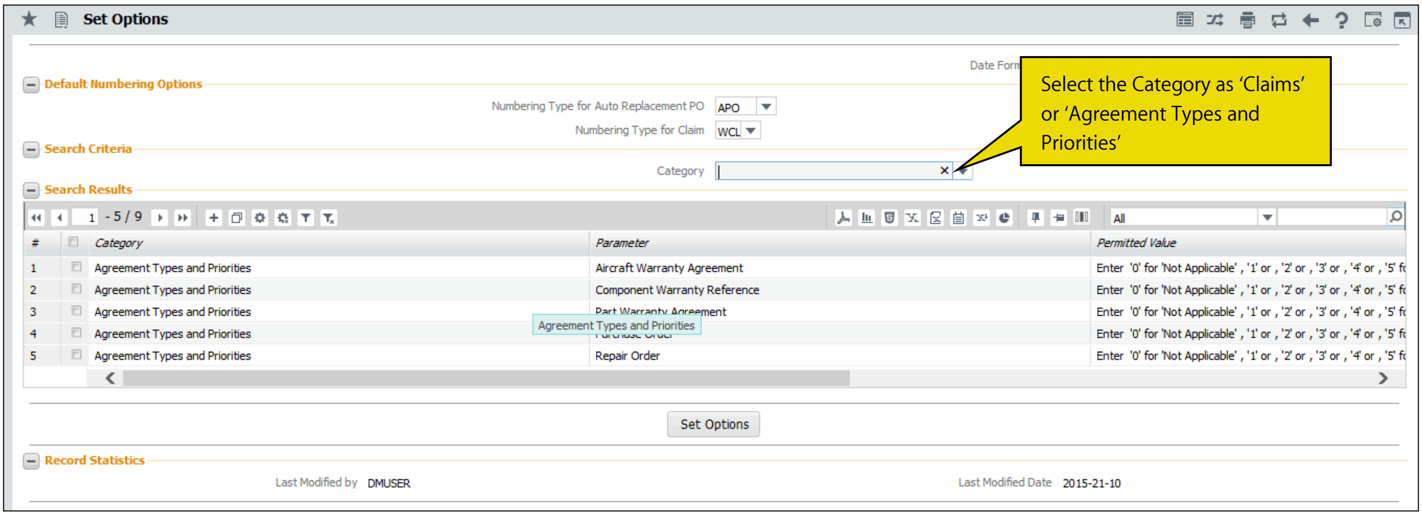


Figure 2.16 Setting options for claims

2. In the **Default Numbering Options** group box, use the **Numbering Type for Auto Replacement PO** drop-down list box to specify the numbering type for automatic purchase order generation for replacement of parts.

3. Select the **Numbering Type for Claim.**

4. In the **Search Criteria** group box, select the **Category** of parameters for which the user intends to set the option as “Claim” or “Agreement Types and Priorities”.

The system displays the following in the **Search Results** multiline:

a. The Parameter defined for the category. The parameter values are displayed based on the category selected:
   - If the Category is “Claim”, the system displays “Auto PO for Part Replacement Claims”, “Status of Auto Part
   - Replacement PO” or “Enforce Warranty Claim document for Under Warranty Repairs”.
   - If the category is “Agreement Types and Priorities” the system displays “Purchase Order”, “Repair Order”, “Part Warranty Agreement”, “Component Warranty Reference” or “Aircraft Warranty Agreement”.

b. The Permitted Value of the parameter. The system displays the following options for different parameter values:
   - **Enter ‘0’ for ‘Not Required’, ‘1’ for ‘On Accept’**, if the parameter is “Auto PO for Part Replacement Claims”.
   - **Enter ‘0’ for ‘Not Applicable’, ‘1’ for ‘Fresh’, ‘2’ for ‘Open’**, if the parameter is “Status of Auto Part Replacement PO”.
   - **Enter ‘0’ for ‘Non-Mandatory’, ‘1’ for ‘Mandatory’**, if the parameter is “Enforce Warranty Claim document for Under Warranty Repairs”.

- Enter **'0' for 'Not Applicable', '1' or '2' or '3' or '4' or '5' for 'Applicable and Priority'**, against all the parameters available under the category "Agreement Types and Priorities".

5. Enter the **Value** "0" or "1" based on the **Permitted Value,** in the multiline.

   Note: Ensure that the value entered against the parameter "Status of Auto Part Replacement PO" is 0, if the value specified against the parameter "Auto PO for Part Replacement Claims" is 0.

   Ensure that the value entered against the parameter "Status of Auto Part Replacement PO" is 1 or 2, if the value specified against the parameter "Auto PO for Part Replacement Claims" is 1.

   If a value other than '0' is set for the parameter under the category '"Agreement Types and Priorities", then ensure that the value is not duplicated.

   If the value '0' is set for any of the parameters under the category '"Agreement Types and Priorities", ensure that the value set for the remaining parameters is lesser than or equal to the total number of agreement types applicable for the claim.

6. Click the **Set Options** pushbutton to set the options.

2.3.2 MAINTAINING QUICK CODES FOR CLAIMS

Quick codes are user-defined values, used to categorize the claims based on certain characteristics. You can define the quick code values for the quick code type, by providing a unique identifier and a description for it. These values are used in all the other claims activities. The quick code should be unique for the organizational unit. This activity also allows you to modify the quick code details such as description, default value and status.

1. Select the **Maintain Quick Codes** link under the **Claims** business component. The **Maintain Quick Codes** page appears. *See Figure 2.17.*
2. Use the **Quick Code Type** drop-down list box to select the quick code type as "Claim Category", "Claim User Status", "Claim Implication", "Expense Category", "Correspondence Category" or "Correspondence Status" for which quick codes have to be defined.
3. Specify the **Status** of the quick code. The system provides the options "Active" or "Inactive".
4. Click the **Search** pushbutton to retrieve the quick codes in the multiline.

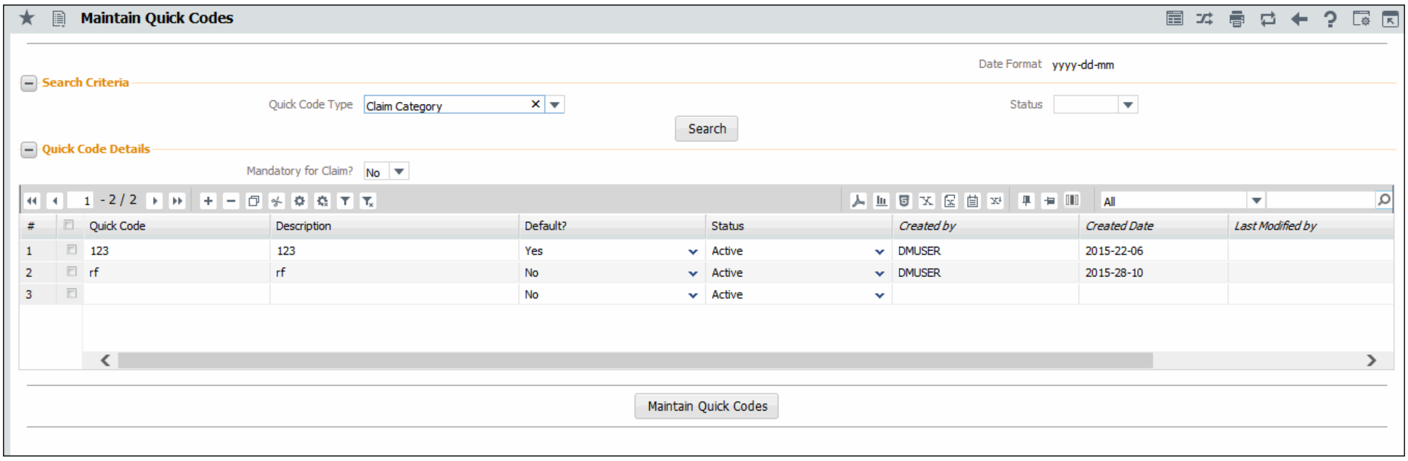


Figure 2.17 Maintaining quick codes for claims

In the **Quick Code Details** group box:

5. Use the **Mandatory for Claim?** drop-down list box and select the option "Yes" if the selected quick code type is a mandatory field to be selected or entered in various operations to be performed in different user interfaces of the "Claims" business component. Else, select the option "No".
6. Enter the unique identifier of the quick code in the **Quick Code** field, and the **Description** of the quick code.
7. Use the **Default?** drop-down list box and select the option "Yes" if any default quick code value has to be set. Else select the option "No".

8. Use the **Status** drop-down list box to specify the status of the quick code. The system provides the options "Active" or "Inactive".

2.3.3 INITIATING CLAIMS

Using this page, you can retrieve the parts that are eligible for claim generation, and generate claim for the retrieved parts. The system generates a claim in "Draft" status. The segregation based on which parts can be retrieved for claim is specified in the Display Option.

The system retrieves different records based on the combination of the Display Option and the Reference Document Type specified in the search criteria. A claim document is generated for the selected record based on the Claim Generation Option which could be Line Item Wise, Supplier Part Wise or Supplier Wise. The system generates a claim in "Draft" status.

1. Select the **Initiate Claims** link under the **Claims** business component. The **Initiate Claims p**age appears. *See Figure 2.18.*
2. In **Search Criteria** group box, specify the **Display Option** as "Failed Part", "Aircraft" or "Others", to specify the method in which the parts are retrieved for claim generation.
3. Specify the **Processing Status** of part #-serial #-lot # combination eligible for claim.

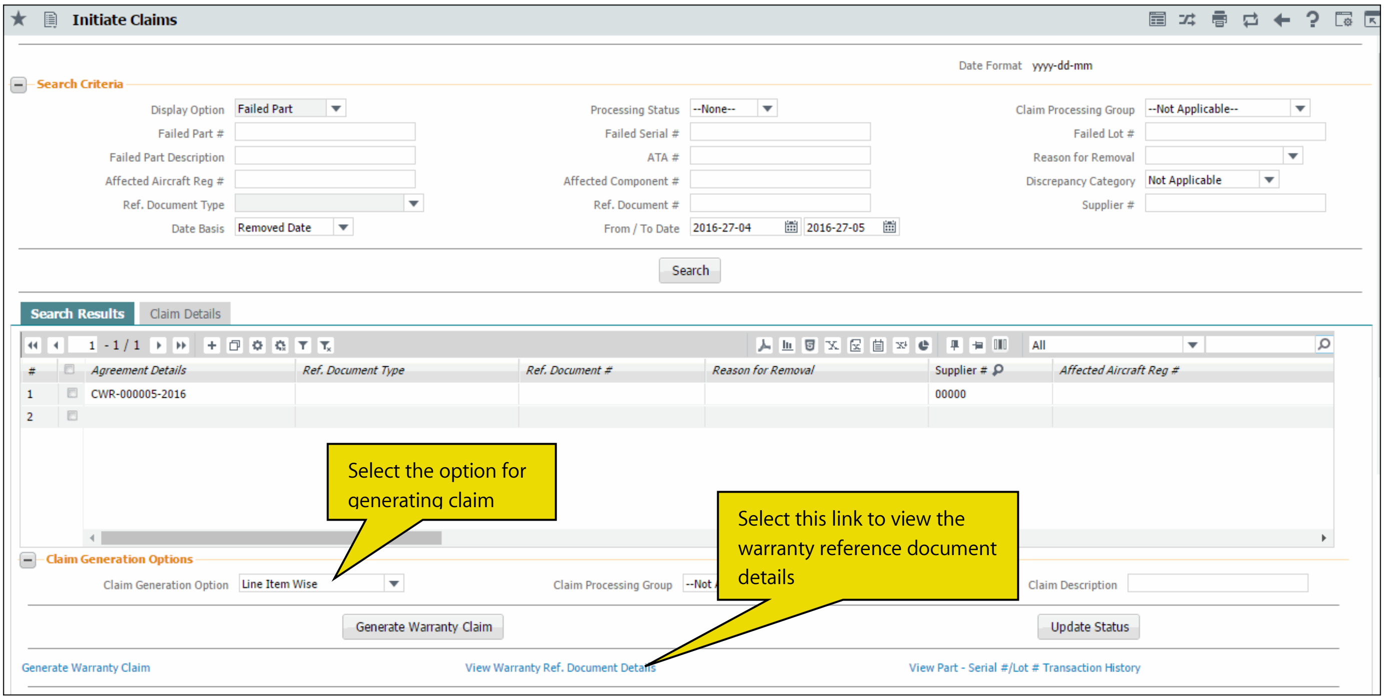


Figure 2.18 Initiating claims

4. Enter the **Failed Part #**, **Failed Part Description**, **Failed Serial #**, **Failed Lot #** and **ATA #**.
5. Specify the **Reason for Removal** of the part and enter **Affected Aircraft Reg #**.
6. Select the category of the discrepancy detected in the aircraft in the **Discrepancy Category** field and enter the **Affected Component #** and **Supplier #**.
7. Select the **Ref. Document Type** and enter the **Ref. Document #** and **Ref Document Code**.

   *Note: The reference document types are listed based on the value selected in the **Display Option** drop-down list box.*

8. Use the **Date Basis** drop-down list box and select "Start Date", End Date", "Issue Date", Removed Date", "Document Date" or "Reported Date", to specify the date on which the part has failed or the date on which the execution document is raised for the failed part.

   Note: Values are listed in the Date Basis field based on Reference Document Type and Display Option.

9. Click the **Search** pushbutton to search for the claim details.
10. Select the **Search Results** tab to search for the claim details. Refer to the topic "Viewing search results" for more details.
11. Select the **Claim Details** tab to view the claim details. Refer to the topic "Viewing claim details" for more details.

Viewing search results

1. Select the **Search Results** tab in the **Initiate Claims** page. *See Figure 2.20.*
2. Enter the **Supplier #** in the multiline.
3. Specify the **Processing Status** of part #-serial #-lot # combination eligible for the claim.
4. In the **Claim Generation Option** group box, select the **Claim Generation Option** as "Line Item Wise", "Supplier Part Wise" or "Supplier Wise".
5. Click the **Generate Warranty Claim** pushbutton to generate the warranty claims.
6. Click the **Update Status** pushbutton to update the status of the record in the multiline.

To proceed further

- Select the **Generate Warranty Claim** link to record or update the claim details.
- Select the **View Warranty Ref. Document Details** link to view the warranty reference document details.
- Select the **View Part – Serial #/Lot # Transaction History** to view the part serial number or lot number transaction history.

Viewing claim details

1. Select the **Claim Details** tab in the **Initiate Claims** page. *See Figure 2.19.*

Note: The system displays the Claim #, Claim Date, Claim Status, Part # / Aircraft Reg #, Part Description, Quantity, UOM, Supplier # and Supplier Name in the multiline.

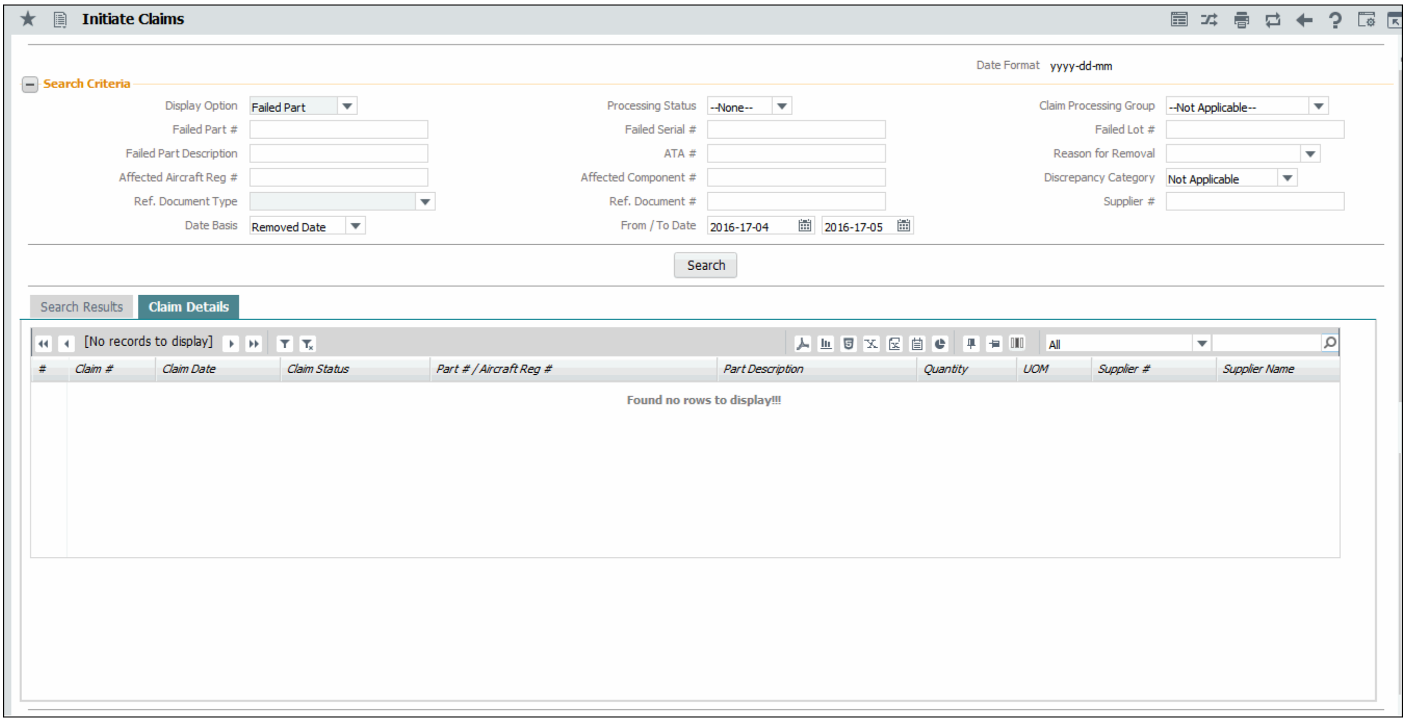


Figure 2.19 Viewing claim details

2.3.4 RECORDING OR UPDATING CLAIM DETAILS

Claims are recorded for the goods that are received in damaged condition or lost in transit. This activity allows you to record the claim information and also update or modify the details later. The system generates unique claim # in "Fresh" status on initiation. You can also confirm or cancel the claim. If the claim is unwarranted, then it can be canceled and the document attains 'Canceled' status. Otherwise, the document can be modified and confirmed for registration with the supplier. On confirmation, the document attains the 'Confirmed' status.

1. Select the **Record/Update Claim** link under the **Claims** business component. The **Record / Update Claim Information** page appears. *See Figure 2.20.*

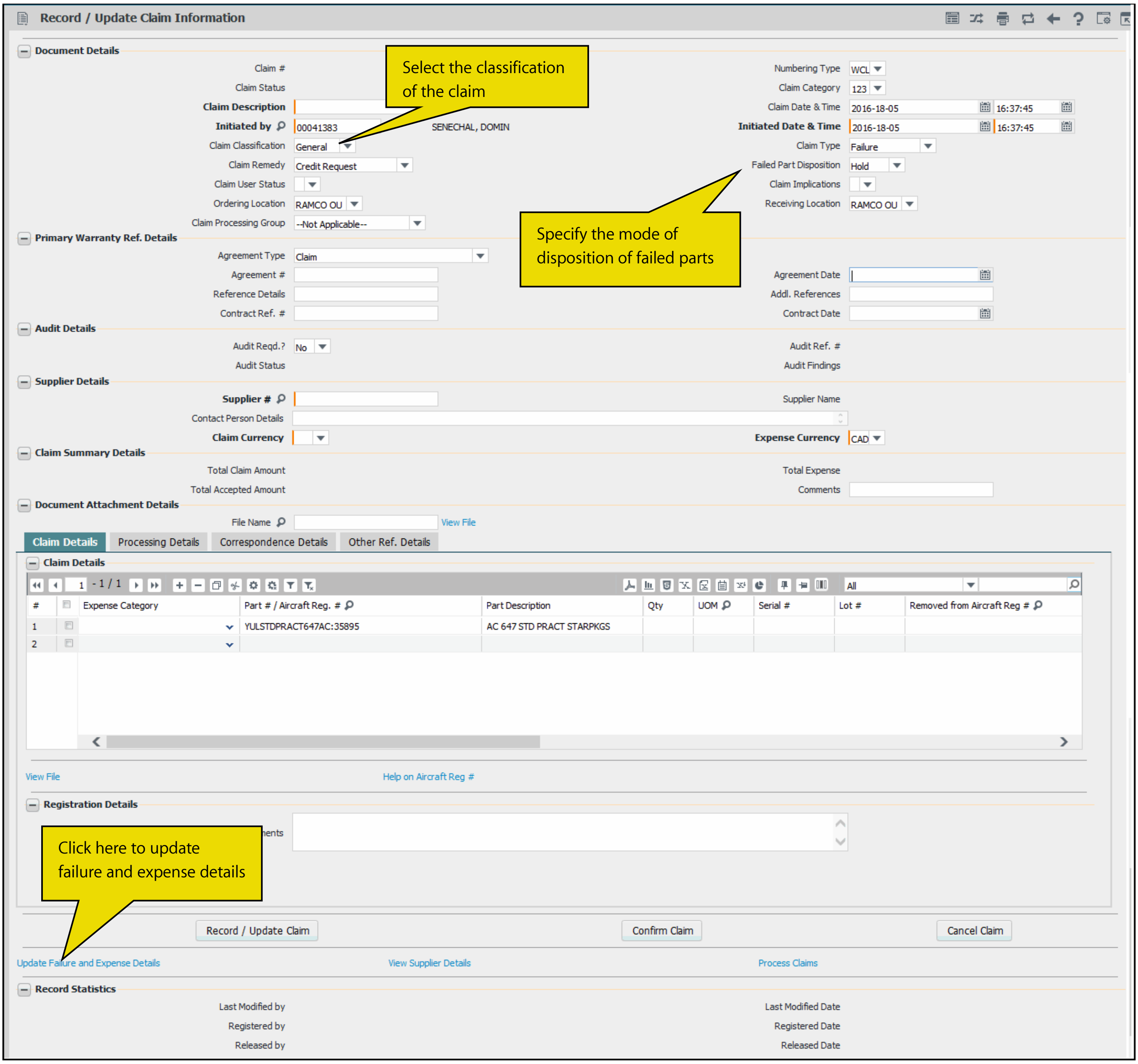


Figure 2.20 Recording/Updating claims

2. Specify the **Numbering Type** in which the component warranty claim number must be generated in the **Document Details** group box.

3. Use the **Claim Category** drop-down list box to specify the category to which the claim belongs. You must select the category, if the quick code type "Claim Category" is set as mandatory in the **Maintain Quick Codes** activity.

4. Enter the textual description of the claim in the **Claim Description** field.
5. Enter the date and time at which the claim must be released to the supplier, in the **Claim Date & Time** field.
6. Enter the code identifying the employee who initiated or recorded the claim in the **Initiated By** field.
7. Enter the date and time at which the claim was initiated, in the **Initiated Date & Time** field.

   Note: Ensure that the initiated date and time entered here is earlier than or equal to the current server date & time and the claim date & time.

8. Use the **Claim Classification** drop-down list box and select "General" to indicate that the claim is generated manually or "Maintenance" to indicate that the claim is generated for a part declared as failed with reference to an Execution Work Order document, Engineering Document or Component Replacement.
9. Select the **Claim Type** as "Failure", "Reliability", "Repair" or "Others".
10. Select "Part Replacement" or "Credit Request" in the **Claim Remedy** drop-down list box, to request for part replacement or credit of claim amount from the supplier as a claim remedy for the failed part.
11. Use the **Failed Part Disposition** drop-down list box and select "Scrap" to indicate that failed parts are scrapped off, "Return" to specify that the failed part is returned to the supplier, or "Hold" to specify that the failed part is kept on hold by the airline operator.
12. Use the **Claim User Status** drop-down list box to specify the user status of the claim. Data selection in this field is mandatory, if the quick code type "Claim User Status" is set as mandatory in the "Maintain Quick Codes" activity of the current business component.
13. Use the **Claim Implications** drop-down list box to specify the implications of the claim. Data selection in this field is mandatory, if the quick code type "Claim Implication" is set as mandatory in the "Maintain Quick Codes" activity of the current business component.
14. Use the **Ordering Location** drop-down list box to specify the location in which PO must be generated on claim acceptance, if the "Claim Remedy" is set as "Part Replacement".
15. Use the **Receiving Location** drop-down list box to specify the location in which the goods are received.
16. Select the **Agreement Type**, and enter the **Agreement #, Agreement Date**, **Reference Details**, **Addl. References, Contract Ref. #** and **Contract Date** in the **Primary Warranty Ref. Details** group box.
17. Use the **Audit Reqd.?** drop-down list box in the **Audit Details** group box, to specify whether auditing is required for the claims or not. The system provides the options "Yes" and "No".
18. In the **Supplier Details** group box, enter the supplier on whom the claim is raised / initiated, and the **Contact Person Details.**
19. Use the **Claim Currency** drop-down list box to specify the currency in which the claim for the loss or damage is raised.
20. Use the **Expense Currency** drop-down list box to specify the currency in which the loss or damage is expensed.
21. Enter any additional **Comments** pertaining to the claims.
22. Enter the **File Name** that contains the reference document details in the **Document Attachment Details** group box.
23. Click the **View File** link provided alongside to view the document attachment details.
24. Click the **Record /Update Claim** pushbutton, to record the claim details.

   Note: You cannot update the registration comments, if the claim is being created for the first time or while updating the document in "Fresh", "Released" or "Accepted" status.

   The system generates a unique claim # in "Fresh" status on recording the claim information for the first time.

   The claim documents in "Draft" status are changed to "Fresh" status. If claim document is in Fresh" or "Confirmed" status, the status remains the same.

25. Click the **Confirm Claim** pushbutton to confirm the claim details.

    Note: On confirmation of the claim, the system updates the status of the claim as "Confirmed".

    Only those claims whose status is "Fresh" can be confirmed. In case of any modification done to the claim in "Fresh" status, the confirmation can be done only after recording the claim.

26. 26. Click the **Cancel Claim** pushbutton to cancel the claim.

    Note: The system updates the status of the claims as "Cancelled".

    You can cancel only those claims that are in "Fresh" status.

To proceed further,

- Select the **Update Failure and Expense Details** link to update the failure and expense details for the parts.
- Select the **View Supplier Details** link to view the supplier details.
- Select the **Process Claims** link to process the claims.
- Select the **Claim Details** tab to enter the warranty claim details.

Refer to the topic "Entering claim details" for more details.

- Select the **Processing Details** tab to process the warranty claim details.

Refer to the topic "Entering claim processing details" for more details.

- Select the **Correspondence Details** tab to enter the correspondence details.

Refer to the topic "Entering correspondence details" for more details.

- Select the **Reference Details** tab to enter the reference details for the warranty claim.

Refer to the topic "Entering reference details" for more details.

Entering claim details

Using this tab page you can enter the claim details for the loss or damage, that need to be recorded, confirmed or cancelled.

1. Select the **Claim Details** tab in the **Record / Update Claim Information** page. *See Figure 2.21*. In the **Claim Details** multiline:
2. Specify the **Expense Category** for which the claim is raised. Data selection in this field is mandatory, if the quick code type "Expense Category" is set as mandatory in the "Maintain Quick Codes" activity of the current business component.
3. Enter the number identifying the part or the registration number of the aircraft for which the claim is raised, in the **Part # / Aircraft Reg. #** field.
4. Enter the unit of measurement of the part in the **UOM** field.
5. Enter the **Serial #, Lot #, Removed from Aircraft Reg #, Removed Date** and **Reason for Removal.**
6. Enter any additional **Remarks** pertaining to the claim.
7. Enter **Registration Comments** pertaining to the registration of the claim with the supplier in the **Registration Details** group box.

Entering claim processing details

Using this page you can enter the claim processing details.

1. Select the **Processing Details** tab in the **Record / Update Claim Information** page. *See Figure 2.21.*
2. In the **Expense / Claim Details** group box, select the display option of the of the claim and expense details as "Summary" to retrieve the claim and expense details at claim line level, or "Detail" to retrieve the claim and expense details against different claim heads, pertaining to a line item in the claim document.
3. Click the **Get Details** pushbutton to retrieve the claim and expense details in the multiline.

Note: If the Display Option is set as “Summary”, the system retrieves and displays the Expense Amount, Claim Amount and Accepted Amount for each Line # in the multiline.

If the Display Option is set as “Detail”, the system retrieves and displays the Expense Amount, Claim Amount and Accepted Amount against each claim head displayed in the “Expense Category” field.

4. Enter the **Expense Amount**, **Claim Amount** and the **Accepted Amount** in the multiline.

Note: The “Accepted Amount” cannot be updated or modified, if the claim status is in “Fresh”, “Confirmed”, “Registered”, “Accepted” or “Cancelled”. Also, you cannot modify the “Claim Amount” or the “Expense Amount” if the claim status is either “Released” or “Accepted”.

5. Enter the reference number of the supplier acknowledgment for the claim registration in the **Ack. Reference** field.

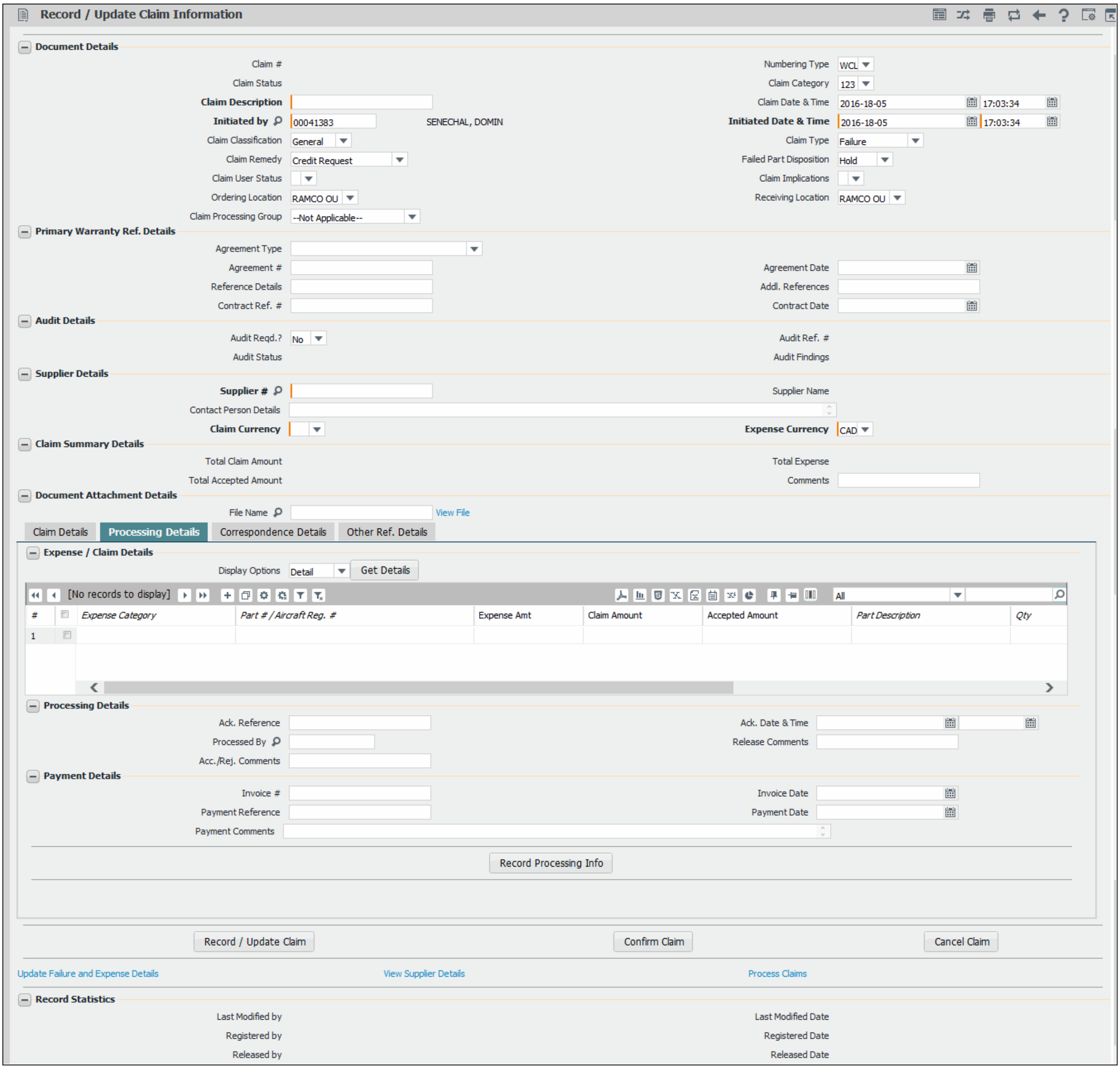


Figure 2.21 Entering claim processing details

6. The date of the supplier acknowledgement for the claim registration in the **Ack. Date & Time** field.

Note: The acknowledgement date and time cannot be modified or updated, if the claim is in either “Fresh”, “Registered”, “Released” or “Accepted” status.

7. Enter the employee code and name of the employee in the **Processed By** field, by whom the claim was processed.

8. Enter the **Release Comments** recorded at the time of release of the claim to the supplier. Leave this field blank, if the claim is in either “Fresh”, “Confirmed” or “Registered” status.

9. Enter the **Acc./Rej. Comments** recorded during the acceptance or rejection of the claim by the supplier. Leave this field blank, if the claim status is either “Fresh”, “Confirmed”, “Released” or “Registered”.

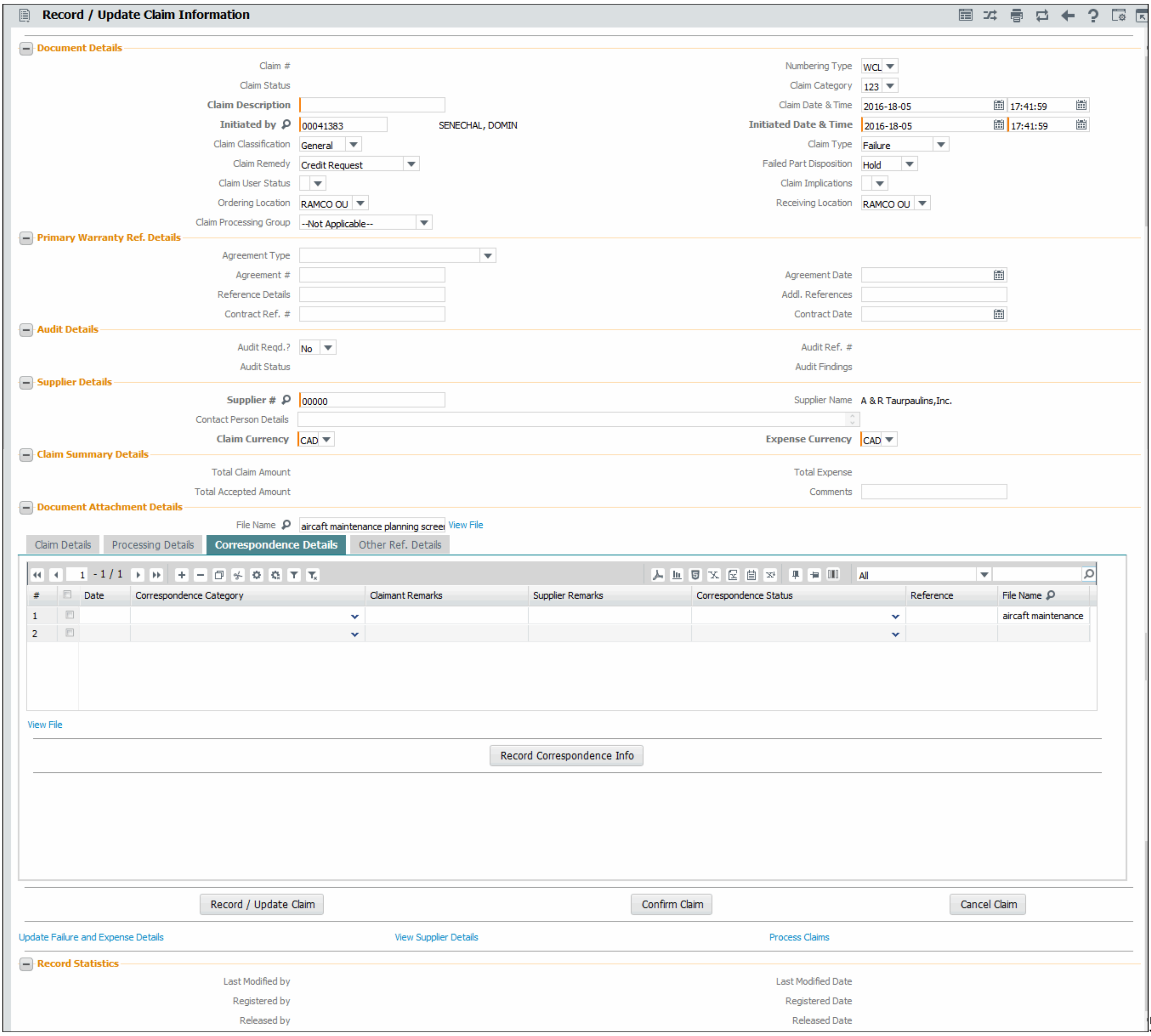
10. Enter the **Invoice #, Invoice Date**, **Payment Reference**, **Payment Date** and **Payment Comments** in the **Payment Details** group box.

11. Click the **Record Processing Info** pushbutton to record the claim processing information.

Entering correspondence details

Using this tab page you can enter the correspondence information with the supplier.

1. Select the **Correspondence Details** tab in the **Record / Update Claim Information** page. *See Figure 2.22.*



5.

Figure 2.22 Updating supplier correspondence details

2. Enter the **Date** of correspondence of claimant and the supplier.

3. Use the **Correspondence Category** drop-down list box to specify the correspondence category. Data selection in this field is mandatory, if the quick code type "Correspondence Category" is set as mandatory in the "Maintain Quick Codes" activity of the current business component.
4. Enter the **Claimant Remarks** and **Supplier Remarks** pertaining to the supplier correspondence.
5. Use the **Correspondence Status** drop-down list box to specify the status of the correspondence of the claimant with the supplier. Data selection in this field is mandatory, if the quick code type "Correspondence Status" is set as mandatory in the **Maintain Quick Codes** activity of the **Claims** business component.
6. Enter the **Reference** of the correspondence details and the **File Name** that contains the reference document details.
7. Click the **Record Correspondence Info** pushbutton to record the correspondence details between the claimant and the supplier.

Entering reference details

1. Select the **Reference Details** tab in the **Record / Update Claim Information** page. *See Figure 2.23.*

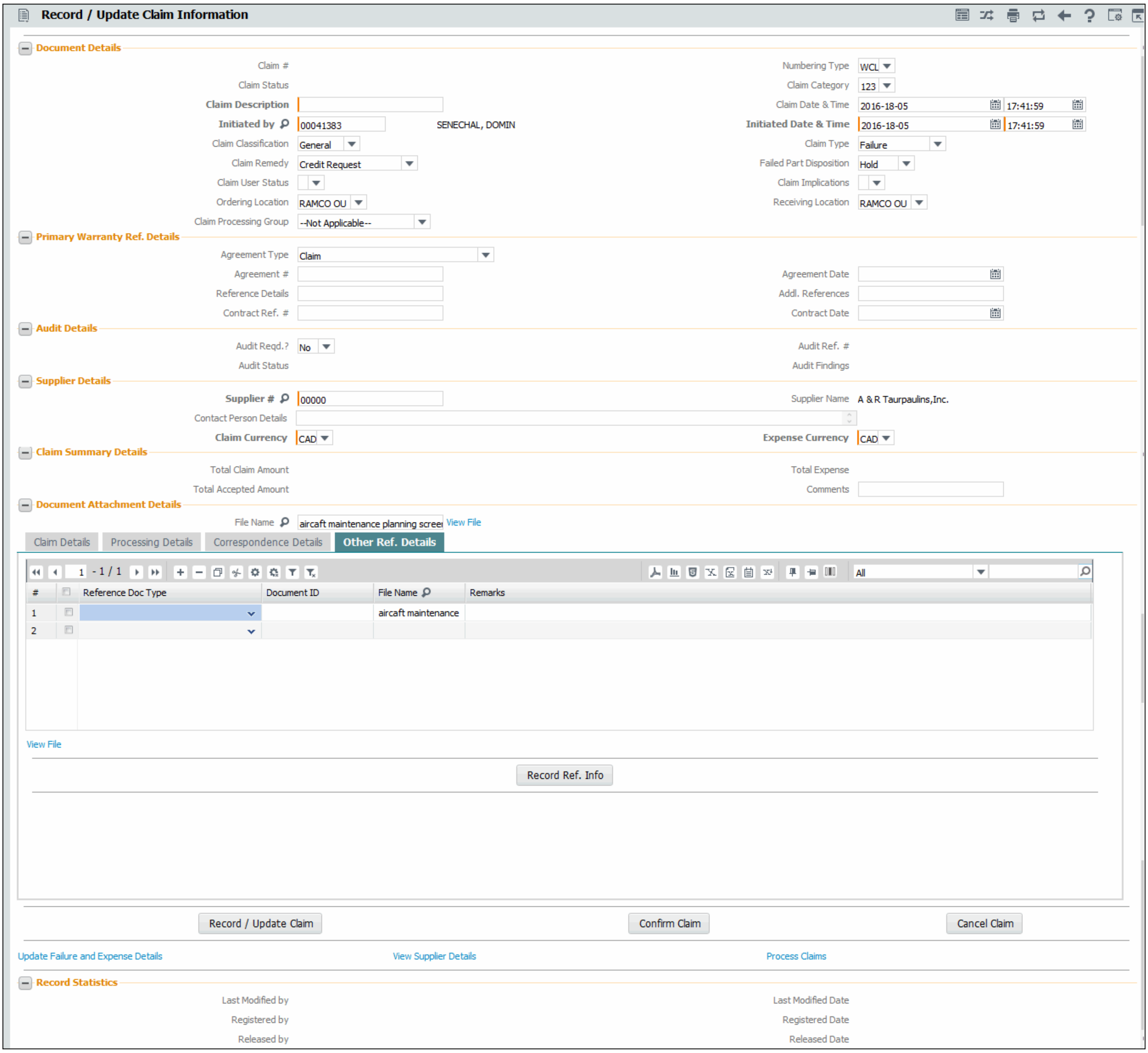


Figure 2.23 Updating reference document details

2. Use the **Reference Doc Type** drop-down list box to specify the type of the reference document. Data selection in this field is mandatory, if a value is entered in any other field in the multiline.

3. Enter the code identifying the reference document in the **Document ID** field.

4. Enter the **File Name** and **Remarks** pertaining to the reference document.

5. Click the **Record Ref. Info** pushbutton to record the reference document details.

2.3.5 UPDATING FAILURE AND EXPENSE DETAILS

Using this page, you can update the failure details and expense details for the part or aircraft. The expense details incurred to repair the part internally or externally can be recorded.

1. Select the **Update Failure and Expense Details** link in the **Record /Update Claim Information** page. The **Update Failure and Expense Information** page appears. *See Figure 2.24.*

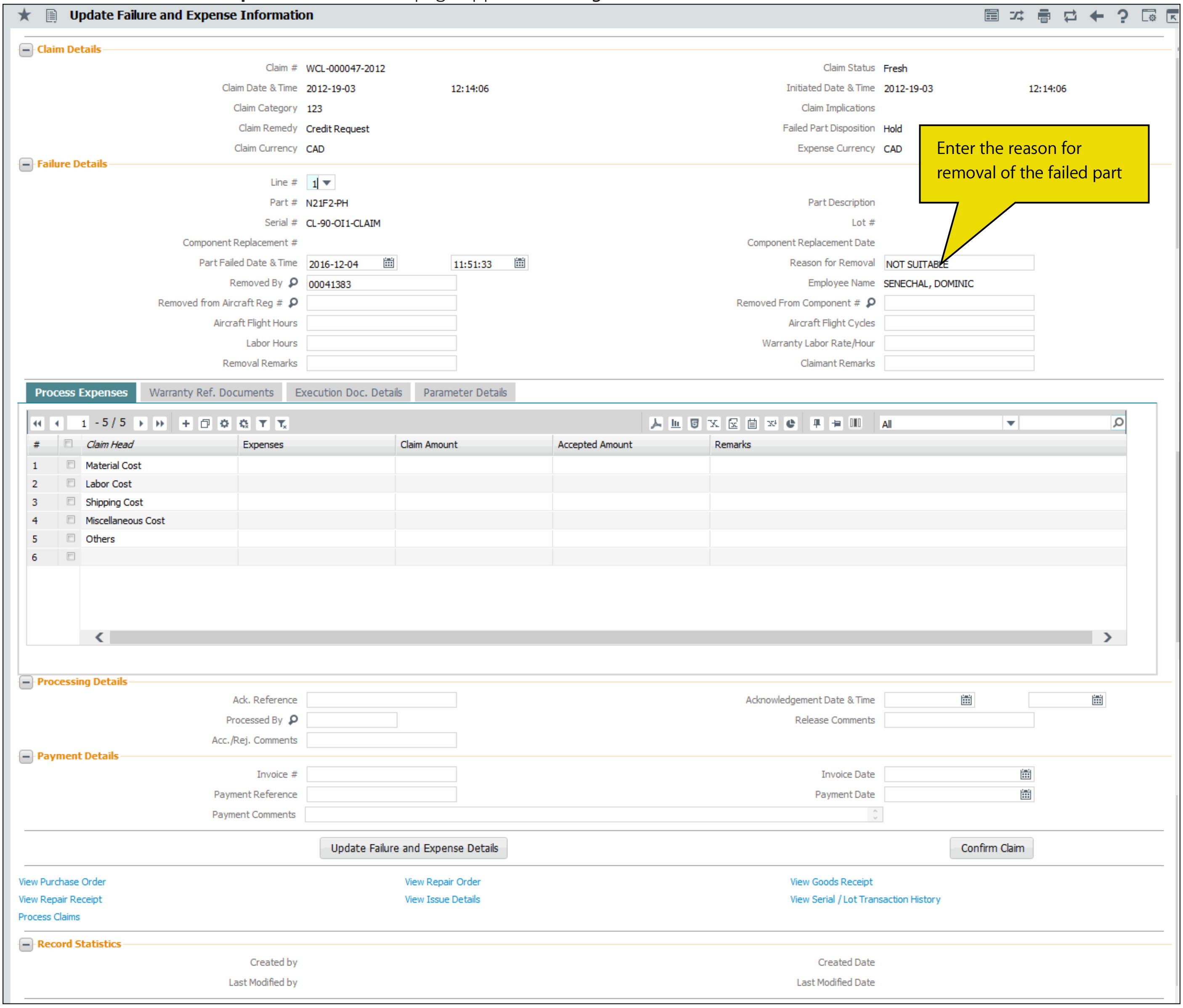


Figure 2.24 Updating failure and expense details

2. Specify the **Line #** of the claim.

3. Enter the **Part Failed Date & Time, Reason for Removal** of the part, **Removed By, Removed from Aircraft Reg # and Removed from Component #.**

4. Enter the **Aircraft Flight Hours, Aircraft Flight Cycles, Labor Hours, Warranty Labor Rate / Hour, Mechanic Remarks** and **Claimant Remarks.**

To proceed further,

- Select the **Process Expenses** tab to record the expense details.

Refer to the topic "Updating expense details" for more details.

- Select the **Warranty Ref. Documents** tab which displays the warranty reference documents.

Refer to the topic "Updating warranty reference document details" for more details.

- Select the **Execution Doc. Details** tab to update the execution document details.

Refer to the topic "Recording execution document details" for more details.

- Select the **Parameter Details** tab to update the parameter details.

Refer to the topic "Updating parameter details" for more details.

5. In the **Processing Details** group box, enter the **Ack. Reference**, **Acknowledge Date & Time**, **Processed By**, **Release Comments** and **Ack./Rej. Comments**.
6. In the **Payment Details** group box, enter the **Invoice #**, **Invoice Date**, **Payment Reference**, **Payment Date** and **Payment Comments**.
7. Click the **Update Failure And Expense Details** pushbutton to update the failure and expense details for the parts.
8. Click the **Confirm Claim** pushbutton to confirm the claim.

To proceed further,

- Select the **View Purchase Order** link at the bottom of the page to view the purchase order details.
- Select the **View Repair Order** link at the bottom of the page to view the repair order details.
- Select the **View Goods Receipt** link at the bottom of the page to view the goods receipt information.
- Select the **View Repair Receipt** link at the bottom of the page to view the repair receipt information.
- Select the **View Issue Details** link at the bottom of the page to view the stock issue details.
- Select the **View Serial / Lot Transaction History** link at the bottom of the page to view the transaction details of the part.
- Select the **Process Claims** link at the bottom of the page to process the claims.

Updating expense details

Using this tab page, you can record expense details such as Expense Amount, Claim Amount and Accepted Amount different pre-defined claim heads i.e., Material Cost, Labor Cost, Shipping Cost, Misc. Cost and Others.

1. Select the **Process Expenses** tab in the **Update Failure and Expense Information** page. *See Figure 2.32.*
2. Enter the amount of **Expenses** for the parts corresponding to the claim head, **Claim Amount** for the expense particulars, **Accepted Amount** and **Remarks** in the multiline.

Updating warranty reference document details

This tab page displays the Warranty Agreement (source documents) against which the part has been determined as eligible for claim.

1. Select the **Warranty Ref. Documents** tab in the **Update Failure and Expense Information** page. *See Figure 2.25.*

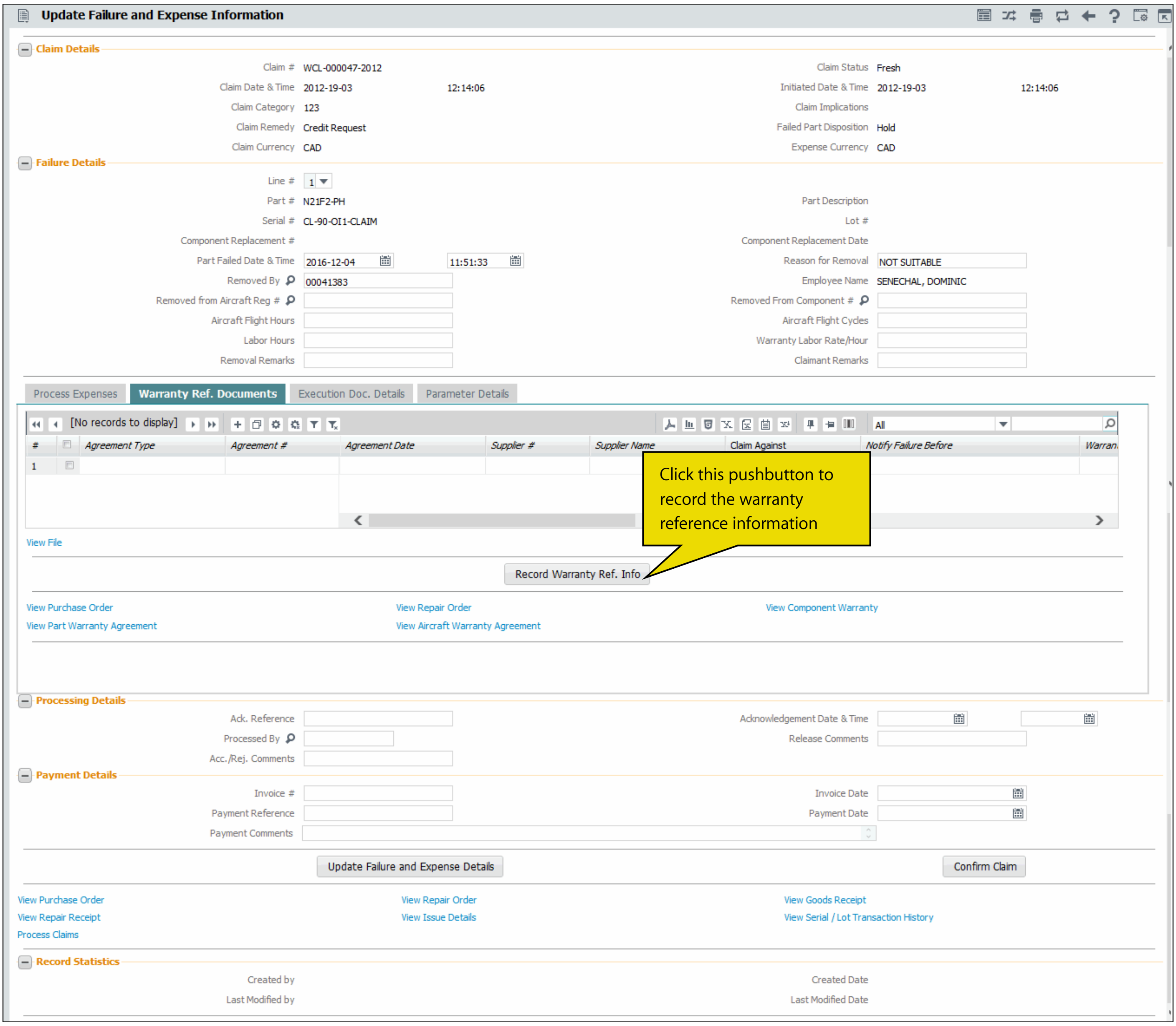


Figure 2.25 Updating warranty reference document details

2. The system displays the **Agreement Type**, **Agreement #**, **Agreement Date**, **Supplier #** and **Supplier Name** in the multiline.

3. Use the **Claim Against** drop-down list box and select “Direct” to specify that the failed part is claimed directly from the supplier of the part., “Backstop” to specify that the failed part is claimed from the original equipment manufacturer against the agreement type specified, or “No” to specify that the failed part is not claimed.

4. Click the **Record Warranty Ref. Info** pushbutton to record the warranty reference information.

To proceed further,

- Select the **View Purchase Order** link to view the purchase order details.
- Select the **View Repair Order** link to view the repair order details.
- Select the **View Component Warranty** link to view the component warranty information.
- Select the **View Part Warranty Agreement** link to view the part warranty agreement information.

Recording execution document details

In this tab page, execution documents i.e., Repair Order, Shop Work Order, etc, available for the failed part after the component removal, are displayed along with the cost details. On executing the **Get Exec. Details** push-button, the status of the execution documents and their corresponding costs will be retrieved.

1. Select the **Execution Doc. Details** tab in the **Update Failure and Expense Information** page. *See Figure 2.26.*

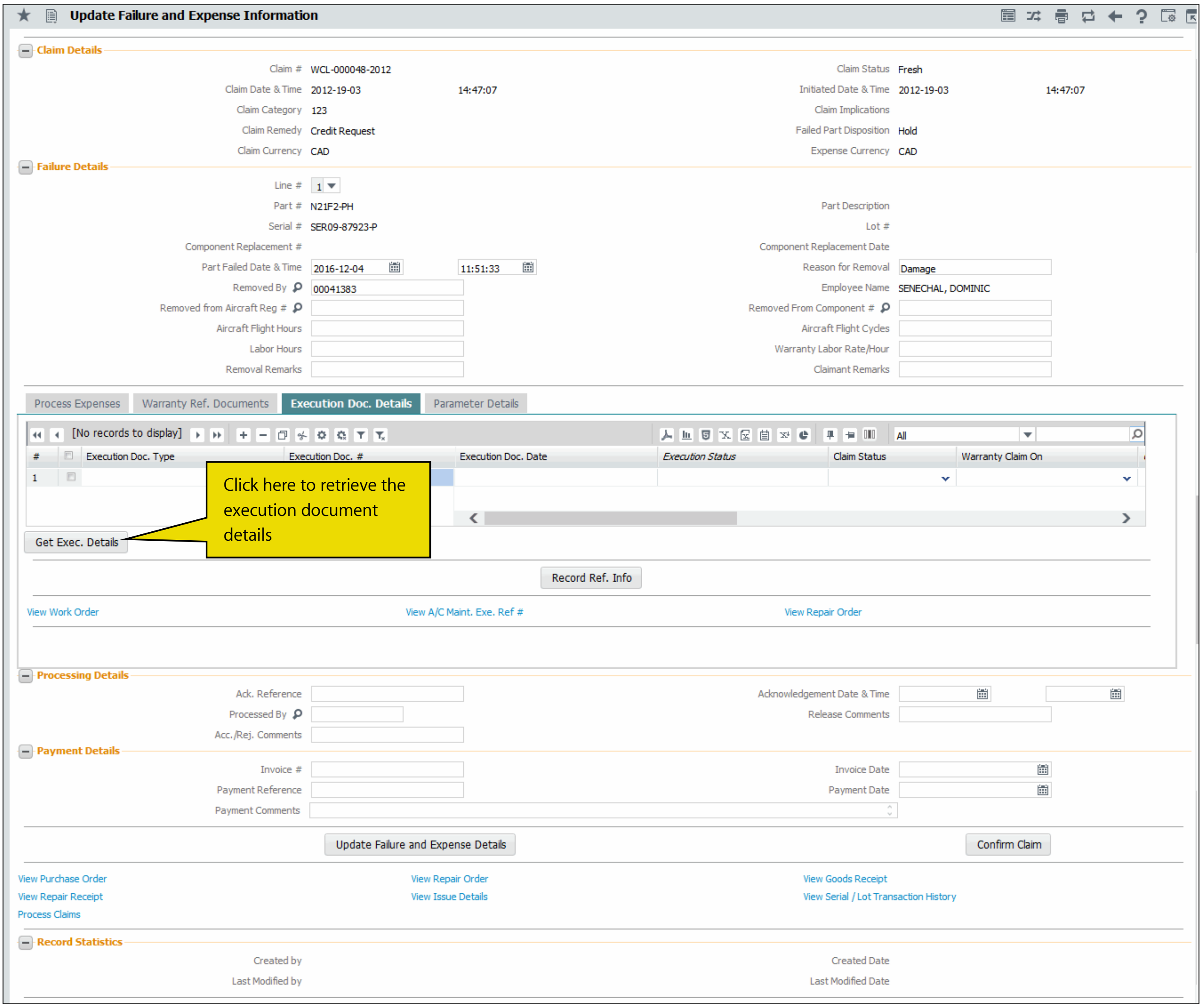


Figure 2.26 Updating execution document details

2. Select the **Execution Doc. Type** as ”Shop Work Order”, “A/C Maint. Exe. Ref #”, “Repair Order” or “Others”, in the multiline.
3. Enter the **Execution Doc. #** and **Execution Doc. Date.**
4. Use the **Claim Status** drop-down list box and select “Accepted”, “Rejected” or “Partially Accepted”, to specify the acceptance status of the claim.
5. Use the **Warranty Claim On** drop-down list box and select “Full”, “Partial”, “Material”, “Labor” or “Others”, to select the option based on which the cost incurred on the work order execution is claimed.
6. Click the **Get Exec. Details** pushbutton to retrieve the execution document details.
7. Click the **Record Ref. Info** pushbutton to record the reference information.

To proceed further,

- Select the **View Work Order** link below the multiline to view the work order execution information.

- Select the **View A/C Maint. Exe. Ref #**link below the multiline to view the aircraft maintenance execution reference details.
- Select the **View Repair Order** link below the multiline to view the repair order details.

Updating parameter details

In this tab page, the parameters of the component as on the creation date of the claim can be captured.

1. Select the **Parameter Details** tab in the **Update Failure and Expense Information** page. *See Figure 2.27.*

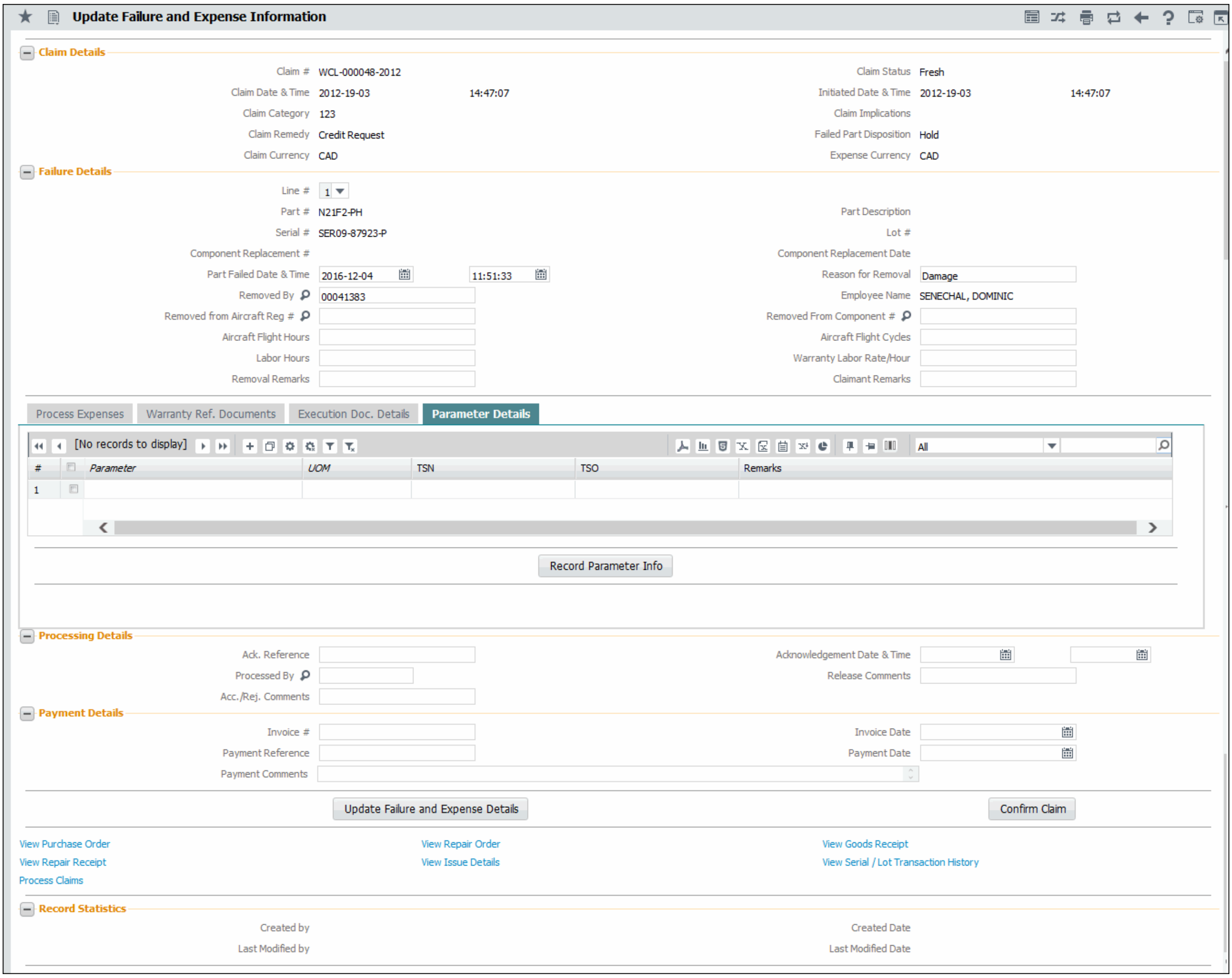


Figure 2.27 Updating parameter details

2. Enter the cumulative flying hours of the component since it is manufactured in the **TSN** field, and the cumulative flying hours of the component since its last overhaul in the **TSO** field.
3. Click the **Record Parameter Info** pushbutton to record the parameter information.

2.3.6 MODIFYING CLAIM DETAILS

The details of the claim document recorded can also be modified. You can select a particular claim for modification by performing a search based on the following search criteria: claim number, claim description, supplier #, initiated by, part #, part description, claim category, and the claim user status.

1. Select the **Edit Claim** link under the **Claims** business component. The **Select Claim** page appears. *See Figure 2.28.*

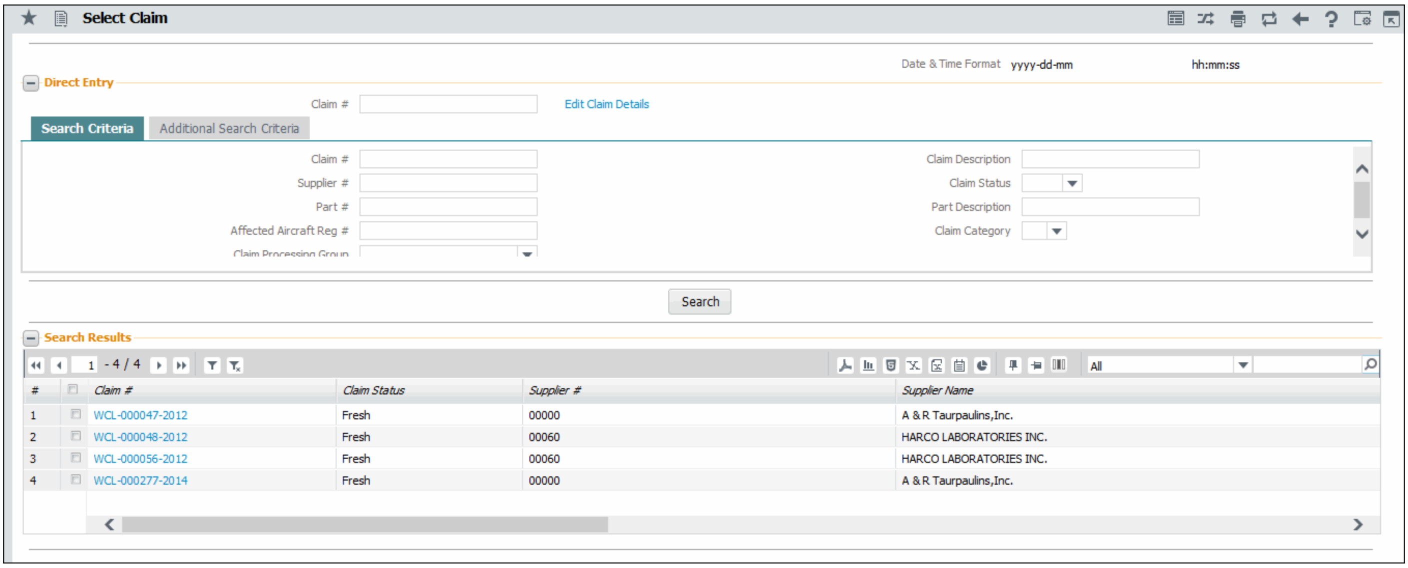


Figure 2.28 Selecting claim for modification

2. Enter the **Claim #** in the **Direct Entry** group box and select the **Edit Claim Details** link provided alongside to modify the claim details.

Or

3. Specify the **Search Criteria** and **Additional Search Criteria** in the tab pages and click the **Search** pushbutton.

4. Select the hyperlinked **Claim #** in the **Search Results** multiline. The **Record / Update Claim Information** page appears. Refer to the topic "Recording or Updating Claim Details" for further processing.

2.3.7 PROCESSING CLAIMS

This activity allows you to perform various processing operations on the claims. This operation includes registering and releasing claims, recording claim acceptance details from the supplier, recording claim rejection details from supplier and closing claims.

1. Select the **Process Claim** link under the **Claims** business component. The **Process Claim** page appears. *See Figure 2.29.*

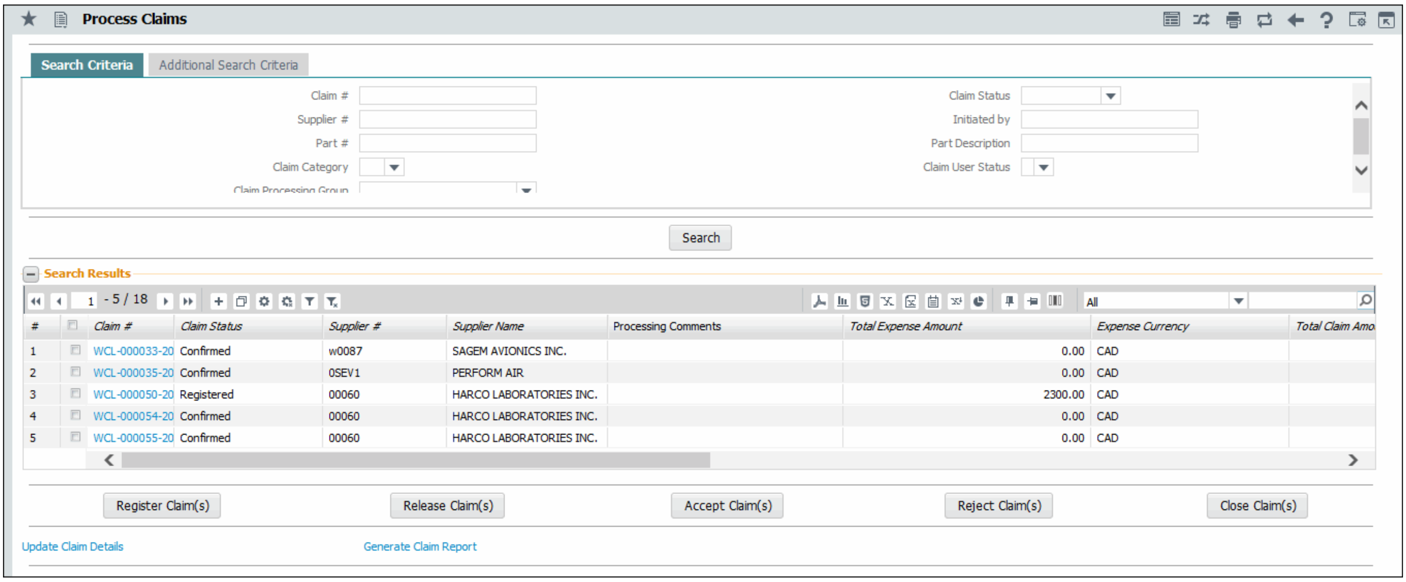


Figure 2.29 Processing claims

In the **Search Criteria** group box:

2. Specify the **Search Criteria** and **Additional Search Criteria** in the tab pages.

3. Click the **Search** pushbutton, to retrieve the details in the Search Results multiline.
4. Enter **Processing Comments** pertaining to the claim in the multiline.
5. Click the **Register Claim(s)** pushbutton to register the claim with the supplier.

   Note: You can register only the claim documents that are in "Confirmed" status.

   For the claim document that is to be processed, the system ensures that "Ack. Reference" and "Ack.Date & Time" are specified in the "Processing Details" tab page of the "Record/Update Claim" activity. If not, the system does not allow further processing of the claim document.

   The system updates the status of the claim document as "Registered".

6. Click the **Release Claim(s)** pushbutton to release the claim.

   Note: Only those claim documents that are in "Confirmed" or "Registered" status can be released.

   For the claim document that is to be processed, the system ensures that the "Ack. Reference", "Ack.

   Date & Time", "Total Expense Amount" and "Total Claim Amount" is specified in the "Processing Details" tab page of the "Record/Update Claim" activity. If not, the system does not allow further processing of the claim document.

   The system updates the status of the claim document as "Released".

7. Click the **Accept Claim(s)** pushbutton to accept the claim.

The system performs the following on clicking the above pushbutton.

- The system updates the status of the claim as "Accepted". The system allows further processing of the claim document, only if the claim is in "Released" status and the "Total Accepted Amount" is specified in the "Processing Details" tab page.
- On claim acceptance, the system creates a purchase order automatically, if the Claim Remedy is set as "Part Replacement" and if the permitted value of the parameter "Auto PO for Part Replacement Claims" is other than "Not Required" as defined in the "Set Options" activity of the current business component. This is applicable only if the current business component interacts with the "Purchase Order" business component.
- On acceptance of warranty claim, the system automatically generates a Debit Note on the supplier for the claim accepted amount, if the Claim Remedy is set as "Credit Request" and if the "Auto Generation of Debit Note for Warranty Claims" drop-down list box is set as "In Authorized Status" in the "Set Function Defaults" activity of the "Supplier Debit Credit Note" business component.

8. Click the **Reject Claim(s)** pushbutton to reject the claim.

   Note: You can reject only those claim documents that are in "Released" status.

   The system updates the status of the claim as "Rejected".

9. Click the **Close Claim(s)** pushbutton to close the claim.

   Note: You can close only those claim documents that are in "Accepted" status.

   The system ensures that the "Payment Reference" and "Payment Date" are specified in the "Processing Details" tab page under the "Record/Update Claim" activity.

   The system updates the status of the claim as "Closed".

To proceed further,

- Select the "Update Claim Details" link provided at the bottom of the page to update the claim details.
- Select the **Generate Claim Report** link provided at the bottom of the page to generate the report containing claim details for the record selected in the multiline.

MRO WARRANTY

An MRO organization offers warranty to the customers when the parts are sold or serviced by them or maintains the warranty documents offered by the OEMs to its customers, as an authorized vendor for the OEM. The sub-process provides the ability to setup MRO warranty agreement with the customer, and maintain the warranty information for parts covered under part sale or service sale agreements and also the warranty extended by OEM. The sub-process provides the following features:

- Ability to define MRO warranty agreement with the following information:
  - Parts covered under Warranty
  - Warranty details including Warranty Type, Duration, warranty applicability based on customer, aircraft model from which part is removed and sent, etc.
  - Aircraft Model or Aircraft Tail #s which are covered in Warranty agreement
  - Customers for whom the warranty agreement is valid
  - General Inclusion and Exclusions
  - Customer who should be back billed under the warranty agreement
- Ability to have a register of the Part-Serial/Lot #s offered under warranty to the customers

3.1 MANAGING MRO WARRANTY AGREEMENT

MRO Warranty Agreement activity enables to define the Agreement information including Agreement Description, Agreement Date and Agreement Validity dates and provides different tabs to identify various elements of the Warranty Agreement.

1. Select the **Manage MRO Warranty Agreement** activity under the **MRO Warranty** business component. The **Manage MRO Warranty Agreement Page** appears**.** *See Figure 3.1*

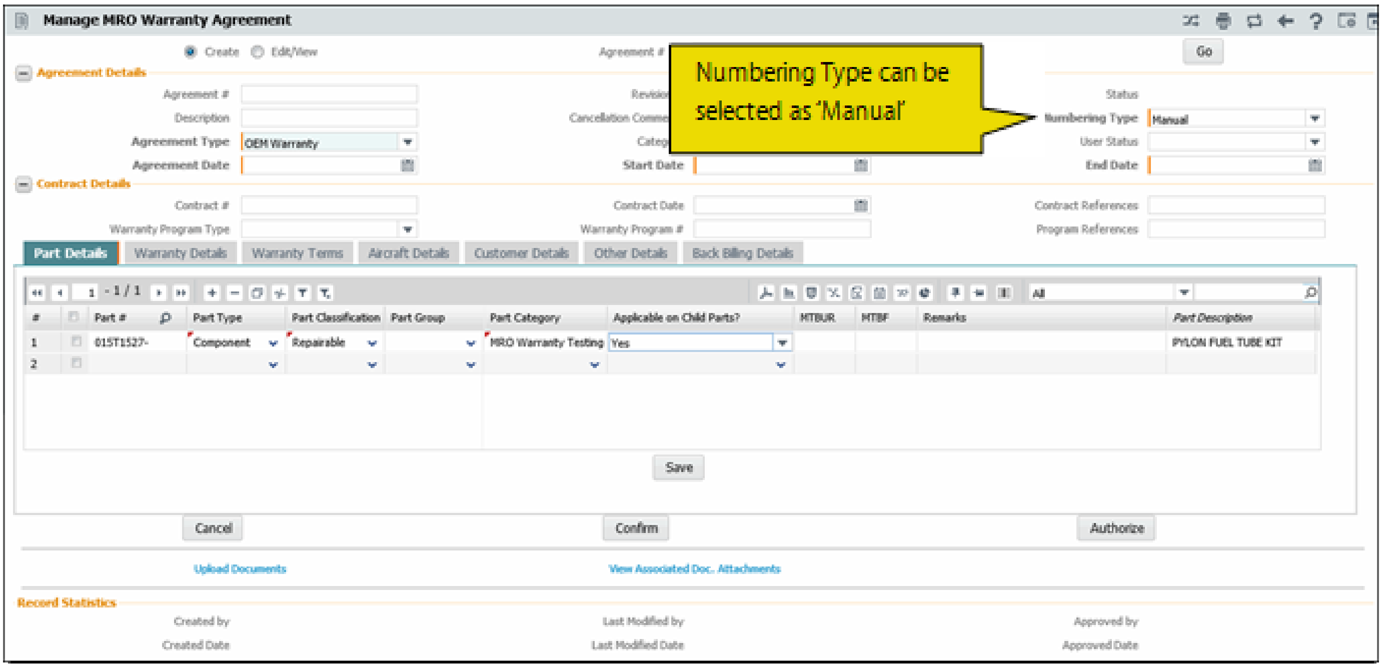


Figure 3.1 Managing MRO Warranty Agreement

2. Select the **Create** radio button to create the MRO warranty agreement or **Edit / View** radio button to modify or view the MRO warranty agreement.

3. Specify the **Agreement Type** as one of the following:
   - OEM Warranty – Indicates that MRO maintains warranty offered by OEM to its customers, MRO being authorized vendor to the OEM.
   - Part Sale – If MRO offers warranty to customers for parts sold by them
   - Service Sale – If MRO offers warranty for parts serviced by them

4. Select the **Numbering Type** of the MRO warranty agreement. The system lists the value 'Manual' along with 'Active' Numbering Types defined in the Document Numbering Class" business component.

   Note: If the Numbering Type field is set as 'Manual', then the warranty agreement # will be generated with the value that is provided for Agreement #. If the numbering type value is other than manual, then the warranty agreement number will be generated with the selected numbering type

5. Specify the **Agreement Date** and **Start Date** / **End Date** (Agreement Validity period).

6. The screen provides various tabs to identify and save the Parts covered under the Warranty Agreement, Warranty details, Warranty Terms, aircraft Details, customer details, inclusion / exclusion terms against the warranty agreement and back billing details.

7. Select the **Part Details** tab to specify the Parts covered under the Warranty Agreement.

8. Select the **Warranty Details** tab to specify the combination of the Part – Customer - Aircraft attributes covered under the Warranty Agreement.

9. Select the **Warranty Terms** tab to identify the terms of Warranty offered like the Claim Remedy, Costs covered under warranty, Failed part disposition, etc.

10. Select the **Aircraft Details** tab to map the Aircrafts covered under the MRO Warranty Agreement.
11. Select the **Customer Details** tab to map the customers for whom the MRO Warranty Agreement is applicable.
12. Select the **Other Details** tab to define the general inclusion and/or exclusion terms against an MRO Warranty Agreement.
13. Select the **Back Billing Details** tab to define the back billing information against an MRO Warranty Agreement.
14. Once the details in the Part Coverage Details, Warranty Details and Warranty Terms are saved, the warranty agreement can be confirmed and authorized.

    Note: The MRO Warranty Agreement will attain 'Fresh' status once Part Details, Warranty Details and Warranty Terms are updated.

To proceed

- Click the Cancel pushbutton to cancel the MRO Warranty Agreement.

  Note: Cancellation of the agreement will be supported when the document is in 'Draft' or 'Fresh' status.
- Click the Confirm pushbutton to confirm the MRO Warranty Agreement.

  Note: Once the document goes to 'Fresh' status, the agreement can be confirmed and then authorized.
- Click the Authorize pushbutton to authorize the MRO Warranty Agreement.

  Note: If an authorized document is modified, then a new revision will be generated. Once the new revision is authorized, the old revision will go to 'Revised' status.

  At one time, there can be only one revision which is in authorized status.
- Select the Upload Documents link to facilitate upload of documents against the MRO Warranty Agreement.
- Select the View Associated Doc. Attachments link to view the uploaded documents against the MRO Warranty Agreement.

3.1.1 RECORDING PART DETAILS

The **Parts Details** tab in the **Manage MRO Warranty Agreement** enables identifying the parts covered under the Warranty Agreement. Parts covered under the agreement can be mentioned individually or through Part Type, Classification or Group. Once the part details are saved, the system generates a Warranty Agreement # in 'Draft' status with the default numbering type mapped for the transaction 'MRO Warranty Agreement' in the **Document Numbering Class** business component, in Create Mode.

1. Select the **Part Details** tab in the **Manage MRO** Warranty **Agreement** page. *See Figure 3.2.*

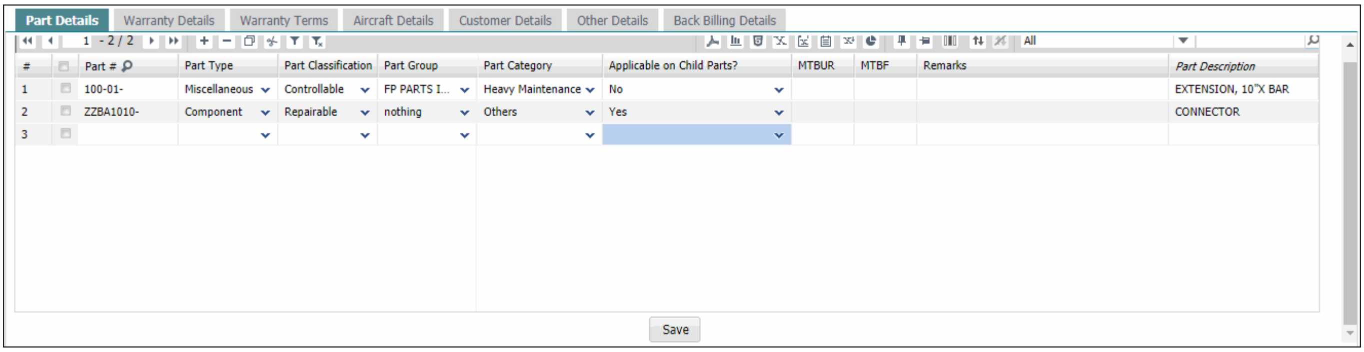


Figure 3.2 Recording part details

2. Enter the Part Details like **Part #**, **Part Type**, **Part Classification**, **Part Group**, **Part Category**, **MTBUR** and **MTBF**.
3. You can also specify whether MRO warranty Agreement is applicable for on child parts by selecting 'Yes' or 'No' in **Applicable on Child Parts?** drop-down list box.
4. Click **Save** pushbutton to record the details of the part covered under the warranty Agreement

3.1.2 RECORDING WARRANTY DETAILS

The **Warranty Details** tab enables identifying the combination of the Part - Customer - A/C attributes covered under the warranty agreement.

1. Select the **Warranty Details** tab in the **Manage MRO Warranty Agreement** page. *See Figure 3.3.*

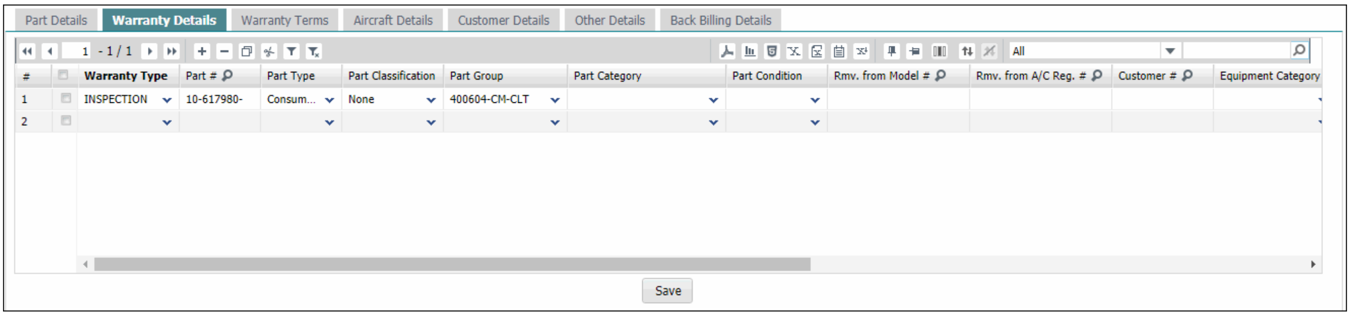


Figure 3.3 Recording warranty details

2. You can enter details like **Warranty Type**, **Part Group**, **Part Type**, **Part Classification**, **Customer #**, **Warranty Duration**, **Parameter details**, **Warranty begins on** (Shipment Date, Certificate Date, Mfr. Date, A/C Induction Date, A/C Operation Date) etc.

3. Click **Save** pushbutton to record the warranty details

3.1.3 RECORDING WARRANTY TERMS

The **Warranty Terms** tab identifies the terms of Warranty offered like the Claim Remedy, Costs covered under warranty, Failed part disposition, etc. Once warranty terms are saved the agreement change to 'Fresh' status.

1. Select the **Warranty Terms** tab in the **Manage MRO Warranty Agreement** page. *See Figure 3.4.*

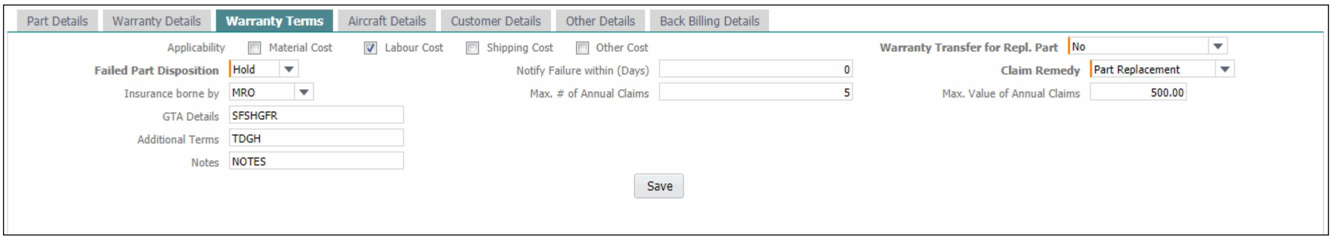


Figure 3.4 Recording warranty terms

2. Use the **Warranty Transfer for Repl. Part** drop-down list box and specify 'Yes' or 'No' to specify whether the warranty is transferable for replacement part during customer part exchanges.

3. Specify the **Failed part Disposition** as 'Hold', 'Return' or 'Scrap'.

4. Select the **Claim Remedy** as 'Part Replacement', 'Credit Request', 'Repair' and 'All'.

5. Click **Save** pushbutton to record the warranty terms for the warrant agreement.

3.1.4 RECORDING AIRCRAFT DETAILS

The **Aircraft Details** tab helps in identifying various aircrafts for which the warranty agreement is valid. This tab can save the information at Aircraft Model or at Aircraft Reg. # level. If the Aircraft Model # or Aircraft Reg. # is mentioned here, then the document is valid only for the work done against AME in the mentioned Aircraft model or Aircraft reg. #.

1. Select the **Aircraft Details** tab in the **Manage MRO Warranty Agreement** page. *See Figure 3.5.*

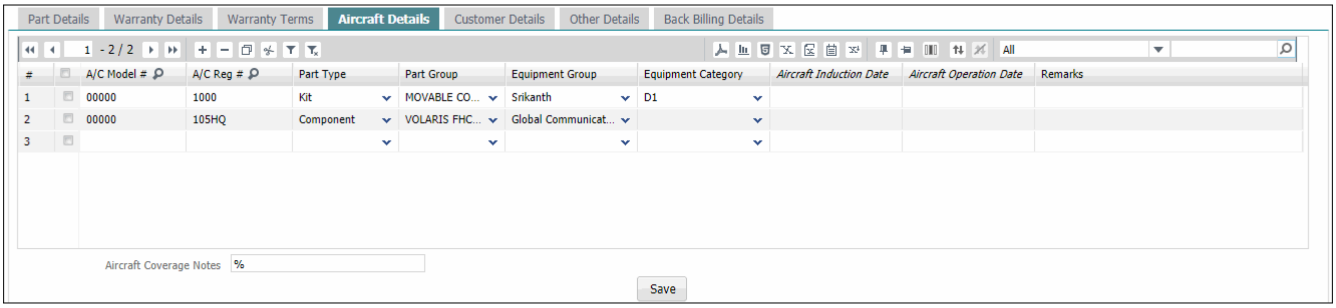


Figure 3.5 Recording aircraft details

2. You can record details like **A/C Model #, A/C Reg #**, **Part Type**, **Part Group**, **Equipment Group**, **Equipment Category**, etc.
3. Specify the **Aircraft Coverage Notes**.
4. Click **Save** pushbutton to record the details of the aircrafts covered under the MRO Warranty Agreement.

3.1.5 RECORDING CUSTOMER DETAILS

The **Customer Details** tab identifies various customers for whom the warranty agreement is valid. This tab can save the information at Customer # or at Customer Group level. If the Customer Group or Customer # is mentioned here, then the document is valid only for the work done against AME/SWO raised for Components/Aircraft mapped to that customer.

1. Select the **Customer Details** tab in the **Manage MRO Warranty Agreement** page. *See Figure 3.6.*

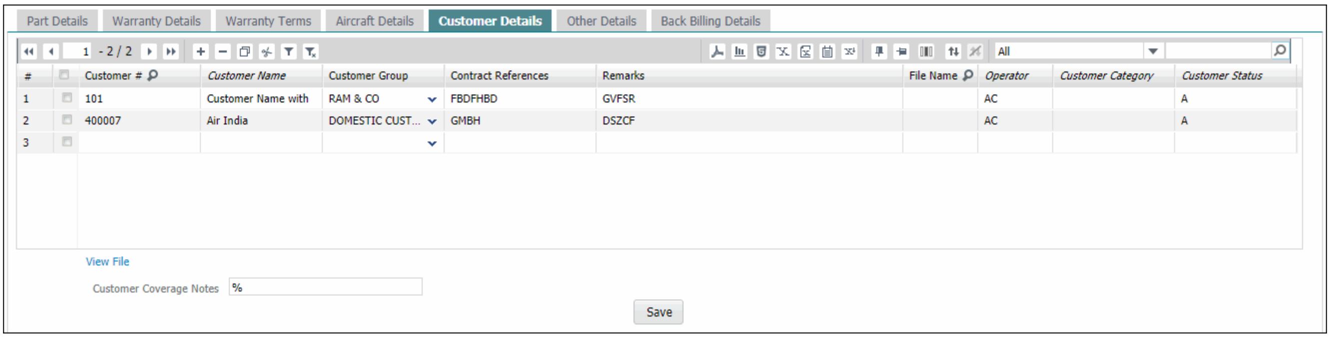


Figure 3.6 Recording customer details

2. Specify customer details like **Customer #**, **Customer Group** and **Customer Coverage Notes**.
3. Click **Save** pushbutton to record the details of the customer details for the MRO Warranty Agreement.

3.1.6 RECORDING OTHER DETAILS

The **Other Details** tab defines the general inclusion and/or exclusion terms against an MRO warranty agreement.

1. Select the **Other Details** tab in the **Manage MRO Warranty Agreement** page. *See Figure 3.7.*

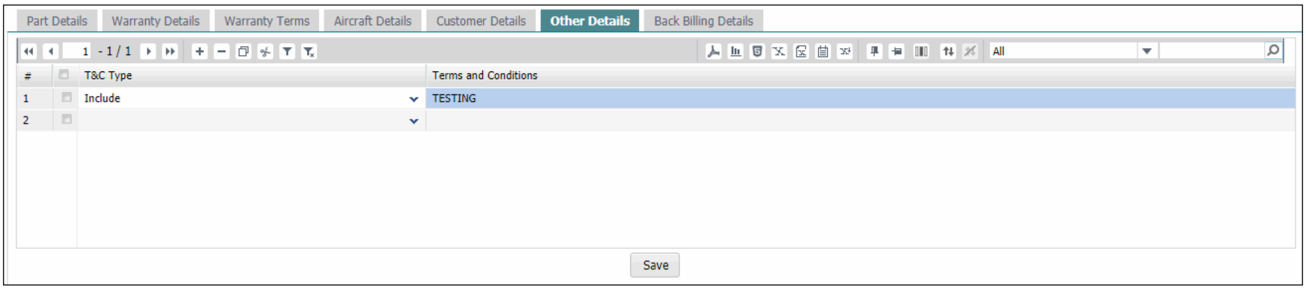


Figure 3.7 Recording other details of MRO Warranty

2. Select 'Include' or 'Exclude' in **T&C Type** drop-down list box and enter the **Terms and Conditions** of the MRO warranty agreement.

3. Click **Save** pushbutton to record the inclusion and/or exclusion terms against the MRO warranty agreement.

3.1.7 RECORDING BACK BILLING DETAILS

The **Back Billing Details** tab provides the facility to define back billing information against an MRO warranty agreement. The tab enables identifying the Customer # to whom the back billing should be done, whenever warranty orders are processed.

1. Select the **Back Billing Details** tab in the **Manage MRO Warranty Agreement** page. *See Figure 3.8.*

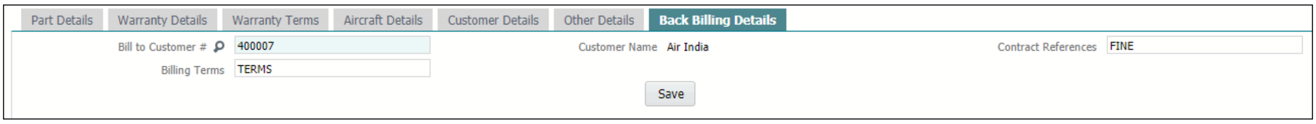


Figure 3.7 Recording back billing details

2. Specify the **Bill to Customer #** indicating the customer to whom the billing should be done in case of claims made against OEM warranty agreements.

3. Enter the **Contract References** and **Billing Terms**.

4. Click **Save** pushbutton to record the back billing information against the MRO warranty agreement.

3.2 MANAGING PARTS UNDER MRO WARRANTY

This enhancement provides the ability to update the Part-Serial/Lot #s under warranty against different agreements and search for the various Part-Serial/Lot #s under the warranty. Provision to activate and/or inactivate the warranty instances is also supported. The warranty instances can be setup automatically during the following scenarios:

- Closure of Work Order raised against Customer Orders which refer a valid MRO Warranty Agreement on the date of Work Order closure.
- Confirmation of General Issue raised against a Part Sale Order.
- Confirmation of Shipping Note raised against the General Issue or Direct Issue raised against the Part Sale Order or Customer Order respectively.

3.2.1 MANAGING PARTS UNDER MRO WARRANTY

This page allows you to update the Part-Serial/Lot #s under warranty against different agreements and activate and/or inactivate the warranty instances.

1. Select the **Manage Parts under MRO Warranty** activity under the **MRO Warranty** business component. The **Manage Parts under MRO Warranty** page appears. *See Figure 3.8.*

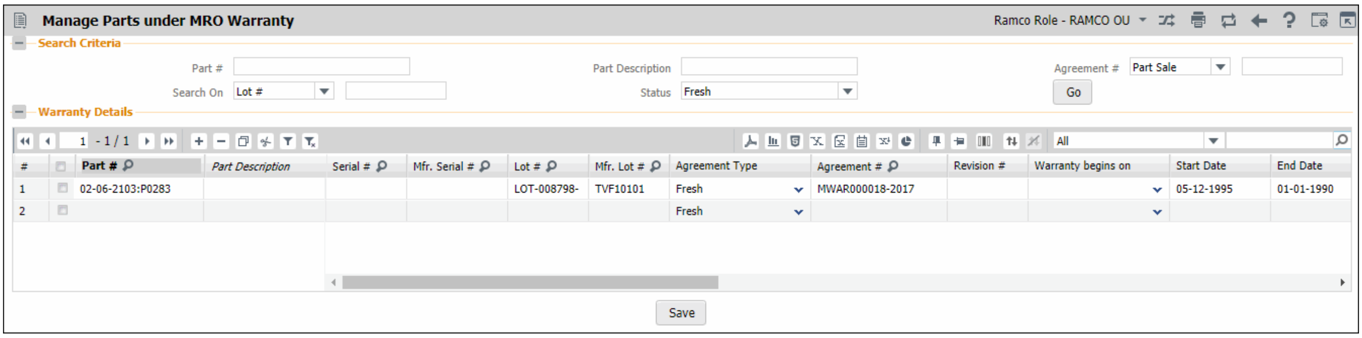


Figure 3.8 Managing parts under MRO warranty

2. Enter **Search Criteria** and click **Go** to retrieve the warranty details.
3. You can also directly enter the Part-Serial / Lot # # details in the **Warranty Details** multiline.
4. Enter **Agreement Type, Agreement #, Warranty Start Date / End Date**.
5. Select the start date of warranty in the **Warranty begins on** drop-down list box as Shipment Date', 'Certificate Date', 'Mfr. Date', 'A/C Induction Date', A/C Operation Date', 'A/C Delivery Date' or 'A/C Entry into Service Date'.
6. Set the **Status** of the warranty agreement as "Active" or "Inactive".
7. Click the hyperlinked **Parameter** field in the multiline to launch the **Manage Warranty Parameter Value** pop-up. This pop-up enables you to update the required parameter details like Parameter value, description and warranty value for the warranty.
8. Click the **Save** pushbutton to record the Part-Serial / Lot # # details under the warranty. On save, the system generates the Warranty Instance # in 'Fresh' status.

Managing warranty parameter value

You to update the required parameter details based on which the warranty is offered, along with the warranty value using a pop-up that can be launched from the **Manage Parts under MRO Warranty** page.

1. Click the **Parameter** field in the multiline of the **Manage Parts under MRO Warranty** page. The **Manage Warranty Parameter Value** page appears. *See Figure 3.9.*

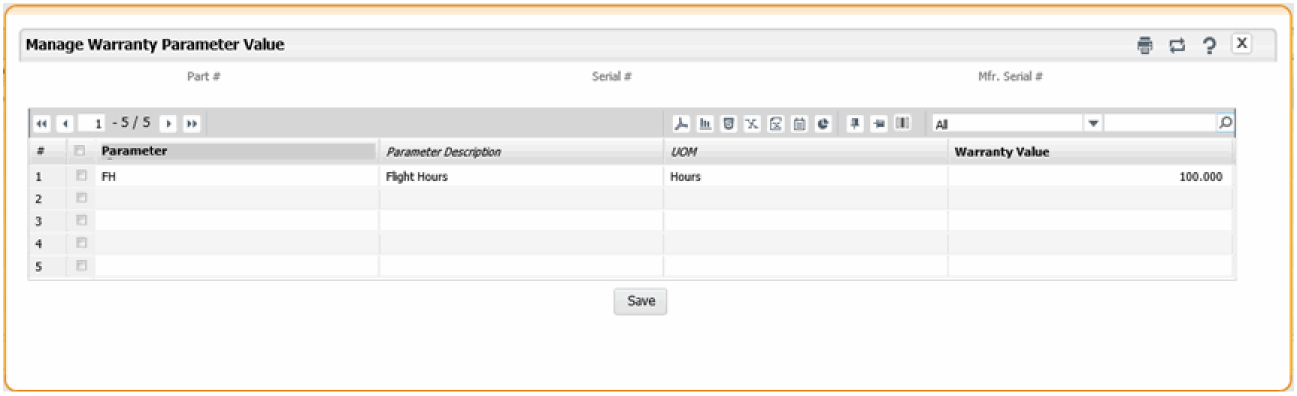


Figure 3.9 Managing warranty parameter value

2. Enter the **Parameter** and the **Warranty Value**.
3. Click the **Save** pushbutton to record the parameter details for the warranty.

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