Oracle® Process Manufacturing

System Administration User's Guide

Release 11*i*

September 2001

Part No. A77212-05

ORACLE

Oracle Process Manufacturing System Administration User's Guide, Release 11*i*

Part No. A77212-05

Primary Author: Michele-Andrea Fields

Contents

3 OPM Lookups

4 Workflow Setup

Send Us Your Comments

Oracle Process Manufacturing System Administration User's Guide, Release 11*i*

Part No. A77212-05

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this publication. Your input is an important part of the information used for revision.

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most about this manual?

If you find any errors or have any other suggestions for improvement, please indicate the chapter, section, and page number (if available). You can send comments to us in the following ways:

- FAX: 650-506-7200 Attn: Oracle Process Manufacturing
- Postal service:

  Oracle Corporation
  Oracle Process Manufacturing
  500 Oracle Parkway
  Redwood City, CA 94065
  U.S.A.

If you would like a reply, please give your name, address, and telephone number below.

If you have problems with the software, please contact your local Oracle Support Services.

Preface

Welcome to Release 11i of the *Oracle Process Manufacturing System Administration User's Guide*.

This user's guide includes information to help you effectively work with the Oracle Process Manufacturing (OPM) application and contains information about the following:

- Oracle Process Manufacturing overview and reference information
- Oracle Process Manufacturing functions and features
- Oracle Process Manufacturing programs, reports, and navigation paths
- How to navigate to Oracle Process Manufacturing windows

This preface explains how this user's guide is organized and introduces other sources of information that can help you.

About This System Administration User's Guide

This guide contains overviews as well as task and reference information. It includes the following:

- Chapter 1 describes how to set up and manage the OPM System Administration Functions.
- Chapter 2 describes how to use the Purge and Archive functions in OPM.
- Chapter 3 describes how to use the OPM Lookup window. The information found in the List of Values (LOVs) is set from this window.
- Chapter 4 describes how to set up and active a Workflow.
- Appendix A describes how to navigate to each window and the profile options to set.
- A Glossary provides definitions of terms that are used in this guide.

Intended Audience

This guide assumes that you have working knowledge of your business area's processes, tools, principles, and customary practices. It also assumes that you are familiar with OPM System Administration. If you have never used OPM, we suggest you attend one or more of the Oracle Process Manufacturing training classes available through Oracle University.

To learn more about Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See: Other Information Sources for more information about Oracle Applications product information.

Other Information Sources

You can choose from other sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Process Manufacturing.

If this user guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides unless we specify otherwise.

Online Documentation

All Oracle Applications documentation is available online (HTML and PDF). Note that the HTML documentation is translated into over twenty languages.

The HTML version of this guide is optimized for onscreen reading, and you can use it to follow hypertext links for easy access to other HTML guides in the library. When you have an HTML window open, you can use the features on the left side of the window to navigate freely throughout all Oracle Applications documentation.

- You can use the Search feature to search by words or phrases.
- You can use the expandable menu to search for topics in the menu structure we provide. The Library option on the menu expands to show all Oracle Applications HTML documentation.

You can view HTML help in the following ways:

- From an application window, use the help icon or the help menu to open a new Web browser and display help about that window.
- Use the documentation CD.
- Use a URL provided by your system administrator.

Your HTML help may contain information that was not available when this guide was printed.

Related Documents

Since Oracle Process Manufacturing shares business and setup information with other Oracle products as well as with our core OPM products, you should consult other related user's guides when you set up and use any OPM product. You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle store.

You may find the following Oracle Applications user's guides useful:

- *Oracle Applications User's Guide*
- *Oracle Application's Flexfields Guide*
- *Oracle Workflow User Guide*
- *Oracle Applications System Administrator's Guide*
- *Oracle General Ledger User's Guide*
- *Oracle Payables User's Guide*
- *Oracle Receivables User's Guide*
- *Oracle Human Resources North American User's Guide*
- *Oracle Purchasing User's Guide*

Oracle Process Manufacturing Guides

The following is a list of documentation in each product group for OPM:

Financials

- *Oracle Process Manufacturing Accounting Setup User's Guide*
- *Oracle Process Manufacturing Cost Management User's Guide*
- *Oracle Process Manufacturing Manufacturing Accounting Controller User's Guide*
- *Oracle Process Manufacturing and Oracle Financials Integration User's Guide*

Inventory Control

- *Oracle Process Manufacturing Inventory Management User's Guide*
- *Oracle Process Manufacturing Physical Inventory User's Guide*

Logistics

- *Oracle Process Manufacturing Order Fulfillment User's Guide*
- *Oracle Process Manufacturing Purchase Management User's Guide*
- *Using Oracle Order Management with Process Inventory Guide*

Process Execution

- *Oracle Process Manufacturing Process Operation Control User's Guide*
- *Oracle Process Manufacturing Production Management User's Guide*

Process Planning

- *Oracle Process Manufacturing Integration with Advanced Planning and Scheduling User's Guide*
- *Oracle Process Manufacturing MPS/MRP and Forecasting User's Guide*

Product Development

- *Oracle Process Manufacturing New Product Development User's Guide*
- *Oracle Process Manufacturing Quality Management User's Guide*

Regulatory

- *Oracle Process Manufacturing Regulatory Management User's Guide*

System Administration and Technical Reference

- *Oracle Process Manufacturing Implementation Guide*
- *Oracle Process Manufacturing System Administration User's Guide*
- Oracle Process Manufacturing Technical Reference Manuals
- Oracle Process Manufacturing API User's Guides

Training and Support

Training

We offer a complete set of training courses to help you and your staff master Oracle Applications. We can help you develop a training plan that provides thorough training for both your project team and your end users. We will work with you to organize courses appropriate to your job or area of responsibility.

Training professionals can show you how to plan your training throughout the implementation process so that the right amount of information is delivered to key people when they need it the most. You can attend courses at any one of our many Educational Centers, or you can arrange for our trainers to teach at your facility. We also offer Net classes, where training is delivered over the Internet, and many multimedia–based courses on CD. In addition, we can tailor standard courses or develop custom courses to meet your needs.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

We STRONGLY RECOMMEND that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications tables, unless we tell you to do so in our guides.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications forms, you might change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications forms to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. But, if you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at http://www.oracle.com/accessibility/.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support and office automation, as well as Oracle Applications. Oracle Applications provides the E–business Suite, a fully integrated suite of more than 70 software modules for financial management, Internet procurement, business intelligence, supply chain management, manufacturing, project systems, human resources and sales and service management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers, and personal digital assistants, enabling organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and application products, along with related consulting, education and support services, in over 145 countries around the world.

Thank You

Thank you for choosing Oracle Process Manufacturing and this user's guide.

We value your comments and feedback. At the beginning of this guide is a Reader's Comment Form that you can use to explain what you like or dislike about this user's guide. Mail your comments to the following address or call us directly at 650-506-7000.

Oracle Applications Documentation Manager
Oracle Corporation
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

Or, send an electronic mail message to appsdoc@us.oracle.com

1

OPM System Setup

This topic explains how to set up and manage the OPM System Administration Functions. This includes Document Types, Unit of Measure, Users and Organizations, as well as several others.

The following topics are covered:

- Document Types
- Document Ordering
- Geography Codes
- HR Locations
- Organization Parameters
- OPM Organizations
- Paragraphs
- Reason Codes
- Session Parameters
- Text Tokens
- Units Of Measure
- User Organization
- User Planning Classes
- Special Menu

Editing Document Types

Documents are used to categorize transaction activity that is generated from many OPM functions including inventory, sales, purchasing, production, etc. OPM documents are categorized by type, each recording different kinds of information related to different transactions. Document types and organizations must be defined before you can define document ordering.

Note: Do not modify the document types supplied with OPM. You can add and maintain new document types, but do not change the supplied document types.

Use the Document Types window to add and maintain document types. Examples of document types include the following:

- ADJI - Inventory Adjustment - Immediate
- ADJR - Inventory Adjustment - Journaled
- BAL - Balance Qty - For MRP
- CMOR - Combined MORD
- CREI - Create New Inventory - Immediate
- CRER - Create New Inventory - Journaled
- DMOR - Divided MORD
- DDOR - Dummy DORD
- FCST - Forecast
- FPO - Firm Planned Order
- GLVN - General Ledger Voucher No.
- GRDI - Change Grade - Immediate
- GRDR - Change Grade Journaled'
- JRNL - Inventory Quantities Document Sequencing
- OPCR - Credit Memo Document Number
- OPDB - Debit Memo document Number
- OPIN - Invoices

- OPOP - Sales Order Profiles
- OPSO - Sales orders
- OPSP - Shipment
- MGRI - Mass Grade Update - Immediate
- MSTI - Journaled Sales Return - Mass Status Update - Immediate
- MTRI - Mass Movement - Immediate
- PBPR - Planned BPO Release
- PBPO - Blanket Purchase Orders
- PICY - Physical Inventory - Cycle No
- PIPH - Physical Inventory - Physical
- PORD - Purchase orders
- PROD - Production Batch
- RECV - Receiving
- PPRD - Planned Production
- PPUR - Planned Purchase
- PTRN - Planned Transfer
- RVAL - Cost Revaluation Process
- REPI - Replace Quantity / Status - Immediate
- REPR - Replace Quantity / Status - Journaled
- RTRN - Purchase Return (Rglr / Stock Reciept)
- SHRT - MRP - Document Type for Shortage
- STSI - Change Status - Immediate
- STSR - Change Status - Journaled
- TRNI - Inventory Movement - Immediate
- TRNR - Inventory Movement - Journaled
- XFER - Required to operate the Transfer form
- XPRD - Phantom
- XSHT - Phantom Shortage

Document Types Procedure

1. Navigate to the **Document Types** window.
2. Complete the fields as described.
3. Save the window.

Document Types Field Reference

Type

Displays the code, maximum four characters, that identifies this document type.

Description

Displays the text, maximum 40 characters, that describes this document type.

English Description

Displays additional text, maximum 40 characters, that describes this document type.

Editing Document Ordering

Use the Document Ordering window to determine the document number assignment for each type of document. A Document is an online window that creates a financial, inventory, or resource transaction. Different document numbers are assigned for each document type and organization. All document numbers are prefaced with an organization code; therefore, multiple organizations can use the same number ranges and still uniquely identify their documents.

Numbers can be assigned to documents manually or automatically.

- If you use automatic number assignment, OPM assigns numbers to documents sequentially. However, do the following:
  - Initiate the document numbering sequence by assigning a number that is smaller in value by 1 than the desired starting document number.
  - Define the maximum number of digits for the number, which cannot exceed 10 digits (or six digits if integrated with Oracle Financials).
  - Determine whether the number is padded with leading zeroes or blanks. Zeros are recommended for reporting/query purposes.
- If you use manual number assignment, assign the document numbers. Manual number assignment is useful when you are using pre-printed forms or when document numbers are generated by another system.

Note: Define a number assignment on the Document Order window for the document type JRNL to interact with the Inventory Quantities window. All inventory quantity documents use the numbering scheme defined for the document type JRNL.

Pay careful attention to the initial number assignment. Altering number assignment parameters after documents are saved may cause problems with the order in which documents are listed on reports and lookups.

Document Ordering Procedure

1. Navigate to the **Document Ordering** window.
2. Complete the fields as described.
3. Save the window.

Document Ordering Field Reference

Document Type

Enter the code, which was defined on the Document Type window, that identifies the document type for which you want to define this document numbering system. (Required)

Organization

Enter the code, which was defined on the Organizations window, that identifies the organization for which you want to define this document numbering system. Transactions generated from your documents will be associated with the Organization chosen here. (Required)

Assignment Type

Determines whether you assign document numbers manually or automatically for this document type and organization. (Required)

Manual = Manual number assignment (allows alphanumeric characters)

Automatic = Automatic number assignment (numeric only)

Last Assigned

This field is displayed when you enter Automatic as the Assign Type value. A document number may or may not be displayed depending upon whether you have already established document ordering:

- If you are assigning a document number for the first time, enter the document number that is smaller in value by 1 than the desired starting document number. For example, if you want purchase orders to begin with document number 200, enter 199 in this field.
- If you have already assigned a document number, the last number assigned to this document type and organization is displayed.

Format Size

Enter the maximum number of digits for this document type and organization. You can enter any positive number between 1 and 10. For example, if you will assign purchase order numbers 1 to 999, enter the value 3.

If you are integrating with Oracle Financials, the maximum size is 6.

Editing Geography Codes

Use the Geography Code window to add and maintain user-defined geography codes. Geography codes are used to reference geographical areas on purchase orders, customer receipts, and other documents that contain addresses.

Geography Code Procedure

1. Navigate to the **Geography Code** window.
2. Complete the fields as described.
3. Save the window.

Geography Code Field Reference

Type

Defines the type of Geography Code. The options are:

- Country
- State
- Province
- County

Code

Displays the code that identifies the geographical area; for example, NY for New York.

Description

Displays the text that describes the geography code.

Editing HR Organizations

Use the HR Organization window to set up:

- Business Groups
- GREs (Government Reporting Entities)
- internal organizations
- external organizations

The nature of each organization is determined by the *classification* you select for it. The setup information you enter for an organization depends in large part on its *classification*. You must create a Business Group and a responsibility to allow access to it, before you create other organizations.

You can enter the basic information into this form to set up a Business Group. It is critical at this point to set up the Inventory Organization Parameters.

For more details on setting up this form, refer to the *Oracle Human Resources North American User's Guide Release 11i*.

Editing Organization Parameters

The Organization Parameters for is found by navigating to OPM System Setup > HR Organizations > Description > Others > Inventory Information.

This form is used to define the organization parameters (inventory, costing etc.) for the organizations classified as 'Inventory Organization'. This form will be modified to add two new fields:

1. Process Enabled
2. Process Organization

The user will enable the flag 'Process Enabled' on the folder 'Inventory Parameters' to indicate that this is an OPM warehouse. As a result of enabling this flag, the field 'Process Organization' will become active and mandatory. The field 'Process Organization' will contain of a list of values of all OPM companies and their children organizations that are attached to the Operating Unit of this Inventory Organization.

For more details on setting up this form, refer to the *Oracle Inventory User's Guide Release 11i*.

Editing HR Locations

This menu option has been added to OPM System Administration responsibilty to allow creation of HR Locations which gets attached to the HR Organizations. When this HR Organization is classified as an Inventory Organization (Process Enabled) and saved, a database trigger will create an OPM warehouse. The address in the HR Location for the Organization will be synchronized to OPM as the warehouse address.

No changes have been made to the form. However, a new address style ‘OPM’ is defined for the Human Resources Descriptive flexfield Location Address. This address style and the flexfield structure could be seeded into the application or alternatively part of the setup and included in the OPM setup documentation.

In the case where a different address style is used, the organization trigger will use the mapping defined for the ‘OPM’ address style and attempt to synchronize the addresses.

Users can extend the ‘OPM’ address style, if needed. The organization trigger will work properly as long as the seeded values of this address style flexfield are not modified.

For more details on setting up this form, refer to the *Oracle Human Resources North American User’s Guide Release 11i.*

Editing Organizations

Organizations are entities to which you can assign resources, warehouses, General Ledger accounts, and other cross-module items. When you define an organization, specify whether it is a company, a plant, or both. A company is a legal entity that must maintain a balanced set of books. A plant is an organization that manufactures goods.

Both companies and plants are classified as organizations in OPM.

You can set up "parent" organizations with multiple "child" organizations. Child organizations can have independent resources and warehouses that are accounted for on the parent general ledger; you must, however, set up the parent organization before the child organizations. You can also create independent organizations. Organizational setup accommodates multi-company accounting.

Organizational Hierarchies

In setting up an organization, you must specify the organization's parent organization. In this way, organizational hierarchies can be constructed. For example, a company may have several subsidiary companies, and each company may have several plants.

Organizations Procedure

1. Navigate to the **Organizations** window.
2. Complete the fields as described.
3. Save the window.

Organizations Field Reference

Organization

Enter a unique code to identify the organization, for example, 100.

If you are defining an organization that you will associate with a parent company, you may want to enter a code that relates the organization to the parent company. If this is an organization under 100, enter 101.

The code entered will be used to identify documents printed for this organization.

Name

Displays descriptive information, such as the company or plant name, for the organization you are defining.

Parent

Parent organization is one level above a given organization on the organizational hierarchy. If the given organization is at the top of the organizational hierarchy, enter its organization code.

Company

Displays a unique code to identify the Oracle Financials company. If the organization is a company, enter its organization code. If the organization is not a company, enter the organization code of the company to which the organization reports.

Plant

Determines whether the organization is a manufacturing plant.

Non Manufacturing Plant = Organization is not a manufacturing plant

Manufacturing Plant = Organization is a manufacturing plant

Process Operation Control

Determine whether Process Operations Control (POC) data (Routing information) will be collected.

Data Not Collected = POC data will not be collected

Data Collected = POC data will be collected

Tax Location

Displays the tax location code for the organization.

The tax location code is set up on the Tax Location Code window; however, you can enter the default value "NONE" until you set up tax information.

This field is only required if the system constant OP$GEMMSTAX is set to a value of 1.

Editing Paragraphs

Paragraphs in OPM are structures that are used to store and categorize text. OPM is installed with one default paragraph per database table, the General Text paragraph. When you select Edit Text and access the Text Editor window, by default, the edited text is put into this General Text paragraph.

The Paragraphs window allows you to specify different paragraphs that can be associated with tables. After selecting Edit Text, a list of valid paragraphs displays in the Text Paragraph Selection window, even if the only available paragraph code is General Text. You must choose one to proceed.

Paragraph codes control whether text prints on hardcopy documents such as orders or shipping forms or what language your text is stored in. The default General Text paragraph is set up as display only, but it can be changed to enable printing.

Most OPM forms enable you to associate text with the document or record with which you are working. To add or update text, select Edit Text from the Special pulldown menu, choose the Paragraph which you want to associate the text with, and access the Text Editor window. The entered text can be displayed on-line and can be printed on hard copies of documents.

Take, for example, purchase orders. If you are creating or editing a purchase order header on the Purchase Orders window, you can select Edit Text from the Special pulldown menu and add the text that will be associated with the document. If you are creating or editing purchase order lines on the Purchase Order Lines window, you can add text to each line, which is associated with each line of the document. The text you add is associated only with the purchase order line that was highlighted when you selected Edit Text.

When you invoke the Text Editor, the entered text is associated only with the paragraph code and record on which you are working. For example, if you enter text for a line in an order using the General Text paragraph, that text is associated only with that line on that order.

Note: Paragraph codes are linked to specific database tables when they are set up; therefore, you will not see the same list of paragraphs from every OPM window.

For example, you could create a paragraph on the Batch Header table (pm_btch_hdr). When you select Edit Text from the Special menu, this paragraph is displayed as an option on the Text Paragraph Selection window. If you have defined a paragraph for Routing Instructions, select the Routing Instructions paragraph. The entered text is stored in this paragraph.

Paragraph Procedure

1. Navigate to the **Paragraph** window.
2. Complete the fields as described.
3. Save the window.

Paragraph Field Reference

Table

Displays the database table name to which this paragraph is to be linked.

Language

Displays the language code associated with this paragraph.

Code

Displays the code that identifies this paragraph.

Note: If you are creating subparagraphs, each subparagraph should have the same paragraph code as the main paragraph.

Sub Code

Displays a subparagraph code when you have one paragraph related to another paragraph. Subparagraphs are printed beneath the main paragraph in numerical order. Subparagraph codes must be integers, which determine the order in which subparagraphs are printed.

The subparagraph code for the main paragraph is the default value 0.

Nonprintable

Displays the print indicator, which specifies whether the paragraph text is to be included when documents are printed:

Yes - Text does not print (Yes Nonprintable)

No - Text does print (No NOT Nonprintable)

Description

Displays a maximum 40-character description. This description is displayed when you select paragraphs for which you will enter text.

Editing Reason Codes

Reason codes provide information on increases or decreases in inventory. They are used to flag transactions and attach reasons to them. All transactions entered though the Inventory Quantities window, must have a reason code associated with it. Other OPM forms require Reason Codes as well.

For example, you may have a batch of product that cannot be shipped because the color is wrong. Should this be a common occurrence, you may want to set up a reason code which would readily identify such situations.

Reason Code Procedure

1. Navigate to the **Reason Codes** window.
2. Complete the fields as described.
3. Save the window.

Reason Code Field Reference

Code

Displays the code, maximum four characters, that identifies this reason.

Type

Indicates the effect on inventory quantity associated with this reason code.

Increases & Decreases = Allow increases and decreases to inventory. Reason codes for movement of inventory between warehouses must have this Reason Type because there is a decrease in inventory at one warehouse and an increase at another.

Increases = Allow only increases to inventory.

Decreases = Allow only decreases to inventory.

Flow

Indicates the type of stock movement with which the reason code is associated. The corresponding inventory adjustment that results from stock movement may be related to the following: an inflow of goods, as in a purchase; an outflow of goods, as in a sale; the usage of goods, consumption; and to other miscellaneous reasons, for example, spillage.

Outflows

Usages

Inflows

Exclude

Consider the following scenarios. To correct errors made in recording consumption, you may want to set up reason codes for adjustments to inventory quantity.

For example, if too little were recorded consumed, inventory would have to be adjusted downward. You could use the following reason code parameters:

Reason type = Decreases, which allows for a decrease to inventory

Flow type = Usages, which indicates usage

If too much were recorded consumed, inventory would have to be adjusted upward. You could use the following reason code parameters:

Reason type = Increases, which allows for an increase to inventory

Flow type = Usages, which indicates usage

Description

Displays the text, maximum 40 characters, which describes this reason code. This description is displayed on forms where this reason code is used.

Comment

Displays comments, maximum 70 characters, for this reason code. These comments are printed on reports, but are not displayed on documents where this reason code is used.

Authorization

Reserved for future use.

Editing Session Parameters

In addition to providing current system session information, the Session Parameters window enables you to change your default organization and default schedule simply by selecting the new entry using the List of Values and clicking OK. You can specify whether you want the change to affect only the current session or all sessions until the default organization value may be changed again.

Note: OPM will only allow you to choose an organization for which you are authorized to specify as defined through the User Organizations window. See the *Assigning Organizations to User* topic for details.

Session Parameters Procedure

1. Navigate to the **Session Parameters** window.
2. Complete the fields as described.
3. Save the window.

Session Parameters Field Reference

Session Number

A unique session ID, created automatically on a per session, per user basis.

Time

Displays the logon date and time.

Database Manager

Displays the RDBMS name Oracle.

Database

Displays the database name Oracle.

Username

Displays the user and user name of the current session's user.

Organization

Enter the code for the organization that is to be the default organization. This code must be one for which you are authorized to select as specified through the User Organizations window.

Company

Displays the Company code associated with the default Organization.

Schedule

Enter the default schedule for this session.

Editing Text Tokens

Text tokens are codes or short descriptions that represent longer descriptions or messages. These tokens are set up on the Text Token window.

After selecting Edit Text from the Special pulldown menu and invoking the Text Editor, specify a token instead of typing the full description of the text by entering a token preceded by a period. Upon clicking the **<Tab>** key, the token is converted to the text it represents.

For example, you might set up a text token called Fragile that represents the text: Fragile, Handle with Care. Whenever you want to include these instructions on a document, you can type Fragile on the Text Editor window rather than typing the message text. You can also invoke the LOV function to select a text token. After choosing from the LOV, click **<Tab>**.

To record the text that will be printed when you enter the token, select Edit from the Special pulldown menu and enter the text on the Text Editor window.

Text Tokens Procedure

1. Navigate to the **Text Tokens** window.
2. Complete the fields as described.
3. Save the window.

Text Tokens Field Reference

Token

Enter the code or a short description, of up to 40 characters, for this text token. This token is the value that is entered on the Text Editor window preceded by a period.

Language

Enter the code for the language in which you want the text to be printed. Language codes are set up on the Languages window.

Description

Enter a short description for this text token. This is not the text that replaces the token. Instead, this description appears on lookups. To create the text that you want to replace the token, select Edit Text from the Special pulldown menu.

Special > Edit Text

In order to create the text that you want to replace the token, select Edit Text from the Special pulldown menu. For more details on using the Edit Text option, refer to the *Special Menu* topic.

Units of Measure

The Unit of Measure window is used to add and maintain Units of Measure (UOM) definitions. A UOM definition consists of a UOM code, a description, a type, and the conversions between the reference UOM and all other UOMs of the same type.

Before you can maintain, purchase, or sell inventory, you must define the UOMs against which the item quantities are measured.

Note: The order in which you set up UOMs is of utmost importance. The first UOM value that you define for a given UOM type becomes the reference against which all other UOMs of the same UOM type are based. All subsequent UOMs defined for the specified UOM type require conversion against this reference UOM.

All conversions specified on the Units of Measure window are conversions between the same UOM types. Conversions across UOM types must be defined individually for each item on the Item Lot/Sublot Std Conversion window.

After setting up UOM types, set up the actual UOM values on the Unit of Measure window. The first UOM that you set up for each UOM type becomes the reference UOM, also called base or standard UOM, for that type. All other UOMs of this type are defined in relation to the reference UOM.

For example, should you set up L (liters) as the first UOM for the UOM type VOL (volume), you have to define each new volume UOM in terms of liters; therefore, if the new volume is GAL (gallons), it must be defined in relation to liters. As such, you would specify a two-way conversion between GAL (gallons) and L (liters) and L (liters) and GAL (gallons) in the Conversion column.

The two-way conversion equation is as follows:

- One unit of "new" UOM = *X* unit of "reference" UOM
- One unit of "reference" UOM = *X* unit of "new" UOM

The factor between the newly entered UOM, in this example GAL (gallons), and the reference UOM, L (liters) , and vice versa, is entered in the Conversion Factor column. You only need to enter the conversion factor going “one way”; the other conversion factor will be automatically calculated.

Note: Altering the UOM conversion once inventory has been created will corrupt inventory balances.

All conversions specified on the Unit of Measure window are conversions between the same UOM types. For example, for a VOL (volume) UOM type with a reference UOM of L(liter), you might have two-way conversions between GAL(gallons) and L(liters), ML(milliliters) and L(liters), OZ(fluid ounces) and L(liters), and so on. Conversions across UOM types, for example MASS(mass) to VOL(volume) type conversions involving LB(pounds) to L(liters), must be defined individually for each item on the Item Lot/Sublot Std Conversion window. See the *Item Conversions* topic. Keep in mind, the reference UOM for a particular UOM type is the measure against which a conversion is based even when the conversion is across UOM types. In keeping with the example, L(liter) would still be the reference UOM for the VOL(volume) UOM type.

The new UOM is available to the session in which you entered the UOM and to all users beginning OPM sessions after you enter it. If you change a conversion, the change does not take effect in the current session. You must log out of OPM and then log in again. Note that this is not recommended.

New Unit of Measure Functionality

OPM is now using the Oracle Inventory Unit of Measure forms for the creation of UOMs, as well as viewing existing UOMs. These forms can be run from either the Oracle Inventory menu or from the Oracle Process Manufacturing System Administration menu.

These forms allow you to now use mixed case when creating your UOMs and their descriptions. All UOMs are now three characters, which is the Oracle Financials standard. You can also create a 25 character name for each UOM in addition to the description.

The Unit of Measure Classes form in Oracle Inventory allows you to set up new Base Units of Measure. This is the same as the OPM Unit of Measure Type form, with more information. The Oracle Inventory form allows you to set both a name and a description for each UOM.

The Unit of Measure form is the same as the OPM Unit of Measure form, with additional information similar to the Unit of Measure Classes form, where you are able to have both a description and a name for each UOM.

The Unit of Measure Conversions form, also displayed as the Conversions button on the Unit of Measure Classes form, is used for setting the conversion factors. This form replaces the conversion section of the OPM Unit of Measure form.

The Unit of Measure LOVs have also changed. The LOV now features three columns to accommodate both new and existing UOMs. An LOV will look as follows:

UOM	**UOM Name**	**Description**
CNT	CNT	Count Base
EACH	EACH	Each
Lbs	Pounds	Pounds (1kg = 2.2 pounds)

In this example, the CNT and EACH are carried over from OPM, where there was no UOM Name. Therefore, the UOM is duplicated into the name field. The Lbs UOM is from the Oracle Inventory system, and shows a different UOM Name. This will carry forward with all new UOMs.

For details on the Oracle Inventory Unit of Measure forms, refer to the *Oracle Applications Inventory Management User's Guide.*

Editing User Organizations

The default organization for each user is defined through Oracle System Administration Personal Profiles and associating an OPM Organization Code under the User Value column to the profile option GEMMS_DEFAULT_ORGN. Use the User Organizations window to assign any number of organizations to a user. Once assigned, a user can only work with an organization from among these authorized organizations.

User Organizations Procedure

1. Select the **User Organizations** window.
2. Complete the fields as described.
3. Save the window.

User Organizations Field Reference

Username

Enter the username for whom the organizations are assigned.

Code

Displays the code for the organization that is authorized for selection by this user.

Description

Displays the description of the organization that is authorized for selection by this user.

Editing User Planning Classes

The User Planning Classes window allows you to associate planning classes with users. Once these associations are made, an applications user will be able to run OPM reports based on the Planning Classes the user has access to.

The default planning class for each user is defined through the Oracle Applications System Administration Personal Profiles and associating a planning class under the User Value column to the profile option GEMMS_DEFAULT_SCHEDULE.

Note: User Planning Classes are required for generating MRP and MPS reports. Refer to the *Oracle Process Manufacturing MRP/MPS* manual for additional information on how User Planning Classes are defined and used.

User Planning Classes Procedure

1. Navigate to the **User Planning Classes** window.
2. Complete the fields as described.
3. Save the window.

User Planning Classes Field Reference

User

Select a user through the Find... or Query functions. A user name will be displayed, as well as the user name description.

Class

Displays the code for the planning class that the user is associated with.

Description

Displays the description of the planning class that the user is associated with.

Special Menu

From the Special menu, there are options that can be used to edit information. The Edit Text and Address Edit options, if available, will edit both the text in the text token, or allow you to change all of the address information for the selected user.

Edit Text

If there is only one line of text to be edited, the Text Edit window will appear. If there is more than one line that can be edited, the Select Text Paragraph window will appear first.

Edit Text Procedure

1. Navigate to the Edit Text option.
2. If the **Select Text Paragraph** window is displayed, select a line, and click **Edit Text**. If not, the **Text Edit** window will be displayed.
3. Complete the fields as described.
4. Click **OK**.

Edit Text Field Reference

Language

Displays the language code for the text.

Table Name

Displays the table name that the text is stored in.

Description

Displays a description of the text.

Text

Enter the appropriate text.

Address Edit

If the forms you are using has the Address Edit option, you can change the address information for the selected user.

Address Edit Procedure

1. Navigate to the **Address Edit** window.
2. Complete the fields as described.
3. Click **OK**.

Address Edit Field Reference

Name

Displays the name of the selected organization or entity that has an address associated with it.

Line 1

Displays address line 1.

Line 2

Displays address line 2.

Line 3

Displays address line 3.

Line 4

Displays address line 4.

City

Displays the city. This is user-defined on this window and not validated.

State

Displays the code and description for the state. The State is defined through the Geography Codes window. There is an LOV defined for the field against the SY_ GEOG_TBL, specific to its geography type.

Country

Displays the code and description for the country. The Country is defined through the Geography Codes window. There is an LOV defined for the field against the SY_GEOG_TBL, specific to its geography type.

Postal

Displays the postal code.

Province

Displays the code and description for the province. The Province is defined through the Geography Codes window. There is an LOV defined for the field against the SY_GEOG_TBL, specific to its geography type.

County

Displays the code and description for the county. The County is defined through the Geography Codes window. There is an LOV defined for the field against the SY_GEOG_TBL, specific to its geography type.

2

Purge and Archive

This topic explains how to use the Purge and Archive functions in OPM.

The following topics are covered:

- Purge and Archive
- Purge Inquiry
- Purge Setup

Purge and Archive

Use the Purge and Archive window to enter criteria for and execute a given purge. The purge can be one of the predefined OPM purges, or a custom purge defined by your System Administrator.

For the base OPM product, purge and archive functionality exists only for a pre-defined set of tables and transaction data. They are:

APRD Selects all Production batch records and the associated detail transaction and text records

AOPS Selects all Sales order and Shipment records and the associated detail transaction and text records

APOR Selects all PO, Receipt, and Return records and the associated detail transaction and text records

AJNL Selects all Inventory Journal records and the associated detail transaction and text records

PROD Removes all Production batch records and the associated detail transaction and text records

OPSO Removes all Sales order and Shipment records and the associated detail transaction and text records

PORD Removes all PO, Receipt, and Return records and the associated detail transaction and text records

JRNL Removes all Inventory Journal records and the associated detail transaction and text records

Purge and Archive Procedure

1. Navigate to the **Purge and Archive** window.
2. Complete the fields as described.
3. Save the Purge and Archive window. The Purge Id is assigned. Refer to the *Purge and Archive* - *Fields* topic for a description of the Purge Id.

Purge and Archive Field Reference

Purge Type

Enter value that specifies the category of all records associated with the Purge. This value was originally entered on the Purge Setup window.

There are eight standard purges. See above table for the names and descriptions of these purges.

Purge ID

A unique ID assigned to this purge. Allows you to query or retrieve the purge. Auto generated upon saving this window.

This unique ID is not created through OPM document ordering.

Purge Status

Status of this purge. Auto generated.

0 = Defined, not yet run

1 = Archive in progress

2 = Archived Successfully

3 = Purge in progress

4 = Purge Completed Successfully

-1 = Archive Process Failed

-3 = Purge Process Failed

Comment

Enter supporting information that provides additional information on the purge.

Description

Enter the description of the archive or purge you are running.

Criteria Values (Dynamic Criteria Fields)

Each standard purge has eight criteria. These criteria are:

- Latest creation date
- Last document number
- Latest modification date
- Last organization code
- Earliest creation date
- First document number
- Earliest modification date
- First organization code

Each criteria field is **required.** Following are examples of proper data formatting:

- Date criteria must follow this format: dd-mon-yyyy hh.mm.ss
- Document range must fill in the Pad characters (e.g. 00010 rather than 10)
- Ranges of organizations must contain real organization codes. For example, it is valid to enter FBP1 to FBP9 (where FBP1 and FBP9 are valid organization codes). However, it is not valid to enter A to Z

The following fields are updated following a purge or archive, and are for query only.

Row Details - Archived

The total archived. Auto generated.

Row Details - Deleted

The total rows deleted. Auto generated.

Row Details - Purged

The total rows purged. Auto generated.

Note: All criteria values must be entered and the purge engine will validate all the values at run time.

Archive/Purge Process

After the purge criteria is specified on the Purge and Archive window and saved, initiate an archive of data or purge your archive tables.

Archive/Purge Dialog Window Procedure

1. Navigate to either the **Archive Process** or **Purge Process** window.
2. Complete the fields as described.

Archive/Purge Dialog Box Field Reference

Purge Date

Enter the date and time that the purge is to be executed. This field is only displayed when the Queue field is populated with a value of QUEUE1.

Purge Inquiry

Use the Purge Inquiry window to view the status of purges. The status of the purge appears in descending order from the most recently submitted purge to the oldest submitted purge. Purge status information is stored in table sy_purg_mst.

Purge Inquiry Procedure

1. Navigate to the **Purge Inquiry** window.
2. Enter the Purge Type to view all of the associated archives and purges.

Purge Inquiry Field Reference

Purge Type

Enter the purge name. This could be one of the standard predefined purges (**APRD, AOPS, APOR, AJNL, PORD, OPSP, PORD, JRNL**) or a custom purge name.

Description

The description for this purge type is displayed.

Number

Populated with the Purge ID value that was generated on the Purge & Archive window.

Start

Populated with the date and time values, which specify when the purge began or is scheduled to begin.

Elapsed (Hours)

Populated with the elapsed time, in hours, for the purge listed.

Status

Populated with the values that specify the progress of the purge process. The displayed values include the following:

0= Defined, not yet run

1= Archive in progress

2= Archived Successfully

3= Purge in progress

4= Purge Completed Successfully

-1 = Unsuccessful Archive

-3 = Unsuccessful purge

Archived

Indicates the total number of rows archived for this run (copied into Archive tables).

Deleted

Indicates the total number of rows deleted for this run (removed from live tables and put into Archive tables).

Purged

Indicates the total number of rows Purged for this run (dropped from the database).

Purge Setup

Use the Purge Setup window to view the OPM standard predefined purges **-** *or* **-** (for the user who is very familiar with the OPM datamodel) define custom purges.

You need not use this window to run standard predefined purges, rather you can simply view them. To execute standard predefined purges, use the Purge and Archive window.

Purge Setup Procedure

1. Navigate to the **Purge Setup** window.
2. Complete the fields as described.
3. Save the window.

Purge Setup Field Reference

Purge Type

Enter a code up to four characters that specifies the category for this purge. Example: **PROD.**

Note: PROD is a predefined Purge, you can use PROD as an example to view its setup. PROD will be display only.

Description

Enter a description of the purge.

Criteria

A "tag" that identifies the data to be entered in this field before run time. For Example, "Organization."

Mask

The database mask for the data type contained within this criteria. The three standard masks supplied with the product are C for character, D for date, and N for numeric. Entering any of these characters in the field will display the actual “to_ char” or “to_data” mask used in the purge. Any mask necessary can be entered here and used with custom purges.

Description

Enter the a description for this criteria. This is displayed to the user on the Purge & Archive window when executing this purge.

Purge Tables

The Purge Tables window is displayed when selected from the Special pulldown menu when the Purge Setup window is displayed.

Purge Tables Procedure

1. Navigate to the Purge Tables window from the Special pulldown menu.
2. Complete the fields as described.
3. Save the window.

Purge Tables Field Reference

Purge Type

Enter a code up to four characters that specifies the category for this purge. Example: **PROD**.

> **Note:** PROD is a predefined Purge, you can use PROD as an example to view its setup. PROD will be display only.

Description

Enter a description of the purge.

Name

Enter the name of the Table.

Action

Enter the action to be taken. An action can either be to **Keep** the data in the Table or to **Delete** the data in the Table.

3

OPM Lookups

This topic explains how to use the OPM Lookup window. The information found in the List of Values (LOVs), is set from this window.

The following topic is covered:

- OPM Lookups

OPM Lookup

The OPM Lookup window allows you to add to the values that are found in a particular lookup, or List of Values (LOV). The available LOVs are only the ones that are seen on the OPM Lookup window.

OPM Lookup Procedure

1. Navigate to the **OPM Lookup** window.
2. Complete the fields as described.
3. Save the window.

OPM Lookup Field Reference

Type

Enter the names that will appear in the lookup.

Application

Enter the name of the OPM application that contains the column for which you are defining valid values.

Description

Enter the text that describes the category which is defined by the lookup name in the Type field.

Language

Enter the language for the lookup display. The default language for English is US.

Code

Enter the values for the lookup. These can be either numeric or alphanumeric.

Meaning

Enter the meaning of the value.

Description

Enter a description of the lookup.

From/To

Enter the dates that the lookup is effective **From** and **To**. If you do not enter a **To** date, the lookup will not expire.

Enabled

Select whether the lookup is currently enabled or not.

4

Workflow Setup

In creating workflow-based applications for Oracle Applications, there are many instances when it is necessary to associate an Oracle Workflow Role with some element of the workflow-based application.

From the OPM System Administration, you have the ability to use the seeded data that comes with the system, or create your own workflow activities, column definitions, and role associations. In addition, you can activate and deactivate a workflow activity from the Workflow Activation window.

The following topics are covered:

- Business Needs
- Roles
- Graphical Process Navigation
- Workflow Process Activation
- Workflow Process Configuration Framework
- Workflow Activity Approval Configuration Framework
- Workflow Process Configuration
- Workflow Activity Configuration
- Workflow Activation

Business Needs

Approval process of a business can vary from enterprise to enterprise. Therefore it is necessary to provide an approval process which is flexible and users can customize them easily. Because of this reason approval process should be flexible and users should be able to customize for their needs easily. These customizations include enabling or disabling approval process based on certain criteria or based on sensitivity of information and defining approval authority for each step within the approval process

This design addresses the customization of approval process in a consistent fashion when creating workflow-based applications. By using a generic method instead of application-specific ones, the following objectives can be achieved.

User Oriented objectives allows users to:

- Enable or disable approval processes enterprise wide
- Enable or disable approval process based on certain criteria.
- Customize steps of the approval process using certain criteria
- Define approver for each steps of the approval process

Developer oriented objectives allows developers to design:

- Generic and consistent architecture
- More easily readable application code resulting in easier maintenance
- Modularity, which allows performance improvements to be applied across the board
- Smaller body of code
- Less likelihood of error in creating new similar code

Business Questions

How can I enable or disable an approval process instance wide?

Use the Workflow Process Activation window to enable or disable an approval process instance wide. Query for approval process or processes in question and check the checkbox to enable or uncheck it to disable an approval process instance wide.

How can I configure the approval process?

Use the Workflow Process Configuration Framework window to configure workflow process. Query for approval process defined in the Workflow process Activation window.

How can I customize the Approval Process?

Use the Workflow Process Configuration window to customize an approval process. Query for approval process need to be customized. Select the parameter values from list of values provided. Check enable flag to enable for the current data values.

How can I customize an approval process activity?

Use the Workflow Activity Configuration window to customize the behavior of approval process activity. Query the approval process activity to be customized. Select the parameter values from list of values provided. Check enable flag to enable for the current data values. Enter an approver for the data values. Uncheck the flag to disable for current data values.

Workflow Graphical Process Navigator

Oracle Application allow for navigation to a window in two ways. First, you can use the navigator menu. This menu is organized by function. For example, if the you needs to create, modify, or inspect a purchase order, all of these functions are grouped together under the menu item called Purchase Orders. The second method of navigation is at the document level. Documents can be placed on the desktop so that you can go directly to the document that is needed. With the Graphical Process Navigator, you can navigate in the context of a business process.

The Workflow Process Navigator provides you with a high level look at your business processes. By having the ability to look at things from a high-level perspective, managers may become aware of inefficiencies, and other employees will understand the overall context of the processes that they are following.

GPN Navigation

There are five steps in the GPN process for the OPM Workflow system. The process contains both the definition option and maintenance option, if necessary, for each stage in the GPN.

1. **Navigate to Workflow Process Activation**

– Workflow Process Activation window

Use this form to define or maintain approval process. To add a new approval process to the OPM Approval Process Framework you must create a workflow process and save in to the database. Once you save the Approval Process Workflow, open the Workflow Process Activation window and register the approval process. You can use this form to enable or disable approval processes instance wide.

To Register new approval process:

- Save New Approval Process Workflow into the database
- Create appropriate triggers and business logic packages into the database
- Open the Workflow Approval Process window
- Select New approval process workflow and process names from List of Values provided
- Check the checkbox to enable approval process instance wide or uncheck to disable

To enable or disable approval process instance wide:

- Open the Workflow Approval Process window. You can see all registered approval processes
- Navigate to the approval process you want to enable or disable and check the Enable checkbox to enable or uncheck it to disable.

2. **Navigate to Workflow Process Configuration Framework**

– Workflow Process Configuration Framework window

This window is used to setup configuration parameters for the approval process at the processes level. You can control the approval process at three levels.

- Instance wide using the Workflow Approval Process window.
- Process Level using the Workflow Approval Process Configuration Framework and Workflow Process configuration windows
- Activity Level using the Workflow Activity Approval configuration Framework form and Workflow Activity Configuration windows

You have to define configuration parameters in the Workflow Process Configuration Framework window. Using these parameters, you can enable or disable the approval process for a set of parameter values using the Workflow Process Configuration window.

You can define up to 10 configuration parameters for each approval process. To customize configuration parameters:

- Open the Workflow Process Configuration Framework window.
- Select the approval process for which you want customize configuration parameters.
- Enter the configuration parameter hierarchy. This is used to determine display order of configuration parameters on the Workflow Process Configuration window, as well as to interpret whether approval is required for the given parameter values on the Workflow Process Configuration window.
- For each parameter provide Table name, Column Name, Prompt to be shown, table and column names to provide List of Values (LOV).
- Provide a select statement which will return all configuration parameter values in the order they are defined. This select statement should contain a driving table and should return only one row after appending the primary key where clause for the driving table. The driving table is the main transaction table which is monitored by the approval process.

3. **Navigate to Workflow Activity Approval Configuration Framework**

– Workflow Process Configuration window

This window is used to setup configuration parameters for the approval process at the activity level.

You have to define configuration parameters on the Workflow Activity Approval Configuration Framework window. Using these parameters you can enable or disable the approval process for a set of parameter values using the Workflow Activity Configuration window.You can define up to 10 configuration parameters for each approval process. To customize the configuration parameters:

- Open the Workflow Activity Approval Configuration Framework window.
- Select the approval process activity for which you want customize configuration parameters.
- Enter the configuration parameter hierarchy. This is used to determine the display order of configuration parameters on the Workflow Activity Configuration window as well as to interpret whether approval is required

for the given parameter values on the Workflow Activity Configuration window.

- For each parameter provide Table name, Column Name, Prompt to be shown, table and column names to provide List of Values (LOV).
- Provide a select statement which will return all configuration parameter values in the order they are defined. The select statement should contain a driving table and should return only one row after appending the primary key where clause for the driving table. The driving table is the main transaction table which is monitored by the approval process.

4. **Navigate to Workflow Process Configuration**

   – Workflow Activity Configuration Framework window

   Use this window to enable or disable the approval process at the process level. Open the Workflow Process Configuration window.

   - Query for the approval process you want to setup configuration parameter values for. The window will show configuration parameters in the order defined in the Workflow Process Configuration Framework window.
   - Select the parameter values from the List of Values provided.
   - Select Yes if the approval is required for current parameter values, otherwise select No from the dropdown list provided for the Approval Required field.

   You can check how conditions are evaluated to determine if approval is required or not by clicking Show Execution Order.

5. **Navigate to Workflow Activity Configuration**

   – Workflow Activity Configuration window

Use this window to enable or disable the approval process at the activity level.

- Open the Workflow Activity Configuration window.
- Query for the approval process activity for which you want to setup configuration parameter values. The window will show the configuration parameters in the order defined on the Workflow Activity Approval Configuration Framework window.
- Select parameter values from the List of Values provided.
- Select Yes if approval is required for current parameter values, otherwise select No from the dropdown list provided for the Approval Required field.

- Enter the Approver for the current parameter values.

You can check how conditions are evaluated to determine if approval is required or not by clicking Show Execution Order.

Roles

A Role is the name of a group of Oracle Workflow users, one of which is to receive notifications for a particular instance of a workflow. That person is generally responsible for responding to notifications, and perhaps for making decisions based upon the content of the notifications.

Users may be chosen via various mechanisms from within the role at run time.

In the case of Oracle Applications, workflow roles generally map to elements of the Application responsibilities, Application users and persons defined and workflow local users and roles.

Workflow Process Activation

This window is used to define the approval processes that use the generic workflow customization framework. Using this window users can enable or disable approval process instance wide.

Prerequisites

Before you can use this window you need to ensure that a Workflow of OPM has been defined in the Database.

Workflow Process Activation Procedure

1. Navigate to the **Workflow Process Activation** window.
2. Complete the fields as described.
3. Save the window.

Workflow Process Activation Field Reference

Workflow Name

This field displays the name of the workflow.

Process Name

This field displays the process that will be taken by the workflow. There can be many processes associated to one workflow.

Enable

This field allows you to set the workflow process to enabled or disabled. When the system is initially set up, all workflow processes are disabled.

Workflow Process Configuration Framework

This window is used to define the configuration parameters for each approval process. Using these configuration parameters you can customize the approval process behavior. For example, if the configuration parameter is Organization, then you can enable or disable the approval process for any organization.

You can define up to 10 columns from this window.

Workflow Process Configuration Framework Procedure

1. Navigate to the **Workflow Process Configuration Framework** window.
2. Complete the fields as described.
3. Save the window.

Workflow Process Configuration Framework Field Reference

Workflow

This field displays the name of the workflow.

Process

This field displays the process that will be taken by the workflow. There can be many processes associated to one workflow.

Column Details

Hierarchy

This is used to determine the display order of configuration parameters on the Workflow Process Configuration window as well as to interpret whether approval is required for the given parameter values on the Workflow Process Configuration window.

Table

This field displays the name of the OPM table in which the column name can be found.

Column Name

This field displays the column name from the OPM table.

Column Prompt

This field displays the name of the column you will see on the Role Association window.

List Table

This field displays the name of the OPM table from where the Role Association List of Values comes.

List Columns

This field displays the List of Values column name, which is two fields.

Data Retrieval Query

Allows you to enter a select statement which will return all configuration parameter values in the order they are defined. The select statement should contain a driving table and should return only one row after appending the primary key where clause for the driving table. The driving table is the main transaction table monitored by the approval process.

Workflow Activity Approval Configuration Framework

This window is used to define the configuration parameters for each approval process activity. Using these configuration parameters you can customize the behavior of an activity. For example, if the configuration parameter is Organization, then you can customize the approval process activity behavior based on any organization.

Prerequisites

Before you can use this window you need to ensure that roles have been defined against the workflow to which you want to associated the fields.

Workflow Activity Approval Configuration Framework Procedure

1. Navigate to the **Workflow Activity Approval Configuration Framework** window.
2. Complete the fields as described.
3. Save the window.

Workflow Activity Approval Configuration Framework Reference

Workflow

This field displays the name of the workflow.

Process

This field displays the process that will be taken by the workflow. There can be many processes associated to one workflow.

Activity

This field displays the type of activity the process will do. There can be many activities associated to one process.

Description

This field displays a description of the action the Activity will take.

Column Details

Hierarchy

This is used to determine the display order of configuration parameters on the Workflow Activity Configuration window as well as to interpret whether approval is required for the given parameter values on the Workflow Activity Configuration window.

Table

This field displays the name of the OPM table in which the column name can be found.

Column Name

This field displays the column name from the OPM table.

Column Prompt

This field displays the name of the column you will see on the Role Association window.

List Table

This field displays the name of the OPM table from where the Role Association List of Values comes.

List Columns

This field displays the List of Values column name, which is two fields.

Data Retrieval Query

Allows you to enter a select statement which will return all configuration parameter values in the order they are defined. The select statement should contain a driving table and should return only one row after appending the primary key where clause for the driving table. The driving table is the main transaction table monitored by the approval process.

Workflow Process Configuration

This window is used to customize the approval process behavior at the customer site. Approval may or may not be required based on the business process requirement. This window allows you to enable or disable the approval process based on configuration parameters defined in the *Approval Process Configuration Framework*.

Workflow Process Configuration Procedure

1. Navigate to the **Workflow Process Configuration** window.
2. Complete the fields as described.
3. Save the window.

Workflow Process Configuration Field Reference

Workflow

This field displays the name of the workflow.

Process

This field displays the process that will be taken by the workflow. There can be many processes associated to one workflow.

Configure Process

<column names>

These columns are based on setup done in the Process Configuration Framework window. You can have from one to 10 columns.

Approval Required

With the current set of values and parameters, do you require an approval or not. Valid values are Yes and No.

Show Execution Order

If you had multiple columns, based on the values entered into the multiple fields, the order they are executed at runtime is reevaluted.

Workflow Activity Configuration

Generally, an approval process consists of multiple activities (steps). This window allows users to customize the approval process activities behavior based on the configuration parameters defined in the *Approval Process Activity Configuration Framework*. Sometimes, approval may or may not be required based on the business process requirement. Users can enable or disable an activity and define an approver if the activity requires approval.

Prerequisites

Before you can use this window you need to ensure that Roles are defined against the workflow to which you wish to associate the fields, and the Role Field association is defined for the role.

Workflow Activity Configuration Procedure

1. Navigate to the **Workflow Activity Configuration** window.
2. Complete the fields as described.
3. Save the window.

Workflow Activity Configuration Field Reference

Workflow

This field displays the name of the workflow.

Process

This field displays the process that will be taken by the workflow. There can be many processes associated to one workflow.

Activity

This field displays the type of activity the process will do. There can be many activities associated to one process.

Description

This field displays a description of the action the Activity will take.

Configure Activity

<column names>

These columns are based on setup done in the Activity Approval Configuration Framework window. You can have from one to 10 columns.

Approval Required

With the current set of values and parameters, do you require an approval or not. Valid values are Yes and No.

Approver

If the Approval Required field is Yes,then you must select a valud user to be the approver. A valid user is a user in the application system.

Show Execution Order

If you had multiple columns, based on the values entered into the multiple fields, the order they are executed at runtime is reevaluted.

Workflow Activation

The Workflow Activation for displays all currently defined workflows. From this window the user can enable or disable a workflow from running.

Workflow Activation Field Reference

WF Item Type

This field displays the internal name of the workflow.

WF Description

This field displays a basic description of the workflow.

Trigger Description

All workflows are initiated from a trigger. This field displays a description of that trigger.

Enable

This field allows you to either check a workflow to be active, or uncheck a workflow to be deactivated.

A

Navigation Paths

This table of navigator paths is organized alphabetically by form name.

Form	Path
Document Ordering	OPM System Administration : OPM System Setup :Document Ordering
Document Types	OPM System Administration : OPM System Setup : Document Types
Geography Codes	OPM System Administration : OPM System Setup : Geography Codes
HR Organizations	OPM System Administration : OPM System Setup : HR Organizations
Organization Parameters	OPM System Administration : OPM System Setup : HR Organizations : Description : Others : Inventory Information
HR Locations	OPM System Administration : OPM System Setup : HR Locations
Organizations	OPM System Administration : OPM System Setup : Organizations
Paragraphs	OPM System Administration : OPM System Setup : Paragraphs
Reason Codes	OPM System Administration : OPM System Setup : Reason Codes
Session Parameters	OPM System Administration : OPM System Setup : Session Parameters
Text Tokens	OPM System Administration : OPM System Setup : Text Tokens
Units of Measure	OPM System Administration : OPM System Setup : Units of Measure > Units of Measure

Form	Path
Units of Measure Classes	OPM System Administration : OPM System Setup : Units of Measure > Classes
Units of Measure Conversions	OPM System Administration : OPM System Setup : Units of Measure > Conversions
User Organizations	OPM System Administration : OPM System Setup : User Organizations
User Planning Classes	OPM System Administration : OPM System Setup : User Planning Classes
OPM Lookups	OPM System Administration : OPM System Setup : OPM Lookups
Purge Setup	OPM System Administration : OPM Purge and Archive : Purge Setup
Purge Tables	OPM System Administration : OPM Purge and Archive : Purge Setup : Actions : Purge Tables
Purge and Archive	OPM System Administration : OPM Purge and Archive : Purge and Archive
Archive Process	OPM System Administration : OPM Purge and Archive : Purge and Archive : Actions : Archive Process
Purge Process	OPM System Administration : OPM Purge and Archive : Purge and Archive : Actions : Purge Process
Purge Inquiry	OPM System Administration : OPM Purge and Archive : Purge Inquiry
Workflow Process Activation	OPM System Administration : OPM Workflow Setup : Workflow Process Activation
Workflow Process Configuration Framework	OPM System Administration : OPM Workflow Setup : Workflow Process Configuration Framework
Workflow Process Configuration	OPM System Administration : OPM Workflow Setup : Workflow Process Configuration
Workflow Activity Approval Configuration Framework	OPM System Administration : OPM Workflow Setup : Workflow Activity Approval Configuration Framework
Workflow Activity Configuration	OPM System Administration : OPM Workflow Setup : Workflow Activity Configuration
Workflow Activation	OPM System Administration : OPM Workflow Setup : Workflow Activation

Glossary

User Organizations

The default organization for each user is defined through Oracle System Administration Personal Profiles and associating an OPM Organization Code under the User Value column to the profile option GEMMS_DEFAULT_ORGN.

Units of Measure

A UOM definition consists of a UOM code, a description, a type, and the conversions between the reference UOM and all other UOMs of the same type.

Text Tokens

Text tokens are codes or short descriptions that represent longer descriptions or messages.

Reason Codes

Reason codes provide information on increases or decreases in inventory.

Paragraphs

Paragraphs in OPM are structures that are used to store and categorize text. OPM is installed with one default paragraph per database table, the General Text paragraph.

Organizations

Organizations are entities to which you can assign resources, warehouses, General Ledger accounts, and other cross-module items.

Assignment Type

Determines whether you assign document numbers manually or automatically for this document type and organization.

Document Types

Documents are used to categorize transaction activity that is generated from many OPM functions including inventory, sales, purchasing, production, etc.

Purge and Archive

Provides for the archiving and removal of old data from the OPM database.

Recipe

An entity that contains the minimum set of information that uniquely defines the manufacturing requirements for a specific product. Recipes provide a way to describe products and how those products are produced.

Formula

A statement of ingredient requirements. A formula may also include processing instructions and ingredient sequencing directions. The formula can also specify the quantities of each item.

Routing

A sequenced set of operations that need to be performed in order to complete a production batch.

Operation

A combination of one or more activities and the resources used to perform those activities. For example, the combination of mixing (activity) and the mixer (resource) defines the mixing operation.

Activity

Action performed during the manufacturing process, such as mixing or heating.

Resource

Any non-inventory item used in production, like a mixer or oven.

Index