## Contents

**Send Us Your Comments** .................................................................................................................. vii

**Preface** ................................................................................................................................................ ix

- Audience for This Guide .................................................................................................................... ix
- How To Use This Guide ....................................................................................................................... ix
  - Documentation Accessibility ............................................................................................................ xi

**Other Information Sources** ........................................................................................................... xi

- Online Documentation ......................................................................................................................... xi
- Related User’s Guides ........................................................................................................................... xii
- Guides Related to All Products ........................................................................................................... xii
- User Guides Related to This Product .................................................................................................. xii
- Installation and System Administration ............................................................................................ xvi
- Other Implementation Documentation ............................................................................................... xix
- Training and Support .......................................................................................................................... xxi

Do Not Use Database Tools to Modify Oracle Applications Data .................................................... xxi

About Oracle ....................................................................................................................................... xxii

Your Feedback ...................................................................................................................................... xxii

1 **OPM System Setup**

- Editing Document Types .................................................................................................................. 1-2
  - Document Types Procedure ......................................................................................................... 1-4
  - Document Types Field Reference ................................................................................................. 1-4

- Editing Document Ordering ........................................................................................................... 1-5
  - Document Ordering Procedure .................................................................................................... 1-5
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Ordering Field Reference</td>
<td>1-6</td>
</tr>
<tr>
<td>Editing Geography Codes</td>
<td>1-7</td>
</tr>
<tr>
<td>Geography Code Procedure</td>
<td>1-7</td>
</tr>
<tr>
<td>Geography Code Field Reference</td>
<td>1-7</td>
</tr>
<tr>
<td>Editing HR Organizations</td>
<td>1-8</td>
</tr>
<tr>
<td>Editing Organization Parameters</td>
<td>1-8</td>
</tr>
<tr>
<td>Organizations</td>
<td>1-13</td>
</tr>
<tr>
<td>Organizations Procedure</td>
<td>1-13</td>
</tr>
<tr>
<td>Organizations Field Reference</td>
<td>1-13</td>
</tr>
<tr>
<td>Editing Paragraphs</td>
<td>1-15</td>
</tr>
<tr>
<td>Paragraph Procedure</td>
<td>1-16</td>
</tr>
<tr>
<td>Paragraph Field Reference</td>
<td>1-16</td>
</tr>
<tr>
<td>Editing Reason Codes</td>
<td>1-18</td>
</tr>
<tr>
<td>Reason Code Procedure</td>
<td>1-18</td>
</tr>
<tr>
<td>Reason Code Field Reference</td>
<td>1-18</td>
</tr>
<tr>
<td>Adding Reason Code Security</td>
<td>1-20</td>
</tr>
<tr>
<td>Reason Code Security Procedures</td>
<td>1-20</td>
</tr>
<tr>
<td>Reason Code Security Field Reference</td>
<td>1-21</td>
</tr>
<tr>
<td>Editing Session Parameters</td>
<td>1-22</td>
</tr>
<tr>
<td>Session Parameters Procedure</td>
<td>1-22</td>
</tr>
<tr>
<td>Session Parameters Field Reference</td>
<td>1-22</td>
</tr>
<tr>
<td>Editing Text Tokens</td>
<td>1-24</td>
</tr>
<tr>
<td>Text Tokens Procedure</td>
<td>1-24</td>
</tr>
<tr>
<td>Text Tokens Field Reference</td>
<td>1-24</td>
</tr>
<tr>
<td>Units of Measure</td>
<td>1-26</td>
</tr>
<tr>
<td>New Unit of Measure Functionality</td>
<td>1-27</td>
</tr>
<tr>
<td>Editing User Organizations</td>
<td>1-29</td>
</tr>
<tr>
<td>User Organizations Procedure</td>
<td>1-29</td>
</tr>
<tr>
<td>User Organizations Field Reference</td>
<td>1-29</td>
</tr>
<tr>
<td>Editing User Planning Classes</td>
<td>1-30</td>
</tr>
<tr>
<td>User Planning Classes Procedure</td>
<td>1-30</td>
</tr>
<tr>
<td>User Planning Classes Field Reference</td>
<td>1-30</td>
</tr>
<tr>
<td>Displaying Process Instructions</td>
<td>1-31</td>
</tr>
<tr>
<td>Lookups</td>
<td>1-33</td>
</tr>
</tbody>
</table>
Lookups Values Field Reference ................................................................. 1-34
Action Menu ........................................................................................................ 1-36
   Edit Text ........................................................................................................ 1-36
   Edit Text Procedure ..................................................................................... 1-36
   Edit Text Field Reference .......................................................................... 1-36
   Select Text Paragraph .................................................................................. 1-37
   Address Edit .................................................................................................. 1-38
   Address Edit Procedure ................................................................................ 1-38
   Address Edit Field Reference ..................................................................... 1-38

2 Purge and Archive

   Purge and Archive .................................................................................... 2-2
   Purge and Archive Procedure ................................................................. 2-3
   Purge and Archive Field Reference ....................................................... 2-3
   Archive/Purge Process ................................................................................ 2-6
   Archive/Purge Dialog Window Procedure ............................................. 2-6
   Archive/Purge Dialog Box Field Reference ......................................... 2-6
   Purge Inquiry ............................................................................................ 2-7
   Purge Inquiry Procedure .......................................................................... 2-7
   Purge Inquiry Field Reference .............................................................. 2-7
   Purge Setup ................................................................................................ 2-9
   Purge Setup Procedure ............................................................................... 2-9
   Purge Setup Field Reference .................................................................. 2-9
   Purge Tables ............................................................................................... 2-10
   Purge Tables Procedure ............................................................................ 2-10
   Purge Tables Field Reference .................................................................. 2-10

3 Workflow Setup

   Business Needs .......................................................................................... 3-2
   Business Questions .................................................................................... 3-2
   Workflow Graphical Process Navigator ................................................. 3-3
   GPN Navigation ......................................................................................... 3-3
   Roles ............................................................................................................ 3-7
   Workflow Process Activation .................................................................... 3-8
   Workflow Process Activation Procedure ............................................. 3-8
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

Audience for This Guide


This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Process Manufacturing System Administration
  If you have never used Oracle Process Manufacturing System Administration, Oracle suggests you attend one or more of the Oracle Process Manufacturing System Administration training classes available through Oracle University.
- The Oracle Applications graphical user interface.
  To learn more about the Oracle Applications graphical user interface, read the Oracle Applications User’s Guide.

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

How To Use This Guide

This guide contains the information you need to understand and use Oracle Process Manufacturing System Administration.

- 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 set up and activate a Workflow.
- Chapter 4 describes how to set up and use the OPM Audit Trail Reporting.
- Appendix A describes how to navigate to each window.
- A Glossary provides definitions of terms that are used in this guide.
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/.

Accessibility of Code Examples in Documentation

JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Other Information Sources

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

If this guide refers you to other Oracle Applications documentation, use only the Release 11i versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- Online Help - The new features section in the HTML help describes new features in 11i. This information is updated for each new release of Oracle Process Manufacturing System Administration. The new features section also includes information about any features that were not yet available when this guide was printed. For example, if your administrator has installed software from a mini-packs an upgrade, this document describes the new features. Online help patches are available on MetaLink.
11i Features Matrix - This document lists new features available by patch and identifies any associated new documentation. The new features matrix document is available on MetaLink.

Readme File - Refer to the readme file for patches that you have installed to learn about new documentation or documentation patches that you can download.

Related User’s Guides

Oracle Process Manufacturing System Administration shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other user’s guides when you set up and use Oracle Process Manufacturing System Administration.

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 at http://oraclestore.oracle.com.

Guides Related to All Products

Oracle Applications User’s Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Process Manufacturing System Administration (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user’s guide online by choosing “Getting Started with Oracle Applications” from any Oracle Applications help file.

User Guides Related to This Product

Accounting Setup User’s Guide

The OPM Accounting Setup application is where users set up global accounting attributes about the way financial data will be collected by OPM. These attributes include such things as account keys, financial calendars, and account segments.
Since OPM is closely integrated with Oracle General Ledger (GL), much of the attributes are defined in the Oracle GL instead of OPM, and therefore, the windows are display only within OPM. The *Oracle Process Manufacturing Accounting Setup User’s Guide* describes how to setup and use this application.

**Cost Management User’s Guide**

The OPM Cost Management application is used by cost accountants to capture and review the manufacturing costs incurred in their process manufacturing businesses. The *Oracle Process Manufacturing Cost Management User’s Guide* describes how to setup and use this application.

**Manufacturing Accounting Controller User’s Guide**

The Manufacturing Accounting Controller application is where users define the impact of manufacturing events on financials. For example, event RCPT (Inventory Receipts) results in a debit to inventory, a credit to accrued accounts payable, a debit or a credit to purchase price variance, etc. These impacts are predefined in the Manufacturing Accounting Controller application so users may begin using OPM to collect financial data out-of-the-box; however, they may also be adjusted per your business needs. The *Oracle Process Manufacturing Manufacturing Accounting Controller User’s Guide* describes how to setup and use this application.

**Oracle Financials Integration User’s Guide**

Since OPM is closely integrated with Oracle General Ledger, financial data that is collected about the manufacturing processes must be transferred to the Oracle Financials applications. The OPM Oracle Financials Integration application is where users define how that data is transferred. For example, users define whether data is transferred real time or batched and transferred at intervals. The *Oracle Process Manufacturing Oracle Financials Integration User’s Guide* describes how to setup and use this application.

**Inventory Management User’s Guide**

The OPM Inventory Management application is where data about the items purchased for, consumed during, and created as a result of the manufacturing process are tracked. The *Oracle Process Manufacturing Inventory Management User’s Guide* includes information to help you effectively work with the Oracle Process Manufacturing Inventory application.
Physical Inventory User’s Guide
Performing physical inventory count is the most accurate way to get an accounting of all material quantities purchased, manufactured, and sold, and update your onhand quantities accordingly. The OPM Physical Inventory application automates and enables the physical inventory process. The Oracle Process Manufacturing Physical Inventory User’s Guide describes how to setup and use this application.

Order Fulfillment User’s Guide
The OPM Order Fulfillment application automates sales order entry to reduce order cycle time. Order Fulfillment enables order entry personnel to inform customers of scheduled delivery dates and pricing. The Oracle Process Manufacturing Order Fulfillment User’s Guide describes how to setup and use this application.

Purchase Management User’s Guide
OPM Purchase Management and Oracle Purchasing combine to provide an integrated solution for Process Manufacturing. Purchase orders are entered in Oracle Purchasing and received in OPM. Then, the receipts entered in OPM are sent to Oracle Purchasing. The Oracle Process Manufacturing Purchase Management User’s Guide describes how to setup and use this integrated solution.

Using Oracle Order Management with Process Inventory Guide
Oracle Process Manufacturing and Oracle Order Management combine to provide an integrated solution for process manufacturers. The manufacturing process is tracked and handled within Oracle Process Manufacturing, while sales orders are taken and tracked in Oracle Order Management. Process attributes, such as dual UOM and lot control, are enabled depending on the inventory organization for the item on the sales order. Order Management accepts orders entered through Oracle Customer Relationship Management (CRM). Within CRM, orders can originate from TeleSales, Sales Online, and iStore, and are booked in Order Management, making the CRM suite of products available to Process customers, through Order Management. The Oracle Order Management User’s Guide and Using Oracle Order Management with Process Inventory Guide describes how to setup and use this integrated solution.

Process Execution User’s Guide
The OPM Process Execution application lets you track firm planned orders and production batches from incoming materials through finished goods. Seamlessly integrated to the Product Development application, Process Execution lets you convert firm planned orders to single or multiple production batches, allocate
ingredients, record actual ingredient usage, and then complete and close production batches. Production inquiries and preformatted reports help you optimize inventory costs while maintaining a high level of customer satisfaction with on-time delivery of high quality products. The OPM Process Execution User’s Guide presents overviews of the tasks and responsibilities for the Production Supervisor and the Production Operator. It provides prerequisite setup in other applications, and details the windows, features, and functionality of the OPM Process Execution application.

**Integration with Advanced Planning and Scheduling User’s Guide**

Oracle Process Manufacturing and Oracle Advanced Planning and Scheduling (APS) combine to provide an integrated solution for process manufacturers that can help increase planning efficiency. The integration provides for constraint-based planning, performance management, materials management by exception, mixed mode manufacturing that enables you to choose the best method to produce each of your products, and combine all of these methods within the same plant/company. The Oracle Process Manufacturing Integration with Advanced Planning and Scheduling User’s Guide describes how to setup and use this application.

**MPS/MRP and Forecasting User’s Guide**

The Oracle Process Manufacturing Material Requirements Planning (MRP) application provides long-term "views" of material demands and projected supply actions to satisfy those demands. The Master Production Scheduling (MPS) application lets you shorten that view to a much narrower and immediate time horizon, and see the immediate effects of demand and supply actions. The Oracle Process Manufacturing MPS/MRP and Forecasting User’s Guide describes how to setup and use this application.

**Capacity Planning User’s Guide**

The OPM Capacity Planning User’s Guide describes the setup required to use OPM with the Oracle Applications Advanced Supply Chain Planning solutions. In addition, Resource setup, used by the OPM Production Execution and New Product Development applications, is also described.

**Using Oracle Process Manufacturing with Oracle Manufacturing Scheduling**

Oracle Process Manufacturing integrates with Oracle Manufacturing Scheduling to manage and utilize resources and materials. Through the Process Manufacturing application, you set up manufacturing, inventory, procurement and sales order data. Through the Manufacturing Scheduling application, you can optimize the
schedule based on resource and component constraints and user predefined priorities. Using different optimization objectives, you can tailor Manufacturing Scheduling to meet your needs.

Using Oracle Manufacturing Scheduling helps you improve productivity and efficiency on your shop floor. By optimally scheduling shop floor jobs, and being able to quickly react to unplanned constraints, you can lower manufacturing costs, increase resource utilization and efficiency, and increase customer satisfaction through improved on-time delivery. The Using Oracle Process Manufacturing with Oracle Manufacturing Scheduling User’s Guide describes how to setup and use this integrated solution.

**Product Development User’s Guide**

The Oracle Process Manufacturing Product Development application provides features to manage formula and laboratory work within the process manufacturing operation. It lets you manage multiple laboratory organizations and support varying product lines throughout the organization. You can characterize and simulate the technical properties of ingredients and their effects on formulas. You can optimize formulations before beginning expensive laboratory test batches. Product Development coordinates each development function and enables a rapid, enterprise-wide implementation of new products in your plants. The Oracle Process Manufacturing Product Development User’s Guide describes how to setup and use this application.

**Quality Management User’s Guide**

The Oracle Process Manufacturing Quality Management application provides features to test material sampled from inventory, production, or receipts from external suppliers. The application lets you enter specifications and control their use throughout the enterprise. Customized workflows and electronic record keeping automate plans for sampling, testing, and result processing. You can compare specifications to assist in regrading items, and match customer specifications. Aggregate test results and print statistical assessments on quality certificates. Several preformatted reports and inquiries help manage quality testing and reporting. The Oracle Process Manufacturing Quality Management User’s Guide describes how to set up and use this application.

**Regulatory Management User’s Guide**

The Oracle Process Manufacturing Regulatory Management application generates the Material Safety Data Sheets (MSDSs) required by authorities to accompany hazardous materials during shipping. You can create MSDSs from OPM Formula
Management with Regulatory or Production effectivities. The Oracle Process Manufacturing Regulatory Management User’s Guide describes how to setup and use this application.

**Implementation Guide**

The Oracle Process Manufacturing Implementation Guide offers information on setup. That is, those tasks you must complete following the initial installation of the Oracle Process Manufacturing software. Any tasks that must be completed in order to use the system out-of-the-box are included in this manual.

**System Administration User’s Guide**

Much of the System Administration duties are performed at the Oracle Applications level, and are therefore described in the Oracle Applications System Administrator’s Guide. The Oracle Process Manufacturing System Administration User’s Guide provides information on the few tasks that are specific to OPM. It offers information on performing OPM file purge and archive, and maintaining such things as responsibilities, units of measure, and organizations.

**API User’s Guides**


**Installation and System Administration**

**Oracle Applications Concepts**

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11i. It provides a useful first book to read before an installation of Oracle Applications. This guide
also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

**Installing Oracle Applications**
This guide provides instructions for managing the installation of Oracle Applications products. In Release 11i, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8i Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user’s guides and implementation guides.

**Upgrading Oracle Applications**
Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11i. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11i. You cannot upgrade to Release 11i directly from releases prior to 10.7.

**Maintaining Oracle Applications**
Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

**Oracle Applications System Administrator’s Guide**
This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

**Oracle Alert User’s Guide**
This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.
Oracle Applications Developer’s Guide
This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the Oracle Applications User Interface Standards for Forms-Based Products. It also provides information to help you build your custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products
This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Applications Product Update Notes
Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11i. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Multiple Reporting Currencies in Oracle Applications
If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle Process Manufacturing System Administration. This manual details additional steps and setup considerations for implementing Oracle Process Manufacturing System Administration with this feature.

Multiple Organizations in Oracle Applications
This guide describes how to set up and use Oracle Process Manufacturing System Administration with Oracle Applications’ Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Process Manufacturing System Administration.
**Oracle Workflow Guide**
This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

**Oracle Applications Flexfields Guide**
This guide provides flexfields planning, setup and reference information for the Oracle Process Manufacturing System Administration implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

**Oracle eTechnical Reference Manuals**
Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink.

**Oracle Manufacturing APIs and Open Interfaces Manual**
This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes API’s and open interfaces found in Oracle Manufacturing.

**Oracle Order Management Suite APIs and Open Interfaces Manual**
This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes API’s and open interfaces found in Oracle Order Management Suite.

**Oracle Applications Message Reference Manual**
This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.
Training and Support

Training
Oracle offers a complete set of training courses to help you and your staff master Oracle Process Manufacturing System Administration and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University’s online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support
From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Process Manufacturing System Administration working for you. 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 Oracle8i server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle Applications Data

*Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.*

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 Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your
When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. 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.

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, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing 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 applications products, along with related consulting, education, and support services, in over 145 countries around the world.

Your Feedback

Thank you for using Oracle Process Manufacturing System Administration and this user’s guide.

Oracle values your comments and feedback. At the end of this guide is a Reader’s Comment Form you can use to explain what you like or dislike about Oracle Process Manufacturing System Administration or this user’s guide. Mail your comments to the following address or call us directly at (650) 506-7000.

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Redwood Shores, CA 94065
U.S.A.

Or, send electronic mail to appsdoc_us@oracle.com.
This topic explains how to set up and manage the OPM System Administration functions. This includes Document Types, Users, and Organizations, as well as several others.

The following topics are covered:

- Editing Document Types
- Editing Document Ordering
- Editing Geography Codes
- Editing HR Organizations
- Editing HR Locations
- Editing Organization Parameters
- Editing OPM Organizations
- Editing Paragraphs
- Editing Reason Codes
- Adding Reason Code Security
- Editing Session Parameters
- Editing Text Tokens
- Units Of Measure
- Editing User Organization
- Editing User Planning Classes
- Displaying Process Instructions
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.

- 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
- DDOR - Dummy DORD
- DMOR - Divided MORD
- FCST - Forecast
- FPO - Firm Planned Order
- GLVN - General Ledger Voucher Number
- GRDI - Change Grade - Immediate
- GRDR - Change Grade Journaled
- JRNL - Inventory Quantities Document Sequencing
- MGRI - Mass Grade Update - Immediate
- MSTI - Journaled Sales Return - Mass Status Update - Immediate
- MTRI - Mass Movement - Immediate
- OMSO - Order Management
- OPBO - Blanket Sales Orders
- OPOP - Order Fulfillment Sales Order Profiles
- OPSO - Order Fulfillment Sales Orders
- OPSP - Order Fulfillment Shipment
- PBPO - Blanket Purchase Orders
- OPCR - Credit Memo Document Number
- OPDB - Debit Memo Document Number
- OPIN - Invoices
- PBPR - Planned BPO Release
- PICY - Physical Inventory - Cycle No
- PIPH - Physical Inventory - Physical
- PORC - Oracle Purchasing Receipts/Returns/Corrections
- PORD - Purchase Orders
- POSR - Stock Receipts
- PPRD - Planned Production
- PPUR - Planned Purchase
- PRCV - Material in Receiving
- PREQ - Purchase Requisition
- PROD - Production Batch
- PTRN - Planned Transfer
- RECV - OPM Receipts
- RVAL - Cost Revaluation Process
- REPI - Replace Quantity/Status - Immediate
- REPR - Replace Quantity/Status - Journaled
- RTRN - OPM Purchase Return (Regular/Stock Receipt)
Editing Document Types

- SHMT - Internal Order Shipment
- SHRT - MRP - Document Type for Shortage
- SMPL - Automatic numbering for samples
- STSI - Change Status - Immediate
- STSR - Change Status - Journaled
- TRNI - Inventory Movement - Immediate
- TRNR - Inventory Movement - Journaled
- XFER - Required to Operate the Transfer window
- 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, then 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, not exceeding 10.
  - Determine whether the number is padded with leading zeros or blanks. Zeros are recommended for reporting and query purposes.

- If you use manual number assignment, then 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.

Make note of the initial number assignment. Altering number assignment parameters after documents are saved causes problems with the order that documents are listed on reports and lookups.

Document Ordering Procedure

2. Complete the fields as described.
3. Save the window.
Document Ordering Field Reference

**Document Type**
Enter the code, defined on the Document Type window, that identifies the document type to define this document numbering system. Required.

**Organization**
Enter the code, defined on the Organizations window, that identifies the organization to define this document numbering system. Transactions generated from your documents are 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 displays when you enter Automatic as the Assign Type value. A document number can be displayed depending upon whether you have established document ordering:

- If you are assigning a document number for the first time, then 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, then enter 199 in this field.
- If you have already assigned a document number, then the last number assigned to this document type and organization displays.

**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 assign purchase order numbers 1 to 999, then enter the value 3.
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 identifying the geographical area; for example, NY for New York.

Description
Displays the text describing 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 give access to it, before you create other organizations.

You can enter the basic information into this window 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 window, refer to the Oracle Human Resources North American User’s Guide Release 11i.

Editing Organization Parameters

The Organization Parameters window is used to define the organization parameters (inventory, costing etc.) for the organizations classified as Inventory Organization. This window has two new fields:

- Process Enabled
- Process Organization

Enabling the flag Process Enabled on the folder Inventory Parameters indicates that this is an OPM warehouse. As a result of enabling this flag, the field Process Organization becomes active and mandatory. The field Process Organization contains 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 window, refer to the Oracle Inventory User’s Guide Release 11i.

Editing HR Locations

This menu option is added to OPM System Administration responsibility for creation of HR Locations that get attached to the HR Organizations. When this HR Organization is classified as an Inventory Organization (Process Enabled) and
saved, a database trigger creates an OPM warehouse. The address in the HR Location for the Organization synchronizes to OPM as the warehouse address.

No changes have been made to the window. However, a new address style ‘OPM’ is defined for the Human Resources Descriptive flexfield Location Address. This address style and the flexfield structure can 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 uses the mapping defined for the OPM address style and attempts to synchronize the addresses.

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

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

**Setting Up Process Inventory Organizations to Synchronize as OPM Warehouses**

1. Navigate to the **Organizations** window to create an Inventory Organization that links to an OPM Warehouse:
   - When the **Find Organization Query Find** window displays, click **New**.
   - When creating a process enabled Inventory Organization, give it up to a 3 character code, then use up to the first 4 characters of the Organization Name field for the OPM Warehouse Code. The integration recognizes a colon (:) as a delimiter, and the remainder of the Organization Name becomes the OPM Warehouse Description (40 character field in OPM). Logic is enabled producing an error if there is no colon entered within the first 5 characters of the Inventory Organization Name for a process enabled organization.
   - While selecting the HR locations for the process inventory organizations, only the OPM address style must be selected. This address style is consistent with the OPM addresses. If a different address style is used, then the organization trigger can synchronize the warehouse address incorrectly.

2. Click the **Name** field in the Organization Classifications region of the window. Invoke the LOV. Select **Inventory Organization**. Click the **Enabled** check box to the right of the **Name** field in order to select and save.

3. Click Others.
4. From the Additional Organization Information window, select Accounting Information. When the window validates after your selection, click the Accounting Information field.

5. Invoke the LOV in each of the three segments of the Accounting Information flexfield. Make the following selections:
   - Enter Set of Books
   - Enter Legal Entity
   - Enter Operating Unit

6. Click OK to the flexfield. Return to the Additional Organization Information window.

7. Click OK to save.

8. Click Others.

9. From the Additional Organization Information window, select Inventory Information.

10. On the Inventory Parameters tab, input the following data:
    - In the Organization Code field, assign a 3-digit Inventory Organization code.

        Note: This 3-digit code links over in OPM as the warehouse code.

    - Select or enter data into the Item Master Organization field.
    - Select or enter data into the Calendar field.
    - Click in the Process Enabled check box in order to check it. Upon activating this check box, the Process Org field becomes available.
    - Click in the Process Organization field. Select the correct OPM Organization or Plant to link this warehouse.
Click on the drop down arrow for the **Locator Control** field and make the appropriate selection.

**Note:** Observe the selections in the Locator Control drop down list. Pre-specified is the equivalent of Validated Location-controlled in OPM. Dynamic Entry Allowed links over as Non-Validated Location-control in OPM. None is the equivalent of Not Location-controlled in OPM. The locator control selection of Determined at Sub-inventory level IS NOT USED in process manufacturing. It is used in discrete manufacturing.

11. Click **Save**.

12. On the **Costing** tab, input the following data:
   - Select the Costing Method.
   - Select the Transfer to GL.
   - In the Material field in the Valuation Accounts region of the tab, enter the appropriate accounts.

13. Click on the **Revision, Lot, Serial** tab. Navigate to the **Prefix** field in the **Serial Control** region of the window. Input a 1 in both the **Prefix** and **Starting Serial Number** fields of this tab. Optional.

14. Click **Save**.

15. On the **Other Accounts** tab, input data in the following fields:
   - Purchase Price Variance
   - Inventory Price Variance
   - Inventory AP Accrual
   - Sales
   - Cost of Goods Sold

**Note:** The **Process Enabled** check box must be selected and the **Process Org** field must be completed. It is these two fields that control the conversion/linking of an Inventory Org to an OPM Warehouse.
16. Click Save.
17. Close the window to return to the Organization window.
18. Close the window again to return to the OPM System Administrator Navigator.
Editing Organizations

Organizations are entities for assigning resources, warehouses, general ledger accounts, and other cross-application 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 can have several subsidiary companies, and each company can 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 associate with a parent company, then enter a code that relates the organization to the parent company. If this is an organization under 100, then enter 101.

The code entered is 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, then enter its organization code.

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

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

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 profile option GML:Use OPM Tax Calculations 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 Paragraph window lets you 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 windows enable you to associate text with the document or record you are working with. To add or update text, select Edit Text from the Action pulldown menu, choose the Paragraph you want to associate the text with, and access the Text Editor window. The entered text can be displayed online and can be printed on hard copies of documents.

If you are creating or editing a purchase order header on the Purchase Orders window, then you can select Edit Text from the Action menu and add the text associated with the document. If you are creating or editing purchase order lines on the Purchase Order Lines window, then you can add text to each line, 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 you are working with. For example, if you enter text for a line in an order using the General Text paragraph, then 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 cannot see the same list of paragraphs from every OPM window.
For example, you can create a paragraph on the Batch Header table (pm_btch_hdr). When you select Edit Text from the Action menu, this paragraph displays as an option on the Text Paragraph Selection window. If you have defined a paragraph for Routing Instructions, then 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 linking this paragraph.

**Language**
Displays the language code associated with this paragraph.

**Code**
Displays the code that identifies this paragraph.

---

**Note:** If you are creating subparagraphs, then each subparagraph has 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, determining the order the subparagraphs are printed.

The subparagraph code for the main paragraph is the default value 0.
**Nonprintable**
Displays the print indicator, specifying 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 displays when you select paragraphs when entering 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 through the Inventory Quantities window, must have a reason code associated with it. Other OPM windows require Reason Codes as well.

For example, you have a batch of product that cannot be shipped because the color is wrong. If this is a common occurrence, then you can set up a reason code that identifies these situations.

Reason Code Procedure

1. Navigate to the Reason Code 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 = 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 = Only increases to inventory
Decreases = Only decreases to inventory
Flow
Indicates the type of stock movement associating the reason code. The corresponding inventory adjustment that results from stock movement can 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

To correct errors made in recording consumption, you can set up reason codes for adjustments to inventory quantity.

For example, if too little were recorded consumed, then inventory must be adjusted downward. You can use the following reason code parameters:

Reason type = Decreases, allowing for a decrease to inventory
Flow type = Usages, indicating usage

If too much were recorded consumed, then inventory must be adjusted upward. You can use the following reason code parameters:

Reason type = Increases, allowing for an increase to inventory
Flow type = Usages, indicating usage

Description
Displays the text, maximum 40 characters, describing this reason code. This description displays on windows 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.
Adding Reason Code Security

To prevent or reduce the risk of using an incorrect reason code, reason codes are secured by:

- Document Type
- Oracle User Responsibilities

Any document type that has reason code functionality is required to let you assign which reason codes are valid for the specific document type. A reason code must be associated with both a document type and a responsibility in order for the reason code to be used on a given window.

At least one of the Document Type fields and one of the Responsibility fields must have a value.

The Reason Code being secured always appears in the header block of the window. The fields in the detail block can be used as follows:

- One or more document types is entered, with one or more responsibility entered. The reason code can be used for any of the document types entered, with any of the responsibilities entered.
- All Document Types is checked and one or more responsibilities entered. The reason code can be used for all document types with any of the responsibilities entered.
- One or more document types is entered and All Responsibilities is checked. The reason code can be used for the document types entered with any responsibility.

In order to use reason code security, the profile option GMA:Reason Code Security must be set to Y. The default is N.

Reason Code Security Procedures

2. Complete the fields as described.
3. Save the window.
Reason Code Security Field Reference

**Reason Code**
Displays the reason code and reason code description from the Reason Code window.

**Security Definitions**

**All Document Types**
Select this to set all document types to this reason code. The Document Type field is inactive.

**Document Type**
Enter a document type. If you use this field, then do not use the All Document Types checkbox. If this is checked, then the document type is removed, and made inactive.

**Description**
 Displays the description of the document type when the Document Type field is used. This field remains blank if the All Document Types field is used.

**All Responsibilities**
Select this to set all responsibilities to this reason code. The Responsibility field is inactive.

**Responsibility**
Enter a responsibility. If you use this field, then do not use the All Responsibilities checkbox. If this is checked, then the responsibility is removed, and made inactive.
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 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 is changed.

**Note:** OPM lets you choose only an organization that you are authorized to specify as defined through the User Organizations window.

**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 actual database name.

**Username**
Displays the user and user name of the current session’s user.
Organization
Enter the code for the default organization. You must be authorized to select this code 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 Action 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. Press Tab, and 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 list of values, press Tab.

To record the text that is printed when you enter the token, select Edit from the Action 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. Select Edit Text from the Action menu.
4. Enter the actual text.
5. Click OK.
6. 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 you want the text to be printed in. 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 Action pulldown menu.

Action > Edit Text
In order to create the text that you want to replace the token, select Edit Text from the Action pulldown menu. For more details on using the Edit Text option, refer to the Action Menu topic.
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 the item quantities that are measured.

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, if you set up L (liters) as the first UOM for the UOM type VOL (volume), then you have to define each new volume UOM in terms of liters; therefore, if the new volume is GAL (gallons), then it must be defined in relation to liters. As such, you 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 is automatically calculated.
Units of Measure

**Note:** Altering the UOM conversion once inventory has been created can 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. 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) is the reference UOM for the VOL (volume) UOM type.

The new UOM is available to the session where you entered the UOM and to all users beginning OPM sessions after you enter it. If you change a conversion, then 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 windows for the creation of UOMs, as well as viewing existing UOMs. These windows can be run from either the Oracle Inventory menu or from the Oracle Process Manufacturing System Administration menu.

These windows let you use mixed case when creating your UOMs and their descriptions. All UOMs are three characters, 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 window in Oracle Inventory lets you set up new Base Units of Measure. This is the same as the OPM Unit of Measure Type window, with more information. The Oracle Inventory window lets you set both a name and a description for each UOM.

The Unit of Measure window is the same as the OPM Unit of Measure window, with additional information similar to the Unit of Measure Classes window, where you are able to have both a description and a name for each UOM.
The Unit of Measure Conversions window, also displayed as the Conversions button on the Unit of Measure Classes window, is used for setting the conversion factors. This window replaces the conversion section of the OPM Unit of Measure window.

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

<table>
<thead>
<tr>
<th>UOM</th>
<th>UOM Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CNT</td>
<td>CNT</td>
<td>Count Base</td>
</tr>
<tr>
<td>EACH</td>
<td>EACH</td>
<td>Each</td>
</tr>
<tr>
<td>Lbs</td>
<td>Pounds</td>
<td>Pounds (1kg = 2.2 pounds)</td>
</tr>
</tbody>
</table>

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

For details on the Oracle Inventory Unit of Measure windows, 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 GMA:Default Organization. Use the User Organizations window to assign any number of organizations to a user. Once assigned, a user can work only 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 lets you associate planning classes with users. Once these associations are made, you can 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 GMP:Default Schedule.

**Note:** User Planning Classes are required for generating MRP and MPS reports. Refer to the Oracle Process Manufacturing MPS/MRP and Forecasting User’s Guide 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 displays, 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.
Displaying Process Instructions

The Process Instructions window lets you display all lines of text associated with a batch or batch step in one block or paragraph. It is a persistent, read-only window that lets production operators display process instructions associated with a batch. Process instructions are defined and maintained using the Edit Text feature. These instructions are copied to any batches that use the routings and formulas where process instructions have been defined. After batch creation, you can display process instructions from the following windows by choosing Process Parameters from the Tools menu:

- Firm Planned Order
- Firm Planned Order Material Details
- Batches
- Batch Material Details
- Batch Steps

Understanding Process Instructions

Process instructions provide detailed work instructions. They are a verifiable source of manufacturing procedures. Formulators develop process instructions while developing formulas, routings, and recipes. Production operators follow these instructions when they make a batch.

Entering Process Instructions for Formulas and Routings

The following business rules apply to process instructions:

**Process Instructions in Product Development** You can enter or edit individual process instructions in the Product Development application by using the Edit Text function, and selecting the process instructions paragraph type implemented for your organization.

**Process Instructions in Process Execution** You cannot enter or edit process instructions in the Process Execution application. They are display only. You can view them from the Process Instructions window.

Prerequisites

- Define a new paragraph code, or use the existing paragraph code for process instructions.
o Enter the value of the Process Instruction Paragraph Code in the GMD: Process Instruction Paragraph profile option.
o Enter process instructions.
o Create a batch with a formula or routing that has associated process instructions.

**To display the Process Instructions window:**
1. Navigate to the Process Instructions window.
2. Scroll through the lines in the window to view all process instructions.
3. Click Close to close the window.
Lookups

Maintain existing and define additional lookups for your shared lookup types. You can define up to 250 lookups for each lookup type. Each lookup has a code and a meaning. For example, lookup type YES_NO has a code Y with meaning Yes, and a code N with a meaning No.

Lookups Procedure

**To view the Lookups window:**
1. Navigate to the Lookups window.
2. Complete the fields as described.
3. Save the window.

**To query records by a code attribute, such as the Enabled check box:**
1. Query the lookup type.
2. Move the cursor to any field in the lower region on the window.
3. From the View menu, select Query By Example, Enter.
4. Enter your query criteria.
5. From the View menu, select Query By Example, Run.

Lookups Field Reference

**Type**
Query the type of your Lookup. You can define a maximum of 250 Lookups for a single type.

**User Name**
The user name is used by loader programs.

**Application**
Query the application associated with your Lookup type.
Description
If you use windows specialized for a particular Lookup type, then the window uses this description in the window title.

Access Level
The access level restricts changes that are possible to a lookup type. The possible levels are:
- System - No changes to the lookup codes are allowed.
- Extensible - New lookup codes can be added. However, you cannot modify seeded lookup codes.
- User - You can change any lookup code.

Lookups Values Field Reference

Code
Enter the code value for your Lookup. You can define a maximum of 250 Lookups for a single Lookup type. When you enter a valid Lookup meaning into a displayed window field, Lookups stores this code into a corresponding hidden field. For example, the Lookup Y displays the meaning Yes but stores the code value Y in a hidden field.

You cannot change the values in this field after committing them. To remove an obsolete Lookup you can either disable the code, enter an end date, or change the meaning and description to match a replacement code.

Meaning
When you enter a valid Lookup meaning into a displayed window field, Lookups stores the corresponding code into a hidden field. Lookups automatically displays the meaning in your Lookups field whenever you query your window. For example, the Lookup Y displays the meaning Yes but stores the code value Y in a hidden field.

Description
You can display the description along with the meaning to give more information about your Lookup.
**Tag**
Optionally enter in a tag to describe your lookup. The tag can be used to categorize lookup values.

**Effective Dates**
Enter the dates between which this Lookup becomes active. If you do not enter a start date, then your Lookup is valid immediately.

Once a Lookup expires, users cannot insert additional records using the Lookup, but can query records that already use the Lookup. If you do not enter an end date, then your Lookup is valid indefinitely.

**Enabled**
Indicate whether applications can use your Lookup. If you enter No, then users cannot insert additional records using your Lookup, but can query records that already use this Lookup.

[ ]
The double brackets ([ ]) identify a descriptive flexfield that you can use to add data fields to this window without programming.
Action Menu

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

Edit Text

If there is only one line of text to be edited, then the Text Editor window appears. If there is more than one line that can be edited, then the Select Text Paragraph window appears first.

Edit Text Procedure

1. Navigate to the Edit Text option.
2. If the Select Text Paragraph window displays, then select a line, and click Edit Text. If not, then the Text Editor window displays.
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.

Paragraph
This button returns to the paragraph window so you can select another paragraph to edit.
Select Text Paragraph

Language
Displays the language that the text is shown in.

Non Printable
Determines whether the text is printable on the window.

Paragraph Description
Displays the description of the text.
Address Edit

If the window you are using has the Address Edit option, then 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 - 4
Displays address line 1 - 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 a 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 a 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 a 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 a LOV defined for the field against the SY_GEOG_TBL, specific to its geography type.
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.

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**Note:** Only sales orders, batches, inventory journal records, and purchase orders that are posted to the General Ledger can be purged.

---

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

- **ACST** Copies all cost component details and associated detail transaction records in burden details, actual costing transactions, and standard cost ledgers from the actual tables to the archive tables
- **DCST** Moves all cost component details and associated detail transaction records in burden details, actual costing transactions, and standard cost ledgers from the actual tables to the archive tables
- **ASLA** Copies all actual subledger update data from the actual tables to the archive tables
- **DSLA** Moves all actual subledger update data from the actual tables to the archive tables
- **ASLT** Copies all test subledger update data from the actual tables to the archive tables
- **DSLT** Moves all test subledger update data from the actual tables to the archive tables
- **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 Field Reference 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. Refer to the Purge and Archive section 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

The following are custom criteria:

- Sales Order Status (OPSO and AOPS). Valid values are -1 (voided), 25 (completed), 23 (invoiced)
- Production Batch Status (PROD and APRD). Valid values are -1 (canceled), -3 (convert FPO to batch), 4 (closed)
- Cost calendar, cost period, and cost method (ACST and DCST). These purges only two of the criteria above, Last Modification Date and Earliest Modification Date.
- Company code, fiscal year, fiscal period, and source (ASLA, DSLA, ASLT, and DSLT). Valid values for source are CM for Costing, OP for OPM Order Processing, IC for Inventory Control, PM for Production Management, PO for OPM Purchasing, PUR for Oracle Purchasing, OM for Order Management. These purges only two of the criteria above, Last Modification Date and Earliest Modification Date.

**Note:** All transactions must be received and posted to the General Ledger in order to be archived or purged. For Production Management, batches must be closed and posted to the General Ledger.

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

- Date criteria must follow this format: dd-mon-yyyy hh24:mi:ss. If you do not enter the time, it defaults to 00:00:00, which is the beginning of the day.
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).

The following fields are updated following a purge or archive, and are 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 validates 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.

You cannot purge data until the archive process has been completed on that data. If the archive process is not complete, then the purge process is disabled.

**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.

If you do not populate the Queue field, then it runs immediately.
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 can be one of the standard predefined purges or a custom purge name.

**Description**
The description for this purge type displays.

**Number**
Populated with the Purge ID value that was generated on the Purge and Archive window.

**Start**
Populated with the date and time values, specifying 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 define custom purges.

Use this window to view standard predefined purges. 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 is 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 displays 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 a description for this criteria. This displays on the Purge and Archive window when executing this purge.

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

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 is 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.
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 can 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
- Workflow Graphical Process Navigator
- Roles
- 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 that is flexible and users can customize them easily. Because of this, the reason approval process is flexible and users are able to customize for their needs easily. These customizations include enabling or disabling approval process based on certain criteria or 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, enabling 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 you need 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 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 the Workflow Process Activation window.
Use this window 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 window to enable or disable approval processes instance wide.

To register a new approval process:

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

To enable or disable the approval process instance wide:

a. Open the Workflow Approval Process window to view all registered approval processes.
b. Navigate to the approval process you want to enable or disable and check the Enable checkbox to enable or uncheck it to disable.


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 window 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 to 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.
- Provide a select statement returning all configuration parameter values in the order they are defined. This select statement contains a driving table and returns 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.

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

e. Provide a select statement returning all configuration parameter values in the order they are defined. The select statement contains a driving table and returns 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.

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

   a. Query for the approval process you want to setup configuration parameter values for. The window shows configuration parameters in the order defined in the Workflow Process Configuration Framework window.

   b. Select the parameter values from the List of Values provided.

   c. 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 the Workflow Activity Configuration window. Use this window to enable or disable the approval process at the activity level.

   a. Open the Workflow Activity Configuration window.

   b. Query for the approval process activity you want to setup configuration parameter values for. The window shows the configuration parameters in the order defined on the Workflow Activity Approval Configuration Framework window.

   c. Select parameter values from the List of Values provided.

   d. Select Yes if approval is required for current parameter values, otherwise select No from the dropdown list provided for the Approval Required field.

   e. 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, with one receiving 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 through 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 is 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

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 is 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 where 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 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 two fields of List of Values column name.

**Data Retrieval Query**
Allows you to enter a select statement returning all configuration parameter values in the order they are defined. The select statement contains a driving table and returns 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, ensure that roles are defined against the workflow for associating 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 is taken by the workflow. There can be many processes associated to one workflow.

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

Description
This field displays a description of the action the activity takes.
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 where 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 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 two fields of the List of Values column name.

Data Retrieval Query
Allows you to enter a select statement returning all configuration parameter values in the order they are defined. The select statement contains a driving table and returns 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 is taken by the workflow. There can be many processes associated to one workflow.

Configure Process

<column names>
These columns are based on setup 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, then the order they are executed at runtime is reevaluated.
Workflow Activity Configuration

Generally, an approval process consists of multiple activities or 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, ensure that Roles are defined against the workflow for associating 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 is taken by the workflow. There can be many processes associated to one workflow.

- **Activity**
  This field displays the type of activity the process does. There can be many activities associated to one process.

- **Description**
  This field displays a description of the action the activity takes.
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 valid 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, then the order they are executed at runtime is reevaluated.
Workflow Activation

The Workflow Activation window 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 lets you either check a workflow to be active, or uncheck a workflow to be deactivated.
Although your System Administrator may have customized your Navigator, typical navigation paths are described in the following tables. In some cases, there is more than one way to navigate to a window. These tables provide the most typical default path.

<table>
<thead>
<tr>
<th>Window</th>
<th>Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Types</td>
<td>OPM System Administration : OPM System Setup : Document Types</td>
</tr>
<tr>
<td>Geography Codes</td>
<td>OPM System Administration : OPM System Setup : Geography Codes</td>
</tr>
<tr>
<td>HR Organizations</td>
<td>OPM System Administration : OPM System Setup : HR Organizations</td>
</tr>
<tr>
<td>Organization Parameters</td>
<td>OPM System Administration : OPM System Setup : HR Organizations : Description : Others : Inventory Information</td>
</tr>
<tr>
<td>HR Locations</td>
<td>OPM System Administration : OPM System Setup : HR Locations</td>
</tr>
<tr>
<td>Organizations</td>
<td>OPM System Administration : OPM System Setup : Organizations</td>
</tr>
<tr>
<td>Paragraphs</td>
<td>OPM System Administration : OPM System Setup : Paragraphs</td>
</tr>
<tr>
<td>Reason Codes</td>
<td>OPM System Administration : OPM System Setup : Reason Codes</td>
</tr>
<tr>
<td>Session Parameters</td>
<td>OPM System Administration : OPM System Setup : Session Parameters</td>
</tr>
<tr>
<td>Window</td>
<td>Path</td>
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<td>--------------------------------</td>
<td>-----------------------------------------------------------------------</td>
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<tr>
<td>Text Tokens</td>
<td>OPM System Administration : OPM System Setup : Text Tokens</td>
</tr>
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<tr>
<td>Units of Measure Classes</td>
<td>OPM System Administration : OPM System Setup : Units of Measure : Classes</td>
</tr>
<tr>
<td>Units of Measure Conversions</td>
<td>OPM System Administration : OPM System Setup : Units of Measure : Conversions</td>
</tr>
<tr>
<td>User Organizations</td>
<td>OPM System Administration : OPM System Setup : User Organizations</td>
</tr>
<tr>
<td>User Planning Classes</td>
<td>OPM System Administration : OPM System Setup : User Planning Classes</td>
</tr>
<tr>
<td>OPM Lookups</td>
<td>OPM System Administration : OPM System Setup : OPM Lookups</td>
</tr>
<tr>
<td>Purge Setup</td>
<td>OPM System Administration : OPM Purge and Archive : Purge Setup</td>
</tr>
<tr>
<td>Purge Tables</td>
<td>OPM System Administration : OPM Purge and Archive : Purge Setup : Actions : Purge Tables</td>
</tr>
<tr>
<td>Purge and Archive</td>
<td>OPM System Administration : OPM Purge and Archive : Purge and Archive</td>
</tr>
<tr>
<td>Archive Process</td>
<td>OPM System Administration : OPM Purge and Archive : Purge and Archive : Actions : Archive Process</td>
</tr>
<tr>
<td>Purge Inquiry</td>
<td>OPM System Administration : OPM Purge and Archive : Purge Inquiry</td>
</tr>
<tr>
<td>Workflow Process Activation</td>
<td>OPM System Administration : OPM Workflow Setup : Workflow Process Activation</td>
</tr>
<tr>
<td>Workflow Activity Approval Configuration Framework</td>
<td>OPM System Administration : OPM Workflow Setup : Workflow Activity Approval Configuration Framework</td>
</tr>
<tr>
<td>Window</td>
<td>Path</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Workflow Activity Configuration</td>
<td>OPM System Administration : OPM Workflow Setup : Workflow Activity Configuration</td>
</tr>
<tr>
<td>Workflow Activation</td>
<td>OPM System Administration : OPM Workflow Setup : Workflow Activation</td>
</tr>
</tbody>
</table>
During your implementation, you set a value for selected profile options to specify how your System Administration application is configured. System Administration uses the listed profile options:

- GMA:Address
- GMA:All
- GMA:Default Language
- GMA:New
- GMA:Now
- GMA:Default Organization
- GMA:Workflow Delimiter
- GMA:Minimum Date
- GMA:Maximum Date
- GMA:CPG Install

Your System Administrator sets user profile options at one or more of the following levels: Site, Application, Responsibility, and User. Use the Personal Profile Options window to view or set your profile options at the user level. You can consult the Oracle Process Manufacturing Implementation Guide for a complete description of the profile options listed. Consult your Oracle Applications System Administrator’s Guide for a list of profile options common to all Oracle Applications.
Following are the audit groups and tables packaged with OPM.

<table>
<thead>
<tr>
<th>Audit group name</th>
<th>Table name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Audit Setup Group</td>
<td>FND_AUDIT_COLUMNS</td>
</tr>
<tr>
<td>Audit Setup Group</td>
<td>FND_AUDIT_GROUPS</td>
</tr>
<tr>
<td>Audit Setup Group</td>
<td>FND_AUDIT_SCHEMAS</td>
</tr>
<tr>
<td>Audit Setup Group</td>
<td>FND_AUDIT_TABLES</td>
</tr>
<tr>
<td>Batch Information Group</td>
<td>GME_BATCH_HEADER</td>
</tr>
<tr>
<td>Batch Information Group</td>
<td>GME_MATERIAL_DETAILS</td>
</tr>
<tr>
<td>Recipe Information Group</td>
<td>FM_FORM_MST_B</td>
</tr>
<tr>
<td>Recipe Information Group</td>
<td>FM_MATL_DTL</td>
</tr>
<tr>
<td>Recipe Information Group</td>
<td>FM_ROUT_DTL</td>
</tr>
<tr>
<td>Recipe Information Group</td>
<td>GMD_OPERATIONS_B</td>
</tr>
<tr>
<td>Recipe Information Group</td>
<td>GMD_RECIPES_B</td>
</tr>
<tr>
<td>Recipe Information Group</td>
<td>GMD_RECIPE_VALIDITY_RULES</td>
</tr>
<tr>
<td>Recipe Information Group</td>
<td>GMD_ROUTINGS_B</td>
</tr>
<tr>
<td>Recipe Information Group</td>
<td>QC_RSLT_MST</td>
</tr>
<tr>
<td>Recipe Information Group</td>
<td>QC_SPEC_MST</td>
</tr>
<tr>
<td>Recipe Information Group</td>
<td>GMD_RESULTS</td>
</tr>
<tr>
<td>Recipe Information Group</td>
<td>GMD_SPEC_RESULTS</td>
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<td>Table_name</td>
</tr>
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<td>-------------------------------</td>
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</tr>
<tr>
<td>Recipe Information Group</td>
<td>GMD_SPECIFICATIONS_B</td>
</tr>
<tr>
<td>Recipe Information Group</td>
<td>GMD_SPEC_TESTS_B</td>
</tr>
<tr>
<td>Reference Data Group</td>
<td>IC_ITEM_CNV</td>
</tr>
<tr>
<td>Reference Data Group</td>
<td>IC_ITEM_MST_B</td>
</tr>
</tbody>
</table>
**User Organizations**
User Organizations is a list of organizations a user is given access to.

**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 where you can assign resources, warehouses, General Ledger accounts, and other cross-application 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.

Audit Time Stamp
Time stamp for a database event that has happened and is recorded in audit tables.

Transaction Type
The type of transaction that can happen to a table. Valid transaction types are:

- Insert
- Update
- Delete
- Current

**Transacted By**
Oracle Applications user who performs a transaction using Oracle Applications or populated by an outside API.

**Audit Group**
A logical group that groups together a specific selection of tables where auditing is enabled.

**Industry Template**
A logical group that groups together a specific selection of audit groups where auditing is enabled.
Index

A
Action menu, 1-36
Action pulldown menu, 1-25
Address Edit, 1-38
Address Edit options, 1-36
ADJI - Inventory Adjustment - Immediate, 1-2
ADJR - Inventory Adjustment - Journaled, 1-2
Archive Process window, 2-6
Assign Type value, 1-6
Audit Trail Seed Data, C-1

B
BAL - Balance Qty - For MRP, 1-2

C
cchild organizations, 1-13
classification, 1-8
CMOR - Combined MORD, 1-2
codes, paragraph, 1-15
companies, defined, 1-13
county code, 1-39
creating
text tokens, 1-24
CREI - Create New Inventory - Immediate, 1-2
CRER - Create New Inventory - Journaled, 1-2
custom purge, 2-2

d
Data Retrieval Query, 3-10, 3-12
database mask, 2-9
database table, 1-15
DDOR - Dummy DORD, 1-2
digits, allowed in document numbering, 1-6
DMOR - Divided MORD, 1-2
document numbering
automatic, 1-5
manual assignment, 1-5
document numbering, digits, allowed in, 1-6
document ordering, 1-5
Document Ordering window, 1-5
Document Types window, 1-2, 1-4
documents, 1-5

E
Edit Text option, 1-36
editing
document ordering, 1-5
geography codes, 1-7
paragraphs, 1-15
planning classes, user, 1-30
session parameters, 1-22

F
FCST - Forecast, 1-2
flow type, inventory, 1-19
FPO - Firm Planned Order, 1-2

G
general text paragraph, 1-15
Geography Code window, 1-7
GLVN - General Ledger Voucher No., 1-2
GMA
Address, B-1
All, B-1
CPG Install, B-1
Default Language, B-1
Default Organization, B-1
Maximum Date, B-1
Minimum Date, B-1
New, B-1
Now, B-1
Workflow Delimiter, B-1

GMD
  Process Instruction Paragraph, 1-32
GRDI - Change Grade - Immediate, 1-2
GRDR - Change Grade Journal, 1-2

H
hierarchies, organizational, 1-13
HR Locations, 1-8
HR Organization window, 1-8

I
inflows, inventory, 1-19
inventory adjustment, 1-19
Inventory Quantities window, 1-18
Inventory Quantities window, interaction, 1-5
inventory, increases and decreases to, 1-18

J
JRNL - Inventory Quantities Document
  Sequencing, 1-2
JRNL document type, 1-5

L
Lookups window, 1-33

M
mask types
  C - character, 2-9
  D - date, 2-9
  N - numeric, 2-9
MGRI - Mass Grade Update - Immediate, 1-2
MSTI - Journalized Sales Return - Mass Status Update - Immediate, 1-3
MTRI - Mass Movement - Immediate, 1-3

N
  nonprintable text, 1-17
  number assignment parameters, altering, 1-5

O
OMSO - Order Management, 1-3
OPBO - Blanket Sales Orders, 1-3
OPCR - Credit Memo Document Number, 1-3
OPDB - Debit Memo Document Number, 1-3
OPIN - Invoices, 1-3
OPOP - Sales Order Profiles, 1-3
OPSO - Sales Orders, 1-3
OPSP - Shipment, 1-3
Organization Code, 1-29
organization hierarchy, 1-13
Organization Parameters window, 1-8
organizations
  associating with a parent company, 1-13
  companies, 1-13
defined, 1-13
manufacturing plant, 1-14
nonmanufacturing plant, 1-14
plants, 1-13
outflows, inventory, 1-19

P
paragraph codes, 1-15
Paragraph window, 1-15, 1-16
parent organizations, 1-13
PBPO - Blanket Purchase Orders, 1-3
PBPR - Planned BPO Release, 1-3
Personal Profiles, 1-29
PICY - Physical Inventory - Cycle No, 1-3
PIPH - Physical Inventory - Physical, 1-3
plants, 1-13
pm_betch_hdr, 1-16
PORC - Oracle Purchasing
    Receipts/Returns/Corrections, 1-3
PORD - Purchase Orders, 1-3
POSR - Stock Receipts, 1-3
postal code, 1-38
PPRD - Planned Production, 1-3
PPUR - Planned Purchase, 1-3
PRCV - Material in Receiving, 1-3
predefined purges, 2-9
PREQ - Purchase Requisition, 1-3
Process Enabled, 1-3
Process Organization, 1-3
PPRD, 1-3
province, geography code, 1-39
PTRN - Planned Transfer, 1-3
Purchase Order Lines window, 1-15
Purchase Orders window, 1-15
Purge and Archive window, 2-2, 2-3
Purge Inquiry window, 2-7
purge criteria
- earliest creation date, 2-5
- earliest modification date, 2-5
- first document number, 2-5
- first organization code, 2-5
- last document number, 2-5
- last organization code, 2-5
- latest creation date, 2-5
- latest modification date, 2-5
Purge Process window, 2-6
Purge Setup window, 2-9, 2-10
purge status, 2-4
- archive in progress, 2-8
- archived successfully, 2-8
- defined, not yet run, 2-8
- purge completed successfully, 2-8
- purge in progress, 2-8
- unsuccessful archive, 2-8
- unsuccessful purge, 2-8
Purge Tables window, 2-10
purges
- customized, 2-2
- predefined, 2-9

R
RDBMS name, 1-22
Reason Codes window, 1-18
reason type, inventory, 1-19
RECV - OPM Receipts, 1-3
reference UOM, 1-26
REPI - Replace Quantity/Status - Immediate, 1-3
REPR - Replace Quantity/Status - Journaled, 1-3
Role, 3-7
RTRN - OPM Purchase Return (Rg/Stock Receipt), 1-3
RVAL - Cost Revaluation Process, 1-3

S
Session Parameters window, 1-22
setup
- purge, 2-9
SHMT - Internal Order Shipment, 1-4
Show Execution Order, 3-13
SHRT - MRP - Document Type for Shortage, 1-4
SMPL, 1-4
standard predefined purges, 2-9
status, of purges, 2-4
stock movement, 1-19
storing and categorizing text, 1-15
structure, organizational, 1-13
STSI - Change Status - Immediate, 1-4
STSR - Change Status - Journaled, 1-4
subparagraph code, 1-16
subparagraphs, 1-16
SY_GEOG_TBL, 1-38, 1-39

T
tax location code, 1-14
Text Edit window, 1-36
text editor, 1-24
Text Editor window, 1-15, 1-24
Text Paragraph Selection window,  1-15
Text Token window,  1-24
text tokens,  1-24
text, associating with a document,  1-15
text, storing and categorizing,  1-15
to_char mask,  2-9
to_data mask,  2-9
TRNI - Inventory Movement - Immediate,  1-4
TRNR - Inventory Movement - Journaled,  1-4

U
Unit of Measure window,  1-26
usages, inventory,  1-19
user organization, editing,  1-29
User Organizations window,  1-29
User Planning Classes window,  1-30

W
Workflow Activity Approval Configuration Framework window,  3-5, 3-6, 3-11
Workflow Activity Configuration window,  3-5, 3-6, 3-14
Workflow Approval Process window,  3-4
workflow business needs,  3-2
Workflow Process Activation window,  3-2, 3-3, 3-8
Workflow Process Configuration Framework window,  3-4, 3-6, 3-9
Workflow Process Configuration window,  3-4, 3-6, 3-13
Workflow Process Navigator,  3-3

X
XFER - Required to Operate the Transfer window,  1-4
XPRD - Phantom,  1-4
XSHT - Phantom Shortage,  1-4