

Oracle® Process Manufacturing

System Administration User's Guide

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

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

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Preface

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

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

- The principles and customary practices of your business area.
- Oracle Process Manufacturing.

If you have never used Oracle Process Manufacturing, Oracle suggests you attend one or more of the Oracle Applications training classes available through Oracle University.

- Oracle Self-Service Web Applications.

To learn more about Oracle Self-Service Web Applications, read the *Oracle Self-Service Web Applications Implementation Manual*.

- 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

The Oracle Process Manufacturing System Administration User's Guide contains the information you need to understand and use Oracle Process Manufacturing. This guide contains four chapters:

- Chapter 1 describes how to set up and manage the OPM System Administration functions.
- Chapter 2 describes how to use the Archive and Purge functions in OPM.
- Chapter 3 describes how to set up and activate a Workflow.
- Appendix A describes how to navigate to each window.
- Appendix B describes the OPM System Administration profile options.
- Appendix C describes the audit trail seed data.
- 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 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.

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Other Information Sources

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

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

Online Documentation

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

- **PDF Documentation**- See the Online Documentation CD for current PDF documentation for your product with each release. This Documentation CD is also available on Oracle*MetaLink* and is updated frequently.
- **Online Help** - You can refer to Oracle iHelp for current HTML online help for your product. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation. No system downtime is required to apply online help.
- **Online Help** - You can refer to Oracle Applications Help for current HTML online help for your product. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation. No system downtime is required to apply online help.
- **Release Content Document** - See the Release Content Document for descriptions of new features available by release. The Release Content Document is available on Oracle*MetaLink*.
- **About document** - Refer to the About document for information about your release, including feature updates, installation information, and new documentation or documentation patches that you can download. The About document is available on Oracle*MetaLink*.

Related Guides

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

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). 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.

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.

Using Oracle Advanced Planning and Scheduling with Oracle Process Manufacturing

Oracle Process Manufacturing and Oracle Advanced Planning and Scheduling (APS) combine to provide a solution for process manufacturers that can help increase planning efficiency. This solution 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 *Using Oracle Advanced Planning and Scheduling with Oracle Process Manufacturing 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.

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

Public Application Programming Interfaces (APIs) are available for use with different areas of the Oracle Process Manufacturing application. APIs make it possible to pass information into and out of the application, bypassing the user interface. Use of these APIs is documented in individual manuals such as the *Oracle Process Manufacturing Inventory API User's Guide*, *Oracle Process Manufacturing Process Execution API User's Guide*, *Oracle Process Manufacturing Product Development Formula API User's Guide*, *Oracle Process Manufacturing Product Development Recipe API User's Guide*, *Oracle Process Manufacturing Quality Management API User's Guide*,

and the *Oracle Process Manufacturing Cost Management API User's Guide*. Additional API User's Guides are periodically added as additional public APIs are made available.

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 11*i*. 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 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle 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 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 11*i*. 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 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

“About” Document

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software updates, refer to the “About” document for your product. “About” documents are available on Oracle *MetaLink* for most products starting with Release 11.5.8.

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 and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms 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 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Process Manufacturing implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide 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 Oracle *Metalink*

Oracle Applications Message Manual

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

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Process Manufacturing 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 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 Oracle 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 tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications 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 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.

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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 and this user guide.

Oracle values your comments and feedback. In this guide is a reader's comment form that you can use to explain what you like or dislike about Oracle Process Manufacturing or this user guide. Mail your comments to the following address or call us directly at (650) 506-7000.

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Or, send electronic mail to appsdoc_us@oracle.com.

OPM System Setup

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

- Lookups
- Action Menu

Editing Document Types

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

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

Use the Document Types window to add and maintain document types.

- ADJI - Inventory Adjustment - Immediate
- ADJR - Inventory Adjustment - Journalled
- BAL - Balance Qty - For MRP
- CMOR - Combined MORD
- CREI - Create New Inventory - Immediate
- CRER - Create New Inventory - Journalled
- DDOR - Dummy DORD
- DMOR - Divided MORD
- FCST - Forecast
- FPO - Firm Planned Order
- GLVN - General Ledger Voucher Number
- GRDI - Change Grade - Immediate
- GRDR - Change Grade Journalled
- JRNL - Inventory Quantities Document Sequencing
- MGRI - Mass Grade Update - Immediate

- „ MSTI - Journalled 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 - Journalled
- „ RTRN - OPM Purchase Return (Regular/Stock Receipt)

- SHMT - Internal Order Shipment
- SHRT - MRP - Document Type for Shortage
- SMPL - Automatic numbering for samples
- STSI - Change Status - Immediate
- STSR - Change Status - Journalled
- TRNI - Inventory Movement - Immediate
- TRNR - Inventory Movement - Journalled
- 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

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

Document Ordering Field Reference

Document Type

Enter the code, 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:
 - n Enter Set of Books
 - n Enter Legal Entity
 - n 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:
 - n In the **Organization Code** field, assign a 3-digit Inventory Organization code.

Note: This 3-digit code synchronizes to OPM as the Inventory Organization file of the warehouse code.

- n Select or enter data into the **Item Master Organization** field.
- n Select or enter data into the **Calendar** field.
- n Click in the **Process Enabled** check box in order to check it. Upon activating this check box, the **Process Org** field becomes available.
- n Click in the **Process Organization** field. Select the correct OPM Organization or Plant to link this warehouse.

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.

- 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

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

1. Navigate to the **Reason Code Security** window from the Action menu on the Reason Code window.
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.

Units of Measure

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

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

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

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

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

For example, 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.

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:

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

In this example, the CNT and EACH are carried over from OPM, where there was no UOM Name. Therefore, the UOM 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:

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

- o 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.

ww 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.

Archive and Purge

This topic explains how to use the Archive and Purge functions in OPM. Archive and purge is a two step process for testing and archiving data. First, you test the process and the data is copied into a set of archive tables. You can then purge this test data. Once your test process is correct, you can then archive the data into the archive tables. Then, you can purge the archive data to remove it from the system completely.

For example, the test process copies data from `op_ordr_hdr` and associated tables into the test archive table, based on the archive type OPSO. Once you have your archive criteria set correctly, you run the archive process for OPSO. This moves the data from `op_ordr_hdr` and associated tables into the archive tables. When you want to remove this data from the system completely, you then run the purge on the archive for OPSO. This removes the data by dropping the archive tables.

The following topics are covered:

- Archive and Purge
- Inquiry
- Setup

Archive and Purge Types

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

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, archive and purge functionality exists only for a predefined set of tables and transaction data. They are:

DCST Cost component details and associated detail transaction records in burden details, actual costing transactions, and standard cost ledgers.

DSLA Subledger update data.

DSL T Test subledger update data.

PROD Production batch records and the associated detail transaction and text records. This does not purge data related to Order Management or Common Purchasing.

OPSO Sales order and shipment records and the associated detail transaction and text records. This does not purge data related to Order Management or Common Purchasing.

PORD PO, receipt, and return records and the associated detail transaction and text records.

JRNL Inventory journal records and the associated detail transaction and text records.

Archive and Purge Procedure

1. Navigate to the **Archive and Purge** window.
2. Complete the fields as described.

3. Save the **Archive and Purge** window. The Purge ID is assigned. Refer to the "Archive and Purge Field Reference" topic for a description of the Purge ID.

Archive and Purge Field Reference

Type

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

There are seven standard purges. Refer to the "Archive and Purge" section for the names and descriptions.

ID

A unique ID assigned to this purge that you can use to query or retrieve the purge. This is automatically generated upon saving this window.

This unique ID is not created through OPM document ordering.

Test Status

Status of the test process. Automatically generated.

- Defined, not yet run
- Test Archive in progress
- Test Archive Completed Successfully
- Test Purge Completed Successfully
- Test Purge in Progress
- Test Purge Process Failed
- Test Process Failed
- Test Archive Process Failed

Archive Status

Status of the archive process. Automatically generated.

- Archive Completed Successfully
- Archive Process Failed
- Archive in Progress

- Defined, not yet run
- Process Failed
- Purge Completed Successfully
- Purge Process Failed
- Purge in Progress

Comment

Enter supporting information that provides additional information on the process.

Details

Description

Each standard purge can have up to 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

Criteria Values (Dynamic Criteria Fields)

The criteria values can be selected from the List of Values for each field. The following are custom criteria:

- Sales Order Status (OPSO). Valid values are -1 (voided) and 25 (completed)
- Production Batch Status (PROD). Valid values are -1 (canceled), -3 (convert FPO to batch), 4 (closed)
- Cost calendar, cost period, and cost method (DCST). This purge only has two of the criteria above, Last Modification Date and Earliest Modification Date
- Company code, fiscal year, fiscal period, and source (DSL A and DSL T). 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 use 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. 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).

Total Row Details

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

Row Details - Tested

The total number of rows that were tested, which is data copied from the live tables. Automatically generated.

Row Details - Archived

The total number rows archived, which is data removed from the live tables. Automatically generated.

Row Details - Purged

The total number of rows removed from the archive tables. Automatically generated.

Note: All criteria values must be entered and the purge engine validates all the values at runtime.

Archive and Purge Process

After the criteria is specified on the Archive and Purge window and saved, you can either run a test archive or archive process. You cannot purge test or archive data until the test or archive process has been completed on that data. If the process is not complete, then the purge process is disabled.

This process is run as a concurrent program, Archive and Purge Process. After the process is complete, view the log for the Archive and Purge Process request to determine if there are any errors.

If a test archive fails, then you can fix the problem, and rerun the test archive process. The archive tables are dropped if they were created during the failed run, and recreated them with the same archive ID.

Archive and Purge Dialog Window Procedure

1. Navigate to either the **Test Process**, **Purge Test Rows**, **Archive Process**, or **Purge Archived Rows** window.
2. Complete the fields as described. The concurrent request runs in the background.
3. View the log from the **Requests** window.

Archive and Purge Dialog Box Field Reference

Concurrent Request Datetime

Enter the date and time that the process is to start. If you do not populate the Queue field, then it runs immediately.

Archive and Purge Inquiry

Use the 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.

Archive and Purge Inquiry Procedure

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

Archive and Purge Inquiry Field Reference

Type

Enter the purge type. This can be one of the standard predefined purges or a custom purge type.

Description

The description for this purge type displays.

Number

Populated with the Purge ID value that was generated on the Archive and Purge 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 archive 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

Tested

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

Archived

Indicates the total number of rows archived 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).

Archive and Purge Setup

Use the Archive and Purge Setup window to view the OPM standard predefined purges or define custom purges.

Use this window to view standard predefined purges. To run standard predefined purges, use the Archive and Purge window.

Archive and Purge Setup Procedure

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

Archive and Purge Setup Field Reference

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 runtime. 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 Archive and Purge window when running this purge.

Archive and Purge Tables

The **Archive and Purge Tables** window displays when selected from the Actions menu on the **Setup** window.

Archive and Purge Tables Procedure

1. Navigate to the **Archive and Purge Tables** window from the **Actions** menu by selecting the **Purge Tables** option.
2. View the fields as described.

Archive and Purge Tables Field Reference

Type

Displays 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

Displays a description of the purge.

Name

Displays the name of the table.

Action

Displays the action to take. An action can either be to Keep the data in the table or to Delete the data in the table.

Workflow Setup

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

From the OPM System Administration, you 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 lets users:

- 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 developers 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 Applications lets you navigate 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 can 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.
2. Navigate to the **Workflow Process Configuration Framework** window.

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

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

- a. Open the **Workflow Process Configuration Framework** window.
 - b. Select the approval process to customize configuration parameters.
 - c. 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.
 - d. 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. 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:

- a. Open the **Workflow Activity Approval Configuration Framework** window.
- b. Select the approval process activity to customize configuration parameters.
- c. 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.

- d. 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. Open the **Workflow Process Configuration** window.

- 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 for making decisions based upon the content of the notifications.

Users can be chosen through various mechanisms from within the role at runtime.

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. Before you can use this window, ensure that an OPM Workflow is defined in the database.

■ To add a new approval processes:

1. Navigate to the **Workflow Process Activation** window.
2. Enter the **Workflow Name**. Required.
3. Enter the **Process Name**, which is the process taken by the workflow. There can be many processes associated to one workflow.
4. Select **Enable** if necessary. This field lets you set the workflow process to enabled or disabled. When the system is initially set up, all workflow processes are disabled.
5. Save the window.

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.

■ To add a new configuration parameter:

1. Navigate to the **Workflow Process Configuration Framework** window. The following fields display viewable information:
 - The **Workflow** field displays the name of the workflow.
 - The **Process** field displays the process that is taken by the workflow. There can be many processes associated to one workflow.
2. Modify the following fields to define the configuration parameters:
 - **Hierarchy** 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** displays the name of the OPM table where the column name can be found.
 - **Column Name** displays the column name from the OPM table.
 - **Column Prompt** displays the name of the column you see on the Role Association window.
 - **List Table** displays the name of the OPM table from where the Role Association List of Values comes.
 - **List Columns** displays the two fields of List of Values column name.
3. Enter a data retrieval query, if necessary. This lets you 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.

Finding the Process Configuration Parameter

It is necessary to search for the desired parameter. Use the find window to narrow your search.

► **To find the process configuration parameter:**

1. Navigate to the **Find Workflow Process Configuration Framework** window.
2. Enter the workflow name, or the workflow name and process.
3. Click **Find**.

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.

■ To find the approval configuration parameter:

1. Navigate to the **Find Activity Configuration Framework** window by selecting **Workflow Activity Approval Configuration Framework**.
2. Enter the workflow name, or the workflow name and process, or the workflow name, process, and activity.
3. Click **New** to add a new configuration parameter or **Find** to see existing parameters.

Adding a New Configuration Parameter

You can customize the behavior of an activity.

■ To add a new configuration parameter:

1. Navigate to the **Activity Configuration Framework** window. The following fields display viewable information:
 - The **Workflow** field displays the name of the workflow.
 - The **Process** field displays the process that is taken by the workflow. There can be many processes associated to one workflow.
 - The **Activity** field displays the type of activity the process does. There can be many activities associated to one process.
 - The **Description** field displays a description of the action the activity takes.
2. Modify the following fields to define the configuration parameters:
 - **Hierarchy** 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** displays the name of the OPM table where the column name can be found.
- **Column Name** displays the column name from the OPM table.
- **Column Prompt** displays the name of the column that displays on the Role Association window.
- **List Table** displays the name of the OPM table from where the Role Association List of Values comes.
- **List Columns** displays the two fields of List of Values column name.

Enter a data retrieval query, if necessary. This lets you 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 can be required based on the business process requirement. This window lets you enable or disable the approval process based on configuration parameters defined in the Approval Process Configuration Framework.

► To find the workflow process configuration:

1. Navigate to the **Find Workflow Process Configuration** window by selecting **Workflow Process Configuration**.
2. Enter the workflow name, or the workflow name and process.
3. Click **Find** to see existing parameters.

Workflow Process Configuration Procedure

Use this window to enable or disable the approval process.

► To add workflow process configuration parameters:

1. Navigate to the **Workflow Process Configuration** window.
2. Enter an **Organization** name.
3. Enter the **Approval Required** parameter. This field determines if you need an approval based on the current set of values and parameters.
4. If you have multiple columns, then click **Show Execution Order** to reevaluate the runtime order.
5. Save the window.

Workflow Activity Configuration

Generally, an approval process consists of multiple activities or steps. This window lets you customize the approval process activities behavior based on the configuration parameters defined in the Approval Process Activity Configuration Framework. Sometimes, approval can be required based on the business process requirement. Users can enable or disable an activity and define an approver if the activity requires approval.

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.

■ To find the approval configuration parameter:

1. Navigate to the **Workflow Activity Configuration** window by selecting **Workflow Activity Configuration**.
2. Enter the workflow name, or the workflow name and process, or the workflow name, process, and activity.
3. Click **New** to add a new configuration parameter or **Find** to see existing parameters.

Adding Workflow Activity Configuration Parameters

Use this window to customize approval process activities.

■ To add a new workflow activity configuration parameter:

1. Navigate to the **Workflow Activity Configuration** window. The following fields display viewable information:
 - The **Workflow** field displays the name of the workflow.
 - The **Process** field displays the process that is taken by the workflow. There can be many processes associated to one workflow.
 - The **Activity** field displays the type of activity the process does. There can be many activities associated to one process.
 - The **Description** field displays a description of the action the activity takes.
2. Modify the following fields to define the configuration parameters:
3. Enter an **Organization** name.

4. Enter the **Approval Required** parameter. This field determines if you need an approval based on the current set of values and parameters.
5. If the approval is required, then enter the name of the approver.
6. If you have multiple columns, then click **Show Execution Order** to reevaluate the runtime order.
7. Save the window.

Workflow Activation

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

► **To find the approval configuration parameter:**

1. Navigate to the **Workflow Activations** window.
2. View the following information:
 - The **WF Item Type** displays the internal name of the workflow.
 - The **WF Description** displays a basic description of the workflow.
 - All workflows are initiated from a trigger. The **Trigger Description** field displays a description of that trigger.
 - The **Enable** field lets you either select a workflow as active or deactivated.

Navigation Paths

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.

Window	Path
Document Ordering	OPM System Administration : OPM System Setup : Document Ordering
Document Types	OPM System Administration : OPM System Setup : Document Types
Geography Codes	OPM System Administration : OPM System Setup : Geography Codes
HR Organizations	OPM System Administration : OPM System Setup : HR Organizations
Organization Parameters	OPM System Administration : OPM System Setup : HR Organizations : Description : Others : Inventory Information
HR Locations	OPM System Administration : OPM System Setup : HR Locations
Organizations	OPM System Administration : OPM System Setup : Organizations
Paragraphs	OPM System Administration : OPM System Setup : Paragraphs
Reason Codes	OPM System Administration : OPM System Setup : Reason Codes
Session Parameters	OPM System Administration : OPM System Setup : Session Parameters

Window	Path
Text Tokens	OPM System Administration : OPM System Setup : Text Tokens
Units of Measure	OPM System Administration : OPM System Setup : Units of Measure : Units of Measure
Units of Measure Classes	OPM System Administration : OPM System Setup : Units of Measure : Classes
Units of Measure Conversions	OPM System Administration : OPM System Setup : Units of Measure : Conversions
User Organizations	OPM System Administration : OPM System Setup : User Organizations
User Planning Classes	OPM System Administration : OPM System Setup : User Planning Classes
OPM Lookups	OPM System Administration : OPM System Setup : OPM Lookups
Purge Setup	OPM System Administration : OPM Archive and Purge : Setup
Archive and Purge Tables	OPM System Administration : OPM Archive and Purge : Setup : Actions : Purge Tables
Archive and Purge	OPM System Administration : OPM Archive and Purge : Purge and Archive
Test Process	OPM System Administration : OPM Archive and Purge : Archive and Purge : Actions : Test Process
Purge Test Rows	OPM System Administration : OPM Archive and Purge : Archive and Purge : Actions : Purge Test Rows
Archive Process	OPM System Administration : OPM Archive and Purge : Archive and Purge : Actions : Archive Process
Purge Archived Rows	OPM System Administration : OPM Archive and Purge : Archive and Purge : Actions : Purge Archived Rows
Purge Inquiry	OPM System Administration : OPM Archive and Purge : Inquiry
Workflow Process Activation	OPM System Administration : OPM Workflow Setup : Workflow Process Activation
Workflow Process Configuration Framework	OPM System Administration : OPM Workflow Setup : Workflow Process Configuration Framework
Workflow Process Configuration	OPM System Administration : OPM Workflow Setup : Workflow Process Configuration

Window	Path
Workflow Activity Approval Configuration Framework	OPM System Administration : OPM Workflow Setup : Workflow Activity Approval Configuration Framework
Workflow Activity Configuration	OPM System Administration : OPM Workflow Setup : Workflow Activity Configuration
Workflow Activation	OPM System Administration : OPM Workflow Setup : Workflow Activation

Profile Options

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
- GMA:Reason Code Security

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.

Audit Trail Seed Data

Following are the audit groups and tables packaged with OPM.

Audit group_name	Table_name
Audit Setup Group	FND_AUDIT_COLUMNS
Audit Setup Group	FND_AUDIT_GROUPS
Audit Setup Group	FND_AUDIT_SCHEMAS
Audit Setup Group	FND_AUDIT_TABLES
Batch Information Group	GME_BATCH_HEADER
Batch Information Group	GME_MATERIAL_DETAILS
Recipe Information Group	FM_FORM_MST_B
Recipe Information Group	FM_MATL_DTL
Recipe Information Group	FM_ROUT_DTL
Recipe Information Group	GMD_OPERATIONS_B
Recipe Information Group	GMD_RECIPES_B
Recipe Information Group	GMD_RECIPE_VALIDITY_RULES
Recipe Information Group	GMD_ROUTINGS_B
Recipe Information Group	QC_RSLT_MST
Recipe Information Group	QC_SPEC_MST
Recipe Information Group	GMD_RESULTS
Recipe Information Group	GMD_SPEC_RESULTS

Audit group_name	Table_name
Recipe Information Group	GMD_SPECIFICATIONS_B
Recipe Information Group	GMD_SPEC_TESTS_B
Reference Data Group	IC_ITEM_CNV
Reference Data Group	IC_ITEM_MST_B

Glossary

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.

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