

Oracle® Product Lifecycle Management

User's Guide

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Oracle Product Lifecycle Management User's Guide, Release 12

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Contents

Send Us Your Comments

Preface

1 Item Catalog Administration Overview

Searching for Item Catalog Categories.....	1-2
Creating Item Catalog Categories.....	1-2
Updating Item Catalog Categories.....	1-4
Managing Import Formats.....	1-6
Managing Item Statuses.....	1-9
Browsing the Item Catalog Category Hierarchy.....	1-10
Assigning People to an Item Catalog Category.....	1-10
Associating Attribute Groups with an Item Catalog Category.....	1-11
Adding Actions to an Attribute Group.....	1-12
Setting Up New Item Request Types.....	1-14
Associating New Item Requests with an Item Catalog Category.....	1-16
Defining Item Templates.....	1-17
Defining Item Numbers and Descriptions.....	1-18
Creating Parameter Mappings for an Action.....	1-19
Creating Pages for an Item Catalog Category.....	1-20
Managing Lifecycle Phases.....	1-21
Associating Lifecycles with an Item Catalog Category.....	1-22
Adding Attachment Categories to an Item Catalog Category.....	1-22
Deleting Attachment Categories from an Item Catalog Category.....	1-24
Managing Item Change Policies.....	1-24
Optimizing the Item Catalog Text Index.....	1-26
Associating Report Templates with an Item Catalog Category.....	1-27

GDSN Administration..... 1-28

2 Catalog Administration

Creating Categories..... 2-1
Creating Catalogs..... 2-3
Assigning a Category to a Catalog..... 2-5
Catalog Category Mapping..... 2-6
Creating a Category Hierarchy within a Catalog..... 2-6
Updating a Category Hierarchy within a Catalog..... 2-7
Deleting a Category from a Catalog..... 2-8
Assigning People to a Catalog..... 2-8
Assigning People to a Valid Category..... 2-9

3 Change Management Administration

Creating Change Categories..... 3-1
Managing Change Header Types..... 3-4
Creating Task Templates..... 3-11
Managing Change Line Types..... 3-12
Creating Change Priorities..... 3-14
Creating Statuses..... 3-15
Creating Change Reasons..... 3-17
Creating Classifications..... 3-17
Optimizing the Change Management Text Index..... 3-18
Creating Reports..... 3-19
Subscribing to a Change Management Business Event..... 3-20
Creating Workflow Templates..... 3-23

4 Configuration Management Administration

Searching for Structure Types..... 4-1
Creating Structure Types..... 4-2
Associating Structure Names with a Structure Type..... 4-4
Searching for Structure Names..... 4-4
Creating Structure Names..... 4-5
Associating Component Attribute Groups with a Structure type..... 4-5
Associating Other Information with Structure Types..... 4-6

5 People and Roles Administration Overview

Managing and Viewing Roles..... 5-1
Creating Roles..... 5-3

Updating Roles.....	5-4
Updating Role Mappings.....	5-4
Deleting Roles.....	5-4
Managing Organization-Level Roles.....	5-5
Managing People, Groups, and Companies.....	5-6

6 Attributes and Function Administration

User-Defined Attributes.....	6-1
Creating User-Defined Functions.....	6-6
Creating Value Sets.....	6-10
Defining Table Value Sets.....	6-12
Creating Independent Values.....	6-14
Creating Custom Privileges.....	6-15

7 Advanced Search

Managing Search Criteria.....	7-1
Managing Display Formats.....	7-5

8 Item Catalog

Browsing the Item Catalog.....	8-2
Assigning an Item to a Category.....	8-4
Copying Items with Category Assignments.....	8-5
Searching for Items.....	8-5
Managing Favorite Items.....	8-9
Using Recently Visited.....	8-10
Creating New Items.....	8-10
Creating Multiple Items.....	8-15
Managing Item Imports.....	8-17
EGO_ITM_USR_ATTR_INTRFC.....	8-19
EGO_ITM_USR_ATTR_INTRFC Column Details.....	8-21
EGO_ITEM_PEOPLE_INTF.....	8-24
EGO_ITEM_PEOPLE_INTF Column Details.....	8-26
Importing Items Using a Spreadsheet.....	8-28
Importing Item Revisions Using a Spreadsheet.....	8-31
Importing Item Categories Using a Spreadsheet.....	8-35
Importing Item Organization Assignment Using a Spreadsheet.....	8-37
Importing Item People Assignment Using a Spreadsheet.....	8-38
Updating Existing Items.....	8-40
Updating Existing Items Using a Spreadsheet.....	8-41
Mass Updating Items, Item Categories and Item Assignments	8-44

Updating Multi-Row Attributes in a Spreadsheet.....	8-49
Managing Item Specifications.....	8-51
Managing Item Phases.....	8-58
Managing AMLs.....	8-61
Creating Item Revisions.....	8-61
Managing Item Attachments.....	8-62
Using Item Business Events.....	8-67
Enabling Organization Assignments.....	8-68
Adding People.....	8-69
Managing Revision Phases.....	8-70
Managing Projects.....	8-72
Viewing Item Transaction Information	8-77
Generating Reports.....	8-79

9 Global Data Synchronization Network

Managing Items for GDSN Syndication.....	9-1
Associating GTINS for GDSN Syndication.....	9-3
Managing GTIN Cross References.....	9-4
Managing GDSN Attributes.....	9-5
Managing the Packaging Hierarchy.....	9-17
Registering Items With GDSN.....	9-21
Managing Customer Subscriptions.....	9-25
Publishing Items to a Customer.....	9-27
Query.....	9-32

10 Change Management

Change Management Overview.....	10-2
Searching for Ideas, Issues, and Changes.....	10-2
Creating Issues.....	10-4
Creating Ideas.....	10-7
Creating Change Requests.....	10-11
Creating Change Orders.....	10-20
Performing Actions.....	10-23
Managing the Action Log.....	10-25
Creating Change Revisions.....	10-26
Managing Change Header Attachments.....	10-27
Managing People and Roles.....	10-29
Managing Issue and Change Request Lines.....	10-30
Managing Change Order Revised Items.....	10-32
Managing Change Tasks.....	10-39

Creating Relationships.....	10-39
Managing Workflows.....	10-40
Importing Changes.....	10-52
Importing Changes Using the Engineering Change Order Open Interfaces.....	10-52
Engineering Change Order Open Interface Tables.....	10-55
Managing Reports.....	10-68
11 Configuration Management	
Searching for Items in a Structure.....	11-1
Viewing Item Structures.....	11-2
Managing Item Structures.....	11-4
Performing Item 'Where Used' Inquiries.....	11-5
12 Product Workbench	
Product Workbench Overview.....	12-1
Item Management.....	12-3
Creating Items.....	12-20
Overview of Product Structure and Bills of Material Management.....	12-21
Managing Bills of Material/Product Structures.....	12-26
Importing Product Structure/BOM.....	12-27
Using Multilevel Structures.....	12-31
Managing Structures Using Effectivity Control.....	12-41
Excluding Structures.....	12-42
Exclusion Rules by Product Revisions.....	12-49
Creating Structures.....	12-52
Viewing Structure Information.....	12-59
Editing Structure Information.....	12-65
Using Defined Structure Names and Types.....	12-74
Viewing Structures in the Context of a Change Order.....	12-75
Marking Up Structures.....	12-81
Creating New Issues or Change Orders.....	12-85
Valid Component Types.....	12-89
13 E-Business Suite Attachments	
Using E-Business Suite Attachments.....	13-1
Adding Attachments.....	13-3
Managing Attachments.....	13-10
Logging On to Repositories	13-23
Troubleshooting Attachments.....	13-23

14 Document Management and Collaboration

Document Management and Collaboration Overview.....	14-2
Setting Up Document Management.....	14-11
Creating User-Defined Attribute Groups.....	14-13
Setting Up Workflow Templates.....	14-14
Defining Lifecycle Phases.....	14-15
Creating Lifecycles.....	14-16
Creating Primary Categories.....	14-17
Defining Alternate Categories.....	14-18
Associating Attribute Groups To Primary Categories.....	14-19
Assigning People to a Document Primary Category.....	14-22
Associating Lifecycles with a Document Primary Category.....	14-25
Managing Document Change Policies.....	14-27
Assigning Access Policies to a Lifecycle Phase.....	14-29
Defining Primary Attributes for a Primary Category.....	14-30
Assigning Oracle XML Publisher Templates to a Document Primary Category.....	14-35
Creating Display Formats for a Document Primary Category.....	14-37
Creating Search Criteria for a Document Primary Category.....	14-38
Using Document Management and Collaboration.....	14-38
Searching for Documents.....	14-39
Creating Documents.....	14-42
Managing Document Lifecycles.....	14-48
Changing Primary and Alternate Categories.....	14-50
Using Document Versions and Revisions.....	14-52
Locking and Unlocking Documents	14-58
Reviewing and Approving Documents.....	14-59
Associating Documents with Items and Other Documents.....	14-63
Publishing Documents.....	14-65

Index

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Oracle Product Lifecycle Management User's Guide, Release 12

Part No. B31990-04

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- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

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Preface

Intended Audience

Welcome to Release 12 of the *Oracle Product Lifecycle Management User's Guide*.

See Related Information Sources on page xii for more Oracle Applications product information.

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Structure

- 1 Item Catalog Administration Overview**
- 2 Catalog Administration**
- 3 Change Management Administration**
- 4 Configuration Management Administration**
- 5 People and Roles Administration Overview**
- 6 Attributes and Function Administration**
- 7 Advanced Search**
- 8 Item Catalog**
- 9 Global Data Synchronization Network**
- 10 Change Management**
- 11 Configuration Management**
- 12 Product Workbench**
- 13 E-Business Suite Attachments**
- 14 Document Management and Collaboration**

Related Information Sources

- Oracle Applications User's Guide
- Oracle Applications Developer's Guide
- Oracle Application Framework Personalization Guide
- Oracle Applications System Administrator's Documentation Set
- Oracle Bills of Material User's Guide
- Oracle Customers Online User Guide
- Oracle Engineering User's Guide
- Oracle Inventory User's Guide
- Oracle Manufacturing APIs and Open Interfaces Manual
- Oracle Product Lifecycle Management Implementation Guide
- Oracle Projects Fundamentals User Guide

- Oracle Workflow User's Guide
- Oracle XML Publisher User's Guide

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your 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 an Oracle Applications form 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.

Item Catalog Administration Overview

This chapter covers the following topics:

- Searching for Item Catalog Categories
- Creating Item Catalog Categories
- Updating Item Catalog Categories
- Managing Import Formats
- Managing Item Statuses
- Browsing the Item Catalog Category Hierarchy
- Assigning People to an Item Catalog Category
- Associating Attribute Groups with an Item Catalog Category
- Adding Actions to an Attribute Group
- Setting Up New Item Request Types
- Associating New Item Requests with an Item Catalog Category
- Defining Item Templates
- Defining Item Numbers and Descriptions
- Creating Parameter Mappings for an Action
- Creating Pages for an Item Catalog Category
- Managing Lifecycle Phases
- Associating Lifecycles with an Item Catalog Category
- Adding Attachment Categories to an Item Catalog Category
- Deleting Attachment Categories from an Item Catalog Category
- Managing Item Change Policies
- Optimizing the Item Catalog Text Index
- Associating Report Templates with an Item Catalog Category

- GDSN Administration

Searching for Item Catalog Categories

You can search for item categories by entering search criteria for a category name, description, or parent category.

To search for item categories:

1. In the Applications tree menu, click the "Setup Workbench" link.
2. On the **Search and Select: Catalog Categories** page, enter your search criteria.
Note: When you enter a search string, the wildcard character "%" is appended to the input. For example, entering "mem" enters the search string "mem%", so that the "memory" catalog category could be returned in the search results. If you wish to search for entries that end with a particular string, such as "log", you can type in "%log", and all entries ending in "log" are returned. If you do not enter a search string in the text box, an error is returned.
3. If your search criteria is Catalog Category or Parent Catalog Category, you can also click the hierarchy icon (three linked folders to the right of the Go button) to select your Catalog Category.
4. On the **Catalog Category Hierarchy** page, navigate through the catalog category hierarchy, click the radio button next to your category and then click Select. The selected category is added to the text field on the **Search and Select: Catalog Categories** page.
5. Click Go to display the search results.

Creating Item Catalog Categories

Item catalog categories provide metadata common to all items that share the category. For example, the item catalog category "Engine" describes attributes, functions and other characteristics common to several item numbers, such as Engine M10000 and Engine M20000.

Note: Item catalog categories are hierarchically structured, with characteristics (attribute groups, functions, pages, lifecycles, criteria templates, and result formats) being inherited throughout the hierarchy.

When you create a new item catalog category that does not have a parent node (meaning it is a top node), the system associates all base attribute groups and pages with the item catalog category. You cannot delete the attribute associations, but you can delete the pages. When you create a new item catalog category that has a parent node, all base attributes and pages are inherited from the parent. If a page is deleted at the

parent node, then it is also deleted within all its child nodes. So if you wish to display pages in a particular item catalog category, but they have been deleted at the parent node, you must explicitly add them in the child item catalog category.

For a complete listing of the base (or main) attributes associated with new item catalog categories, see "Item Attributes Listed by Group Name" in the *Oracle Inventory User Guide*.

The following pages are configured for all new item catalog categories:

- Physical Attributes
- Sales and Order Management
- Planning
- Purchasing
- Inventory
- Manufacturing
- Service

To create an item catalog category:

1. On the item **Search: Item Catalog Categories** page, click the Create Item Catalog Category link.
2. On the **Create Item Catalog Category** page, enter the following:

Catalog

Defines the category name. The number of segments (and respective labels) for item catalog category depends on how the item catalog group flexfield is defined in Oracle Inventory setup.

<Key Flexfield>

All administrators have a key flexfield available for use in the "Catalog Category" section of the Create Catalog Category page. The heading and function of this field is determined by the administrator. The key flexfield is case insensitive.

Note: Any leading or ending white spaces in the key flexfield segments are trimmed automatically.

Description

Optionally enter a brief description of the item catalog category.

Parent Item Catalog Category

Specify the immediate parent of the item catalog category being created, thereby determining the item catalog category hierarchy.

Default Template

Optionally specify an item template to use to populate the **Create Item** page for any item of the item catalog category being created. On the **Create Item** page, you can modify the template to be applied upon item creation or choose not to apply a template.

Item Creation Allowed

Select to specify that items of the item catalog category can be created (if you do not select, the category only serves the purpose of being a placeholder in the catalog hierarchy). If item creation is not allowed, the category will typically specify characteristics (attribute groups, etc.) that are inherited by its descendants.

Inactive On

Optionally specify a date on which the item catalog category will become inactive. You cannot specify an inactive date that is later than the inactive date of an item catalog category's parent, nor can you specify an inactive date that has already passed. Also, all children of a parent catalog category with an inactive date should be made inactive at the same time or earlier. Making a category inactive has the following implications:

- You cannot create items of that item catalog category or any of its descendants.
- You cannot use that item catalog category or any of its descendants as the parent catalog category upon creation of an item catalog category.

3. Click Apply.

Updating Item Catalog Categories

It is likely that you will have to update item catalog categories at some point—you may need to change a category so that it can be used for item creation, or modify the inactive date so that the category will no longer be used. Often, users simply need to correct a mistake or reclassify the category due to shifting relationships within the catalog category hierarchy.

To update a catalog category:

1. On the **Search: Item Catalog Categories** page, search for the item catalog category you wish to update and click the corresponding link.
2. On the **Basic Information** page for the item catalog category, click Update.
3. On the **Edit Item Catalog Category** page, enter the following information:

Item Catalog Category (required)

Defines the category name. The number of segments (and respective labels) for catalog category depends on how the item catalog group flexfield is defined in Oracle Inventory setup.

<Key Flexfield>

All administrators have a key flexfield available for use in the "Catalog Item Category" section of the **Create Item Catalog Category** page. The heading and function of this field is determined by the administrator. The key flexfield is case insensitive.

Note: Any leading or ending white spaces in the key flexfield segments are trimmed automatically.

Description

Optionally enter a brief description of the catalog category.

Parent Catalog Category

If at any time a parent catalog category has been created for this item catalog category, then you cannot leave this field blank. In other words, once you have defined a parent for an item catalog category, you always have a parent catalog category. Also, if a parent catalog category has already been defined, then you can only choose the current parent catalog category, its siblings, or its sibling's children as a parent catalog category.

Default Template

Optionally specify an item template to use to populate the Create Item page for any item of the catalog category being created. On the Create Item page, you can modify the template to be applied upon item creation or choose not to apply a template.

Item Creation Allowed

Select to specify that items in the item catalog category can be created (if you do not select, the category only serves the purpose of being a placeholder in the catalog hierarchy). If item creation is not allowed, the category will typically specify characteristics (attribute groups, etc.) that are inherited by its descendants.

Inactive On

Optionally specify a date on which the item catalog category will become inactive. You cannot specify an inactive date that is later than the inactive date of a catalog category's parent, nor can you specify an inactive date that has already passed. Thus, all children of a parent catalog category with an inactive date should be made inactive at the same time or earlier. Making a category inactive has the following implications:

- You cannot create items of that catalog category or any of its descendants.

- You cannot use that catalog category or any of its descendants as the parent catalog category upon creation of a catalog category.

Note: After you've updated an inactive date, the change propagates to all of the catalog category's children.

4. Click Apply.

Managing Import Formats

To import items and item revisions from the system into an Excel spreadsheet, you must use an import format. An import format identifies the base and user attributes in an item catalog category that will be imported into the spreadsheet. Consequently, when you import items from an Excel spreadsheet, the items are all imported to a particular item catalog category defined in the import format. These imported items inherit all the attribute groups defined for the specific item catalog category. You can also copy, update and delete import formats.

You can define import formats for both items and item revisions

Import formats are always created in the context of a particular item catalog category.

If users do not select an item catalog category when importing items or item revisions, the default System Item import format is available for use. If an import format has not yet been defined for an item catalog category that a user selects, then the default System Item import format is available for use. The System Item import format does not appear if a user selects an item catalog category that already has import formats defined. You cannot modify the System Item import format.

Items uploaded to the system from a spreadsheet become, by default, Engineering items. If you wish to upload a non-Engineering item, then include an available base attribute column called "Engineering Item Flag" in your import format. When uploading the spreadsheet identify such items in this column by specifying the value "Yes" or "No" in this column. If you leave the column blank, the item once again defaults to an Engineering item.

To create an item import format:

1. In the Applications tree menu, click the Setup Workbench link.
2. On the **Search: Catalog Categories** page, locate the item catalog category for which you wish to create the import format, and click its name link.
3. On the **Basic Information** page for the item catalog category, click the Import Formats link.
4. On the **Import Formats** page, click Create.

5. On the **Create Import Format** page, provide the following information:

Name

Provide the name of the import format you are creating for the item catalog category.

Description

Provide a description of the import format.

Set as Default

Select the checkbox if you wish for this import format to be the default import format for the item catalog category in which it is created.

Note: There can be only one default import format for each item catalog category.

Import

Select the object for which the import format is being created. Item is the default. If you select Item Revision, notice that the base attributes listed in the Available Columns table below now display the base attributes of the item revision rather than those of the item.

6. Click Go after selecting the Import object (item, item revision).
7. After the **Create Import Format** page refreshes, specify the columns/attributes you want to display in the import format. Note that you can rename the columns that will appear in your import format by clicking Rename Columns. On the **Rename Columns** page, the original column names that you have already selected are listed. Enter the new column names in the New Column Name field and click Continue.

If there are more columns/attributes than can be easily scrolled in the list, you can filter the list by providing the attribute group and clicking Go, or providing the attribute name and clicking Find.

Note: You can select either single or multi-row attributes to include in the import format.

8. Click Apply

Note: When importing data using Excel, you can use a combination of 220 character fields, 200 numeric fields, and 50 date fields, subject to an overall 255 field limit. For example, an import format can include 220 character columns and 35 numeric columns for a total of 255 columns. If you use a display format to export and

import data, the same restriction applies.

To copy an import format:

1. Navigate to the **Import Format** page. See: To create an item import format, page 1-6.
2. On the **Import Formats** page, locate the import format you wish to copy and click its Copy icon in the Copy column.
3. On the **Copy Import Format** page, note that a new name is defaulted, as well as the description. You can change either, and also add or remove attributes in the Available Columns and Columns Displayed.

Note that you can rename the columns that will appear in your import format by clicking Rename Columns. On the Rename Columns page, the original column names that you have already selected are listed. Enter the new column names in the New Column Name field and click Continue.

If there are more columns/attributes than can be easily scrolled in the list, you can filter the list by providing the attribute group and clicking Go, or providing the attribute name and clicking Find.

Note: You can select either single or multi-row attributes to include in the import format.

4. Click Apply.

To update an import format:

1. Navigate to the **Import Format** page. See: To create an item import format, page 1-6.
2. On the **Import Formats** page, locate the import format you wish to update and click its name link.
3. On the **Edit Import Format** page, you can change the name, description, default setting and add or delete attributes/columns as needed.

Note that you can rename the columns that will appear in your import format by clicking Rename Columns. On the **Rename Columns** page, the original column names that you have already selected are listed. Enter the new column names in the New Column Name field and click Continue.

If there are more columns/attributes than can be easily scrolled in the list, you can filter the list by providing the attribute group and clicking Go, or providing the attribute name and clicking Find.

Note: You can select either single or multi-row attributes to include in the import format. Also, you cannot modify the System Item import format.

4. Click Apply.

To delete an import format:

1. Navigate to the **Import Format** page. See: To create an item import format, page 1-6.
2. On the **Import Formats** page, locate the import format you wish to delete, select it and click Delete.

Related Topics

Defining Item Catalog Import Formats, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*

Managing Item Statuses

An item status is assigned to a lifecycle phase; in fact, each lifecycle phase can have multiple item statuses associated with it. You should create item statuses, or edit item statuses appropriately before associating them with lifecycle phases.

To create an item status:

1. On the **Search: Item Catalog Categories** page, click the Lifecycle Phases tab.
2. On the **Search: Lifecycle Phases** page, click the Item Statuses link.
3. On the **Search: Item Statuses** page, click the Create Item Status link.
4. On the **Create Item Status** page, provide the following information:

Status

The name of the item status.

Description

The description of the item status.

Inactive Date

The date on which the item status is no longer valid and available for use.

5. Select the Value checkboxes that correspond to the attributes that you wish to associate with the item status.

6. Click Apply.

To edit an item status:

1. In the Applications tree menu, click the Setup Workbench link.
2. On the **Search: Item Catalog Categories** page, click the Lifecycle Phases tab.
3. On the **Search: Lifecycle Phases** page, click the Item Statuses link.
4. On the **Search: Item Statuses** page, select the item status that you wish to edit.
5. On the **Item Status Details** page, click Update.
6. On the **Edit Item Status** page, update the Description, Inactive Date, or, select an attribute you wish to apply.
7. Click Apply.

Related Topics

Defining Lifecycle Phases, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*

Browsing the Item Catalog Category Hierarchy

Item catalog categories are structured hierarchically. You can expand and collapse levels in the hierarchy to view the current structure of your catalog.

To browse the item catalog category hierarchy:

1. On the **Search: Item Catalog Categories** page, click the Catalog Hierarchy link.
2. On the **Hierarchy: Item Catalog** page, click the arrow icons to expand or collapse levels of the hierarchy.
3. Click the focus icon next to the desired item catalog category to display it at the top level.
4. Click an item catalog category link to view the corresponding **Basic Information** page.

Assigning People to an Item Catalog Category

Roles assigned to people for an item catalog category determine the set of privileges that the assignee will have on items of that item catalog category. There are two sets of

role assignments for an item catalog category:

Catalog People

Roles specified under "catalog people" apply at the item catalog category level. For example, the role "Item Catalog Category User" grants the assignee the ability to create items of that catalog category.

Item People

Roles specified under "item people" for a given item catalog category are propagated to any item of that item catalog category.

To assign people to a catalog category:

1. On the **Search: Item Catalog Categories** page, locate the desired item catalog category and click its corresponding name link.
2. On the **Basic Information** page for the item catalog category, click the People link.
3. On the **People** page, in the "Item Catalog Category People" section, click Update to assign people to the item catalog category.
4. On the **People For** page, click Add People to create an empty row on the table.
5. Select a Role, Type, Name, and Start Date for each person you are adding.
6. Click Apply after all people have been added.
7. On the **People** page, in the "Item People" section, click the flashlight icon to select the organization to which the item people apply.
8. Click Update to assign item people.
9. On the **People For** page, click Add People to create an empty row on the table.
10. Select a Role, Type, Name, and Start Date for each person you are adding.
11. Click Apply after all item people have been added to the category.

Associating Attribute Groups with an Item Catalog Category

Attributes are details that further define the item and specify the item's behavior. For example, Physical item attributes identify the size, shape, and color of an item.

Attribute groups represent the logical grouping of similar item attributes. They collect characteristics (attributes) that can be used to record specifications or represent the properties of an item belonging to an item catalog category. Attribute groups can be associated with an item catalog category at the item or item revision levels, thereby determining whether attribute values change over revisions.

Note: Attribute groups inherited from a parent catalog category cannot be deleted at the child catalog category level. Attribute groups can be inherited from a parent catalog category *and* explicitly added to the catalog category itself. Administrators should not associate the same attribute group with an item catalog category in this manner.

Note: Common attribute group values will be retained even after moving to the target item catalog category.

To associate an attribute group with an item catalog category:

1. On the **Search: Item Catalog Categories** page, search for the item catalog category, page 1-2 and click its corresponding name link.
2. On the **Basic Information** page of the item catalog category, click the Attribute Groups link.
3. On the **Attribute Groups** page, click Add.
4. On the **Add Attribute Groups to Catalog Category** page, select the attribute groups you wish to associate with an item catalog category. Also select the Data Level for each.
5. Click Apply.

Related Topics

Defining Item Attributes and Attribute Groups, *Oracle Product Information Management Implementation Guide* or *Oracle Product Lifecycle Management Implementation Guide*

Associating Item Catalog Attributes, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*

Adding Actions to an Attribute Group

You can associate user-defined actions with an attribute group in the context of an item catalog category. A user-defined action describes a function that, at run-time, can be invoked by the user. Attributes of the attribute group can be mapped to function parameters, so that their values are dynamically passed during function invocation.

To add an action to an attribute group associated with an item catalog category:

1. On the **Search: Item Catalog Categories** page, locate the appropriate item catalog

category and click its name link.

2. On the **Basic Information** page, click the Attribute Groups link.
3. On the **Attribute Groups** page, click the Edit Actions icon.
4. On the **Actions** page, click Add.
5. On the **Create Action** page, provide the following information:

Sequence

If there are multiple actions associated with an attribute group, the sequence number determines the order in which they are displayed to the user.

Action Name

The name of the action.

Description

The description of the action.

Function

Associates an existing function with the action. The function has a name, type, and specified parameters.

Security Privilege

The privilege required by a user in order for that user to execute this action.

Execution Method

The manner in which the action is executed.

Display Style

Defines the user interface element that executes the action.

Prompt Application

The application of the prompt for the action if the prompt is defined in the database.

Prompt Message Name

The message name of the prompt if the prompt is defined in the database. Otherwise, the actual prompt.

Dynamic Prompt Function

Selects an existing function whose return value will define the prompt of the action. Must have parameter of type Return, with data type String.

Dynamic Visibility Function

Selects an existing function whose value will determine whether or not the action is

rendered.

6. Click Apply.

Setting Up New Item Request Types

Important: Before setting up a new item request type, you must have already defined a workflow template. For details, see *Creating Workflows*, page 3-23.

New Item Request is a seeded Change Management category for which you must define a Type before you can set up new item requests for an item catalog category. For more details, see *Associating New Item Requests with an Item Catalog Category*, page 1-16.

When users create items in item catalog categories that require an item request, the New Item Request Type specified for the item catalog category determines how the request is routed for distribution and approval, and identifies the approvers for the new item. For example, the New Item Request Type determines what item request attributes and sections are available on pages; it determines the valid priorities and reasons available to users; it also determines the valid statuses for the request (for example, Open, Approval, and Closed). In essence, the new item request change type defines the process for routing the collection of item attributes and approval requests from various people who are internal (such as Engineering and Manufacturing) or external to your organization (such as Suppliers).

To define a new item request type:

1. On the Change Management **Categories** page in the Setup Workbench, select the New Item Request category and click the New Item Request Types link. When the page refreshes click Create.
2. On the **Create New Item Request Type** page, enter information in the required fields.

The Number Generation field provides multiple methods for item number request generation, but you can only select the Sequence Generated method for the new item request type. When using the sequence generated item request numbering method, all item number requests automatically generate based on the sequence generation rules specified here. Specify a prefix, starting number, and increment.

Note: The Number Generation field on the **Create New Item Request Type** page applies to the number generation for new item requests, not for new items. Item number generation is defined at the item catalog category level.

You can set up the default Assignee for all new item requests of this Type in the Default Assigned To section.

3. After creating the New Item Request Type you can continue the setup tasks via the side navigation links on the **Basic Information** page.

Click the Attribute Groups link to associate attribute groups with the New Item Request type.

Click the Pages link to organize the associated attribute groups on one or more **New Item Request** pages.

Click the Codes link to associate valid priorities and reasons for new items that are created with this request type.

Click the Configuration link to select the display sections and primary attributes that you wish to make available for this request type.

Click the Lifecycle link to associate different lifecycle phases with the request type. Click the Properties icon to set up valid phases for promotion, demotion and the associated workflow. Depending on which workflow template that you select, you can then specify the following:

- **Allow Updates**
Indicates that the item request type will allow updates to the item request while the workflow is running.
- **Auto Promote**
Indicates that when the workflow completes successfully and all required approvers have approved, the item request will automatically be promoted to the next valid phase.
- **Auto Demote**
Indicates that when the workflow completes successfully and all required approvers have approved, the item request will automatically be demoted to the previous phase.
- **Enable Digital Signature**
Indicates that users who are expected to approve or reject the item request must enter their username and password to reauthenticate themselves.

Related Topics

Defining New Item Request Types, Oracle Product Information Management Implementation Guide or *Oracle Product Lifecycle Management Implementation Guide*

Setting Up New Item Request for an Item Catalog Category, Oracle Product Lifecycle Management Implementation Guide or *Oracle Product Information Management*

Associating New Item Requests with an Item Catalog Category

Important: Before associating new item requests with an item catalog category, you must set up *both* a workflow template and a new item request type. For details, see *Creating Workflows*, page 3-23 and *Setting Up New Item Request Types*, page 1-14.

You can define a new item approval request for all items created in a particular item catalog category. Defining a new item approval request enables an enterprise to enforce standard business processes during item creation, thereby avoiding costly mishaps, such as duplicate parts. New item approval requests enable your enterprise to have different people from various lines of business help define the many item attributes required during item creation.

You can set up a new item request for an item catalog category to request approval from several people in sequence or parallel. Each person may also be required to enter certain item attributes during the approval process.

To associate new item requests with an item catalog category:

1. On the **New Item Request** page, click Update in the Item Request section and select Yes from the New Item Request Required pop-up menu. Specify the Item Request Type to be used for the new item request. For more details see *Setting Up New Item Request Types*, page 1-14.
2. In the Workflow/Approval section, you can specify which people are required to enter attributes during the workflow process for each lifecycle phase of the new item request. For example, when the new item request is in the Open phase, one person in the workflow may be responsible for some technical specifications associated with the new item being created; another might need to provide details about the new item's safety standards--in this case you would be sure to associate the attribute groups related to technical specifications and safety standards so that the appropriate people can add the information necessary to define all aspects of the new item. You can set up the collection of user-defined attributes during the new item request process for any attribute group associated with the item catalog category.

The Workflow/Approval Routing section associated with each lifecycle phase of the New Item Request determines which Workflow/Approval steps and people are available for entering item attributes during the lifecycle of the request. You can specify the attribute groups that each person in each step of the Workflow/Approval routing is responsible for entering. For more details, see *Creating Workflows*, page 3-23 and *Setting Up New Item Request Types*, page 1-14

People associated with the Workflow must also have sufficient privileges on the item for which you are creating a request. To ensure the appropriate people have sufficient privileges to view and update the attributes on the item for which they are responsible, you should confirm that they have the appropriate role at the organization or item catalog category level.

Defining Item Templates

Users can specify an *item template* during the item creation process. An item template is a defined set of attribute values used during item creation. When you apply a template to an item, you overlay or default in the set of attribute values to the item definition. For example, every time users in a particular organization create new items, the attributes as defined and approved by the organization appear in the appropriate fields--no user guesswork is required, and much time is saved during the creation of items with a similar form, fit and function.

You can create item templates that contain either the operational attributes for an item, which are visible to all organizations, or user-defined attributes, which are specific to an item catalog category. When you explicitly associate a template with an item catalog category, it is made available for all create and update item actions in that item catalog category. Also, the values for the user-defined attributes that are specified in the template are inherited from parent to child within the particular item catalog category. After creating the item template for use with user-defined attributes, you must associate it with an item catalog category.

For more details about creating item templates that use operational attributes, as well as a listing of the Oracle provided templates, see the *Oracle Inventory User's Guide*.

To define an item template and specify user-defined attributes:

1. On the **Search: Templates** page, click Create.
2. In the Oracle Forms **Find Item Templates** window, click New.
3. Provide the item template name and description, and then specify the operational attributes and the default values. When finished, save the template.
4. Navigate to the item catalog category to which you wish to associate the new item template and click the Templates link.
5. On the **Templates** page, click Add Template.
6. On the **Add Templates to Item Catalog Category** page, locate the new template, select it and click Apply.
7. On the **Templates** page for the item catalog category, click the item template to which you wish to add user-defined attributes.

8. On the **Update Template** page, select the user-defined attributes you wish to add to the template. You can also make this the default item template for all new items created in this item catalog category by selecting Set as Default. Click Apply.

Related Topics

Setting Up Item Templates, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*

Defining Item Numbers and Descriptions

You can define new item numbers and descriptions so that they are automatically generated when users create new items. Setting up autonumber generation ensures that new items created in item catalog categories have a consistent numbering scheme. You can set up item number and description generation so that numbers/descriptions are either:

- Sequence generated

If the item request numbering method is sequence generated, then all item number requests will be automatically generated based on the sequence generation rules specified here. You can specify a prefix, starting number, increment, and suffix.

Note: Sequence generation does not apply to Item Description generation--it is for item number generation only.

- Function generated

If the item request numbering/description method is function generated, then all number/descriptions for new items in the item catalog category will be automatically generated based on a custom function. When specifying that an item number/description is function generated, select the function that you want to use, and then map the function parameters to the user-defined attributes that you want included in the item number/description. When you create a new item, users will be prompted to enter the user-defined attributes used in generating the item number/description.

Note: You must have already defined a custom function before using this item number/description generation method. For details, see *Creating User-Defined Functions*, page 6-6.

- Inherited from parent

If the item request numbering/description generation method is inherited from parent, then the item number/descriptions for the items will be generated using the

same method as the parent item catalog category.

Note: All item catalog category subcategories have, by default, a number/description scheme that is inherited from parent.

- User entered

If the item request numbering/description method is user entered, then the user is required to manually enter a number or a description for new items.

To define automatic item number/description generation:

1. On the **Basic Information** page of an item catalog category, click either the Number Generation or Description Generation link. On the **Auto Generation** page for the generation method you selected, click Update.
2. On either the **Item Description Generation** or **Item Number Generation** page, select the generation method you wish to use and fill in the required fields.

Creating Parameter Mappings for an Action

After creating an action, you should specify the values that will be passed to its associated functions when that action is executed. You can have up to three associated functions: the main function, the dynamic prompt function and the dynamic visibility function.

To create parameter mappings for an action:

1. On the **Actions** page, click the name of the action you just created.
2. On the **Action Details** page, within the appropriate function heading, click Edit.
3. On the **Create Mappings** page, for each function parameter select the following:

Mapping Group Type

The type of attribute that will be mapped to this parameter.

Mapped Attribute

The actual attribute that is mapped. Only attributes with the data type that matches the parameter data type are available.

4. Click Apply.

Creating Pages for an Item Catalog Category

Item pages provide a mechanism to customize the user interface. The administrator can combine and sequence attribute groups into pages. There is no limit on the number of attribute groups associated with a page. However, attribute groups contained in a page must have the same association level, for example, they must all be "item level" or "item revision level" attribute groups.

Note: Pages inherited from a parent catalog category cannot be deleted at the child catalog category level. Pages can be inherited from a parent catalog category *and* explicitly added to the catalog category itself. Administrators should not associate the same pages with an item catalog category in this manner.

To create a page for an item catalog category:

1. On the **Search: Item Catalog Categories** page, search for the item catalog category, page 1-2 and click its corresponding name link.
2. On the **Basic Information** page for the item catalog category, click the Item Pages link.
3. On the **Item Pages** page, click Add.
4. On the **Create Item Catalog Category Page** page, enter the following:

Display Name

Enter the name to be displayed in the user interface.

Internal Name

Enter the internal name. The internal name cannot be updated once a page has been created.

Description

Enter a description of the catalog category page.

Sequence

Enter the sequence number. For each page associated with a catalog category, a corresponding link is displayed to the user on the Item Detail page. The sequence number determines the order for the page links on the **Item Detail** page.

Data Level

Select Data Level and click Go. The data level constrains applicable attribute groups. The data level cannot be updated after a page has been created.

Note: If you change the data level after you have already associated attribute groups with a page, those attribute groups will no longer be associated with the page.

5. Click Add Another Row if you wish to add an attribute group to the page being created.
6. Click Apply.

Managing Lifecycle Phases

Lifecycle phases can have multiple item statuses. Potential item statuses should be defined and edited appropriately before they are associated with a lifecycle phase.

For more information about lifecycle phases see:

- Defining Lifecycles, *Oracle Product Lifecycle Management Implementation Guide* or *Product Information Management Implementation Guide*
- Associating Lifecycles to Item Catalog Categories, *Oracle Product Lifecycle Management Implementation Guide* or *Product Information Management Implementation Guide*

To edit a lifecycle phase:

1. In the Application tree menu, click the Setup Workbench link.
2. On the **Search: Item Catalog Categories** page, click the Lifecycle Phases tab.
3. On the **Search: Lifecycle Phases** page, click the lifecycle phase you wish to edit.
4. On the **Phase Details** page, click Update.
5. On the **Edit Phase Details** page, provide the following information:

Item Status

The valid item status associated with a phase. You can specify more than one. If no item status is associated, then there is no default item status. When you specify the first item status, that value becomes the default. If you delete your default item status, then the next item status in the list becomes the default. To add a new item status, click Add Another Row. To make that new item status the default, click the default icon in the Default column.

6. Click Apply.

Associating Lifecycles with an Item Catalog Category

Important: The ability to associate a lifecycle tracking project to an Item and/or Item revision is only available to customers who have licensed Product Lifecycle Management, and it is not available to licensees of Product Information Management.

You can associate any number of lifecycles with an item catalog category. During creation of an item belonging to the item catalog category, you can choose the applicable lifecycle for the item from the set of lifecycles associated with the item catalog category.

Note: Lifecycles inherited from a parent catalog category cannot be deleted at the child catalog category level. Lifecycles can be inherited from a parent catalog category *and* explicitly added to the item catalog category itself. Administrators should not associate the same lifecycle with an item catalog category in this manner.

To associate a lifecycle with an item catalog category:

1. In the Applications tree menu, click the Setup Workbench link.
2. On the **Search: Item Catalog Categories** page, search for the item catalog category, page 1-2 and click its corresponding name link.
3. On the **Basic Information** page for the item catalog category, click the Lifecycles link.
4. On the Lifecycles page, click Add.
5. On the **Search and Select: Lifecycles** page, select the lifecycle you wish to associate with the item catalog category.
6. Click Apply.

Related Topics

Associating Lifecycles to Item Catalog Categories, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*

Adding Attachment Categories to an Item Catalog Category

To add attachments to an item, users need to specify an attachment category.

Attachment Categories sort and organize attachments that users might attach to an item or items. They provide a way to classify attachments—this classification identifies the purpose of the attachment to the business object, and can also be used as one of the search criteria within an attachment list. If users do not specify an attachment category for an item catalog category, and none are inherited from its parent catalog category, they always have the option of using the attachment category "Miscellaneous"

When moving attachment categories, only those attachments whose categories are common between the source and target catalog categories will be retained.

By adding attachment categories, you can classify all attachments that you add to specific item catalog categories.

Note: Attachment categories inherited from a parent catalog category cannot be deleted at the child catalog category level. Attachment categories can be inherited from a parent catalog category *and* explicitly added to the catalog category itself. Administrators should not associate the same attachment category with an item catalog category in this manner.

The following attachment categories are available for all item catalog categories:

- CADView-3D Model
- Description
- Image
- Item Internal
- Miscellaneous
- To Buyer
- To Supplier
- To Receiver
- To Mobile Picker
- To Mobile Putaway
- To Mobile Receiver

To add an attachment category to an item catalog category:

1. On the **Search: Item Catalog Categories** page, locate the item catalog category to which you wish to attach an attachment category.

2. On the **Basic Information** page of the item catalog category, click the Attachment Categories link.
3. On the **Attachment Categories** page, click Add.
4. On the **Search and Select: Attachment Categories** page, select an attachment category from the list. You can also search within the list for a specific attachment category and then select it.
5. Click Apply.

Deleting Attachment Categories from an Item Catalog Category

To delete an attachment category from an item catalog category:

1. On the **Search: Item Catalog Categories** page, locate the item catalog category from which you wish to delete an attachment category.
2. On the item catalog category's **Basic Information** page, click the Attachment Categories link.
3. On the **Attachment Categories** page, select the attachment categories you wish to remove from the item catalog category.
4. Click Delete.

Related Topics

Defining Item Attachment Categories, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*

Managing Item Change Policies

Important: Before defining an item change policy you must first define a lifecycle and its phases, and then associate it with an item catalog category. For more details see *Managing Lifecycle Phases*, page 1-21 and *Associating Lifecycles within an Item Catalog Category*, page 1-22.

Administrators can define and update item change policies for item catalog categories. These item change policies determine the rules for how and when an item's attributes, attachments, and associations are changed. For example, a company manufacturing an engine that has hundreds of specifications may wish to define item change policies for the different phases of development. So when the engine is in the concept or design phase, many of the attributes are allowed to change without formal approval, and the

lifecycle policy is not very restrictive. When the engine progresses to the prototype phase, the company might wish to place all attributes, attachments, and associations under stricter change control, perhaps requiring a change order for all modifications. Later, when the engine is in the production phase, the company will likely want every facet of the engine's production under tight control.

Defining item change policies enables a company to:

- Specify whether or not item changes are allowed in a particular lifecycle phase of an item lifecycle
- Specify what types of changes (attributes, attachments, associations, structures) are allowed for an item in each lifecycle phase
- Specify whether or not a change order is required to make particular changes to an item in a specific lifecycle phase

Note: Change policies inherited from a parent catalog category cannot be edited at the child catalog category level.

If you do not define a change policy for an item, then by default changes are allowed in all lifecycle phases.

Item change policies only take effect after the item has been Approved.

To define or update an item change policy:

1. On the **Search: Item Catalog Categories** page, search for the item catalog category (see: Searching for Item Catalog Categories, page 1-2) for which you would like to define an item change policy, and click its name link.
2. On the **Basic Information** page for the item catalog category, click the Lifecycles link.
3. On the **Lifecycles** page, locate the lifecycle for which you wish to define a change policy. If no lifecycles are listed, associate the lifecycle for which you wish to define item change policies.

Select the item change policy (for attributes, associations, attachments, structures) you wish to define for the selected lifecycle, and then select the lifecycle phase.

4. On the **Update Change Policy for Attributes** (Associations, Attachments, or Structures) page, select the appropriate attribute group (association or attachment category) and the change policy you wish to apply for the particular phase. The valid change policies are:
 - Allowed

- Not Allowed
- Change Order Required

Important: Before establishing a change policy for attributes or attachments, you must first associate the attribute group or attachment category with the item catalog category.

You can switch back and forth among the various lifecycle phases via the tabs on the **Update Change Policy for Attributes** (Associations or Attachments) page.

Related Topics

Defining Change Policies, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*

Optimizing the Item Catalog Text Index

As item data changes over time due to ongoing item insert, delete, or update operations, the query response time may gradually decrease. Optimizing the index using the Optimize Item Catalog Text Index concurrent program removes old data and minimizes index fragmentation, and therefore can improve query response time.

The Item Catalog Text Index should be optimized:

- After the import of many items
- After deleting or updating of many items
- On a regular basis (it is recommended that you do this at regular intervals--for example, twice a week)
- When you notice slow performance for item simple search

Note: This program optimizes at most 16,000 items per single run. To continue optimizing more items, re-run the program.

To optimize the catalog text index:

1. In the Applications tree menu, click the "View Concurrent Requests" forms link.
2. In the **Find Requests** form, click Submit a New Request.
3. In the **Submit a New Request** form, select Single Request and click OK.

4. In the **Submit Request** form, select Optimize Item Catalog Text Index from the Name list of values.

5. In the **Parameters** form, provide the Program parameter values:

FAST

This optimization method compacts fragmented rows. However, old data remaining from deleted rows is not removed.

FULL

This method both compacts rows and removes old data (for example, performs garbage collection).

Maximum Optimization Time

Specify the maximum optimization time, in minutes, for FULL optimize.

If you do not enter a value, the program runs until the entire index is optimized. If you specify a maximum time, the program performs as much work as allowed by the imposed time limit. The optimization picks up and continues the next time the program is run. When you specify 0 for maximum time, Oracle performs minimal optimization.

6. Click Submit.

Associating Report Templates with an Item Catalog Category

Important: Before associating Report Templates you must first create Report Templates using XML Publisher Administration responsibility.

Report Template is the framework of your final Item report. It contains the item attributes and its layout. Report templates are created for various purposes. For example, Report template for a data sheet will be different from the template created for Item RoHS material specifications report or for GDSN Attributes. Depending upon their use, report templates can be associated with an Item Catalog Category. You can associate more than one Report template to an Item Catalog Category.

Note: Report Templates inherited from a parent catalog category cannot be deleted at the child catalog category level. Report templates can be inherited from a parent catalog category and explicitly added to the catalog category itself.

To associate a Report Template to an Item catalog category:

1. Locate the Item catalog category to which you want to associate the Report

Template.

2. On the **Item Catalog Category: Basic Information** page, click Report Template.
3. Click Add
4. Select the Report Template you want to associate to the Item Catalog Category.
5. Click Apply.

For more information about report templates, see:

- Creating the Template, *Oracle XML Publisher User's Guide*
- Defining Report Templates Using XML Publisher in the *Oracle Product Lifecycle Management Implementation Guide* or the *Product Information Management Implementation Guide*

To generate an XML Publisher document:

See: Using the Concurrent Manager to Generate Your Custom Output, *Oracle XML Publisher User's guide*

GDSN Administration

Important: To use GDSN Administration, you must have licensed Oracle Product Data Synchronization for GDSN and UCCnet Services. You must also set the "EGO GDSN Enabled" profile option to Yes.

Managing the Default GDSN Catalog

Product Data Synchronization for GDSN and UCCnet Services includes two new GDSN Syndication functional areas. Associate a Catalog to these functional areas per the GDSN data pool requirement.

These functional areas are:

- GDSN Syndication – UDEX: As the name suggests, you associate a UDEX Catalog to this functional area. You must associate a UDEX Category to an item to register an item with 1SYNC.
- GDSN Syndication – GPC: Associate a GPC Catalog to this functional area. This is mandatory if the supplier is synchronizing data with a retailer connected to the GDSN network. If the supplier and retailer use 1SYNC as their data pool, then the UDEX Category is sufficient.

You can associate an existing catalog that you are currently using or create a new catalog for both of these functional areas.

To associate a default Catalog to a GDSN Syndication functional area:

1. Navigate to the Catalogs tab in the Setup workbench.
2. Click Default Catalogs.
3. Click Update.
4. For the GDSN functional area, select a default Catalog and click Apply to save it.

Managing the Included GDSN Attribute Groups

Product Data Synchronization for GDSN and UCCnet Services includes 27+ attribute groups containing 150+ GDSN attributes. Update the default setup of these attributes to match your business processes.

Update the following attribute details:

- Display Name
- Sequence
- Tip
- Enabled
- Required
- Display
- Indexed
- Unit of Measure
- Value set name
- Default Name

You cannot delete the included attributes.

To update a GDSN Attribute within a GDSN Attribute group:

1. Navigate to the Items tab in the Setup workbench.
2. Click the Attributes sub-tab.
3. Find attribute group by name, description, internal name and type. The Attribute Group type for GDSN attributes is 'Item GTIN Single Row Attributes' or 'Item GTIN Multi Row Attributes'.
4. Click the Attribute Group name link.

5. You cannot add or delete any attributes.
6. You can update the attribute details mentioned above.

Associating GDSN Attribute Groups to an Item Catalog Category

By default, the GDSN attribute groups, except for the Hardlines and FMCG industry-specific attribute groups, are associated with the Root Item Catalog Category. Delete the association and re-associate attribute groups to a different Item Catalog Category.

In addition, Item pages are created for each Root Item Catalog Category. Delete the Item pages and create or modify existing pages with GDSN attribute groups.

If you plan to send Hardlines or FMCG industry-specific attribute information to your customer, associate those attributes to the Item Catalog Category, and create Item pages to display them. For details on managing attribute group associations, see *Associating Attribute Groups*, page 1-11 with an Item Catalog Category. For details on creating Item pages, see *Creating Pages for an Item Catalog Category*, page 1-20.

Defining GTIN Number Setup

Important: You do not need to have Oracle Product Data Synchronization for GDSN and UCCnet Services to use GTIN functionality. This functionality is generally available in the system.

Define new GTIN numbers so that they are automatically generated. Setting up autonumber generation ensures that new GTINS being created have a consistent numbering scheme. Define a GTIN number as:

- Function-generated

If the GTIN numbering method is function-generated, then all the GTIN numbers are automatically generated based on a custom function. To specify that a GTIN number is function-generated, select the desired function, then map the function parameters to the user-defined attributes that you want to include in the GTIN Number generation scheme. When you create a new GTIN, you are prompted to enter the user-defined attributes used in generating the GTIN Number.

- User-entered

If the GTIN numbering method is user-entered, then the user manually enters a 14-digit number.

To define automatic GTIN Number generation:

1. Navigate to the Items tab in the Setup workbench.
2. Click the GTIN sub-tab.
3. Select the generation method and enter the required fields.

Catalog Administration

This chapter covers the following topics:

- Creating Categories
- Creating Catalogs
- Assigning a Category to a Catalog
- Catalog Category Mapping
- Creating a Category Hierarchy within a Catalog
- Updating a Category Hierarchy within a Catalog
- Deleting a Category from a Catalog
- Assigning People to a Catalog
- Assigning People to a Valid Category

Creating Categories

A category is a logical classification of items that have similar characteristics. Before creating a product catalog (also known simply as a catalog), you must have first created the appropriate category.

Note: You can automatically trigger actions based on creating, updating, or deleting a category. See: *Item Business Events, Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide* and *Managing Business Events, Oracle Workflow Developer's Guide*.

To create a category:

1. On the **Search: Item Catalog Categories** page, click the Catalogs tab.

2. On the **Search: Catalogs** page, click the Categories tab.
3. On the **Search: Categories** page, click the "Create Category" link.
4. On the **Create Category** page, select a Flex Structure and click Continue.

You must enter a flexfield structure. You can define multiple segment structures for the item categories flexfield structure. Each segment in the structure can have its own display name and its own prompt.

If you choose a multi-segment flexfield structure you can assign a specific meaning to each segment. For example, if you want to group items according to product line and product information, then you can use the first segment to represent product line and the second segment to represent the product.

Note that the categories that you assign to a catalog must have the same flexfield structure as the catalog itself. This is true even if you choose not to validate the category list.

The "Category" section of the **Create Category** page is refreshed and populated with fields defined by the flexfield structure you have chosen. Provide the information in the remaining fields of the "Category" section.

5. In the "Category Details" section, provide the following information:

Description

Enter a meaningful description of the category.

Inactive on

Select an inactive date for this category. As of the inactive date, you can no longer assign this category:

- As the default category of a new catalog
- As a valid category of a catalog
- To an item
- As a valid category of an item catalog category

You cannot set the inactive date to a date in the past. However, you can change the inactive date to one that is in the future. You cannot assign an inactive date to a category that is the default for a mandatory catalog set.

Iprocurement

The default is disabled (unchecked); this field cannot be modified unless the category is the default category for the purchasing functional area.

Viewable By Supplier

The default is enabled (checked); this field cannot be modified unless it is the

default category for the purchasing functional area.

6. Click Apply

Creating Catalogs

Before creating a catalog, it is a good idea to first understand its purpose and function. It may be easiest if you first understand what makes up an item catalog. The item catalog basically contains all items defined for your company or organization. Item catalogs are hierarchical, and relationships between the various item catalog categories (such as an item's catalog category attributes) are inherited. Catalogs are also hierarchical; however, relationships between the categories are not inherited. Instead, relationships between the categories are explicitly defined by the administrator. A catalog contains some user-defined subset of items that exist in the item catalog. The following table highlights some of the key differences between an item catalog and a catalog.

Important: *Category sets* (in Oracle Inventory) are now available for use in the system as *catalogs*. You can add people to catalogs and enable them to browse. You can also create a hierarchy to reflect the category set taxonomy (which now appears in the system as a flat list using categories and subcategories).

Functional Comparison of forms "Item Catalog" and the system

Area of Comparison	Item Catalog	Catalog
Purpose	Set up all item-level attributes, lifecycles, attachment categories, etc.	Create taxonomies related to lines of business (such as Assets, Purchasing, Service, etc.)
Contains	All items	Logical subsets of items that are typically based on lines of business
Security	Control inherited roles for items	Control access to catalog (basically, who can view or edit the catalog)
Lifecycle	Set up valid lifecycles for items	N/A

Area of Comparison	Item Catalog	Catalog
Business Intelligence	N/A	Intelligence reports based on catalog taxonomy

Before creating a catalog, you should have already created the necessary categories. Note that a category is a logical classification of items that have similar characteristics, while a catalog is a distinct grouping scheme and consists of categories.

To create a catalog:

1. In the Applications tree menu, click the "Setup Workbench" link.
2. On the **Search: Item Catalog Categories** page, click the Catalogs tab.
3. On the **Search: Catalogs** page, click the "Create Catalog" link.
4. On the **Create Catalog** page, provide the following information:

Name

Enter the name of the catalog.

Description

Enter a meaningful description of the catalog. A description is required here so that users can browse the catalog by either the name or description.

Flex Structure

Select a flexfield structure. Flexfield structures contain multiple segment structures for the product catalog flexfield; each segment structure has its own display prompts and fields.

When you install the system, Oracle provides two flexfield structures by default: Item Categories and PO Item Category. You can define your own segment structures that have their own display prompts and fields.

Note that the categories that you assign to a catalog must have the same flexfield structure as the catalog itself. This is true even if you choose not to validate the category list.

Controlled At

Select one of the two available control levels.

- *Item*

Items assigned to this catalog have the same catalog category value in all organizations in which the item is assigned.

- *Organization Item*

Important: Once you assign the control level to the Organization Item level, you cannot change it back to Item level.

Default Category

Select a default category. This is the default category used when you assign an item to a catalog. You can override the default category and replace it with a more relevant category for each item.

Allow Multiple Item Category Assignments

Selecting this checkbox indicates that an item can be assigned to multiple categories within this catalog. If you do not select this checkbox, an item can be assigned to exactly one category in the catalog.

Note: If you select this checkbox, you can assign multiple items to multiple categories within this catalog, but if multiple assignments exist, then you cannot deselect this checkbox until you delete the assignments and are left with only one.

Enforce List of Valid Categories

Select this checkbox if you wish to assign items only to those categories defined as valid categories for this catalog. When selected, the default category is automatically added to the list of valid categories for this catalog. If you do not select this checkbox, then you can assign an item to any defined category that uses the same flexfield structure as this catalog.

You can specify flex structures for both category sets and categories. You can also associate different categories with a category set; if you do this, they must share the same flex structure. However, this does not make a valid category set. The category set and category must also be associated. Once the catalog and category set share the same flex structure and are associated, you have a valid category set.

Enable Hierarchy for Categories

Selecting this checkbox enables you to define explicit hierarchies of categories within a catalog. Once made, you cannot revise this selection.

5. Click Apply.

Assigning a Category to a Catalog

You can assign different categories to a catalog; however, the only categories that you can assign to this catalog are categories with the same flexfield structure as the catalog. When you assign a category to a catalog, you can also define a hierarchical category

structure, page 2-6.

Note: You can automatically trigger actions based on assigning a category to a catalog. See: *Item Business Events, Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide* and *Managing Business Events, Oracle Workflow Developer's Guide*.

To assign a category to a catalog:

1. On the **Search: Item Catalog Categories** page, click the Catalogs tab.
2. On the **Search: Catalogs** page, select the catalog to which you wish to assign a category.
3. On the **Basic Information** page for the catalog, click the "Categories" link.
4. On the **Categories** page, click Add Category.
5. On the **Search: Categories** page, locate the category you wish to assign to the catalog. Note that you search for the category by Name, Description, Flex Structure or Inactive On date. Select the category and click Apply.

Catalog Category Mapping

Users can use Catalog Category mapping to map categories of different category sets to the reporting category set.

To view the Catalog Category Mapping page:

1. In the Applications tree menu, click the "Setup Workbench" link.
2. On the **Search: Item Catalog Categories** page, click the Catalogs tab.
3. On the **Search: Catalogs** page, click the "Catalog Category mapping" link. The **Catalog Category Mapping** page is displayed.

Creating a Category Hierarchy within a Catalog

You can define a hierarchy of categories within the context of a catalog, thereby making it easier to browse all the categories within a particular catalog. Creating category hierarchies within a catalog eases use because you are logically grouping categories even further within the context of a catalog. You can define multiple hierarchies within a catalog.

When you define a hierarchy, you add categories to a catalog. You can choose to add a

category as a top level category, or as a child of an existing category. Note that the categories appearing in the category list all have the same flexfield structure as the catalog.

To create a category hierarchy within a catalog:

1. In the Applications tree menu, click the "Setup Workbench" link.
2. On the **Search: Item Catalog Categories** page, click the Catalogs tab.
3. On the **Search: Catalogs** page, select the catalog in which you wish to create a category hierarchy.
4. On the **Basic Information** page for the catalog, click the "Categories" link.
5. On the **Categories** page, you can add a parent category by clicking Add Category, or you can add sub-categories by selecting an existing category and then selecting Add Sub-category from the Actions pulldown.
6. On the **Search: Categories** page, locate the category you wish to assign as a sub-category. Select the category and click Apply.

Updating a Category Hierarchy within a Catalog

You can update a category hierarchy within a catalog by changing parent categories in the list of categories for that catalog.

Note: You cannot assign the parent category of a valid category to a child (also known as a descendant) because it would create loops in the hierarchy.

To update a category hierarchy within a catalog:

1. On the **Search: Item Catalog Categories** page, click the Catalogs tab.
2. On the **Search: Catalogs** page, select the catalog in which you wish to update the category hierarchy.
3. On the **Basic Information** page for the catalog, click the "Categories" link.
4. On the **Categories** page, select the name link of the category whose parent category you wish to update.
5. On the **Category Details** page, click Update.
6. On the **Edit Catalog Category** page, select a new Parent Category, and then click

Apply.

Deleting a Category from a Catalog

You can delete categories from a catalog as long as you have not already assigned items to it. In other words, if you have already assigned items to a category within a catalog, then you cannot delete the category.

Note: You can automatically trigger actions based on deleting a category to a catalog. See: *Item Business Events, Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide* and *Managing Business Events, Oracle Workflow Developer's Guide*.

To delete a category from a catalog:

1. On the **Search: Item Catalog Categories** page, click the Catalogs tab.
2. On the **Search: Catalogs** page, select the catalog in which you wish to delete a category.
3. On the **Basic Information** page for the catalog, click the "Categories" link
4. On the **Categories** page, select the category that you wish to delete, and then select Delete from the Actions pulldown.
5. Click Go.

Assigning People to a Catalog

Depending on their assigned role, people can assign items to a catalog, update the catalog hierarchy, or view the catalog hierarchy. You can assign either of the following roles to people in a catalog:

Catalog Manager

The Catalog Manager role enables users to edit the catalog hierarchy and also enables them to assign items to this catalog.

Catalog Viewer

The Catalog Viewer role enables users to view the catalog hierarchy, but they cannot edit or assign items to it.

To assign people to a catalog:

1. On the **Search: Item Catalog Categories** page, click the Catalogs tab.
2. On the **Search: Catalogs** page, select the catalog to which you wish to assign people.
3. On the **Basic Information** page for the catalog, click the "People" link.
4. On the **People** page, click Update. After the page refreshes, click Add People.
5. After the **People** page refreshes, select a person, specify the role to assign to the person, as well as a Start Date and End Date.
6. Click Apply.

Assigning People to a Valid Category

You can assign roles to people on a valid category. The system does not see any privileges or roles for valid categories.

A category is valid when it meets the following two conditions:

- The catalog and category share the same flex structure.
- The catalog and category are associated.

To assign people to a valid category:

1. On the **Search: Item Catalog Categories** page, click the Catalogs tab.
2. On the **Search: Catalogs** page, click on the name of the catalog that contains the valid category to which you wish to assign people.
3. On the **Basic Information** page for the catalog, click the "Categories" link.

Note: The categories that now appear are the valid categories.

4. Click on the name link of the valid category to which you wish to assign people.
5. On the **Category Details** page, click the "People" link.
6. On the **People** page, click Update. After the page refreshes, click Add People.
7. After the **People** page refreshes, select a person, specify the role to assign to the person, as well as a Start Date and End Date.

8. Click Apply.

Change Management Administration

This chapter covers the following topics:

- Creating Change Categories
- Managing Change Header Types
- Creating Task Templates
- Managing Change Line Types
- Creating Change Priorities
- Creating Statuses
- Creating Change Reasons
- Creating Classifications
- Optimizing the Change Management Text Index
- Creating Reports
- Subscribing to a Change Management Business Event
- Creating Workflow Templates

Creating Change Categories

Important: The seeded Change Management categories of Idea and Issue are available only to customers who have licensed Product Lifecycle Management, and they are not available to licensees of Product Information Management.

The system provides five base change categories that can be used to create other categories:

- Idea

- Issue
- Change Request
- Change Order
- Change Notification

Other change categories provided by the system include:

- File Review
- File Approval
- New Item Request (NIR)

You can create your own change categories to manage a variety of issue and change management business processes relevant to your company.

To create a new change category:

1. On the **Categories** page in the Setup Workbench, select any change category and click Duplicate.

Note: Creating new categories by duplicating existing categories enables your enterprise to better control the general change categories in use. It also makes it easier to introduce new categories that are similar to the basic issue, change request and change order categories. Note, however, that duplication is not allowed for the following change categories:

- File Review
- File Approval
- New Item Request (NIR)

2. On the **Duplicate Category** page, change the data in the fields as necessary to create your new category.

Important: When duplicating a change category, all information from the Basic Information section is copied. For new change categories based on existing change order categories, the following seeded line types are copied:

- Item AML changes

- Item attachment changes
- Item attribute changes

Note the following fields:

- **Plural Name**

Enter alphanumeric text to specify the plural of the name that appears in the user interface.

- **Sort Sequence**

Enter a number to specify the tab sequence in which the categories will appear in the user interface.

- **Autonumbering**

If you select the Number Generation method Override at Type Level, then autonumbering must be specified at the Type level, and therefore does not inherit the numbering schema used for the parent change category.

3. Click Apply to complete creation of the new change category.

If, after creating a new change category you wish for the new category to be displayed as a tab in the item workbench, you must create a form function passing the change category name as a parameter, then assign the form function to the appropriate Menu in the user interface, and finally assign the Menu to a Responsibility, which in turn is granted to a user. For more information, see the *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*. For more information on Menus and Responsibilities, see the *Oracle Applications Developer's Guide*.

All new change categories created will be available to the user for search and reporting under the general Change Management Menu.

If you wish to have this category be available separately to the user, you must create separate form functions for simple search, advanced search, create, and reports, assign the form functions to a menu, and finally assign the menu to a responsibility.

After creating a new change category, you can configure the Header Types, Line Types and Reports. For more details see:

- Managing Change Header Types, page 3-4
- Creating Line Types, page 3-12
- Creating Reports, page 3-19

Managing Change Header Types

Change header types provide enterprises a way to accommodate business processes and classify types of changes within a change category. Change types enable you to configure the following for each change header type:

- **Attribute Groups**

Associate an unlimited number of attribute groups with a change header type.
- **Pages**

Create pages to organize how the associated attribute groups are displayed.
- **Codes**

Set up valid priority and reason codes for specific change header types.
- **Configuration**

Specify which sections (such as Attached Documents or Action Log) and primary attributes (such as Creation Date or Assigned To) are enabled for a change header type.
- **Workflow**

You can associate workflows to the available statuses. You can choose to automatically promote or demote the change statuses by specifying a valid status a change can move to upon completion of the workflow. You can associate multiple workflows to each status and specify whether or not a digital signature is required for any responses (such as an Approval).
- **Organization Policies**

For change orders only. You can specify task templates and propagation rules by organization. You can group a set of change tasks (defined in a task template) to be performed during or between certain statuses of the change type's workflow. You can also specify whether or not all or some of these tasks are mandatory. A propagation rule enables you to specify an organizational hierarchy to propagate the change order, including all associated revised items and tasks. You can specify a change status for propagation and the propagation rule will be executed automatically when the change order enters a specific status. Also, you can choose to immediately schedule the change in the propagated organization.

Note: This option is only available for change types that support 'Schedule' as a change status.

To create a change header type:

1. On the **Categories** page in the Setup workbench, select a change category and then click the Header Types tab.
2. If you already know of a similar header type, select it and click Duplicate. Otherwise, click Create.
3. On the **Create <Change Category Name>Type** page, note the following fields:

- **Number Generation**

Select a number generation method.

Note: To enable autonumbering, you must enter both a prefix and next available number.

- **Sequence Generated**

If the change header type numbering method is sequence generated, then all change headers will be automatically generated based on the sequence generation rules specified here. You can specify a prefix, starting number, and increment.

- **User Entered**

If you specify user entered, then the user is required to manually enter a number for new headers of this change header type.

Note: The User Entered number generation method is not supported for the New Item Request change category.

- **Function Generated**

Enables you to associate user-defined functions based on change type attributes. These functions will automatically create change numbers in the sequenced defined in the function.

See: Creating User-defined Functions, page 6-6.

- **Inherit From Parent**

If the change header type numbering method is inherited from parent, then the change header type number generation method will be the same as that defined for the parent change category.

Note: Inherit From Parent only appears as a Number

Generation selection choice for the change header type when the associated change category's (the parent) Number Generation is set to Override at Type Level.

Note: When importing new item requests using a spreadsheet, the associated change header type must have Sequence Generated or Function Generated autonumbering. User Entered autonumbering results in an import error.

- **Subject**

You can specify that the subject of the change header type is an item, item revision, item and component, or document revision. The subject may then be restricted by item catalog category, item status, or item type. For example, you can set up an issue header type named Production Motherboard Issue where the subject of the issue is restricted to items in the Motherboard item catalog category with a status of Production.

Similarly, you can restrict the subject document revision by document category, document status, document lifecycle phase.

Note: Unlike other change categories, the Change Order category does not support document revision as a subject.

- **Assignee Type**

You can set up the change header type to assign change objects by Person, Group, or Item Role. A user may have more than one role for an because you can assign item roles at the organization, item catalog category, and item level. If you choose to assign change objects by item role, then you need to choose an Assignee Type that specifies the level in which to look up the assignee by item role:

- **Group**

The change header is assigned to members of the group that is specified.

- **Item Role at Catalog Category Level**

The change header is assigned to users who have a role on the subject item that is inherited from the item catalog category.

- **Item Role at Item Level**

The change header is assigned to users who have a role on the subject item.

- **Item Role at Organization Level**
The change header is assigned to users who have a role on the subject item that is inherited within the organization.
- **Person**
The change header is assigned to the person specified.

After creating and saving the basic information for the change header type, you can complete the configuration setup as described in the following tasks.

To associate attribute groups with a change header type:

1. On the **Basic Information** page of the header type to which you wish to associate attributes groups, click **Attribute Groups**.
2. Click **Add Attribute Groups**.
3. Search for and select the attribute groups you wish to associate and click **Apply**.

To associate pages with a change header type:

Use the **Pages** link to add attribute groups specified for a type to pages within the user interface. For example, you may have created and associated the attribute groups **Cost Information** and **Inventory Impact** for a particular change header type. Now you wish to make them available via the user interface. Using **Pages**, you can set up a new page, for example, **Related Information**, on which to view and update the interface for the attributes **Cost Information** and **Inventory Impact**.

1. On the **Basic Information** page of the header type to which you wish to associate attributes groups, click **Pages**.
2. On the **Pages** page, click **Create Page**.
3. Enter the basic information in the required fields. Note that the number entered in **Sequence** determines the order in which the page links appear on the change object's detail page.
4. Click **Add Another Row** in the **Attribute Groups** section. Enter the **Sequence** number to specify the order in which the attribute groups will appear on the page.

To associate codes with a change header type:

You can specify valid priority and reason codes applicable to a change header type.

1. On the **Basic Information** page of the header type to which you wish to associate attributes groups, click **Codes**.

2. On the **Codes** page, select the valid priorities and reasons code for the header type.

To configure a change header type:

You can configure the change header type to specify what sections and primary attributes are enabled for the type.

1. On the **Basic Information** page of the header type click Configuration.
2. On the **Configuration** page, select the sections and primary attributes to enable for the change header type.

To associate workflows with a change header type:

You can associate multiple workflows to each status and set one of them as default. The default workflow will be used automatically when user creates a change of that type. However, user will have the choice to select any of the associated workflows when creating the change.

Note: If a mandatory workflow step is unassigned in an approval workflow, the workflow does not launch until all mandatory steps have valid assignees. If a workflow is associated to the first status (Open) on a change and a mandatory step in the workflow is unassigned, the change can only be saved as a draft. The change can move to the Open status after the step is assigned.

When you create a status you specify a status type. These status types determine some of the operational characteristics of the change header during its workflow:

- **Open**
When a change header has a status of Open, users can update the issue, change request, or change order. However, if the workflow is running and Update Allowed is not selected, users cannot update it.
- **Scheduled**
Users cannot update the issue, change request or change order (unless reopened). Scheduled change orders are picked up and implemented by the auto-implement manager. Change headers must be Scheduled before they can enter the Implemented status.
- **Released**
Ready to be scheduled or implemented. Cannot be updated (unless the change is reopened).
- **Approval**

A workflow is mandatory for this status. Once the Approval is granted, the issue, change request or change order cannot be updated. You can associate a workflow template containing an approval request step for Approval status types only.

- **Implemented**

The changes specified in the change order take effect. Implemented change orders cannot be reopened and canceled. Once implemented, no further changes can be made. For each change header type, only one status can use Implemented. Implemented must always be the final status.

Certain workflow types can be associated with the statuses defined here. Following are the associations between status type and workflow type for non-new item requests:

Status Type	Valid Workflow Type
Approval	Approval
Others	Generic

Following are the associations between status types and workflow types for new item requests:

Status Type	Valid Workflow Type
Open	Definition
Approval	Definition & Approval, or Approval
Others	Generic

1. On the **Basic Information** page of the header type, click Workflow to define the workflow for the change header type.
2. On the **Workflow** page, click Add Another Row in the Statuses section.
3. Specify a number that indicates the order in which the statuses are executed, and select a status. Click Apply.
4. After creating a workflow for a change header type, you can click the Update Properties icon to specify for each status the valid promotion and demotion statuses and assign a workflow. For workflows that contain an Approval status, you must assign a workflow template that contains at least one Request Approval step. If you specify a workflow, you can also select a status that, when successfully completed,

automatically promotes the change to the next status. If the status is not successfully completed, you can likewise specify that the change is automatically demoted to a previous status.

To specify organization policies for change headers:

You can specify organization policies for change orders only.

You can specify organization policies for change header types such that task templates and propagation rules are applied to every change order created in a specific organization. The changes specified in a change order may need to be propagated to several other organizations in your company. A business may therefore be comprised of hierarchically related organizations for which you need to propagate these change orders. For example, you may have an organization, Vision Operations, which has two manufacturing organizations in the VisionMfg hierarchy named Seattle Manufacturing and Chicago Manufacturing. You initially create change orders in the Vision Operations organization. Once the change orders reach a certain status in the workflow (for example, Scheduled), the change orders can be propagated (for example, copied to the destination organization with the Status initially set to Open) to the two manufacturing organizations in the hierarchy. You can set up the organization policy such that a change order is automatically propagated downward to the other organizations in the hierarchy whenever the change order reaches a particular status. However, the changes only propagate to the organizations within the hierarchy to which the user entering the change order has access. For example, if another user who only has security access to the Vision Operations and Seattle Manufacturing organizations enters change orders under this organization policy, the change orders only propagate to Vision Operations and Seattle Manufacturing and not to Chicago Manufacturing.

Task templates identify the specific tasks that must be performed before a status is considered complete. For details, see *Creating Task Templates*, page 3-11.

1. On the **Basic Information** page of the change order header type to which you wish to create organization policies, click **Organization Policies**.
2. On the **Organization Policies** page, select the organization to which the organization policy will be applied.
3. Click the **Task Template** tab, and then click **Add Another Row** to specify the task template you wish to use. Note that you can assign more than one task template. You can specify the status in which to start the task and the status in which to complete the task.
4. Click the **Propagation Rules** tab. Before specifying the organization hierarchy for propagation, you have the option of selecting a particular status that, when entered, will automatically propagate the change order to a default organization hierarchy. To do so, select **Auto Propagate** and specify the **Status for Propagation**. If you wish to manually propagate change orders, do not select **Auto Propagate**.

5. In the Organization Hierarchy for Propagation table, click Add Another Row, then select the Organization Hierarchy to which the change order will be propagated. While you can add more than one organization hierarchy to the propagation rules, the change order can only be propagated to one. Also, you can select one organization hierarchy as the default to which all change orders are propagated.

Note: *Both* an organization and the task templates/propagation rules must be specified before you click Apply. If you select an organization only and click Apply no organization policy has been defined, thus nothing is saved.

Creating Task Templates

Task templates define the various tasks that must be completed for a change order. You can create task templates only for categories whose base change category is Change Order. After creating task templates, you can use them to define the organization policies for change order header types.

To create a task template:

1. On the **Categories** page in the Setup Workbench, click the Task Templates tab.
2. On the **Task Templates** page, click Create.
3. On the **Create Task Template** page, provide data in the required fields and click Add Another Row in the Change Tasks table to specify the tasks associated with the change order header type. Note the following fields:
 - **Sequence**
Determines the order in which the tasks will appear on the page.
 - **Task**
The name of the task.
 - **Assignee Type**
Specify whether you wish to assign the task to a person or group.
 - **Assignee**
The person (or group) to whom the task is assigned.
 - **Mandatory**
Specifies that the task must be completed before the change order can proceed to the next status.

Managing Change Line Types

Change orders employ tasks and revised items to capture their various elements or "to do's." Change orders do not support ad-hoc line types. Issues, Change Notifications, Ideas, and Change Requests, however, use *change lines*, which serve a similar role. NIR and File Approval and File Review do not support line types. Change lines capture all the details required for a change.

To create a change line type:

1. On the **Categories** page in the Setup Workbench, select any change category that supports line types, and click the Line Types tab.
2. If you already know of a similar line type, select it and click Duplicate. Otherwise, click Create.
3. On the **Create <Change Category Name> Line Type** page, note the following fields:

- **Subject**

You can specify an item, item revision, or document revision upon which the line type shall be based. You can restrict the subject item further by item catalog category, lifecycle phase, or item type. For example, you can create an issue line type to restrict the subject to all items in a particular catalog category whose value you specify. So when users file issues, they will select from a list of values. If you do not restrict the subject, then all items will be available for the line type.

Similarly, you can restrict the subject document revision by document category, document status, and document lifecycle phase.

Note: Unlike other change categories, the Change Order category does not support document revision as a subject.

- **Assignee Type**

Typically users have different roles at different levels within an enterprise. To ensure users are assigned the correct role on line types, you can choose from the following Assignee Types:

- **Group**

The change line type is assigned to members of the group that is specified.

- **Item Role at Catalog Category Level**

The change line type is assigned to users who have a role on the subject item that is inherited from the item catalog category.

- **Item Role at Item Level**
The change line type is assigned to users who have a role on the subject item.
- **Item Role at Organization Level**
The change line type is assigned to users who have a role on the subject item that is inherited within the organization.
- **Person**
The change line type is assigned to the person specified.

After the change line type is created, you can associate attribute groups and pages with it.

To associate attribute groups with a change line type:

1. On the **Basic Information** page of the change line to which you wish to associate attributes groups, click Attribute Groups.
2. Click Add Attribute Groups.
3. Search for and select the attribute groups you wish to associate and click Apply.

Note: You cannot associate attribute groups with the following change order line types:

- AML changes
- Attribute changes
- Attachment changes

To associate pages with a change line type:

Use the Pages link to add attribute groups specified for a change line type to pages within the user interface. For example, you may have created and specified the attribute groups Cost Information and Inventory Impact for a particular change line type. Now you wish to make them available via the user interface. Using Pages, you can set up a new page, for example, **Related Information**, on which to make available the interface for the attributes Cost Information and Inventory Impact.

1. On the **Basic Information** page of the change line to which you wish to associate attributes groups, click Pages.
2. On the **Pages** page, click Create Page.

3. Enter the basic information in the required fields. Note that the number entered in Sequence determines the order in which the page links appear on the change line's detail page.
4. Click Add Another Row in the Attribute Groups section. Enter the Sequence number to specify the order in which the attribute groups will appear on the page.

Note: You cannot associate pages with the following change order line types:

- AML changes
- Attribute changes
- Attachment changes

To associate workflows with a change line type:

You can associate multiple workflow templates to a change line type, setting one of them as the default workflow.

Note: Only Generic and Notification workflow types are supported for change line types. The Approval workflow type is not supported.

1. On the **Basic Information** page of the change line to which you wish to associate workflows, click Update.
2. On the **Update Change Request Line Type** page, find the Workflows section of the page. Click Add Another Row.
3. Search for and select a workflow template.
4. Optionally, with the workflow template selected, click Set as Default to select this template as the default workflow for the change line type.
5. Click Apply.

Creating Change Priorities

Change priorities enable you to define the degree of urgency of change requests, change orders, and issues in a way that accommodates your business processes.

To create a change priority:

1. On the **Search: Item Catalog Categories** page in the Setup Workbench, click the

Change Management tab.

2. On the **Categories** page, click the Codes tab.
3. On the **Priorities** page, click Add Another Row.
4. In the new row, enter the following:

Priority

Enter alphanumeric text to specify the name of the priority.

Priority Sequence

Enter a number between 0 and 9. Use 0 to denote the highest priority and 9 the lowest. Priority sequence is used to determine the sort sequence.

Description

Enter a description for the priority.

Note: You can delete a change priority as long as it has not yet been used--once in use, a priority cannot be deleted.

Creating Statuses

Change categories are managed through their statuses and an approval workflow. Each status can have one workflow associated with it, and that workflow is automatically launched when changes enter into the status.

Note: You can change the name of any status, even those provided by the system. If a status is already in use you cannot delete it. Also, you cannot delete any of the system provided status.

To create a status:

1. On the **Search: Item Catalog Categories** page in the Setup Workbench, click the Change Management tab.
2. On the **Categories** page, click the Workflow tab.
3. On the **Statuses** page, click Add Another Row.
4. In the new row, enter the following:

- **Status**

Provide a name for the new status.

- **Status Type**

Select the type that applies to the status:

- **Open**

When a change order has a status of Open, users can update it. However, when the workflow is running and Update Allowed is not selected, users cannot update it. Note that Update Allowed specifies that even if a workflow is running, the change object can still be updated. Otherwise, if a workflow is running, it cannot be updated, except for the posting of comments.

- **Scheduled**

Once in use, the change cannot be updated. Scheduled change orders are picked up and implemented by auto-implement manager (when auto-implement is set up).

- **Released**

Cannot be updated.

- **Approval**

A workflow is mandatory for this status. Once the Approval is granted, the status cannot be updated. You can associate a workflow template containing an approval request step for Approval status types only.

- **Implemented**

For each change header type, only one status can use Implemented. Implemented change orders cannot be reopened and canceled. Implemented must always be the final status.

Note: Once in use, you cannot delete or update Status Types (except for the Display Name).

- **Description**

Enter a description of the status.

- **Inactive On**

Optionally, enter a date on which the status becomes inactive. As of this date, you can no longer assign the status.

Creating Change Reasons

Use change reasons to categorize and identify causes for changes. The system uses reasons for reference only.

To create a change reason:

1. On the **Search: Item Catalog Categories** page in the Setup Workbench, click the Change Management tab.
2. On the **Categories** page, click the Codes tab.
3. On the **Priorities** page, click the Reasons link.
4. On the **Reasons** page, click Add Another Row. In the new row, enter the following:

Reason

Enter alphanumeric text to describe a unique reason for initiating a change. For example, you could define a reason named OBSOLETE to indicate an obsolete part, or WAIVER to indicate a component change on a bill of material.

Description

Enter a description of the reason.

Note: You can delete a change reason as long as it has not yet been used--once in use, a reason cannot be deleted.

Creating Classifications

Classifications provide a mechanism for companies to automate the categorization of change orders, and to also indicate to users exactly how the change order will impact their production. The system provides two types of classifications:

- **Derived**

Derived classification codes are derived from a user-defined function. For example, a division of a company, Vision Operations, needs to automate the process whereby a change order is assigned a particular classification code as well as being assigned a workflow routing. To create an automated classification process, Vision has created a set of attributes that, when filled in by users, classifies change orders into a particular classification or workflow routing. The user-supplied attributes are mapped to user-defined functions. The function takes the data supplied in the attributes and derives a valid classification code and workflow routing. Derived classification codes appear to users as read-only data.

For details about user-defined attributes and functions see *User-Defined Attributes*, page 6-1 and *Creating User-Defined Functions*, page 6-6. For details about setting up user-defined functions to derive classification codes and workflow routings, see: *Creating Classification Codes*, *Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*

- **Valid**

Valid classification codes are selected by the user from a list of values. Valid values are specified in the change header type.

Note: Classifications are available only to change categories whose base category is Change Order.

To create classifications:

1. On the **Search: Item Catalog Categories** page in the Setup Workbench, click the Change Management tab.
2. On the **Categories** page, click the Codes tab.
3. On the **Priorities** page, click the Classifications link.
4. On the **Classifications** page, click Add Another Row.
5. In the new row, provide the name of the Classification Code and a Description.

Note: You can delete a classification code as long as it has not yet been used. Once in use, a classification code cannot be deleted.

Optimizing the Change Management Text Index

As item data changes over time due to ongoing item insert, delete, or update operations, the query response time may gradually decrease. Optimizing the change Management Text index using the Optimize Item Catalog Text Index concurrent program removes old data and minimizes index fragmentation, and therefore can improve query response time.

The Change Management Text Index should be optimized:

- After the import of many items
- After deleting or updating many items

- On a regular basis (you should optimize the text index at regular intervals, for example, twice a week.)
- When you notice slow performance for item simple search

Note: This program optimizes at most 16,000 items per single run. To continue optimizing more items, re-run the program.

To optimize the Change Management Text Index:

1. In the Applications tree menu, click the "View Concurrent Requests" forms link.
2. In the Find Requests form, click Submit a New Request.
3. In the Submit a New Request form, select Single Request and click OK.
4. In the Submit Request form, select Optimize Change Management Text Index from the Name list of values.
5. In the Parameters form, provide the Program parameter values: FAST

This optimization method compacts fragmented rows. However, old data remaining from deleted rows is not removed. FULL This method both compacts rows and removes old data (for example, performs garbage collection).

Maximum Optimization

Time Specify the maximum optimization time, in minutes, for FULL optimize. If you do not enter a value, the program runs until the entire index is optimized. If you specify a maximum time, the program performs as much work as allowed by the imposed time limit. The optimization picks up and continues the next time the program is run. When you specify 0 for maximum time, Oracle performs minimal optimization.

6. Click Submit.

Creating Reports

Change management reports are basically search criteria and display formats that you can save, browse, email, or print. You can create reports for any change management category. You can also browse a report sequentially or using a summary view. Browsing a report sequentially enables you to step through each change object in a report. A summary view displays the report in tabular column format. You can send a report to other users including registered suppliers and customers.

Creating a report from your most common or frequent searches saves you the time of selecting a change category, search criteria and display format, and repeating the same

search over and over again. You can give reports meaningful names as well. For example, a search for all open change orders may yield dozens of change orders, each identified by change order name and number. You can name the report for these search results "Open Change Orders."

Report security is consistent with search security: you can only access change object on which you have the required role. Also, administrator-created reports are available to all users, although only the administrator can edit these reports.

To create a report:

1. In the Setup Workbench, on the **Categories** page, click the Reports tab. When the page refreshes, click Create Report.

2. When the **Create Report** page refreshes, provide the following:

Name

Provide a name for the Report.

Description

Optionally, provide a description of the Report.

Criteria

Select the criteria to be used in the search. You can use an existing search criteria template (if one exists for the change category selected), or add criteria here by clicking Add Criteria.

Format

Select a format for the report. You can use an existing display format by selecting it from the Display Format pulldown and clicking Go.

3. In the **Export Format** section, you can optionally select an export template and output format, such as .pdf , .rtf, .html, .xls, and .xml, in which you want to generate the report.

4. Click Apply.

Subscribing to a Change Management Business Event

Change management business events represent an activity or task that can be extended or customized. For example, creation of items and engineering change orders (ECO's) are examples of business events.

Change Management business events enable you to extend and customize your environment. You subscribe to Change Management business events to:

- Execute custom code on the event information

- Send event information to a workflow process
- Send event information to other queues or systems

Business events are represented within workflow processes by event activities. Business events can be synchronous or asynchronous. That is, when a local event occurs, the subscribing event can be executed during the same time as the transaction (synchronous), or the subscribing event can be deferred (asynchronous).

You use Oracle Workflow to set up business events.

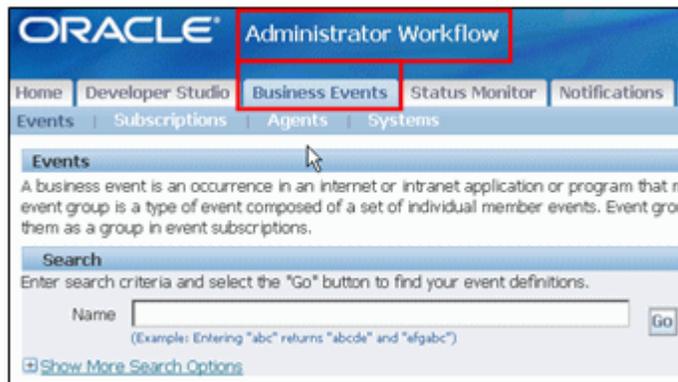
You can subscribe to the following business events:

Business Event	Event Type	Description
oracle.apps.eng.cm.changeObject.changeApprovalStatus	CM Approval Status Change	Business event for change object approval status change
oracle.apps.eng.cm.changeObject.changePriority	CM Priority Change	Business event for change object priority changes
oracle.apps.eng.cm.changeObject.changeStatus	CM Status Change	Business event for change object status changes
oracle.apps.eng.cm.changeObject.changeWorkflowStatus	CM Workflow Status Change	Business event for change object Workflow Status changes
oracle.apps.eng.cm.changeObject.create	CM Create	Business event for the creation of a change object
oracle.apps.eng.cm.changeObject.postComment	CM Post Comment	Business event for a posted comment on a change object
oracle.apps.eng.cm.changeObject.reassign	CM Reassign	Business event for the reassignment of a change object
oracle.apps.eng.cm.changeObject.requestComment	CM Request Comment	Business event for a comment request of a change object
oracle.apps.eng.cm.changeObject.submit	CM Submit	Business event for the submission of a change object
oracle.apps.eng.cm.changeObject.update	CM Update	Business event for the update of a change object

oracle.apps.eng.cm.changeOrder.changeScheduleDate	CM Schedule Date Change	Business event for change order schedule date change
oracle.apps.eng.cm.import.complete	CM Import Complete	Change Management Import is completed
oracle.apps.eng.cm.revisedItem.changeScheduleDate	CM Revised Item Schedule Date Change	Business event for revised item schedule date change
oracle.apps.eng.cm.revisedItem.changeStatus	CM Revised Item Status Change	Business event for revised item status changes

To enable Change Management business events:

1. Log into Oracle Applications as Workflow Administrator.
2. Select the Business Events tab.



3. Search for the business event to which you want to subscribe.

Note: If you do not know the name of the event that you want to search for, use the following search string: Oracle.apps.eng.cm.



The search results include a list of change management business events. By default, all business events are disabled.

Results: Events

Create Event Create Event Group

Select Event(s) and ... Delete

Previous 1-10 Next 10

Select All Select None

Select Name	Display Name	Type	Status	Subscription	Update	Test
oracle.apps.eng.cm.changeObject.changeApprovalStatus	CM Approval Status Change	Event	Disabled			
oracle.apps.eng.cm.changeObject.changePriority	CM Priority Change	Event	Disabled			
oracle.apps.eng.cm.changeObject.changeStatus	CM Status Change	Event	Disabled			
oracle.apps.eng.cm.changeObject.changeWorkflowStatus	CM Workflow Status Change	Event	Disabled			
oracle.apps.eng.cm.changeObject.create	CM Create	Event	Enabled			
oracle.apps.eng.cm.changeObject.postComment	CM Post Comment	Event	Disabled			
oracle.apps.eng.cm.changeObject.reassign	CM Reassign	Event	Disabled			
oracle.apps.eng.cm.changeObject.requestComment	CM Request Comment	Event	Disabled			
oracle.apps.eng.cm.changeObject.submit	CM Submit	Event	Disabled			
oracle.apps.eng.cm.changeObject.update	CM Update	Event	Disabled			

Select Event(s) and ... Delete

Previous 1-10 Next 10

- To enable a business event, click the Update icon, which opens a page for the selected event where you can enable the event.
- Click the Subscription icon to define the subscription code (also known as the Event trigger).

Select Event(s) and ... Delete

Previous 1-10 Next 10

Select All Select None

Select Name	Display Name	Type	Status	Subscription	Update	Test
oracle.apps.eng.cm.changeObject.changeApprovalStatus	CM Approval Status Change	Event	Disabled			
oracle.apps.eng.cm.changeObject.changePriority	CM Priority Change	Event	Disabled			
oracle.apps.eng.cm.changeObject.changeStatus	CM Status Change	Event	Disabled			
oracle.apps.eng.cm.changeObject.changeWorkflowStatus	CM Workflow Status Change	Event	Disabled			
oracle.apps.eng.cm.changeObject.create	CM Create	Event	Enabled			

Subscriptions: Event: &EventName

An event subscription is a registration indicating that a particular event is significant to a particular system. An event subscription specifies the processing to perform when the triggering event occurs.

Create Subscription

System	Source Type	Out Agent	To Agent	Function	Workflow	Status
SCMx7ST2.US.ORACLE.COM	Local			WF_EVENT_FUNCTIONS_PKG.AddCorrelation	ENGWFSTD/	Enabled

To review more detailed business events set up steps See: Setting Up the Business Event System, in the Oracle Workflow Administrator's Guide.

Creating Workflow Templates

Workflow templates enable you to define a workflow for a change object; you can use workflows for a variety of purposes, some of which include informational messages (FYI), request for comment, or approval requests. Create workflow templates for change header and line level usage separately and associate them at the change header and

change line level, respectively.

Workflow templates are made up of steps--each step describes a workflow process and specifies the assignees. For example, you can create steps to request approval, request comment, or send an FYI notification.

To create a header workflow template:

1. In the Applications tree menu, click the Setup Workbench link.
2. On the **Search: Item Catalog Categories** page, click the Change Management tab.
3. On the **Categories** page, click the Workflow tab.
4. On the **Workflow Templates** page, select Header Templates and click Create.
5. 5a)

On the **Create Header Workflow Template** page, note the following fields:

Start Date

Defaults to the current date. Start date is the date from which the workflow template is available.

End Date

The date upon which this workflow template is no longer unavailable.

Type

Identifies the type of workflow template that you are creating. Available workflow template types are:

- Approval
The Approval workflow template type is valid only for workflows with status type Approval.
- Definition
The Definition workflow template type is used primarily for workflows in New Item Requests with status type Open.
- Definition and Approval
The Definition and Approval workflow template type is used primarily for New Item Requests of status type Approval.
- Generic
The Generic workflow template type is used for all other status types.

Certain workflow types can be associated with specific statuses. The following table

shows the association between the header status type and the workflow type for all change categories:

Following are the associations between status types and workflow types for the change category New Item Request:

Header Workflow Types and their Usage in Change Categories and Statuses

Change Category/ Workflow Type	Definition	Definition and Approval	Approval	Generic	Notification
NIR	Available for Open Status	Available for Approval Status	Available for Approval Status	Available for all Statuses	-
Idea	-	-	Available for Approval Status	Available for all Statuses	-
Issue	-	-	Available for Approval Status	Available for all Statuses	-
Change Request	-	-	Available for Approval Status	Available for all Statuses	-
Change Notification	-	-	Available for Approval Status	Available for all Statuses	-
Change Order	-	--	Available for Approval Status	Available for all Statuses	-
File Review	-	-	-	Use in All Statuses	-
File Approval	-	-	Available for Approval Status	Available for all Statuses	-

6. Click Add Step.

7. On the **Add Step** page, provide the following information:

Step

Enter the number of the step. This determines the order in which the steps are executed.

Workflow Process

Select the workflow process that describes this step. After selecting a workflow process, click Go. Selecting FYI changes the fields that follow; only the Instructions field appears. You can create custom workflow processes using Oracle Workflow Builder.

Important: Users receive a role based on the workflow process that is chosen here. If Request Comment is selected, the person from whom you are requesting the comment receives the Change Reviewer role. If Request Approval is selected, the person from whom you are requesting the approval receives the Change Approver role. If FYI is selected, the person to whom you are sending the FYI receives the Change Reviewer role. These roles are assigned in addition to any other roles these users may already have on the change object. The administrator can edit the privileges for these roles.

Assignee

Following are the choices for Assignee:

- User Entered
You must select a particular user who is restricted to the Roles or Groups specified in the Assignees list.
- Derived
The assignee is derived based on user's roles. Hence, the list of available assignees (in the Assignees section) will all have the same role.

Response Required

Following are the rule choices for responses:

- All Assignees
All assignees must respond (or approve).
- One Assignee
Only one of the assignees must respond (or approve).
- Mandatory Assignees

When you add assignees, you specify that they are Optional or Mandatory. You must always have at least one Mandatory responder/approver.

Days to Respond

Enter the number of days--from the time this step is executed--in which you will need a response. Note that this is not the amount of time that transpires from the time the approval routing is submitted, but that it is the number of days from the time this particular step begins.

Instructions

Optionally, enter instructions for the assignees to follow in their responses.

Assignees

You can add assignees based on roles, membership in groups, or by selecting a specific person.

Note: When you select role, you are selecting either a change management or item role. If you assign someone by item role, then all users with this role on the item become Reviewers. If you assign someone by change management role, then all users with this role on the change become Approvers.

8. Click Apply to save this step.
9. On the **Update Workflow Template** page, verify that all steps required for the template have been added, and then click Apply.

To create a line workflow template:

Create line workflow templates using the same steps described in To create a header workflow template, page 3-24.

- Workflows are not associated to a particular status for change lines.
- Approval workflows are not supported at the line level.

The following workflow types are supported at the line level:

- Notification
The notification workflow template type is available at the line level only. The workflow process associated to this type enables users to track assignees responses and manage the change line.
- Generic

Use the generic workflow template type for change lines across all categories that support lines.

The following table shows the associations between change lines and workflow types for all change categories:

Change Category/ Workflow Type	Definition	Definition and Approval	Approval	Generic	Notification
NIR	-	-	-	-	-
Idea	-	-	-	Available	Available
Issue	-	-	-	Available	Available
	-	-	-	Available	Available
	-	-	-	Available	Available
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-

Configuration Management Administration

This chapter covers the following topics:

- Searching for Structure Types
- Creating Structure Types
- Associating Structure Names with a Structure Type
- Searching for Structure Names
- Creating Structure Names
- Associating Component Attribute Groups with a Structure type
- Associating Other Information with Structure Types

Searching for Structure Types

Important: The seeded structure type of Packaging Hierarchy is only available to customers who have licensed Product Information Management, and it is not available to licensees of Product Lifecycle Management excepting those that have licensed both Product Lifecycle Management and its option, Product Data Synchronization for Global Data Synchronization Network and UCCnet Services.

You can search for structure types based on different criteria such as display name, internal name, description or parent structure type.

To search for structure types:

1. On the **Search: Item Catalog Categories** page in the Setup Workbench, click the Structures tab.
2. On the **Search: Structure Types** page, select your search criteria in the Search By menu, enter the search string, and click Go.

Note: The wildcard character (%) is appended to the search string entered. For example, if you enter "Eng", the search string is actually "Eng%". So the structure type Engineering BOM could be returned as part of the search results.

Creating Structure Types

Structure types provide metadata common to all structures/BOMs that share the structure types. For example, the structure type "Engineering BOM" describes valid component types, attributes, functions and other characteristics common to several structures, such as "EBOM Alternate 1" and "EBOM Alternate 2" of the item "Engine10000."

Structure types are hierarchically structured, with structure names inherited throughout the hierarchy.

To help classify your existing structures, you can use the following seeded structure types, or create your own structure types.

Internal Name	Display Name	Allow Subtypes
All-Structure Types	Root	Y
Packaging Hierarchy	PackagingBOM	N
Asset BOM	AssetBOM	Y
CadBOM	CadBOM	Y
Design Structure	Design Structure	Y
Manufacturing Structure	Manufacturing Structure	Y

Important: When you upgrade to a new software release, ensure that you use the newest seeded Packaging Hierarchy instead of an older version. Either delete or rename any older versions of a Packaging Hierarchy structure type.

To create a structure type:

1. On the **Search: Item Catalog Categories** page in the Setup Workbench, click the

Structures tab.

2. On the **Search: Structure Types** page, click the "Create Structure Type" link.
3. On the **Create Structure Type** page, enter the following information:

Internal Name

The structure type's internal name.

Display Name

The structure type's display name.

Description

A brief description of the structure type.

Parent Structure Type

Select a parent structure type. The parent structure type specifies the immediate parent of the structure type being created, thereby determining the structure type hierarchy.

If you leave this field blank, the parent structure type displays as Root. If you use a root structure type as a parent, then the following information defaults to the descendants of the parent:

- Structure Header Attributes
- Item Attachment Categories
- Display Formats
- Import Formats
- Search Criteria
- Component Attribute Groups

See: Viewing Item Structures, page 11-2

Inactive On

Optionally, you can specify a date on which the structure type will become inactive. Making a type inactive has the following implications:

- You cannot create structures of that type or any of its descendants.
- You cannot use that type or any of its descendants as a parent structure type upon creation of a structure type.

Allow Subtypes

Select Allow Subtypes if you want this structure type to be a parent structure type

or a member of a structure type hierarchy.

4. Click Apply.

Associating Structure Names with a Structure Type

To associate a structure name with a structure type:

1. On the **Search: Item Catalog Categories** page in the Setup Workbench, click the Structures tab.
2. On the **Search: Structure Types** page, find the structure type you wish to associate and click its corresponding name link.
3. On the **Basic Information** page, click the "Structure Names" link.
4. On the **Structure Names** page, click Add.
5. On the **Add Structure Names** page, select structure names. You can also select "Create Structure Names" to create a new structure name for the selected structure type.
6. Click Apply.

Searching for Structure Names

You can search for structure names based on different criteria such as display name, internal name, description or parent structure type.

To search for structure names:

1. On the **Search: Item Catalog Categories** page in the Setup Workbench, click the Structures tab.
2. On the **Search: Structure Types** page, click the Structure Names tab.
3. On the **Search: Structure Names** page, select your search criteria in the Search By menu, enter the search string, and click Go.

Note: The wildcard character (%) is appended to the search string entered. For example, if you enter "Alternate", the search string is actually "Alternate%". So the structure name "Alternate 1" could be returned as part of the search results.

Creating Structure Names

You can search for structure names based on different criteria such as display name, internal name, description or parent structure type.

To create a structure name:

1. On the **Search: Item Catalog Categories** page in the Setup Workbench, click the Structures tab.
2. On the **Search: Structure Types** page, click the Structure Names tab.
3. On the **Search: Structure Names** page, click the "Create Structure Names" link.
4. On the **Create Structure Name** page, provide the following information:

Display Name

The display name of the structure.

Description

The description of the structure name.

Structure Type

The associated structure type.

Organization Assignment

A structure name can be assigned to one or more organizations with different inactive dates.

Inactive Date

The date on which the organization assignment is no longer valid. One or more organizations may have different inactive dates.

5. Click Apply

Related Topics

Creating Structures, page 12-52

Defining Structures, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*

Creating a Bill of Material , *Oracle Bills of Material User's Guide*

Associating Component Attribute Groups with a Structure type

Component attribute groups collect characteristics (attributes) for use with recording

specifications or representing the properties of a component belonging to a specific structure type. Component attributes are associated with a structure type at the structure components level.

Note: Child structure types can inherit component attribute groups from a parent structure type. You cannot delete component attribute groups inherited from a parent structure type at the child structure type level.

To associate a component attribute group with a structure type:

1. On the **Search: Structure types** page, search for the structure type and click on its corresponding name link.
2. Click the Component Attribute Groups link on the side navigator.
3. On the **Component Attribute Groups** page, click Add Attribute Groups.
4. On the **Add Component Attribute Groups** page, select the attribute groups you wish to associate with the current structure type.
5. Click Apply.

Related Topics

Creating Structure Types, page 4-2

Associating Other Information with Structure Types

The following pages are accessible from a structure type, but no longer used:

- Structure Pages
- Create/Edit Structure Pages
- Attribute Groups
- Add Attribute Groups

People and Roles Administration Overview

This chapter covers the following topics:

- Managing and Viewing Roles
- Creating Roles
- Updating Roles
- Updating Role Mappings
- Deleting Roles
- Managing Organization-Level Roles
- Managing People, Groups, and Companies

Managing and Viewing Roles

This product provides a mechanism called "role-based data security," which enables users to secure individual data elements. Every object in the product is secured using role-based data security. Your ability to view, edit and perform certain actions on an object is determined by your role on that object. Roles are granted to users by the owner of the object, or by someone who has the privilege to add people. A list of people with object-specific roles is maintained for each of the following objects:

- Item
- Change
- Catalog Category
- Documents

Privileges

A privilege defines your access to an object such as an item, document, or change. For example, your ability to view an item or document, edit it, and promote its lifecycle

phase is determined by your privileges on that item.

Roles

A role is a collection of privileges. Roles are a convenient way to group privileges into a bundle that can later on be assigned to users. Roles are object type-specific. For example, the role Item Reviewer contains the privileges View Item and View Item People List. You can give this role to various people on individual item instances, and they can in turn view items and the view item people list. You can also use Oracle Document Management and Collaboration (DOM) to view documents.

In a collaborative environment, there are users from different departments and companies using the same application. The best people to determine the level of security for their information are the users themselves. The following examples show the importance of role-based security in a collaborative environment.

Example A

Topco Inc. manufactures and sells the products A and B, among others. Their supplier, Comco Inc., supplies components for product A. However, Comco has a competing product for Topco's product B. In this case, Topco would share information about product A with Comco, but would protect all information about product B.

Example B

Engineering-it Dept. is an engineering department that manages many engineering change orders and engineering change requests simultaneously. Alan manages change order X. Alan also reviews some other change orders, but he cannot update any information in those change orders. In this scenario, Engineering-it Dept. would give Alan full access to change order XX and restricted access on the change orders that he reviews.

To view roles:

You can view roles to examine the privileges that are associated with them. However, you must have the View Role function to access roles.

Note: Privileges are tied to specific objects. So if you have the View Item privilege on a particular item or document, you can view that object. Functions are not tied to an object; however, you may not be able to access a particular object when you have the appropriate privileges and yet you do not have the required function. For example, you may have the View Item, Add Item Lifecycle, and Add Item Issue privileges. However, you do not have the Manage Item function. In this case, you would not be able to view the item or document, add an item lifecycle, or add an item issue.

1. Click the Roles link in the Application tree menu.
2. On the **Roles** page, enter the role name and click Go. If you know the specific object

that the role is associated with, select it.

3. On the **Roles Search Results** page, click the name link of the role for which you were searching.
4. On the **Role Detail** page, you can view all the privileges associated with the role. You can also view the role mappings, which identify item or document roles and their corresponding change object roles.

Creating Roles

Administrators must have the Manage Role and Create Role functions to create and update roles. If you only have the Manage Role function, then you can only update roles. If you only have the Create Role function, then you can only create roles. So both functions are required to truly manage roles.

All default item or document roles are mapped to change object roles. User-created item or document roles do not have to be mapped to change roles. If you absolutely do not want a default item or document role to be mapped to a change role, edit that item or document role (item or document reviewer, item or document owner) explicitly.

To create a role:

1. In the Community section of Applications tree menu, click the "Roles" link.
2. On the **Roles** page, click the "Create Role" link
3. On the **Create Role** page, select the object for which you are creating a role and click Next.
4. On the **Create <object name> Role** page, provide a name and description for the new role. Select the object privileges you want to associate with this new role and click Apply. Be aware that selecting the Edit privilege does not implicitly grant the view privilege. So, if you want someone to be able to edit an item or document, they must be able to view it first. Every role must have at least one privilege associated with it.

Note: Click Save and Map Roles if you wish to map the item or document role to a change object role.

Updating Roles

To update a role:

1. In the Community section of Applications tree menu, click the "Roles" link.
2. On the **Roles** page, enter the role name and click Go. If you know the specific object that the role is associated with, select it.
3. On the **Role Search Results** page, click the name link of the role for which you were searching.
4. On the **Role Detail** page, click Edit in the Detail section.
5. On the **Edit Role** page, you can edit the role name, description, or privileges associated with it.
6. Click Apply.

Updating Role Mappings

To update role mappings:

1. In the Community section of Applications tree menu, click the "Roles" link.
2. On the **Roles** page, enter the role name and click Go. If you know the specific object that the role is associated with, select it.
3. On the **Role Search Results** page, click the name link of the role for which you were searching.
4. On the **Role Detail** page, click Edit in the Role Mappings section.
5. On the **Edit Role Mapping** page, you can edit the role name, description, or privileges associated with the role.
6. Click Apply.

Deleting Roles

To delete a role:

1. In the Community section of Applications tree menu, click the "Roles" link.

2. On the **Roles** page, enter the role name and click Go. If you know the specific object that the role is associated with, select it.
3. On the **Role Search Results** page, select the role you want to delete and click Delete.

Note: Once a role has been granted it cannot be deleted.

Managing Organization-Level Roles

You can grant a specific role to a certain person, group, or company that applies to all items or documents in an organization. This is useful when you want to grant one person access to many items or documents.

Note: You can grant organization-level roles if you are assigned the Item Administration function through one of your responsibilities.

To grant a specific role to a person for all items or documents in the organization:

1. In the Applications tree menu, click the "Setup Workbench" link.
2. On the **Search: Item Catalog Categories** page, click the Security tab.
3. On the **Organization Roles** page, select an Organization to which to grant a role and click Go. The table returns all people, groups and companies who have been granted roles in the selected organization.
4. Click Update.
5. On the **Update Organization Roles** page, click Add People. A new row appears in the table. Enter the following information:

Role

Select a role for this grant.

Type

Select the type of grant: a grant to a single person, a group, a company, or all users.

Name

Enter the name of the person, group, or company to which you are making this grant.

Start Date

Select a start date from which this grant is effective.

End Date

Select an end date on which the grant will no longer be effective.

6. Click Apply.

To revoke a specific role from a person for all items or documents in the organization:

1. In the Applications tree menu, click the "Setup Workbench" link.
2. On the **Search: Item Catalog Categories** page, click the Security tab.
3. On the **Organization Roles** page, choose an Organization from which to revoke a role and click Go. The table returns all people, groups and companies who have been granted to the selected organization.
4. Select the person(s) or group(s) whose role you wish to delete, and click Delete.
5. Click Apply.

To edit a role grant of a person for all items or documents in an organization:

1. In the Applications tree menu, click the "Setup Workbench" link.
2. On the **Search: Item Catalog Categories** page, click the Security tab.
3. On the **Organization Roles** page, choose an Organization whose role you wish to edit, and click Go. The table returns all people, groups and companies who have been granted to the selected organization.
4. Click Update.
5. On the **Update Organization Roles** page, select the person or group whose role you wish to edit, and provide a new start date or end date.
6. Click Apply.

Managing People, Groups, and Companies

The Type attribute on the **People Search Results** and **People Detail** pages corresponds to the three basic types of people in the system:

- Internal

When you create a user using the E-Business Suite Define User form, you define an employee in the People field. This person, now identified by the username entered, is classified as Internal in the system. You can search for and view details about this person.

- Customer

When you create a user using the E-Business Suite Define User form, you define a customer in the Customer field. This person, now identified by the username entered, is classified as a Customer in the system. You can search for and view details about this person .

- Vendor

When you create a user using the E-Business Suite Define User form, you define a supplier in Supplier field. This person, now identified by the username entered, is classified as a Vendor in the system. You can search for and view details about this person.

Customer and Vendor are *external* people.

Important: You may have defined people, such as contractors and temporary employees, in Oracle HRMS. You may also have defined people as customers in Oracle Customer Online. These people are not recognized as valid people in the system despite the fact that they are in HRMS and Customer Online. You cannot search for or view details about these people.

To search for people:

1. In the Applications tree menu, click the "People, Groups and Companies" link.
2. On the **People** page, enter the name of the people for whom you are searching in the Search field. If you only know the first or last name of the person for whom you are searching, enter that name. For example, if you are searching for a person with the last name "Smith," then type "Smith" in the search field. A list of all persons with "Smith" in their first name, last name, or part of either the first or last name is returned. For example, all of the following names containing "Smith" are returned to you: John Smith, Blacksmith and Smiths.
3. Click Go. The name you entered is returned in the People Search Results field. If the name you entered is not listed in the People Search Results, check the spelling of the name and try searching again. If you are unable to locate the name, the person is not likely registered in E-Business Suite, or is not valid in the system. Try registering the people in the E-Business Suite first, or make sure the person is valid in the system.

To create a group:

Groups are communities of people you can define in order to collaborate. You can represent all your teams as groups in the system and give your group access to the system's objects. You can send an e-mail to everyone in a group with a click of a button. Also, you can create a group if you are assigned the Manage Group function via one of your responsibilities.

1. In the Applications tree menu, click the "People, Groups and Companies" link.
2. Click the Groups tab.
3. On the **Groups** page, click the "Create Group" link.
4. On the **Create Group** page, provide the following:

Group

Provide a name that identifies the group.

Description

Provide a brief description of the group.

Group Email Address

Specify the group mailing list, if you have one, as your group's Email address.

5. Click Apply to save the group, or click Add Another to create another group.
6. On the **Group Detail** page, click Update to edit group information. Click Add to add additional members to the group. If you wish to delete a member, select that group member and click Delete.

To add/remove members to a group:

1. In the Applications tree menu, click the "People, Groups and Companies" link.
2. Click the Groups tab.
3. On the **Groups** page, click the "My Own Groups" link.
4. Select a group and click Edit Membership.
5. On the **Group Detail** page, click Add, and select one or more persons from the list of values.
6. To remove members, select each member you wish to delete and click Delete.

To search for a group:

1. In the Applications tree menu, click the "People, Groups and Companies" link.
2. Click the Groups tab.
3. On the **Groups** page, enter the name of the group for which you are searching. Click Go.
 - If you only know part of the name of the group for which you are searching, enter that name. For example, if you are searching for a group having the name "dev," type "dev" in the Search field.
 - To locate all Groups in which you are a member, click the "My Group Memberships" link.
 - To locate all Groups that you own, click the "My Own Groups" link.
4. If the group name you entered is not listed in the Group Search Results, check the spelling of the name and try searching again. If you are unable to locate the group, it is likely that it has not yet been created. Try creating the group using the "Create Group" link on the Groups page.
5. On the **Group Search Results** page, click Request Membership to join a group. The owner is sent an Email notification and can add you as a member of that group.
6. Click a group name to see all the members of a group (only if you are the owner or a member of that group).

To find groups that you own:

1. In the Applications tree menu, click the "People, Groups and Companies" link.
2. Click the Groups tab.
3. On the **Groups** page, click the "My Own Groups" link to locate all groups that you own.
4. Select a group and click Edit to change the Description, Group Email, Owner, or Visible To option.

To search for a company:

1. In the Applications tree menu, click the "People, Groups and Companies" link.
2. Click the Companies tab.

3. On the **Companies** page, enter the name of the company for which you are searching, or enter a letter from the alphabet. If you only know part of the name of the company for which you are searching, enter that name. For example, if you are searching for a company named "AAA Supplier," type "AAA Supplier" in the search field. You will then see a list of all companies with "AAA" in their name.
4. Click Go. The name you entered is displayed in the Company Search Results field. If the company name you entered is not listed in the Company Search Results, check the spelling of the name and try searching again. If you are unable to locate the company, it is likely not registered in E-Business Suite. Try registering the customer company using the Customer Online or Order Management product. Try registering the Vendor/Supplier Company using the Purchasing product.

Attributes and Function Administration

This chapter covers the following topics:

- User-Defined Attributes
- Creating User-Defined Functions
- Creating Value Sets
- Defining Table Value Sets
- Creating Independent Values
- Creating Custom Privileges

User-Defined Attributes

You can create user-defined attributes for objects such as items, projects, tasks, issues, documents, and change objects. These attributes are aggregated in user-defined attribute groups. You can associate attribute groups with objects such as items, projects, documents, and change orders so that they appear on the object's **Detail** page. You can use attribute groups to define certain attributes that are specific to your business and are also tied to a particular object type.

For each user-defined attribute, you can optionally specify a value set, page 6-10 with data type and validation rules to be applied when the user inputs data. Once created, value sets can be reused for different attributes. It is recommended that you create value sets before defining your attribute groups.

An attribute group can be multi-row or single-row. Multi-row attribute groups enable you to associate multiple sets of attribute values with the same object instance. For example, if your item is a book, you can create an attribute group called "chapters" with attributes "chapter number," "name" and "number of pages." Multiple rows of "chapters" can be associated with a book.

Tip: You can define an unlimited number of attribute groups, with the

following limitations on the number of attributes within each attribute group:

- 40 character attributes
- 20 number attributes
- 10 date attributes
- 40 translatable attributes

Third-party systems integrators can easily generate a database view of existing attributes and attribute groups. These views are particularly useful when users wish to read the Oracle-provided data as they write code for integration with Oracle applications. To generate database views, on the **Search: Attribute Groups** page, select the attribute groups for which you wish to generate the view and click Generate Database View.

To create and maintain attribute groups:

1. Click the "Setup Workbench" link.
2. On the **Search: Item Catalog Categories** page, click the Attributes tab.

Note: To navigate to Change Management attributes, click the Change Management tab, then click the Header Attributes or Line Attributes tab.

3. On the **Search: Attribute Groups** page, click Create.
4. On the **Create Attribute Group** page, enter the following:

Internal Name

Enter the internal name of the attribute group.

Display Name

Enter the name of the attribute group as it will be displayed in the user interface.

View Privilege

Select a viewing privilege. Users must have a view privilege for any object to which this attribute group is associated. Then, you can narrow the definition of viewing privileges to meet the needs of your enterprise. For example, you may create a privilege called View Item Cost and associate it with an attribute group called "Costs." Users who have view privileges for the item can view the item, but not necessarily the cost information associated with it. To view the costs associated with

the item, users must have the additional View Item Cost privilege.

Note: The lock icon (viewed on the **Search Results** page) indicates that a user does not have the privilege required to view a particular attribute group. If you wish to create a custom privilege, see *Creating Custom Privileges*, page 6-15.

Edit Privilege

Select an edit privilege. Users must have an edit privilege to edit information in this particular attribute group. Privileges are granted by roles assigned to users. If no view or edit privilege is specified for the attribute group, then users' ability to view and edit the attribute group is controlled by the view and edit privileges on the object to which the attribute group is associated. You can define editing privileges to meet the needs of your enterprise.

5. Select Multi-Row to associate multiple sets of attribute values with the same object instance. If you do not wish to add attributes to the attribute group at this point, click Apply.
6. Click Raise Pre Attribute Change Event to raise a business event every time you want to test a proposed attribute change. This enables you to test a proposed attribute change against validating criteria before committing the attribute value to the database. See: *Using Item Business Events*, page 8-67 and *Item Business Events*, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*.
7. Click Raise Post Attribute Change Event to raise a business event every time an attribute is changed. Based on this event, you can choose to execute other functions or workflows to implement your company's business processes. For more details, see *User-Defined Attributes Business Event*, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*.
8. Click Add Attributes to add user-defined attributes to your attribute group. Note that clicking Add Attributes saves the attribute group and commits it to the database, even if you click Cancel while on the **Create Attribute** page.
9. On the **Create Attribute** page, provide the following information:

Sequence

The sequence number for the attribute. The sequence determines the order in which the attribute is displayed on the page, and also determines the order in which the attribute is processed.

Internal Name

The internal name of the attribute. The name by which the attribute is tracked internally.

Display Name

The name of the attribute as it appears within the user interface.

Description

The description of the attribute; this description also appears as tip text on pages that have attributes that can be updated.

Data Type

Lists the available data types. The data type that you select determines the values that are available in the column and value set. An attribute's data type must match the data type specified for that attribute's value set. The list of values for a value set only displays value sets whose data type matches the data type of the attribute. Note that selecting a data type always clears the column and value set. For example, say you selected the Number data type. Then you select your column and value set--remember that your column and value set choices are determined by the data type you chose. Then you decide to change the data type from Number to Date. Notice that after you change the data type, your column and value set are cleared; you need to select new ones based on your new data type. Additionally, the data type determines the values that are available in the Display As field. You cannot change the data type once an attribute is created.

Note: The maximum number of characters for a character type attribute is 150 characters. Translatable text fields have a limit of 1,000 characters. Number type fields have a maximum size and precision of 22.5 (22 digits to the left of the decimal and 5 digits to the right).

Column

A list of values that enables you to specify the column in which the attribute is stored in the database table. The column list of values only returns columns with the data type you specified in Data Type. The list of values also indicates whether or not the column is indexed. If you select Searchable, and you choose a column that has not been indexed, the column will be indexed as a consequence of creating the attribute.

Enabled/Disabled

Specify whether or not the attribute is enabled (and available for use) or disabled (and not available for use). If the attribute is enabled, specify whether or not the attribute is optional or required. If required, the user cannot save data for an object using the attribute group without entering a value for that attribute.

Display As

Determines how the attribute appears within the user interface. For example, if you select Text Field for an attribute called "Cost Center", then "Cost Center" appears in the user interface as a text field. The available values for Display As are determined

by the data type selected.

If you choose Checkbox, then the value set defaults to EGO_YES_NO.

If you select Radio Group, then you must choose an independent value type set (in other words, the value set has a discrete set of values that you have already specified). If, while updating the value set, you select the Long List of Values validation type, attributes will be displayed as a text field with a list of values, thereby ignoring your choice of Radio Group.

If you select Text Field, *and* choose a value set whose type is independent, then your display would be either a poplist or list of values (whether or not you get the poplist or list of values is determined by the way you define the value set). Also, when the data type is Number, and Display As is a Text Field, a Unit of Measure list of values is presented. You can choose either the Unit of Measure or the Value Set; they are mutually exclusive.

Hidden attributes do not show up in the user interface; this attribute is primarily populated via user-defined functions.

Selecting Dynamic URL refreshes the page with a new section for specifying the dynamic URL. Enter an URL and use any attribute Internal Name in the attribute group, enclosed between \$\$ symbols, as a token for the value of a parameter. When users click on the URL, the value for that attribute will replace the token in the URL's query string.

The following table describes which display types are supported for the various data types.

Display Types Supported by Data Types

Display Type	String	Number	Date	Date Time	Translatable Text
Text Field	Supported	Supported	Supported	Supported	Supported
Check Box	Supported	Not Supported	Not Supported	Not Supported	Not Supported
Hidden	Supported	Supported	Supported	Supported	Supported
Static URL	Supported	Not Supported	Not Supported	Not Supported	Supported
Dynamic URL	Supported	Supported	Supported	Supported	Supported

Display Type	String	Number	Date	Date Time	Translatable Text
Radio Group	Supported	Supported	Supported	Supported	Supported
Attachment	Not Supported	Supported	Not Supported	Not Supported	Not Supported

Indexed

Specify whether or not you want the attribute to be indexed. If you choose to make this an indexed attribute, it will appear as an indexed attribute on the criteria template page. Only indexed attributes are available as sort criteria in result formats.

Part of Unique Key

If the attribute group is multi-row, the Part of Unique Key checkbox determines whether or not the attribute is part of the key that uniquely identifies a row. A unique key is any set of attributes whose values can be used to uniquely identify a row within the attribute group. You can define the unique key on the attribute group **Detail** page.

Note: You can specify that each attribute is part of a unique key when creating the attribute, or--more conveniently--you can specify all unique key attributes in the group via the attribute group **Detail** page.

Value Set

Select a value set that will serve as a set of constraints for an attribute. For details about creating value sets, see *Creating Value Sets*, page 6-10.

Default Value

The default value of this attribute. If you've selected a value set, the value set's constraints apply to the default value.

10. Click Apply or Add Another to save and create another attribute group.

Creating User-Defined Functions

To define your own custom logic, you can add user-defined functions and actions to existing pages in the Item Catalog, Document Management, and Change Management without having to customize the entire page. By first setting up user-defined attributes, you can then execute user-defined functions with those attributes.

User-defined functions can be Java, URL, or PL/SQL functions. Functions use input and/or output parameters of various data types such as string, integer, or Boolean. You can also map these parameters to attributes and object primary key values.

Actions are trigger points for functions displayed as buttons or links on the page. You can determine the conditional visibility of the button and the label displayed on the button itself. You can also prompt the user based on the user's input.

To create a user-defined function:

1. In the Applications tree menu, click the "Setup Workbench" link.
2. On the **Search: Item Catalog Categories** page, click the Functions tab.
3. On the **Search and Select: Functions** page, click Create Function.
4. On the **Create Function** page, enter the following information:

Internal Name

The internal name of the function.

Display Name

The name of the function as it appears in the user interface.

Description

The description of the function.

Function Type

Whenever you define a function, there must be an underlying implementation of that function. The type specifies the manner of implementation to which the function maps. The supported function types are:

Java

Specifies that the implementation is via a Java method. When you select Java, the page refreshes and you must specify the following:

- Class

The class in which the method resides.

- Method

The method that implements your custom logic.

PL/SQL

Specifies that the implementation is via a PL/SQL stored procedure. When you select PL/SQL, the page refreshes and you must specify the following:

- Package

The package in which the procedure resides.

- Procedure

The procedure that implements your custom logic.

URL

Specifies that the implementation is a simple URL link. When you select URL, the page refreshes and you must specify the following:

- URL

You can specify either absolute or relative URLs. For absolute URLs, you must begin the URL with the protocol (in most cases, the protocol will be http://).

5. Click Apply.

Note: You can only delete a function when it is no longer associated with an action.

To create parameter mappings for a function:

After creating a user-defined function, you should specify the parameters that will be passed when that function is called.

1. On the **Search and Select: Functions** page, click the name of the function you just created.
2. On the **Function Details** page, click Add.
3. On the **Create Function Parameter** page, enter the following information:

Internal Name

The internal name of the parameter.

Display Name

The name of the parameter as it appears in the user interface.

Sequence

The order in which this parameter appears relative to other parameters associated with this function. Sequence must be unique among all parameters associated with this function.

Data Type

Lists the available data types. The values available are dependent on the type of function for which you are defining parameters.

Parameter Type

The parameter options for a parameter depend on the function type and parameter data type you have already selected. For example, if the Function Type is URL, then the Data Type is constrained to String, and the Parameter type is constrained to Input.

The valid parameters for Java functions are:

- Boolean
- Standard Date
- Error Array
- Float
- Integer
- Long
- Double
- Transaction
- String
- Standard Date Time

The valid parameters for PL/SQL functions are:

- Date
- Error Array
- Number
- Varchar

The valid parameter for URL function is:

- String

The system supports Java function parameters to be used as input, output, input/output or return. For output or input/output parameter types, you have to pass back the changed value as the same object. But you cannot change the values for immutable data types. Therefore, wrapper classes are created for these data types.

Boolean - oracle.apps.ego.common.EgoBoolean

Double - oracle.apps.ego.common.EgoDouble

Float - oracle.apps.ego.common.EgoFloat

Integer - oracle.apps.ego.common.EgoInteger

Long - oracle.apps.ego.common.EgoLong

Date - oracle.apps.ego.common.EgoDate

Timestamp - oracle.apps.ego.common.EgoTimestamp

All these wrapper classes have `getValue ()` and `setValue ()` that return/take the basic parameters respectively. For example, `EgoInteger - setValue(Integer i) Integer getValue()`

Other Java parameters supported are:

String - java.lang.StringBuffer

Transaction - oracle.jbo.Transaction

Note: `ErrorHandler` data type is a `java.util.Vector` to which you can add translated Error messages. This is an output parameter and the errors are displayed on the rendering page.

While writing Java Custom functions, use the above data types. When a user enters a decimal value for an attribute and this attribute is mapped to `EgoInteger` or `EgoLong`, the value is truncated before it passes to the function. For `EgoBoolean`, the value "Y" is considered TRUE. All other values are considered FALSE.

4. Click Apply.

Creating Value Sets

For each user-defined attribute, you can optionally specify a value set with data type and validation rules to be applied when the user inputs data. Once created, value sets can be reused for different attributes. It is recommended that you create your value set before defining your attribute groups.

To create a value set:

1. In the Applications tree menu, click the "Setup Workbench" link.
2. On the **Search: Catalog Categories** page, click the Value Sets tab.
3. On the **Maintain Value Sets** page, click Create.
4. On the **Create Value Set** page, enter the following information:

Value Set Name

The name by which the system and users keep track of the value set. You can only

enter alphanumeric (a, b, c,..., 1, 2, 3,...) and the underscore (_) characters for the value set name. You cannot use spaces or special characters. The length is limited to 15 characters.

Description

Optionally, enter a description of the value set.

Data Type

The data type of the value set. The data type that you select determines the values that are available in the value set. An attribute's data type must match the data type specified for that attribute's value set. The different data types are:

- Character
- Number
- Standard Date
- Standard Date Time

Maximum Size

Specify the maximum size of the value for the attribute using this value set. If you do not want to specify Maximum Size, leave it at the default value of 0. Be aware that entering a Maximum Size that is less than the number of characters you would need to enter a valid value for that data type will result in an error.

Validation Type

A set of values against which the values entered by users are validated. Choices are:

- None
There is no explicit set of values against which the user's input is validated.
- Independent
The explicit values against which the user's input is validated are defined here. To create explicit values, select Independent and click Add Values. If you select this validation type, click [here](#), page 6-14. Select the "Poplist" radio button to display valid values as a drop-down list. Select the "List of Values" radio button to display valid values as a searchable list of values.
- Translatable Independent
- Table
The explicit values against which the user's input is validated comes from a database table. To create explicit values, select Independent and click Add Values or click Table and then click Edit Table Information. If you select this validation type, click [here](#), page 6-12.

Display Type

- Poplist
- List of Values

Important: You can associate the Value Set to an attribute only if the above conditions are satisfied and the Security Type is 'No Security'.

5. Optionally specify a Minimum Value and Maximum Value in the "Value Range" section. If you selected the Validation Type "None" and a data type of "Number," "Standard Date," or "Standard Date Time," you can enter a minimum and maximum value for your value set. If the data type is "Standard Date" or "Standard Date Time," you can substitute the `$$SYSDATE$` token for the current date. `$$SYSDATE$` is a min/max value placeholder that is replaced by the current day on the day the user enters a value for the attribute. You can also add or subtract whole numbers from `$$SYSDATE$`. For example, "`$$SYSDATE$ - 4`" would be four days prior to the current date.

6. Click Apply.

Important: The system's user-defined attributes framework does not support the following value set options. These options can be defined using the flex-fields value set forms.

- Uppercase only
- Number only
- Precision

Defining Table Value Sets

When creating a value set, you must specify a validation type. If you select the validation type "Table", then you must define the table whose values comprise the value set.

Table value sets build queries that draw valid values from a table/view. For example, you have identified the table EMP as having a value column EMP_ID, and the ID column EMP_NAME. If a user searches for a person named "Smith", the query is directed to the table EMP. The search value entered is "Sm", so the actual search value used is "Sm%". The value set builds a search of the EMP table to find all employees whose names begin with "Sm". A list of values containing all employees whose last names begin with "Sm" is returned to the user. Then the user selects the correct

employee, and that employee ID is the value that gets stored for the attribute.

Note: Identifying a table is part of the process of creating a value set. Before identifying a table, you must complete steps 1 through 6 of Creating a Value Set, page 6-10.

To identify a table for a value set:

1. On the **Enter Validation Table Information** page, enter the following information:

Application Name

The name of the application in which the table is located.

Table Name

The name of the database table or view in the schema.

2. In the Value Column section, enter the following information:

Name

The name of the column that stores the internal value.

Type

The data type of the value column.

Size

The size of the value column.

3. In the Meaning Column section, enter the following information:

Name

The name of the column that stores the description of the value..

Type

The data type of the meaning column.

Size

The size of the meaning column.

4. In the ID Column section, enter the following information:

Name

The name of the column that stores the display value.

Type

The data type of the ID column.

Size

The size of ID column.

5. In the "Where Clause" section, enter an additional Where clause to further constrain a query. For example, go back to the example above. Say you wish to further constrict the search results by only searching for current employees. In this case, you would add an additional Where clause defining the JOB_STATUS as ACTIVE.

You can also use bind values in Where clauses in the following ways:

- You can refer to other attributes in the same attribute group as the attribute that uses this value set by using the following syntax:

:\$ATTRIBUTEGROUP\$.<your attribute's internal name>

- You can refer to primary keys for the object to which the attribute group is associated by using the following syntax:

:\$OBJECT\$.<the object's primary key column name>

6. Click Apply.

Creating Independent Values

When creating a value set, you must specify a validation type. If you select the validation type "Independent", then you must define the independent values that comprise the value set.

Note: Creating an independent value is part of the process of creating a value set. Before creating an independent value, you must complete steps 1 through 6 of Creating a Value Set, page 6-10.

To create an independent value type:

1. On the **Create Value** page, enter the following information:

Internal Name

The internal name of the value; this is a valid value in your value set. The internal name must be of the same data type as the value set data type.

Display Name

The display name of the value. The display name does not have to be the same data type as the value set data type.

Sequence

The order or sequence in which the independent values are displayed.

Start Date

The date on which this value becomes a valid value in the value set.

End Date

The date on which this value is no longer a valid value in the value set.

2. Click Apply.

Creating Custom Privileges

The system includes a number of seeded privileges. However, you have the option to create custom privileges to meet the needs of your business.

To create a custom privilege:

1. Log into Oracle Forms using the System Administrator responsibility.
2. In the Application menu, select Function.
3. In the Form Functions window, provide the following information:

Function

Enter a unique function name. You may use this name when calling your function programmatically.

User Function Name

Enter a unique name that describes your function. You see this name when assigning functions to roles.

Description

Provide a description of the function.

4. Click the Region tab, and select the Object for which you are creating this privilege.
5. Click Save.

Advanced Search

This chapter covers the following topics:

- Managing Search Criteria
- Managing Display Formats

Managing Search Criteria

Search criteria templates offer a convenient way to save frequently used search criteria. Search criteria can be created either by administrators or end users.

Administrator-created search criteria templates are available for all users. User-created search criteria are available only to the particular user who creates it. When a default search criteria template for a particular object is defined by a user and administrator, the user-defined search criteria template takes precedence.

Because search criteria templates contain both operational and user-defined attributes, they are always defined in the context of an item catalog category, structure type, document primary category, or change category (depending on the object for which a criteria template is being created).

To create administrator level search criteria:

1. Administrators can create search criteria from the respective item catalog category definition page for an item, the structure type definition page for a structure, the document primary category definition page for a document, or change category list page for a change object. You can access these pages via the Setup Workbench link on the Applications page.
2. From the object's definition page (either the **Basic Information** page for an item catalog category, document primary category, or structure type, or the **Categories** page for a change object), click the Search Criteria link.

Note: On the change management **Categories** page, click the Search

Criteria icon in the row of the category for which you wish to create search criteria.

3. On the **Search Criteria** page, click Create.
4. On the **Create Search Criteria** page, provide a name and description for the search criteria. You can set this search criteria as the default search criteria for the object by clicking Set as Default. Note that the name of the respective item catalog category, document primary category, structure type, or change category already appears. You have the option of copying an existing item catalog category, document primary category, structure type or change category search criteria, and combining the respective attributes with those you wish to add to this search criteria.
5. Click Add Criteria to add search criteria. If the list of available search criteria is quite long, you can filter or narrow them down by electing to view only those criterion in a particular attribute group. You can do this by entering the name of the attribute group and clicking Go. If you simply wish to locate a single attribute, enter its name and click Find.
6. On the **Add Criteria** page, you can move search criteria back and forth from the Available Criteria list to the Selected Criteria list via the Move, Move All, Remove, and Remove All shuttles. When finished, click Continue.

After adding criteria, you can specify operators and values to further refine the search criteria. For example, when searching for Capacitors, you may always want to include Capacitors with a Capacitance value that is between 5 and 30 uF (microfarads)--in this case you would add the attribute "Capacitance Value" to your search criteria, then select the operator "between," and specify a minimum value of "5" uF and a maximum value of "30" uF.

Note: For multi-row attributes with a value set, the distinction between the operators "is not" and "none of which is" is as follows:

- *is not*

Returns *any* record containing at least one attribute value that is not the value specified. For example, suppose you have a multi-row attribute for "Color." If you specify an operator and value "is not" as "Red," then the search results will include records where there is at least one attribute value for "Color" that is not "Red."

- *none of which is*

Returns any record where none of the attribute values is the value specified. For example, suppose you have a multi-row

attribute for "Color." If you specify an operator and the value "none of which is" as "Red," then the search results will include records where none of the attribute values for "Color" are equal to "Red."

To clear the criteria values, select the criteria and click Clear. To delete criteria attributes, select the criteria and click Delete.

Tip: All of the operators except for "contains" are case sensitive.

Configuration Management Only: You can include the "Create and Update" and "Component Details" attribute groups in the display columns.

7. Click Apply to save your search criteria definition.

To create user level search criteria:

1. Navigate to the Advanced Search link from the search sandbox at the top of most Item Catalog, Document Management, and Change Management pages. You can also navigate to the Advanced Search link in the Items, Document Management, and Change Management sections of the Applications tree menu.

Note: To update search criteria for a structure, go to the **First Level Components** or **Structure Component Hierarchy** page for the item structure and click Personalize (next to Criteria).

Note: For structures, you do not have to specify a Structure Type because you are always in the context of a structure and structure type.

2. On the **Advanced Search** page, select an Item Catalog Category, Document Category, or Change Category (whichever is appropriate for your context) and click Go.
3. Click Personalize in the Search Criteria section.
4. On the **Search Criteria** page, click Create.
5. On the **Create Search Criteria** page, provide a name and description for the search criteria. You can set this search criteria as the default search criteria for the object by clicking Set as Default. Note that the name of the respective item catalog category, document primary category, structure type, or change category already appears. You have the option of copying an existing item catalog category, document

primary category, structure type or change category search criteria, and combining the respective attributes with those you wish to add to the template.

6. Click Add Criteria to add attributes to your search criteria. If the list of available attributes is quite long, you can filter or narrow them down by electing to view only those attributes in a particular attribute group. You can do this by entering the name of the attribute group and clicking Go. If you simply wish to locate a single attribute, enter its name and click Find.
7. On the **Add Criteria** page, you can move criteria back and forth from the Available Criteria list to the Selected Criteria list via the Move, Move All, Remove, and Remove All shuttles. When finished, click Continue.

After adding attributes, you can specify operators and values to refine your search. For example, when searching for Capacitors, you may always want to include Capacitors with a Capacitance value that is between 5 and 30 uF (microfarads)--in this case you would add the attribute "Capacitance Value" to your search criteria, then select the operator "between," and specify a minimum value of "5" uF and a maximum value of "30" uF.

Note: For multi-row attributes with a value set, the distinction between the operators "is not" and "none of which is" is as follows:

- *is not*

Returns *any* record containing at least one attribute value that is not the value specified. For example, suppose you have a multi-row attribute for "Color." If you specify an operator and value "is not" as "Red," then the search results will include records where there is at least one attribute value for "Color" that is not "Red."

- *none of which is*

Returns any record where none of the attribute values is the value specified. For example, suppose you have a multi-row attribute for "Color." If you specify an operator and the value "none of which is" as "Red," then the search results will include records where none of the attribute values for "Color" are equal to "Red."

To clear the criteria values, select the criteria and click Clear. To delete criteria values, select the criteria and click Delete.

Tip: All of the operators except for "contains" are case sensitive.

8. Click Apply to save your search criteria definition.

To update user level search criteria:

1. Navigate to the Advanced Search link from the search sandbox at the top of most Item Catalog and Change Management pages. You can also navigate to the Advanced Search link in the Items and Change Management sections of the Applications tree menu.

Note: To update search criteria for a structure, go to the **First Level Components** or **Structure Component Hierarchy** page for the item structure and click Personalize (next to Criteria).

2. On the **Advanced Search** page, select an Item Catalog Category/Document Primary Category/Structure Type/Change Category (whichever is appropriate for your context) and click Go.
3. Click Personalize in the Search Criteria section.
4. On the **Search Criteria** page you are provided with a list of search criterion that are available for the item catalog category/document primary category/structure type/change category you originally selected. You can only edit search criteria that you created. Click the name link of search criteria you wish to update.
5. On the **Edit Search Criteria** page, you can update the name, description, set as default, and other attributes of the search criteria. You can also add/delete/modify criteria, corresponding search operators, and values.
6. Click Apply to save your search criteria definition.

Related Topics

Defining Item Catalog Search Criteria, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*

Managing Display Formats

Display Formats enable you to predefine search display views. You can use these views to look at different sets of attributes of the items, documents, or change objects that are returned by the search. Item display formats, by default, always include the item number, item description, item catalog category, and revision level. Change display formats always include, by default, the change number. Display formats for Document Management and Collaboration always include, by default, the document's number, name, description, revision, version, and its primary category.

Both administrators and users can create display formats. Administrator-created display formats are available to all users. User-created display formats are available

only to the users who created them.

To create an administrator level display format:

1. Administrators can create display formats from the respective item catalog category definition page for an item, the structure type definition page for a structure, the document primary category definition page for a document, or change category list page for a change object. You can access these pages via the Setup Workbench link in the Applications tree menu.
2. From the object's definition page (either the **Basic Information** page for an item catalog category, document primary category, or structure type, or the **Categories** page for a document and change object), click the Display Formats link.

Note: On the change management **Categories** page, click the Display Formats icon in the row of the category for which you wish to create a display format.

3. On the **Display Formats** page, click Create.
4. On the **Create Display Format** page, provide the name and a description for the display format. Also, select the number of rows you want to display per page.

You can set this display format as the default display format for the object by clicking Set as Default. Note that the name of the respective item catalog category, document primary category, structure type, or change category already appears. You have the option of selecting an existing item catalog category, document primary category, structure type or change category display format, and copying the respective columns with those you wish to add in the new display format.

Specify the columns you want to display in the search results display. Note that you can rename the columns that will appear in your display format by clicking Rename Columns. On the **Rename Columns** page, the original column names that you have already selected are listed. Enter the new column names in the New Column Name field and click Continue.

In the Sort Order section, you can select up to three columns upon which to sort the display results. You can also specify whether or not the search results in these columns be displayed in ascending or descending order. Only indexed and non-secured attributes (attributes that are not secured by a view or edit privilege) are available for sorting. Thus, you cannot sort secured attributes.

Under "Display Sections," you can select which sections will be displayed in your search results. Sections are displayed as a column containing an icon with a direct link to the section. For example, to include an Attachments link on your search results page, select Attachments from the Available List and move it to the Selected List.

Configuration Management Only: You can include the "Create and Update," "Component Details," and "Reference Designator" attribute groups in the display columns.

5. Click Apply to save your display format definition.

Note: Set up a display format to include item multi-row attributes the same way you set it up to include single attributes. After the list of items that met your search criteria appears, click the Show link for a particular item. The Show region displays the multi-row attributes.

To update an administrator level display format:

1. Administrators can update display formats from the respective catalog category definition page for an item, the primary category definition page for a document, the structure type definition page for a structure, or change category list page for a change object--all of which are accessible via the Setup Workbench link.
2. From the object's definition page (either the **Basic Information** page for an item catalog category, document primary category, or structure type, or the **Categories** page for a change object), click the Display Format link.

Note: On the change management **Categories** page, click the Display Format icon in the row of the category for which you wish to update a display format.

3. On the **Display Format** page, click the name link of the display format you wish to update. You can only edit the display formats that are explicitly associated with the item catalog category, document primary category, structure type, or change category originally selected.
4. On the **Edit Display Format** page, you can update the name, description and other columns of the display format. You can also add/remove/rename columns and modify sort criteria.
5. Click Apply to save your display format definition.

To create a user level display format:

1. Navigate to the Advanced Search link from the search sandbox that appears at the top of most Item Catalog, Document Management, and Change Management pages. You can also navigate to the Advanced Search link in the Items, Document Management, and Change Management sections of the Applications tree menu.

Note: To create a display format for a structure, go to the **First Level Components** or **Structure Component Hierarchy** page for the item structure and click Personalize (in Display Formats).

2. On the **Advanced Search** page, select an Item Catalog Category, Document Primary Category, or Change Category (whichever is appropriate for your context) and click Go.
3. Click Personalize in the Display Format section.
4. On the **Display Format** page, click Create.

5. On the **Create Display Format** page, provide the name and a description for the display format. Also, select the number of rows you want to display per page.

You can set this display format as the default display format for the object by clicking Set as Default. Note that the name of the respective item catalog category, document primary category, structure type, or change category already appears. You have the option of selecting an existing item catalog category, document primary category, structure type or change category display format, and copying the respective columns with those you wish to add in the new display format.

Specify the columns you want to display in the display results. Note that you can rename the columns that will appear in your display format by clicking Rename Columns. On the **Rename Columns** page, the original column names that you have already selected are listed. Enter the new column names in the New Column Name field and click Continue.

In the Sort Order section, you can select up to three columns upon which to sort the display results. You can also specify whether or not the results in these columns be displayed in ascending or descending order. Only indexed and non-secured attributes (attributes that are not secured by a view or edit privilege) are available for sorting. Thus, you cannot sort secured attributes..

Under "Display Sections," you can select which sections will be displayed in your search display results. Sections are displayed as a column containing an icon with a direct link to the section. For example, to include an Attachments link on your search results page, select Attachments from the Available List and move it to the Selected List.

6. Click Apply to save your display format definition.

To update a user level display format:

1. Navigate to the Advanced Search link from the search sandbox that appears at the top of most Item Catalog, Document Management, and Change Management pages. You can also navigate to the Advanced Search link in the Items, Document

Management, and Change Management sections of the Applications tree menu.

Note: To create display format for a structure, go to the **First Level Components** or **Structure Component Hierarchy** page for the item structure and click Personalize (in Display Formats).

2. On the **Advanced Search** page, select an Item Catalog Category, Document Primary Category, or Change Category (whichever is appropriate for your context) and click Go.
3. Click Personalize in the Display Format section.
4. On the **Display Formats** page, click on the name link of the display format you wish to update. You can only edit the display formats that are explicitly associated with the item catalog category, document primary category, structure type, or change category originally selected.
5. On the **Edit Display Format** page, you can update the name, description and other columns of the display format. You can also add/remove/rename columns and modify sort criteria.
6. Click Apply to save your display format definition.

Related Topics

Defining Item Catalog Display Formats, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*

Defining Change Category Display Format, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*

Item Catalog

This chapter covers the following topics:

- Browsing the Item Catalog
- Assigning an Item to a Category
- Copying Items with Category Assignments
- Searching for Items
- Managing Favorite Items
- Using Recently Visited
- Creating New Items
- Creating Multiple Items
- Managing Item Imports
- EGO_ITM_USR_ATTR_INTRFC
- EGO_ITM_USR_ATTR_INTRFC Column Details
- EGO_ITEM_PEOPLE_INTF
- EGO_ITEM_PEOPLE_INTF Column Details
- Importing Items Using a Spreadsheet
- Importing Item Revisions Using a Spreadsheet
- Importing Item Categories Using a Spreadsheet
- Importing Item Organization Assignment Using a Spreadsheet
- Importing Item People Assignment Using a Spreadsheet
- Updating Existing Items
- Updating Existing Items Using a Spreadsheet
- Mass Updating Items, Item Categories and Item Assignments
- Updating Multi-Row Attributes in a Spreadsheet

- Managing Item Specifications
- Managing Item Phases
- Managing AMLs
- Creating Item Revisions
- Managing Item Attachments
- Using Item Business Events
- Enabling Organization Assignments
- Adding People
- Managing Revision Phases
- Managing Projects
- Viewing Item Transaction Information
- Generating Reports

Browsing the Item Catalog

Item catalogs are structured hierarchically. You can expand and collapse levels in the hierarchy to view the current structure of your catalog. You can only browse catalogs for which you have the Catalog Viewer role. While you can see all the items listed in a catalog, here you only see the subcategories within a particular catalog.

To browse the item catalog:

1. In the Items s section of the Application tree menu, click the "Browse Catalog" link.
2. On the **Browse** page, you can choose to display item categories by Name or Description. After selecting the desired display option, click Go. The default display option is Name.

To view the hierarchy of the categories in the item catalog, click the Hierarchy icon next to the catalog name. The number in parentheses after the catalog name represents the cumulative number of items in this catalog and all of its subcategories.

To perform actions within a catalog category:

From a catalog category, you can select items and perform the following actions for them:

- add them to the category
- export all items in the category to a spreadsheet

- compare them
 - remove them from the catalog category
 - generate a report about them
 - create a change order, change request, or issue for them
 - add to the Favorites list
1. Complete the steps in *To browse the item catalog* above, then select a catalog category.

To add items to the category

2. Click Add Item to add items to the category.

Search for the items you want to add. In the Search Results page, select the items to add, then click Apply.

To export all items to a spreadsheet

3. Click Export All Items or to export all items in the category to a spreadsheet.

To perform all other actions

4. In the Select column, select the items on which to perform an action.
5. In the Select Items field, select one of the following actions from the pull-down list:
 - Generate Report
 - Create Change Order
 - Create Change Request
 - Create Issue
 - Remove
 - Compare
 - Add to Favorites
6. Click Go.

Related Topics

Overview of Item Catalogs, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*

Assigning an Item or Document to a Category, page 8-4

Copying Items or Documents with Category Assignments, page 8-5

Assigning an Item to a Category

When you create an item, it is automatically assigned to the default mandatory item or document catalog, and default category of the functional area in which it is created. You can override the item catalog's default category as well as manually assign the item to an unlimited number of catalogs.

To assign an item to a category:

1. In the Applications tree menu, use either the "Simple Search" or "Advanced Search" links to search for the item whose category you wish to change.
2. Click the link for item in the search results.
3. On the **Item Detail** page, click the Categories tab.
4. On the **Category Assignment** page, click Update. After the page refreshes, click Add Assignment.
5. After the **Category Assignment** page refreshes, select an item catalog and then a category within that catalog.

If *Enforce List of Valid Categories* is enabled in the catalog definition, page 2-3, then you can only choose from the list of valid categories defined for that catalog. Otherwise, you can choose any category that has the same flex field structure as the catalog.

If *Allow Multiple Item Category Assignments* is disabled in the catalog definition, page 2-3, then you can assign an item to only one category in the catalog. Otherwise, you can choose to assign the item to multiple categories in the catalog.

In a hierarchical item catalog, you can only assign items to leaf categories.

6. Click Apply.

Related Topics

Overview of Item Catalogs, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*

Browsing the Item Catalog, page 8-2

Copying Items with Category Assignments, page 8-5

Copying Items with Category Assignments

When you assign an item to another organization, the system copies the item level catalogs, organization level default catalog, and the associated categories assigned in the item master organization. For example, if you manually assign an organization item level catalog to the item in the master organization, the system does not copy over that organization item level catalog when you assign that item to another organization.

After assigning an item to another organization, you can disable the item for one or more functional areas in the new organization. However, the system does not remove the corresponding functional area's default catalog. For example, you may have set the value of the Purchased attribute to "Yes" when you defined the item in the item master organization. When you assign this item to another organization, the system copies over the "Yes" value of the Purchased attribute, and therefore assigns the default catalog of the Purchasing functional area. In the new organization, you may decide to set the value of the Purchased attribute to "No." After you disable the item for the Purchasing functional area in the new organization, the item still retains the Purchasing default catalog. You may manually delete the Purchasing catalog in the new organization.

If you copy an object with item catalogs defined at the organization level, the system assigns the new item the default categories of the mandatory catalogs, even if the original item did not have the default categories. This occurs because the system copies the values of the item defining attributes and not the item catalogs and categories themselves.

Searching for Items

You can perform searches using keywords that may be part of an item number, item catalog category, manufacturer, manufacturer part number, short description or long description. Keyword searches enable you to search using any or all keywords. You can enter additional keywords to be excluded from a search. For example, the keyword search for "SRAM" may return results that include all items that have "SRAM" in the item name, description, or an attribute value. A Wildcard search enables you to enter the percent (%) sign before and/or after a keyword. For example, a search using "mo%" may return "Monitor" and "Mouse," but a search using "mon%" would return "Monitor." A Fuzzy Search enables you to look for records that closely resemble or sound like your word(s), but are spelled differently. For example, a search for "telefone."

Keyword search options include:

- Exact match
Enter search criteria for a specific word.
- Word positioning
Search using a particular phrase such as "optical sensors relay," or search for words near each other, such as "optical NEAR relay."

- Inexact match
Search for words that sound like your word to account for common spelling and typing errors.
- Intelligent match
Search for an item by entering a word that is about something like a theme--for example searching by the word 'Car' can result in items such as Convertibles, Coupes, and Sedans without having the word car in the item name. You may also ignore the noise words such as 'the', 'of'. A default list of noise words (a stop list) is supplied for each European Language.
- Non-alphanumeric characters
You may choose to search with '-' (or other non-alphanumeric characters) as part of the item name such as AS-18947.
- Boolean combinations
Combine terms described above using the operators: AND, OR, and NOT.
- Stemming search
Search for relevant items. For example, entering the word "pen" returns results that include items like pens and pencils.

The system also enables you to search for items based on item revision attribute values. For example, if the horsepower of an engine has changed from 200 hp to 220 hp between revisions A and B, searching for an item revision with the horsepower attribute value of 220, will return only revision B.

To perform a simple item search:

1. On the **Simple Search** page, enter as many keywords as possible in the Keyword Search field. For example, entering "CRT Color Monitor" would return more relevant results than simply entering "Monitor." To specify that the search uses all the keywords entered, select Match all word(s) (AND). To specify that the search use any of the keywords entered, select Match any word(s) (OR).
2. To exclude a keyword from the search, enter it in the Without Keyword(s) field. For example, entering the keywords "Flat LCD Monitor" without the keyword "black " returns all "Flat LCD Monitors" that are not black.
3. Click Search.
 - Enter % (wildcard) before and/or after a keyword to perform a wildcard search. For example, a search for "mo%" returns Mouse and Monitor; a search for mon% returns Monitor.

- Include "\$" before the item name to perform a stemming search. This indicates that you want to search for items whose spelling is derived, or stems from the keyword. For example, a search on the keyword "\$contract" could return: "contract," "contracts," "contracted," and "contracting."
- Include "?" before the item name to perform a fuzzy search. This indicates that you want to search for items whose spelling is close to the actual item for which you are performing the search. The search engine looks for records that closely resemble the words you have entered, but that are spelled differently. The search returns results that have items with that term in either its name or description. Hence, entering the keyword "?telephone" also would return "telephone."
- Simple Search is *case-insensitive*.

As mentioned above, Item simple search supports wildcard, fuzzy and stemming search. However these different types of search are supported only in certain languages. The following table summarizes the search features and the supported languages.

Language	Wildcard (%)	Fuzzy (?)	Stemming (\$)
English	Yes	Yes	Yes
German	Yes	Yes	Yes
Japanese	No	Yes	No
French	Yes	Yes	Yes
Spanish	Yes	Yes	Yes
Italian	Yes	Yes	Yes
Dutch	Yes	Yes	Yes
Portuguese	Yes	Yes	No
Korean	Yes	No	No
Simplified Chinese	No	No	No
Traditional Chinese	No	No	No

Danish	Yes	No	No
Swedish	Yes	No	No
Finnish	Yes	No	No

To perform an advanced search:

Note the following tips and restrictions before conducting an advanced search:

- Providing values for the indexed attributes improves performance during the search.
- If no search criteria is used, you must add your own criteria to be used for the search.
- If no display format is used, the following columns will be the default for your search results: Item, Item Catalog Category, Description, and Item Revision.
- All Advanced Search operators are *case-sensitive*, except for the operator "contains".

1. On the **Advanced Search** page, select an Item Catalog Category and click Go. This determines the search criteria that is available to use for this particular search.

Note: You are not required to search by or select a catalog category. If you do not, by default the system primary attributes appear.

2. You can also search by item revision specific attributes. To search by revision, select the type of Revision on which to base the search. Following are the types of revisions available:

- All
Searches for all (past, current and future) revisions.
- Latest
Searches for the most current effective revisions that are not yet implemented.
- Production
Searches for the revisions that are currently implemented.

3. Select a search criteria, add or delete attributes and enter values to define your parametric search. You must include at least one indexed attribute in your search.

You can select and preview a display format for the search results.

Note: For details about how to use search criteria and display formats to assist in your advanced search, see *Managing Search Criteria*, page 7-1 and *Managing Display Formats*, page 7-5.

4. Click Search.

The Search Results page appears.

You can view the AML or Manufacturer Part Numbers for an item in the item search results page within the show/hide region.

Managing Favorite Items

The Favorite Items list provides you a mechanism for creating and managing lists of your favorite or bookmarked items. You can add items to your Favorite Item list from the **Search Results** page, or while browsing--there are a number of contexts from which the Favorite Items link is available. The following steps describe just one of these contexts.

To add an item to your favorite items list:

1. Navigate to the **Favorite Items** page by clicking the Favorite Items link in the Items section of the Applications tree menu. You can also get there by navigating to any item **Search** or **Browse** page and clicking the Favorite Items tab.
2. On the **Favorite Items** page, click Add Favorite Item.
3. On the **Advanced Search** page, search for item you wish to add to your favorites list.
4. On the **Search Results** page, select the items you wish to add and select Add to Favorites in the Action menu and click Go. A message acknowledging the successful addition of the item to your favorites list appears at the top of the page.

To manage your favorite items list:

1. Navigate to the **Favorite Items** page by clicking the Favorite Items link in the Items section of the Applications tree menu. You can also get there by navigating to any item **Search** or **Browse** page and clicking the Favorite Items tab.
2. On the **Favorite Items** page, click Add Favorite Item to add a new item to the list. To remove an item from your Favorite Items list, select the item and then choose Remove from the Action menu and click Go.

- You can Export to Excel the attributes for your favorite item by selecting it and clicking Export to Excel.
- You can compare attributes of your favorite items by selecting them and then selecting Compare from the Action menu. Each item's attributes will be listed side-by-side in a table.
- You can change the lifecycle of an item by selecting it and then selecting Change Lifecycle from the Action menu.
- You can change an item's catalog category by selecting it and then selecting Change Catalog Category from the Action menu.

Using Recently Visited

Clicking the Recently Visited global button (global buttons appear on all pages in the system's user interface) enables you to view a list of pages that you visited before the current page. This eases navigation throughout the user interface, as the use of your browser's Back button is not supported. The Recently Visited list provides links up to the last 20 pages visited in your current session, in order of most to least recently visited.

Creating New Items

Items are used to represent:

- Products & services you sell
- Resources that you maintain
- Components that make up your products and services

Each item that you create in the catalog has several standard operational attributes that determine the behavior of the item with respect to various functions, such as Purchasing, and Inventory Management. In addition to these operational attributes, the item has several user-defined attributes defined by its item catalog category. These user-defined attributes can capture item specifications and other information relevant to the product definition.

You can choose from multiple methods to create a new item:

- **Create Item** page
- Item Open Interface table (see: Managing Item Imports, page 8-17)
- Microsoft Office Excel spreadsheet (see: Importing Items Using a Spreadsheet, page

8-28)

- Import Workbench (see: Overview of Inbound Product Data Synchronization and Data Quality Management, *Oracle Product Information Management User's Guide*). Import Workbench is available only to customers who have licensed Product Information Management, and is not available to licensees of Product Lifecycle Management.
 - CADView-3D Studio and Translator through Import Workbench
- Product Workbench (see: Creating Items, page 12-20)

The create item process enables you to request new items through a standard approval and creation process. Using this process, companies can promote reuse of items and maintain tight controls over item/part creation, avoiding costly maintenance of duplicate items. The item request approval routing ensures that all relevant parties participate in the item's definition.

Note: If there is no item request associated with an item catalog category, then new items are created with an approval status of Approved. For items such as this, users can define the item status during item creation. If there is a new item request associated with the item catalog category, then the approval status of the item is the same as the approval status of the corresponding new item request. The default approval status of the new item request is Not Submitted for Approval. For such items, regardless of the default approval status, the item status is Pending (all status controlled flags are disabled). Only Product Lifecycle Management and PIMDL users can view items with the item status of Pending. Users cannot view these items in the Master Item window or in any other Oracle application. Users can manually update the item status after the new item request is approved.

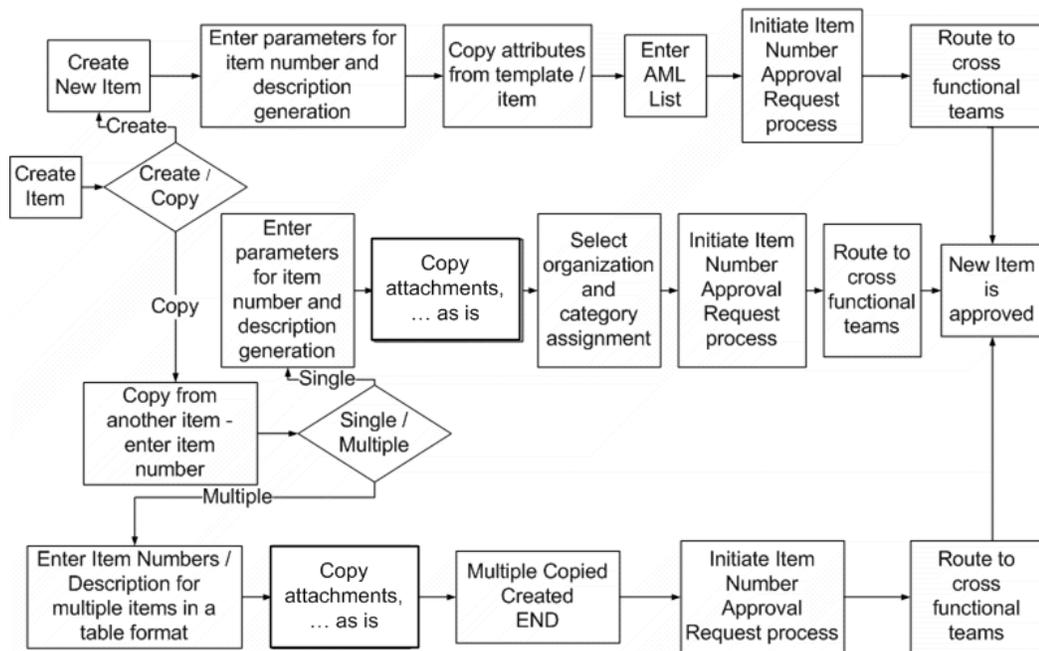
The new item creation process enables you to:

- Perform parametric searches to verify existing functionally-equivalent items
- Copy items and their related information to create single or multiple new items
- Request approval from different functional teams before creating an item
- Automatically route the new item request to different functional groups to participate in the item definition process
- Create related item information, such as a Manufacturer's Part Number, or item attachments (among other item information)

Benefits associated with the new item request process:

- Companies can standardize item numbers and descriptions
- Prevents duplication and promotes reuse of item number that are functionally equivalent
- You can automatically trigger actions based on the item creation business event. See: *Item Business Events, Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide* and *Managing Business Events, Oracle Workflow Developer's Guide*.

Create New Item Flow



To create a new item:

1. On the **Create Item** page, begin by selecting either an Item Catalog Category or an Existing Item.

Note: You can only create items within a particular item catalog category if you have the Catalog Category User role for that item catalog category.

If you are familiar with an item in the same item catalog category in which you

wish to create a new item, then you can save time by creating the new item from an existing item. When you copy an item, select the attribute groups and attachment categories to copy; also choose whether or not to copy people and organizational assignments (you can add new manufacturer part numbers, but you cannot copy existing ones). You can modify the copied information to define the new item's specifications.

Note that you must have the appropriate privileges to copy the item's user-defined attributes, operational attributes, attachments, people, and organizational assignments. For example, if you wish to copy the item's attachments, you must have--at a minimum--the View Item Attachments List privilege. Likewise, if you want to copy the item's people, you must have the View Item People List privilege for the base item.

When creating a new item, you have the option of simultaneously creating multiple items. For details about creating multiple items, see *Creating Multiple Items*, page 8-15.

If a new item request is not required for the item catalog category, then the Engineering Item checkbox appears. Selecting Engineering Item ensures that the new item is an Engineering Item. If not selected, the new item becomes a Manufacturing Item. If a new item request is required, the Engineering Item checkbox is automatically selected and displayed as read-only.

2. On the **Create Item: Enter Number/Description** page, enter the required information.

The item catalog category definition determines the new item's generation method. The item number already appears when the item catalog category specifies that it is Sequence-generated. If the category specifies that the item number or item description is User Entered, then enter an item number or item description. A Function-generated item number or item description is generated after the item and description attributes are entered.

Optionally select a template that sets the operational and user-defined attributes for the item.

If you are creating an item by copying an existing item, add or remove attribute groups on the **Create Item: Copy Item Details** page.

For details about defining item catalog categories, see *Creating Item Catalog Categories*, page 1-2.

3. On the **Review Item Information** page, you can check to ensure the values entered are correct before submitting the item. You can also enter or change item attributes; attach documents or folders from a document repository such as Oracle Files; grant people roles directly on the item if they do not inherit a role from the organization or item catalog category level; specify approved manufacturers and their part numbers for the new item.

Note: Remember that data associated with attributes, attachments, people, etc. of the copied/base item only appears if you have the appropriate privileges on that base item.

Use the tabs to manage all your item information.

- Attributes

View attributes associated with the item catalog category. You can also update or change attribute values, but, depending on your role privileges and the item's lifecycle phase, a change order may be required (see: Managing Item Specifications, page 8-51). You cannot add new attributes. Attribute associations with item catalog categories are performed at the administration level. For more information, see Creating Item Catalog Categories, page 1-2.

- Organizations

View the organization in which the item is created (the Master Organization). You can also add additional organizations, thereby enabling users in those organizations to view the item. For item catalog categories that require approval for new item creation, the Organization tab is disabled. You cannot assign an item to an Organization until after the new item request has been approved.

- Categories

View the catalogs and item catalog categories in which the item appears. You can add or delete catalog assignments. For item catalog categories that require approval for new item creation, the Categories tab is disabled. You cannot make Category assignments until after the new item request has been approved.

After providing the required information and reviewing your item information, click Submit. If there is an item request approval process specified with the item catalog category, proceed to the next step. If not, the item creation process is complete.

4. On the **Create New Item Request** page you can customize/edit the new item approval request.

The Assignee is defaulted based on the item catalog category role specified in the assignment rule for new item requests.

Use the Priority and Reason codes to track the degree of urgency and the reason for requesting the new item.

In the Workflow Approval tab, approval routing templates are available for routing the new item request definition/approval. Routing templates are typically defined for standard business processes associated with new item creation/approvals. You can also use the approval routing template to route the new item request to

different functional groups, providing those groups the ability to participate in the creation and definition of new items. For example, the Design Engineer may be responsible for entering the item's user-defined attributes.

You can submit the new item request or save it if you wish to enter additional information later. If you save it for later, the new item request is saved with a Draft status. Upon submission, an assignment notification is sent via e-mail.

Important: For new items that require an approval, you can choose a Lifecycle Policy, but not a Lifecycle Phase. Instead, the item defaults to the first Lifecycle Phase of the selected Lifecycle Policy.

All new items requiring approval have the Item Status Pending. After the new item is approved, you can change the Item Status to enable the item for viewing/use outside of the system. You can also define or update its operational attributes.

Creating Multiple Items

When creating a new item, you have the option of creating more than one item simultaneously. In situations where you have to create numerous different items requiring approval, it is best to use this procedure. Attributes are entered by the various reviewers/approvers, thereby ensuring that all appropriate parties have an opportunity to provide information relevant to the different items' definitions.

Note: You can also create multiple items via a spreadsheet item import. For details see Importing Items Using a Spreadsheet, page 8-28.

For details about creating a single item, see Creating New Items, page 8-10.

To create multiple items:

1. On the **Create Item** page, create new items by selecting either the Item Catalog Category or an Existing Item.

Note: You can only create items within a particular item catalog category if you have the Catalog Category User role for that item catalog category.

If you are familiar with an item in the same item catalog category in which you wish to create new items, then you can save time by creating the new items from that existing item. When you copy an item, select the attribute groups and attachment categories; also specify whether or not you wish to copy people, and organizational assignments.

Note that you must have the appropriate privileges to copy the item's user-defined

attributes, operational attributes, attachments, people, and organizational assignments. For example, if you wish to copy the item's attachments, you must have the View Item Attachments List privilege. Likewise, if you want to copy the item's people, you must have the View Item People List privilege for the base item. Select the Create Multiple Items option.

2. On the **Create Items: Enter Items** page, enter the required information.

The item catalog category definition determines the new item's Item Number and Item Description generation method. The Item Number already appears when the item catalog category specifies that it is sequence-generated. If the category specifies that the Item Number or Item Description is user entered, then enter an Item Number or Item Description. A function-generated Item Number or Item Description is generated after the item and description attributes are entered.

For details about defining item catalog categories, see *Creating Item Catalog Categories*, page 1-2.

3. On the **Create Items: Enter Primary Attributes** page, check to ensure the values entered are correct before submitting the item.

You can select an item template to default values for operational and user-defined attributes. Note that for items requiring an approval request, only the user-defined attribute values default from the item template. After the item is approved you can edit the operational attributes.

If you are creating the new items from an item catalog category, and there is no approval request associated with that item catalog category, then you can submit the item for creation at this point.

4. If you are creating new items by copying an existing item, on the **Copy Items: Item Details** page, add or remove attributes, attachments, organizations, people, and categories. Note that organizations and categories do not appear on the **Copy Items: Item Details** page when there is an approval request associated with the item catalog category.

Note: Remember that data associated with attributes, attachments, people, etc. of the copied/base item only appears if you have the appropriate privileges on that base item. Also note that operational attributes are only copied if the items do not require an approval request.

If there is no approval request associated with the item catalog category, then submit the new items for creation. If there is an approval request associated with the item catalog category, then proceed to the next step.

5. On the **Create Item Request** page, you can customize/edit the new items' approval request.

The Assignee is defaulted based on the item catalog category role specified in the assignment rule for new item requests.

Use the Priority and Reason codes to track the degree of urgency and the reason for requesting the new item.

You can submit the new items' request or save it if you wish to enter additional information later. If you save it for later, the new items' request is saved with a Draft status. Upon submission, an assignment notification is sent via e-mail.

Important: For new items that require an approval, you can choose a Lifecycle, but not a Lifecycle Phase. Instead, the item status defaults to the first Lifecycle Phase of the selected Lifecycle.

All new items requiring approval have the item status Pending. After the new items are approved, you can change the Item Status to enable the item for viewing/use outside of the system--you can also define or update the operational attributes.

Managing Item Imports

You can use any of the following methods to import items and item-related information:

- Item Open Interface
- Microsoft® Office Excel spreadsheet (see: Importing Items Using a Spreadsheet, page 8-28)
- Import Workbench (see: Overview of Inbound Product Data Synchronization and Data Quality Management, *Oracle Product Information Management User's Guide*)

Caution: The Import Workbench is only available to customers who have licensed Oracle Product Information Management, and is not available to licensees of Oracle Product Lifecycle Management.

This topic discusses importing items using the Item Open Interface. Additionally, you can import people and user attributes for items. The Open Interface program validates all data before importing it into the production tables. You can also import customer items and customer item cross references from any source using the Customer Item and Customer Item Cross Reference Interfaces.

To import items:

1. Load the Item Open Interface table (MTL_SYSTEM_ITEMS_INTERFACE) with the data you want to import.

See: Open Item Interface, *Oracle Inventory User's Guide* and Importing Items, *Oracle Inventory User's Guide* for a full description of how to import items.

To import user attributes for items:

1. Load the Item User-defined Attributes Open Interface table (EGO_ITM_USR_ATTR_INTRFC, page 8-19) with the data you want to import. For detailed help on loading the Open Interface tables, refer to the *Oracle Manufacturing Open Interfaces and APIs* manual.
2. Navigate to the Inventory Responsibility in Oracle Applications, and click the Inventory link. Then click the Items link
3. Click the Import link.
4. Click the Import Item/Item Revision User Attributes link.

Note: The Parameters form automatically appears when you select a request that requires parameter values.

5. After entering the values in the required parameter fields, click OK.
6. Click Submit.

To import item people:

1. Load the Item People Open Interface table (EGO_ITEM_PEOPLE_INTF, page 8-24) with the data you want to import. For detailed help on loading the Open Interface tables, refer to the *Oracle Manufacturing Open Interfaces and APIs* manual.
2. Navigate to the Inventory Responsibility in Oracle Applications, and click the Inventory link. Then click the Items link
3. Click the Import link.
4. Click the Import Item People link.

Note: The Parameters form automatically appears when you select a request that requires parameter values.

5. After entering the values in the required parameter fields, click OK.
6. Click Submit.

To import customer items and customer item cross references:

1. In the Navigator menu under the Batch Import : Import Items heading, click the Import Customer Items link or the Import Customer Item Cross References link.

For more information, see:

- Customer Item and Customer Item Cross Reference Interfaces, *Oracle Inventory User's Guide*
- Importing Customer Items, *Oracle Inventory User's Guide*
- Importing Customer Item Cross References, *Oracle Inventory User's Guide*

Related Topics

Creating New Items, page 8-10

EGO_ITM_USR_ATTR_INTRFC, page 8-19

EGO_ITM_USR_ATTR_INTRFC Column Details, page 8-21

EGO_ITEM_PEOPLE_INTF, page 8-24

EGO_ITEM_PEOPLE_INTF Column Details, page 8-26

Importing Items Using a Spreadsheet, page 8-28

Importing Item Revisions Using a Spreadsheet, page 8-31

Importing Item Categories Using a Spreadsheet, page 8-35

Importing Item Organization Assignment Using a Spreadsheet, page 8-37

Importing Item People Assignment Using a Spreadsheet, page 8-38

Updating Existing Items Using a Spreadsheet, page 8-40

Updating Multi-Row Attributes in a Spreadsheet, page 8-49

Overview of Inbound Product Data Synchronization and Data Quality Management, *Oracle Product Information Management User's Guide*

EGO_ITM_USR_ATTR_INTRFC

The following table shows the columns in the EGO_ITM_USR_ATTR_INTRFC database table. For more details about the columns in EGO_ITM_USR_ATTR_INTRFC, see EGO_ITM_USR_ATTR_INTRFC Details, page 8-21.

EGO_ITM_USR_ATTR_INTRFC table

Column Name	Data Type	Required?
EGO_ITM_USR_ATTR_INTRFC		
TRANSACTION_ID	NUMBER	Yes
PROCESS_STATUS	NUMBER	Yes
DATA_SET_ID	NUMBER	Yes
ORGANIZATION_CODE	VARCHAR2(3)	Yes
ITEM_NUMBER	VARCHAR2(81)	Yes
REVISION	VARCHAR2(30)	
ROW_IDENTIFIER	NUMBER	Yes
ATTR_GROUP_INT_NAME	VARCHAR2(30)	Yes
ATTR_INT_NAME	VARCHAR2(30)	Yes
ATTR_VALUE_STR	VARCHAR2(150)	
ATTR_VALUE_NUM	NUMBER	
ATTR_VALUE_DATE	DATE	
ATTR_DISP_VALUE	VARCHAR2(150)	
TRANSACTION_TYPE	VARCHAR2	Yes
ORGANIZATION_ID	NUMBER	
INVENTORY_ITEM_ID	NUMBER	
ITEM_CATALOG_GROUP_ID	NUMBER	

Column Name	Data Type	Required?
REVISION_ID	NUMBER	
ATTR_GROUP_ID	NUMBER	
REQUEST_ID	NUMBER	
PROGRAM_APPLICATION_ID	NUMBER	
PROGRAM_ID	NUMBER	
PROGRAM_UPDATE_DATE	Date	
CREATED_BY	NUMBER(15)	Yes
CREATION_DATE	DATE	Yes
LAST_UPDATED_BY	NUMBER(15)	Yes
LAST_UPDATE_DATE	DATE	Yes
LAST_UPDATE_LOGIN	NUMBER(15)	

EGO_ITM_USR_ATTR_INTRFC Column Details

TRANSACTION_ID

The Primary Key for this table; its value must be generated from the sequence EGO_IUA_TRANSACTION_ID_S.

PROCESS_STATUS

Whether this row has yet to be processed, is currently being processed, encountered an error, or was successfully processed; its value should correspond to the following constants in EGO_ITEM_USER_ATTRS_CP_PUB: G_PS_TO_BE_PROCESSED, G_PS_IN_PROCESS, G_PS_ERROR, and G_PS_SUCCESS.

DATA_SET_ID

The identifier for a group of rows to be processed together; all rows being processed as part of a single request must share the same DATA_SET_ID, whose value must be generated from the sequence EGO_IUA_DATA_SET_ID_S.

The following column values will be validated and used to populate the

ORGANIZATION_ID, INVENTORY_ITEM_ID, ITEM_CATALOG_GROUP_ID, and REVISION_ID columns.

ORGANIZATION_CODE

The organization to which the Item belongs; currently, user-defined attributes are supported only for master organizations, and the organization code is validated to ensure that it refers to a master organization.

ITEM_NUMBER

The item number (such as, concatenated segments) for the item.

REVISION

The three-letter code for the current revision of the item (only used if the attribute group is associated at the item revision level; for attribute groups associated at the item level, leave NULL).

Because the user-defined attributes framework is so flexible, its structure must be flattened out for this interface table. To understand this flattening it is useful to first define a logical attribute group row. For single-row attribute groups, the logical attribute group row is just the collection of attributes in the attribute group, but for multi-row attribute groups, each row in the attribute group is a logical attribute group row. For example, the single-row attribute group "Dimensions," with Attributes "Width" and "Height," has only one logical attribute group row, but multi-row attribute group "Orders," with attributes "Date" and "Price" has as many logical attribute group rows as there are separate orders to be recorded.

Every interface table row contains data for one attribute in a logical attribute group row, and a logical attribute group row spans as many interface table rows as there are attributes in the logical attribute group row. To keep these flattened-out logical attribute group rows in order, there is the ROW_IDENTIFIER column, which uniquely identifies each logical attribute group row (for example, all attributes with the same ROW_IDENTIFIER value will belong to the same logical attribute group row). Thus, if a multi-row attribute group has ten attributes and three rows of values (for example, three logical attribute group rows), then there will be thirty interface table rows for the attribute group and three distinct ROW_IDENTIFIER values in those thirty rows.

ROW_IDENTIFIER

The grouping identifier for a logical attribute group row; its value must be the same for all interface table rows in the logical attribute group row, and no two logical attribute group rows in the same data set may share the same ROW_IDENTIFIER value.

ATTR_GROUP_INT_NAME

The internal name of the attribute group to which the current interface table row's attribute belongs.

ATTR_INT_NAME

The internal name of the attribute for which the current interface table row holds a value.

ATTR_VALUE_STR

The value for the current interface table row's attribute if its data type is string.

ATTR_VALUE_NUM

The value for the current interface table row's attribute if its data type is number.

ATTR_VALUE_DATE

The value for the current interface table row's attribute if its data type is date. Values will be converted to and from date data types using the format specified in EGO_USER_ATTRS_DATA_PVT.G_DATE_FORMAT.

ATTR_DISP_VALUE

The value for the current interface table row's attribute (as a string, regardless of its data type) if the attribute has a value set with separate display and internal values (for example, value sets with validation type of independent or table). In all other cases, use the preceding three columns.

TRANSACTION_TYPE

The mode of processing for a logical attribute group row; its value should correspond to the following constants in EGO_USER_ATTRS_DATA_PVT: G_DELETE_MODE, G_UPDATE_MODE, G_SYNC_MODE (which either creates or updates, as appropriate), and G_CREATE_MODE. Note that rows will be processed in the order they were just presented (for example, deletion first, followed by updates and synchronization, with creation last), in accordance with Oracle Applications standards. Typical values of these constants are: CREATE, SYNC, UPDATE, or DELETE.

ORGANIZATION_ID

This column is for internal use, and any user-entered values are ignored.

INVENTORY_ITEM_ID

This column is also for internal use, but the user may enter the inventory item ID if known. If the inventory item ID is passed for a given item number, it will save conversion time from item number into inventory item ID; the inventory item ID will still be validated internally, because it will be used with the organization ID to find the item catalog group ID (so rows with invalid inventory item IDs will time-out during the item catalog ID fetching step).

ITEM_CATALOG_GROUP_ID

This column is for internal use, and any user-entered values are ignored.

REVISION_ID

This column is for internal use, but the user may enter the revision ID if known (and if this interface table row belongs to an attribute group that is associated at the item revision level). Doing so will save conversion time.

ATTR_GROUP_ID

This column is provided in case the user knows the attribute group ID for this interface

table row's attribute group. If left blank, the attribute group internal name is used to identify the attribute group.

REQUEST_ID

This column is for internal use (to record the concurrent program request that ordered the processing of this row).

PROGRAM_APPLICATION_ID

This column is for internal use (to record the application ID of the concurrent program that processed this row).

PROGRAM_ID

This column is for internal use (to record the ID of the concurrent program that processed this row).

PROGRAM_UPDATE_DATE

This column is for internal use (to record the time the concurrent program processed this row).

The remaining columns are the standard "Who" columns, and their values must be entered when you load the interface table.

EGO_ITEM_PEOPLE_INTF

The following table shows the columns in the EGO_ITEM_PEOPLE_INTF database table. For more details about the columns in EGO_ITEM_PEOPLE_INTF, see EGO_ITEM_PEOPLE_INTF Details, page 8-26.

EGO_ITEM_PEOPLE_INTF table

Column Name	Data Type	Required?
INVENTORY_ITEM_ID	NUMBER(15)	No
ORGANIZATION_ID	NUMBER(15)	No
GRANTEE_PARTY_ID	NUMBER(15)	No
INTERNAL_ROLE_ID	NUMBER(15)	No
INTERNAL_ROLE_NAME	VARCHAR2(30)	No
LAST_UPDATE_DATE	DATE	No

Column Name	Data Type	Required?
LAST_UPDATED_BY		No
CREATION_DATE	DATE	No
CREATED_BY	NUMBER(15)	No
LAST_UPDATE_LOGIN	NUMBER(15)	No
REQUEST_ID	NUMBER(15)	No
PROGRAM_APPLICATION_ID	NUMBER(15)	No
PROGRAM_ID	NUMBER(15)	No
PROGRAM_UPDATE_DATE	DATE	No
ITEM NUMBER	VARCHAR2(81)	Yes
ORGANIZATION_CODE	VARCHAR2(3)	Yes
DISPLAY_ROLE_NAME	VARCHAR2(80)	Yes
GRANTEE_TYPE	VARCHAR2(8)	Yes
GRANTEE_NAME	VARCHAR2(360)	Yes
START_DATE	DATE	Yes
END_DATE	DATE	No
TRANSACTION_TYPE	VARCHAR2(10)	Yes
TRANSACTION_ID	NUMBER(15)	Yes
PROCESS_STATUS	NUMBER(15)	Yes
DATA_SET_ID	NUMBER(15)	Yes

EGO_ITEM_PEOPLE_INTF Column Details

INVENTORY_ITEM_ID

Identifier for the Inventory item on which the role is to be granted. The value is obtained from MTL_SYSTEM_ITEMS_B for a given item. This column is also for internal use, but the user may enter the inventory item ID if known. If the inventory item ID is passed for a given item number, it will save conversion time from item number into inventory item ID; the inventory item ID will still be validated internally.

ORGANIZATION_ID

The item ID and the organization ID form the unique key combination on which the role is to be granted.

GRANTEE_PARTY_ID

The person ID, group ID or part ID that gets the grant on the item ID and organization ID.

INTERNAL_ROLE_ID

The identifier of the role to be granted.

INTERNAL_ROLE_NAME

The internal role definition name; this name is unique.

LAST_UPDATE_DATE

One of the five standard "WHO" columns.

LAST_UPDATED_BY

One of the five standard "WHO" columns.

CREATION_DATE

One of the five standard "WHO" columns.

CREATED_BY

One of the five standard "WHO" columns.

LAST_UPDATE_LOGIN

One of the five standard "WHO" columns.

REQUEST_ID

The concurrent program submission request ID.

PROGRAM_APPLICATION_ID

The concurrent program application ID. This column is for internal use to record the application ID of the concurrent program that processed this row.

PROGRAM_ID

The concurrent program ID. This column is for internal use to record the ID of the concurrent program that processed this row.

PROGRAM_UPDATE_DATE

The concurrent program update date. This column is for internal use to record the time the concurrent program processed this row.

ITEM_NUMBER

The inventory item number (such as, concatenated segments) for the item. The INVENTORY_ITEM_ID is derived from the ITEM_NUMBER.

ORGANIZATION_CODE

The Inventory Organization Code. Should be one of the values in the MTL_PARAMETERS table column ORGANIZATION_CODE.

DISPLAY_ROLE_NAME

The display name for the role; this is one of the values in the FND_MENUS_VL table column USER_MENU_NAME.

GRANTEE_TYPE

The type of grantee. Has one of the following values: USER, GROUP, or GLOBAL.

GRANTEE_NAME

The name of the grantee. This name can be a user name, group name, or all users, depending on the grantee type specified (PERSON, GROUP or GLOBAL).

START_DATE

The grant start date. The grantee gains access to the item on this date.

END_DATE

The grant end date. The grantee loses access to the item on this date.

TRANSACTION_TYPE

The type of transaction. Valid values are: CREATE, SYNC, UPDATE, or DELETE.

TRANSACTION_ID

The unique identifier of the line. The value is retrieved from EGO_IPI_TRANSACTION_ID_S.

PROCESS_STATUS

Indicates the status of the line. Values are:

1 - To Be Processed, 2 - In Process, 3 - Error, 4 - Success, 5 - Warning

DATA_SET_ID

Unique identifier that indicates the subset of data to be processed (like the job ID). Each line that is newly uploaded in the interface table needs to be assigned a unique ID that is used during the concurrent program request submission. The value is selected

from the PL/SQL API: EGO_ITEM_PEOPLE_IMPORT_PKG.get_curr_dataset_id.

Importing Items Using a Spreadsheet

You can use a Microsoft Excel spreadsheet to import items into the system. Before doing so, you must first have defined import formats for the particular item catalog category you wish to use, and you must also have the appropriate version of the Excel spreadsheet installed.

You can use the same spreadsheet for multiple uploads, and also across different sessions for the same user. To upload the same spreadsheet during another session, open the spreadsheet you wish to upload, and select Upload from the Oracle menu in the menu bar. After you log in and choose the appropriate responsibility, you can immediately begin to upload this spreadsheet again.

Whenever you enter new or existing data in the spreadsheet, the Upl column displays a flag, making it easier to scan the spreadsheet and for rows that have been changed.

You can include multi-row attribute groups in your item import formats. To do so, make sure that the rows in the spreadsheet that you are using for updating multi-row attributes do not contain any attribute values other than the org code, item number, item revision (if applicable), and the user-defined multi-row attribute values.

Caution: If you include values for other primary (for example, item status, or lifecycle) or single-row user-defined attributes in the same rows as the multi-row attributes, then the updates will fail.

Items uploaded to the system from a spreadsheet become, by default, Engineering items. If you wish to upload a non-Engineering item, then include an available base attribute column called "Engineering Item Flag" in your import format. When uploading the spreadsheet, identify such items in this column by specifying the value "Yes" or "No" in this column. If you leave the column blank, the item once again defaults to an Engineering item.

To import items using a spreadsheet:

1. In the Applications tree menu, click the Import from Excel link.
2. On the **Import** page, select the type of object you wish to import and click Continue.

Note: An import format should already be defined for items or item revisions. Item categories do not have a defined import format that is associated with an item catalog category. Instead, a predefined format is used for all item category imports. The columns in this format are identical to the interface table.

3. On the **Import: Item** page, select an item catalog category and then click Go. The item catalog category determines which import formats are available for use.

Note: If you do not select an item catalog category, the default System Item import format is available for use. If an import format has not yet been defined for an item catalog category that you select, then the default System Item import format is available for use. The System Item import format does not appear if you select an item catalog category that already has import formats defined. Neither users nor the system administrator can modify the System Item import format.

4. When the **Import: Item** page refreshes with the import formats available for the item catalog category, select the import format you wish to use and click Import.

Note: If a default import format has been specified for the item catalog category, it will already be selected.

5. On the **Select Settings** page, select the version of Excel that you are using and click Next. You cannot enable or disable Reporting. Also, Language has only one choice, which is already selected.

6. A Download window presents processing messages. Click Close when the transfer is complete. The Excel spreadsheet also opens.

7. In the spreadsheet, base attributes are listed first (on the left), and user-defined attributes appear after (on the right). When entering values into the spreadsheet, you must use one of the following Transaction Types:

Sync

If the item already exists, the spreadsheet values are used to update it. If the item does not already exist, a new one is created using the spreadsheet values. If the Sync creates a new item, then the mandatory attributes for Create are also mandatory for the Sync. If the Sync updates an existing item, then the mandatory attributes for Update are also mandatory for the Sync.

Note: To delete an existing value in a record, enter the following data in the appropriate column of the spreadsheet:

For field type:	Enter value:
Date	31-DEC-9999
Character	!
Numeric	9.99E125

If you want to retain an existing value in a record, leave it blank in the spreadsheet.

Exception: In the user defined attributes interface table, when you want to delete an existing value in any of the following fields, use the value !. If you want to retain an existing value in a record, no entry is necessary.

- ATTR_DISP_VALUE
- ATTR_VALUE_STR
- ATTR_NUM_VALUE
- ATTR_VALUE_DATE

Create

A new item is created using the values entered in the spreadsheet. The following attributes are mandatory when using this transaction type:

- Item
- Organization Code
- Primary Unit of Measure
- Description

Note: Description is a base attribute, but appears on the right side of the spreadsheet among the user-defined attributes. It is placed here so that long descriptions will not disrupt the flow of the spreadsheet. Some attribute columns also utilize poplists and LOVs, depending on the attribute definition.

You can also make updates to multi-row attributes, page 8-49.

Make a note of the Result Format Usage ID at the top of the spreadsheet. You will need this ID later when you upload the spreadsheet in the system.

8. After data entry is complete, select Upload from the Oracle menu in the toolbar.
9. In the **Upload Parameters** window, enter the Result Format Usage ID and check the Automatically Submit Concurrent Process box, and then click Proceed to Upload.
10. In the **Oracle Web ADI** window, click Upload. After the upload process completes, a message appears with the Concurrent Request number. Make a note of this number, as you will need it later when you access the view log for the concurrent request. Click Close when the process messages complete.
11. Return to the Applications tree menu and click the View Concurrent Requests link.

Note: It is recommended that you review the concurrent process view log to ensure that the upload process was successful.

12. On the **View Concurrent Requests** page, click the Details icon.
13. On the **Request Details** page, click View Log.
14. From the View Log, paste the URL string in a web browser to view any errors. If no errors appear, the upload was successful.

Related Topics

Creating New Items, page 8-10

Importing Item Revisions Using a Spreadsheet

You can use a Microsoft Excel spreadsheet to import item revisions into the system. Before doing so, you must first have defined import formats, page 1-6 for the particular item catalog category you wish to use, and you must also have the appropriate version of the Excel spreadsheet installed.

You can use the same spreadsheet for multiple uploads, and also across different sessions for the same user. To upload the same spreadsheet during another session, open the spreadsheet you wish to upload, and select Upload from the Oracle menu in the menu bar. After you log in and choose the appropriate responsibility, you can immediately begin to upload this spreadsheet again.

Whenever you enter new or existing data in the spreadsheet, the Upl column displays a flag, making it easier to scan the spreadsheet and for rows that have been changed.

Item revisions uploaded to the system from a spreadsheet become, by default, Engineering items. If you wish to upload a non-Engineering item, then include an

available base attribute column called "Engineering Item Flag" in your import format. When uploading the spreadsheet, identify such items in this column by specifying the value "Yes" or "No" in this column. If you leave the column blank, the item once again defaults to an Engineering item.

To import item revisions using an Excel spreadsheet:

1. In the Applications tree menu, click the Import from Excel link.
2. On the **Import** page, select the Item Revision and click Continue.

An import format should already be defined for items or item revisions. Item categories do not have a defined import format that is associated with an item catalog category. Instead, a predefined format is used for all item category imports. The columns in this format are identical to the interface table.

3. On the **Import: Item Revision** page, select an item catalog category and then click Go. The item catalog category determines which import formats are available for use.

Note: If you do not select an item catalog category, the default System Item import format is available for use. If an import format has not yet been defined for an item catalog category that you select, then the default System Item import format is available for use. The System Item import format does not appear if you select an item catalog category that already has import formats defined. Neither users nor the system administrator can modify the System Item import format.

4. When the **Import: Item Revision** page refreshes with the import formats available for the item catalog category, select the import format you wish to use and click Import. If a default import format has been specified for the item catalog category, it will already be selected.
5. On the **Select Settings** page, select the version of Excel that you are using and click Next. You cannot enable or disable Reporting. Also, Language has one choice, which is already selected.
6. A Download window presents processing messages. Click Close when the transfer is complete. The Excel spreadsheet also opens.
7. In the spreadsheet, base attributes are listed first (on the left), and user-defined attributes appear after (on the right). When entering values into the spreadsheet, you must use one of the following Transaction Types:

Sync

If the item revision already exists, the spreadsheet values are used to update it. If

the item revision does not already exist, it is created using the spreadsheet values. If the Sync creates a new item revision, then the mandatory attributes for Create are also mandatory for the Sync. If the Sync updates an existing item revision, then the mandatory attributes for Update are also mandatory for the Sync

Create

A new item revision is created using the values entered in the spreadsheet. The following attributes are mandatory when using this transaction type:

- Item
- Organization Code
- Revision Code
- Revision Label
- Effectivity Date

Note: Description is a base attribute, but appears on the right side of the spreadsheet among the user-defined attributes. It is placed here so that long descriptions will not disrupt the flow of the spreadsheet.

Update

Existing item revisions are updated using the values entered in the spreadsheet. The following attributes are mandatory when using this transaction type:

- Item
- Organization Code
- Revision Code

Note: To delete an existing value in a record, enter the following data in the appropriate column of the spreadsheet:

For field type:	Enter value:
Date	31-DEC-9999
Character	!

For field type:	Enter value:
Numeric	9.99E125

If you want to retain an existing value in a record, enter NULL in the appropriate column of the spreadsheet.

Exception: In the user defined attributes interface table, when you want to delete an existing value in any of the following fields, use the value !. If you want to retain an existing value in a record, no entry is necessary.

- ATTR_DISP_VALUE
- ATTR_VALUE_STR
- ATTR_NUM_VALUE
- ATTR_VALUE_DATE

Make a note of the Result Format Usage ID at the top of the spreadsheet. You will need this ID later when you upload the spreadsheet in the system.

You can also make updates to multi-row attributes, page 8-49.

8. After data entry is complete, select Upload from the Oracle menu in the toolbar.
9. In the **Upload Parameters** window, enter the Result Format Usage ID and check the Automatically Submit Concurrent Process box, and then click Proceed to Upload.
10. In the **Oracle Web ADI** window, click Upload. After the upload process completes, a message appears with the Concurrent Request number. Make a note of this number, as you will need it later when you access the view log for the concurrent request. Click Close when the process messages complete.
11. Return to the Applications tree menu and click the View Concurrent Requests link.

Note: It is recommended that you check the concurrent process view log to ensure that the upload process was successful.

12. On the **View Concurrent Requests** page, click the Details icon.
13. On the **Request Details** page, click View Log.

14. From the View Log, paste the URL string in a web browser to view any errors. If no errors appear, the upload was successful.

Importing Item Categories Using a Spreadsheet

You can use a Microsoft Excel spreadsheet to import new, delete old, or update existing item categories in the system. Before doing so, you must also have the appropriate version of the Excel spreadsheet installed.

Whenever you enter new or existing data in the spreadsheet, the Upl column displays a flag, making it easier to scan the spreadsheet and for rows that have been changed.

To import item categories using an Excel spreadsheet:

1. In the Applications tree menu, click the Import from Excel link.
2. On the **Import** page, select Item Categories and click Continue.

Item categories do not have a defined import format that is associated with an item catalog category. Instead, a predefined format is used for all item category imports. The columns in this format are identical to the interface table.

3. On the **Import: Item Catalog Categories Assignment** page, click Import.

When your spreadsheet opens, it will display the same item category columns that appear on this page, plus an old category column. Only use the old category column when updating existing item categories.

4. On the **Select Settings** page, select the version of Excel that you are using and click Next.

You cannot enable or disable Reporting. Also, Language has one choice, which is already selected.

5. A Download window presents processing messages. Click Close when the transfer is complete. The Excel spreadsheet also opens.

Note that the columns that appeared on the **Import: Item Category Assignment** page have been exported to the spreadsheet.

6. When entering values into the spreadsheet, use the one of the following Transaction Types:

- **Create**

Creates a new item using the values entered in the spreadsheet.

- **Delete**

Deletes the item specified in the spreadsheet row.

- **Update**

Makes the changes specified to the item in the spreadsheet row.

The following attributes are mandatory when using these Transaction Types:

- Item
- Organization Code
- Catalog
- Category
- Old Category - mandatory for the Update transaction type only.

Make a note of the Record Set ID at the top of the spreadsheet. You will need this ID later when you upload the spreadsheet to the system.

7. After data entry is complete, select Upload from the Oracle menu in the toolbar.
8. In the Upload Parameters window, enter the Record Set ID.

In the Upload Processed Records menu, select Yes. If you select No, your data is sent to the user interface table only and is not processed; Consequently, debugging is not possible.

In the Delete Processed Records menu, select No. If you select Yes, all records corresponding to the current Record Set ID are cleared from the interface table.

Click Proceed to Upload.

9. In the **Oracle Web ADI** window, wait for the Ready message and click Upload.

Show Trace Messages is, by default, not selected. Do not change this setting unless you wish to have trace information provided via your parameters.

Clicking Parameters enables you to modify your parameters.

Important: When the Upload completes, a Concurrent Request Number appears in this window. Make note of this number, as you can later use it to view the results of the upload process (for example, to view whether or not the upload was successful).

10. If you do not wish to confirm that the upload was successful, you are done. If you wish to view the results of the upload process, return to the Applications tree menu and click the View Concurrent Requests link.

It is recommended that you check the concurrent process view log to ensure that the upload process was successful.

11. On the **Requests** page, select Completed and click Go. Look for your Concurrent Request Number to locate your process. If it does not appear, wait and repeat this step. You can also select Pending and click Go to view pending requests. Locate your process in the Results table and click the Details icon.
12. On the **Request Details** page, click View Log.
13. From the View Log, paste the URL string in a web browser to view any errors. If no errors appear, the upload was successful.

Importing Item Organization Assignment Using a Spreadsheet

You can use a Microsoft Excel spreadsheet to import item organization assignments into the system.

You can use the same spreadsheet for multiple uploads, as well as across different sessions for the same user. To upload the same spreadsheet in another session, open the spreadsheet and select Upload from the Oracle menu in the tool bar. After you log in and select the appropriate responsibility, you can begin uploading the spreadsheet again.

Whenever you enter new or existing data in the spreadsheet, the Upl column displays a flag, making it easier to scan the spreadsheet for rows that have been changed.

Import Item Organization Assignment Using a Spreadsheet:

1. In the **Navigator** page, click the **Import from Excel** link. This link is located under **Batch Import : Import Items**.
2. In the **Import** page, select Item Organization Assignment and click **Continue**.
3. In the **Import: Item Organization Assignment** page, click **Import**.
4. In the **Select: Viewer** page, select the appropriate version of Excel and click **Next**.

The **Processing: Creating Document** page appears. Wait until the Excel application is ready.

The **Confirmation** page appears. An Excel spreadsheet opens and the **Confirmation** page returns to the **Navigator** page. Alternately, click **Return** to return to the **Navigator** page.

Enter Data in the Spreadsheet:

1. Enter the organization assignments for each item in the spreadsheet.
Organization Code - Select your organization from the drop down list.
Item - Enter the item number. For instance, M1000.

Primary Unit of Measure - Enter the display name of the unit of measure. For instance, Each.

Note the **Set Process ID** at the top of the spreadsheet. You will need it to upload the spreadsheet in the system.

2. Select **Upload** from the Oracle menu in the tool bar.
3. In the **Upload Parameters** window, enter the **Set Process ID** and click **Upload**.
4. After upload, a message appears with the Concurrent Request number. Note this number. You will need it to verify the view log for the concurrent request. Click **Close** when the process messages complete.

Tip: It is recommended that you review the concurrent process view log to ensure that the upload was successful.

View Concurrent Requests:

1. Return to the **Navigator** page and click the **View Concurrent Requests** link. This link is located under **Workflow and Request**.
2. In the **Requests** page, click the **Details** icon.
3. In the **Request Details** page, click **View Log**. If no errors are declared in the view log, the upload was successful.

Importing Item People Assignment Using a Spreadsheet

You can use a Microsoft Excel spreadsheet to import item people assignments into the system.

You can use the same spreadsheet for multiple uploads, as well as across different sessions for the same user. To upload the same spreadsheet in another session, open the spreadsheet and select **Upload** from the Oracle menu in the tool bar. After you log in and select the appropriate responsibility, you can begin uploading the spreadsheet again.

Whenever you enter new or existing data in the spreadsheet, the **Upl** column displays a flag, making it easier to scan the spreadsheet for rows that have been changed.

Import Item People Assignment Using a Spreadsheet:

1. In the **Navigator** page, click the **Import from Excel** link. This link is located under **Batch Import : Item Imports**.
2. In the **Import** page, select **Item People Assignment** and click **Continue**.

3. In the **Import: Item People Assignment** page, click **Import**.
4. In the **Select: Viewer** page, select the appropriate version of Excel and click **Next**.
The **Processing: Creating Document** page appears. Wait until the Excel application is ready.
The **Confirmation** page appears. An Excel spreadsheet opens and the **Confirmation** page returns to the **Navigator** page. Alternately, click **Return** to return to the **Navigator** page.

Enter Data in the Spreadsheet:

1. Use one of the following Transaction Types when entering values into the spreadsheet:
 - **Create**
Select this option to create a new item people assignment using the values entered in the spreadsheet.
 - **Delete**
Select this option to delete an existing item people assignment.
 - **Sync**
Select this option to:
 - Create an item people assignment if it does not exist in the system.
 - Update an item people assignment if it exists in the system.
 - **Update**
Select this option to update an existing item people assignment using the values entered in the spreadsheet.

Note: You can update the End Date only in an existing item people assignment.

Note the **Data Set ID** at the top of the spreadsheet. You will need it to upload the spreadsheet in the system.

2. Enter values for the attributes.
Transaction Type - Select the appropriate transaction type from the drop down list.
Organization Code - Select your organization from the drop down list.
Item - Enter the item number. For instance, M1000.

Role - Select the display name of the role from the drop down list. For instance, Design Engineer.

Type - Select the type of user from the drop down list. For instance, Group.

Name - Enter the name of the person, group, or company. Leave the cell empty for type 'All Users.'

Start Date - Enter the start date of the grants. Date format - mm/dd/yyyy.

End Date - Enter the end date of the grant. Date format - mm/dd/yyyy.

3. Select **Upload** from the Oracle menu in the tool bar.
4. In the **Upload Parameters** window, enter the **Data Set ID** and click **Upload**.
5. After upload, a message appears with the Concurrent Request number. Note this number. You will need it to verify the view log for the concurrent request. Click **Close** when the process messages complete.

Tip: It is recommended that you review the concurrent process view log to ensure that the upload was successful.

View Concurrent Requests:

1. Return to the **Navigator** page and click the **View Concurrent Requests** link. This link is located under **Workflow and Request**.
2. In the **Requests** page, click the **Details** icon.
3. In the **Request Details** page, click **View Log**. If no errors are declared in the view log, the upload was successful.

Updating Existing Items

You can choose from two methods to update existing items. Both methods provide the same result.

- Microsoft® Office Excel spreadsheet - use this method if any of the following apply:
 - You need time to determine the changes to make. You can save the spreadsheet and work on it later.
 - When you have less than 200 items to update.
 - You want to update many different types of item fields at once. For example, you want to update many items' attributes, organizations, and categories at the same time.

- Mass update function - Use this method if any of the following apply:
 - Change control is necessary.
 - Your environment is characterized by many items and/or organizations.
 - You want to update certain fields for many items. Choose from the following mass update functions:
 - Update Master Item Attributes
 - Update Organization Item Attributes
 - Assign Items to Organizations
 - Assign Items to Categories
 - Unassign Items from Categories
 - Reassign Categories

Updating Existing Items Using a Spreadsheet

You can use a Microsoft® Office Excel spreadsheet to edit/update existing items. Before doing so, you must also have the appropriate version of the Excel spreadsheet installed.

Whenever you enter new or existing data in the spreadsheet, the Upl column displays a flag, making it easier to scan the spreadsheet and for rows that have been changed.

Items uploaded from a spreadsheet become, by default, Engineering items. If you wish to upload a non-Engineering item, then include an available base attribute column called "Engineering Item Flag" in your import format. When uploading the spreadsheet, identify such items in this column by specifying the value "Yes" or "No" in this column. If you leave the column blank, the item once again defaults to an Engineering item.

To update existing items, you must first search for the items, and then import the search results into the spreadsheet. Search results are limited to 200 items or less. Using this spreadsheet import/update saves you time, as the spreadsheet now contains the attributes/columns need to update the specific items you wish to change.

To update existing items using an Excel spreadsheet:

1. In the Applications tree menu, use either of the searches (Simple or Advanced) to locate the item you wish to update.
2. On the **Item Search Results** page, click Export all Items.
3. On the **Select Settings** page, select the version of Excel that you are using and click

Next. You cannot enable or disable Reporting. Also, Language has one choice, which is already selected.

4. A Download window presents processing messages. Click Close when the transfer is complete. The Excel spreadsheet also opens. Note that all your search results have been exported to the spreadsheet.
5. In the spreadsheet, base attributes are listed first (on the left), and user-defined attributes appear after (on the right). When entering values into the spreadsheet, you must use one of the following Transaction Types:

Sync

If the item already exists, the spreadsheet values are used to update it. If the item does not already exist, a new one is created using the spreadsheet values. If the Sync creates a new item, then the mandatory attributes for Create are also mandatory for the Sync. If the Sync updates an existing item, then the mandatory attributes for Update are also mandatory for the Sync.

Create

A new item is created using the values entered in the spreadsheet. The following attributes are mandatory when using this transaction type:

- Item
- Organization Code
- Primary Unit of Measure
- Description

Note: Description is a base attribute, but appears on the right side of the spreadsheet among the user-defined attributes. It is placed here so that long descriptions will not disrupt the flow of the spreadsheet.

Update

Existing items are updated using the values entered in the spreadsheet. The following attributes are mandatory when using this transaction type:

- Item
- Organization Code

Note: To delete an existing value in a record, enter the following data in the appropriate column of the spreadsheet:

For field type:	Enter value:
Date	31-DEC-9999
Character	!
Numeric	9.99E125

If you want to retain an existing value in a record, enter NULL in the appropriate column of the spreadsheet.

Exception: In the user defined attributes interface table, when you want to delete an existing value in any of the following fields, use the value !. If you want to retain an existing value in a record, no entry is necessary.

- ATTR_DISP_VALUE
- ATTR_VALUE_STR
- ATTR_NUM_VALUE
- ATTR_VALUE_DATE

Important: Make a note of the Result Format Usage ID at the top of the spreadsheet. You will need this ID later when you upload the spreadsheet in the system.

6. After data entry is complete, select Upload from the Oracle menu in the toolbar.
7. In the **Upload Parameters** window, enter the Result Format Usage ID and check the Automatically Submit Concurrent Process box, and then click Proceed to Upload.
8. In the **Oracle Web ADI** window, click Upload. After the upload process completes, a message appears with the Concurrent Request number. Make a note of this number, as you will need it later when you access the view log for the concurrent request. Click Close when the process messages complete.
9. Return to the Applications tree menu and click the "View Concurrent Requests" link. It is recommended that you check the concurrent process view log to ensure that the upload process was successful.
10. On the **View Concurrent Requests** page, click the Details icon.

11. On the **Request Details** page, click View Log.
12. From the View Log, paste the URL string in a web browser to view any errors. If no errors appear, the upload was successful.

Mass Updating Items, Item Categories and Item Assignments

You can use the Mass Update functions to edit and update items, categories and item assignments when you want to change many items or categories and/or many organizations. Mass update item searches are not subject to the 200 item search limit like the spreadsheet option (see: Updating Existing Items Using a Spreadsheet, page 8-41).

Choose from the following mass update functions:

- Update Master Item Attributes
- Update Organization Item Attributes
- Assign Items to Organizations
- Assign Items to Categories
- Unassign Items from Categories
- Reassign Categories

To mass update master item attributes:

1. Navigate to the Update Master Item Attributes: Select Items page.
2. Use either Simple Search or Advanced Search to find the items you want to update. See: Searching for Items, page 8-5. The Update Master Item Attributes: Review Results page appears.
3. Review the search results. If the search results returned the expected items, click Finish. If you need to refine the search criteria, click Back.
4. After clicking Finish, the Update Master Item Attributes:: Choose Action page appears. Choose one of the following actions:
 - Apply changes to Database (This function is disabled for this flow)
 - Export to Excel

Click Submit.

5. The Select Viewer page appears. Select the version of Microsoft Office® Excel on

your desktop.

Follow the instructions on your screen to download the file to your desktop. Update the spreadsheet, then upload it as described in To update existing items using an Excel spreadsheet, page 8-41 with the following exceptions in the Upload Parameters window:

- Enter the Batch Name
- Choose whether to automatically import on data load
- Select whether to create a new change order, add to an existing change order, or to not create a change order.

To mass update organization item attributes:

1. Navigate to the Update Organization Item Attributes: Select Items page.
2. Use either Simple Search or Advanced Search to find the items you want to update. See: Searching for Items, page 8-5. The Update Organization Item Attributes: Review Results page appears.
3. Review the search results. If the search results returned the expected items, click Next and the Select Organization page appears. If you need to refine the search criteria, click Back.
4. Search for an organization using one of the following fields:
 - Organization Code
 - Organization Name
 - Hierarchy

Click Next and the Review Organizations page lists all organizations matching your search criteria.

5. Select the organization(s) you want to update, then click Next and the Review Results page appears. If you want to refine the Organization search, click Back.
6. Review the organization attributes results. Click Back if you need to change the organizations selected or Finish to proceed with updating the organization item attributes.
7. After clicking Finish, the Update Organization Item Attributes: Choose Action page appears. Choose one of the following actions:
 - Apply changes to Database (This option will be disabled for this flow.)

- Export to Excel

Click Submit.

8. The Select Viewer page appears. Select the version of Microsoft Office® Excel on your desktop.

Follow the instructions on your screen to download the file to your desktop. Update the spreadsheet, then upload it as described in To update existing items using an Excel spreadsheet, page 8-41 with the following exceptions in the Upload Parameters window:

- Enter the Batch Name
- Choose whether to automatically import on data load
- Select whether to create a new change order, add to an existing change order, or to not create a change order.

To mass assign items to organizations:

1. Navigate to the Assign Items to Organizations: Select Items page.
2. Use either Simple Search or Advanced Search to find the items you want to update. See: Searching for Items, page 8-5. The Assign Items to Organizations: Review Items page appears.
3. Review the search results. You can filter the search results and select the items that you want to assign. If the search results returned the expected items, click Next and the Select Organization page appears. If you need to refine the search criteria, click Back.
4. Search for an organization using one of the following fields:
 - Organization Code
 - Organization Name
 - Hierarchy

Click Next and the Assign Items to Organizations: Review Organizations page lists all organizations matching your search criteria.

5. Select the organization(s) you want to update, then click Next and the Review Results page appears. If you want refine the Organization search, click Back.
6. Review the Item Organization Assignments. Click Back if you need to change your organization selected or Finish to proceed with assigning the items to organizations.

7. After clicking Finish, the Assign Items to Organizations: Choose Action page appears. Choose one of the following actions:
 - Apply changes to Database (This option enables you to enter changes directly into the database.)
 - Export to Excel

Click Finish.

8. The Select Viewer page appears. Select the version of Microsoft Office® Excel on your desktop.

Follow the instructions on your screen to download the file to your desktop. Update the spreadsheet, then upload it as described in To update existing items using an Excel spreadsheet, page 8-41 with the following exceptions in the Upload Parameters window:

- Enter the Batch Name
- Choose whether to automatically import on data load
- Select whether to create a new change order, add to an existing change order, or to not create a change order.

To mass assign items to and unassign items from categories:

The processes for mass assigning items to categories and unassigning items from categories are almost identical and following the same first three steps:

- Select the catalog
- Search for items
- Review search results. Optionally, go back and search again if the results are unsatisfactory.
- The next step differs depending on the process selected:
 - Assign Items to Categories
 - Unassign Items from Categories
- The remaining steps are the same for both flows:
 - Find and select organizations
 - Review organization item search results. Optionally, go back and search again if the results are unsatisfactory.

- Choose action:
 - Apply changes to the database immediately
 - Export items to change to Excel. Make changes, then upload the changes at a later time.

1. Navigate to one of the following mass update functions:
 - Assign Items to Categories
 - Unassign Items from Categories

The **(mass update function): Select Catalog** page appears.

Search for and select a catalog. Click Next.

2. The **(mass update function): Select Items** page appears.

Use either Simple Search or Advanced Search to find the items you want to update. See: Searching for Items, page 8-5

The Assign Items to Categories: Assign Items or the Unassign Items from Categories: Unassign Items page appears.

3. Select the items you want to assign or unassign, then choose a category. Click Assign or Unassign, then click Next.

4. The **(mass update function): Review Results** page appears.

Review the search results. If the search results returned the expected items, click Finish. If you need to refine the search criteria, click Back.

5. After clicking Finish, the **(mass update function): Choose Action** page appears. Choose one of the following actions:

- Apply changes to Database - use this option to directly update the database
- Export to Excel - use this option if you want to update more than the category information or need more time to determine the updates needed.

Click Submit.

6. If you chose Export to Excel, the Select Viewer page appears. Select the version of Microsoft Office® Excel on your desktop.

Follow the instructions on your screen to download the file to your desktop. Update the spreadsheet, then upload it as described in To update existing items using an Excel spreadsheet, page 8-41 with the following exceptions in the **Upload Parameters** window:

- Enter the Batch Name
 - Choose whether to automatically import on data load
 - Select whether to create a new change order, add to an existing change order, or to not create a change order.
7. If you chose to Apply changes to Database, then the Schedule Request: Review page appears. Submit the concurrent program.

To reassign categories:

1. Navigate to Reassign Categories.
The Reassign Categories: Select Catalog page appears.
Search for and select a catalog. Click Next.
2. The Reassign Categories: Select Categories page appears.
Select an origin and a destination category. Click Next.
3. The Reassign Categories: Review Categories page appears.
Review the results. If the results are as expected, click Finish. If you need to refine the categories, click Back.
4. After clicking Finish, the Reassign Categories: Choose Action page appears. Choose Apply changes to Database.
Click Submit.
5. The Schedule Request: Review page appears. Submit the concurrent program.

Updating Multi-Row Attributes in a Spreadsheet

When creating or updating items/item revisions using a spreadsheet, you can provide values for multi-row attributes. When updating an item/item revision's multi-row attributes, you only provide the values for the multi-row attributes; you cannot make changes to the base attributes--doing so results in errors. Further, when selecting multi-row attributes from a display format for export to a spreadsheet, select which multi-row attribute to update from the search results page. Even though you can create a display format for more than one multi-row attribute, only the data for the single, selected multi-row attribute is exported to the spreadsheet.

When updating an item multi-row attribute in a spreadsheet, you must input values for the following primary attributes for each multi-row attribute row:

- Transaction Type (Sync)

- Item
- Organization Code

When updating an item revision multi-row attribute in a spreadsheet, you must input the Revision Code for each multi-row attribute row.

To create or update an item's multi-row attributes in a spreadsheet:

1. Perform steps 1-7 in the Importing Items Using a Spreadsheet, page 8-28 procedure.
2. In the spreadsheet, copy the row for the item (or item revision) and paste it into the next row. Then, delete the values of the base/single row attributes in the new row. You must delete the values of the base/single row attributes; if you do not, errors will occur.

Note: By default, the spreadsheet is protected. To copy/paste rows, select the Tools menu, then select Protection, and then select Unprotect.

3. Ensure that the unique key remains the same. After you have a row containing the same unique key as the item (or item revision) whose multi-row attributes you wish to update, and the base/single row attributes are removed, you can enter values for the multi-row attributes. In the following spreadsheet the unique key (Org Code and Item) in the second and third rows remain the same; the single row attributes have been deleted, and the multi-row attribute (Product Name, Impact Classification) values are provided.

Note: To delete an existing value in a record, enter the following data in the appropriate column of the spreadsheet:

For field type:	Enter value:
Date	31-DEC-9999
Character	!
Numeric	9.99E125

If you want to retain an existing value in a record, have it blank in the appropriate column of the spreadsheet.

Exception: In the user defined attributes interface table, when you want to delete an existing value in any of the following fields, use

the value !. If you want to retain an existing value in a record, no entry is necessary.

- ATTR_DISP_VALUE
- ATTR_VALUE_STR
- ATTR_NUM_VALUE
- ATTR_VALUE_DATE

Sample Spreadsheet with Multi-Row Attribute

Result Format Usage ID										12384
Upl	Trans	Org Code	Item	UOM	Priority	Planning Status	Design Contact	Product Name	Impact Classification	Description
	SYNC	V1	keyboard_99	Each	High	Planned	Joyce Fee	INV - Inventory	High	Joyce Item
	SYNC	V1	keyboard_99					EGD - Engineering	Medium	
	SYNC	V1	keyboard_99					PJM - Projects	Low	

4. Make a note of the Result Format Usage ID at the top of the spreadsheet. You will need this ID later when you upload the spreadsheet in the systemk.
5. After data entry is complete, select Upload from the Oracle menu in the toolbar.
6. In the **Upload Parameters** window, enter the Result Format Usage ID and check the Automatically Submit Concurrent Process box, and then click Proceed to Upload.
7. In the **Oracle Web ADI** window, click Upload. After the upload process completes, a message appears with the Concurrent Request number. Make a note of this number, as you will need it later when you access the view log for the concurrent request. Click Close when the process messages complete.
8. Return to the Applications tree menu and click the "View Concurrent Requests" link. It is recommended that you check the concurrent process view log to ensure that the upload process was successful.
9. On the **View Concurrent Requests** page, click the Details icon.
10. On the **Request Details** page, click View Log.
11. From the View Log, paste the URL string in a web browser to view any errors. If no errors appear, the upload was successful.

Managing Item Specifications

The specifications of an item are divided into structured and unstructured information.

The structured item information is captured in the form of numerous attributes that are enabled for the base item, and others that are inherited from the catalog category of the item. You can also add an unlimited number of descriptions and images about an item to enrich its specification. All unstructured item information can be added as an attachment to the item.

Most of the item specification information is available at the item revision level as well, which enables you to keep track of the specification information by item revision. For information that is tracked at the revision level, you can perform all of the following actions for each item revision.

Note: You can automatically trigger actions based on an item attribute change. See: *Item Business Events, Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide* and *Managing Business Events, Oracle Workflow Developer's Guide*.

To update an item's detailed description, images, and primary attributes:

1. Locate the item whose description, images or primary attributes you wish to update.

ORACLE Item Catalog
 Item: VI40001 Revision: B
 Organization: Vision Operations (V1) Recent Home Logout Help Preferences Diagnost

Item Lifecycle Change Management Configuration Transactions

Specifications Revisions Attachments Organizations People Associations Syndication

Search [Advanced Search](#) [Shortcuts](#) [Browse Catalog](#)

Overview Actions

Item Catalog Category [PLM High Tech](#) > [Computer Parts and Components](#) > [Motherboards](#)
 Description **Motherboard - 700 Series**

Detailed Description
 Long Description **The VI40001 is a powerful, flexible platform for high availability computing. It is a remarkably versatile board that has been validated for pedestal and rack config. The ICs are mounted on daughter cards specifically designed to plug into the cor. It provides a Vistonix V240912 communications processor, L2 cache, DRAM, flas various clocks and support logic, and an RS-232 interface to a host PC.**

Images

Primary Attributes

Lifecycle	Computer Component Lifecycle	Lifecycle Phase	Prototype
Item Status	Prototype	User Item Type	
Approval Status	Approved	Engineering Item	No
Primary Unit Of Measure	Each	Secondary Unit of Measure	
Tracking	Primary	Pricing	Primary
Defaulting		Positive Deviation Factor	0

- On the item's **Overview** page, select Update from the Actions list and click Go.

ORACLE Item Catalog
Item: VI40001 Revision: B
Organization: Vision Operations (V1) Recent Home Logout Help Preferences Diagnost

Item Lifecycle Change Management Configuration Transactions
Specifications Revisions Attachments Organizations People Associations Syndication
Item: Specifications >

Update Overview
* Indicates required field Cancel Apply

Copy From
Template

Item
Item VI40001

Description
* Description
Long Description

Primary Attributes

Lifecycle	Computer Component Lifecycle	Lifecycle Phase	Prototype
User Item Type	<input type="text"/>	Item Status	Prototype
Engineering Item	No	Approval Status	Approved
Item Catalog Category	Motherboards	Primary Unit Of Measure	Each
Secondary Unit of Measure		Tracking	Primary
Pricing	Primary	Positive Deviation Factor	0
Conversions	Both standard and item specific	Negative Deviation Factor	0

3. Optionally, on the **Update Overview** page, select a template from which to copy detailed descriptions, primary attributes, and images.
4. Optionally, update the description and long description.
5. Optionally, select a different User Item Type and Conversions option.

Important: The Primary UOM cannot be updated. If the lifecycle and lifecycle phase are not editable, it is because they have already been defined and are in use. If these fields are editable, it is because they have not yet been defined.

6. Optionally, add, update or delete an image.
 - Add

In the Images region, click Add Another Row. Provide the Sequence, a Translatable Label, and choose an attached file for the description. The Display Mode enables you to either display the contents of the image inline or as a link.
 - Update

Update the fields in the Images region.

Note: Files attached using Oracle's E-Business Suite are rendered inline. Files attached using Oracle Files Online are rendered as links, regardless of what is specified in the Display As list.

- Delete

Click the Delete icon in the image row you want to delete.

7. Optionally, add, update, or delete a detailed description.

- Add

In the Detailed Description region, click Add Another Row. Provide the Sequence, Description Source, Translatable Label and choose an attached file if the Description Source is Item Attachments. The Display Mode enables you to display the contents of the file inline or as a link.

Note: Use the Description Source list to select either an Item Attachments description or a Long Description. If you wish to select Item Attachments, then the list of values in the Attached File field is enabled. However, if you select the Long Description, then the Attached File field is disabled and the list of values returns no results. Also note that files attached using Oracle's E-Business Suite are rendered inline. Files attached using Oracle Files Online are rendered as links, regardless of what is specified in the Display Mode field.

- Update

Update the fields in the Detailed Description region.

- Delete

Click the Delete icon in the detailed description row you want to delete.

8. Click Apply to save your changes.

To update an item's operational and user-defined attributes:

1. Locate the item whose operational and user-defined attributes you want to update.
2. Click the attribute group you want to update.

For example, click Physical Attributes. In the Physical Attributes page, the Update button appears when:

- a user's role has privileges to update the item and
- the item is in a lifecycle phase where direct updates are allowed

The Create Change Order button appears when:

- the attribute group's change policy is set to Change Order Required and the item is in a lifecycle phase that requires change orders. See: *Defining Change Policies*, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*

If both the Update and the Create Change Order buttons appear, then you can choose whether to create a change order before updating the attributes or not.

Note: Change management is not supported for the following operational attributes. You must update them using the Update button:

- Shipping Subinventory (Sales and Order Management attribute group)
- Receiving Subinventory (Purchasing attribute group)
- Move Order Receipts SubInventory (Inventory/WMS attribute group)

ORACLE Item Catalog
 Item: VI40001 Revision: B
 Organization: Vision Operations (V1) Recent Home Logout Help Preferences Diagnost

Item Lifecycle Change Management Configuration Transactions
 Specifications Revisions Attachments Organizations People Associations Syndication

Search Item Advanced Search Shortcuts Browse Catalog

Physical Attributes

Weight		Volume	
Unit	POUND	Unit	Cubic foot
Unit Weight	2.23	Unit Volume	0.032

Dimensions			
Unit	Inch	Length	3.34
Width	1.2	Height	3

Container			
Container	No	Vehicle	No
Container Type		Internal Volume	
Maximum Load Weight		Minimum Fill Percent	

Type			
Collateral Item		Electronic Format	
Event		Downloadable	
Equipment	No	OM Indivisible	Yes

TIP Indicates attributes derived via hierarchy and propagated up the hierarchy

To update attributes without creating a change order

3. Click Update.

The **Update (Attribute Group) Attributes** page appears. Enter the new attribute values and units of measure, if applicable.

ORACLE Item Catalog
 Item: VI40001 Revision: B
 Organization: Vision Operations (V1) Recent Home Logout Preferences Help Diagnostic

Item | Lifecycle | **Change Management** | Configuration

Specifications | Revisions | Attachments | Organizations | People | Associations | Syndication

Update Physical Attributes

Cancel Apply

Weight		Volume	
Unit	POUND	Unit	Cubic foot
Unit Weight	2.23	Unit Volume	0.032

Dimensions			
Unit	Inch	Length	3.34
Width	1.2	Height	3

Container			
<input type="checkbox"/> Container		<input type="checkbox"/> Vehicle	
Container Type		Internal Volume	
Maximum Load Weight		Minimum Fill Percent	

Type	
<input type="checkbox"/> Collateral Item	<input type="checkbox"/> Electronic Format
<input type="checkbox"/> Event	<input type="checkbox"/> Downloadable
Equipment	<input checked="" type="checkbox"/> OM Indivisible
	No

4. Click Apply.

To update attributes using a change order

5. Click Create Change Order.

Related Topics

Creating Change Orders, page 10-20

Performing Actions, page 10-23

Managing Item Phases

Lifecycles enable you to model the lifecycle phases of your items in a flexible manner. You can pre-establish phase level controls that determine the behavior of an item in the different modules. You can also define a list of valid item statuses within each phase. The item status in turn controls the behavior of the item in eight functional areas. There is one lifecycle definition, which is the same for the item and the item revisions. However, an item and item revisions can be in different phases even if they are using the same lifecycle definition. It is not mandatory that an item have a lifecycle; however, if the item revisions have phases, then you must have a lifecycle defined for the item.

You can promote or demote an item from its current phase. When an item enters a new

phase, based on the control factors of the new phase and status, the behavior of the item will change. For example, when you move an item from the engineering phase to the production phase, you may want to place tighter controls on changes to product specifications, since that will entail significant change management efforts and costs.

You can optionally define a tracking project that will track the lifecycle of an item in a much more detailed manner. The high level tasks of the project correspond to the lifecycle phases of the associated item. The project may have a detailed work breakdown structure that corresponds to the tasks that take place during various lifecycle phases of an item. Additionally, you can associate an item and its components, not only with individual projects, but also within projects to individual tasks.

To create a lifecycle tracking project for an item:

1. Locate the item for which you wish to create a lifecycle tracking project.
2. On the item's **Primary Attributes** page, click the Lifecycle tab.
3. On the **Item Phases** page, click Create Project.

If the item already has a lifecycle tracking project, the corresponding field is populated and the Create Project button is not available. You can either create a project from a template or another project by providing the template or project name. Also, you must associate a lifecycle with an item before you can create a tracking project for that item.

4. Provide the project name, project number, project manager and other required attributes.
5. Click Apply.

To promote an item to the next phase:

1. Locate the item that you wish to promote to the next lifecycle phase.
2. On the item's **Primary Attributes** page, click the Lifecycle tab.
3. On the **Item Phases** page, click Promote.

The Promote button is available only if the item is under lifecycle control, but does not have a lifecycle tracking project associated with it. If the item already has a lifecycle tracking project associated with it, you will only be able to promote the item to the next phase from the Projects workbench.

4. Provide the Effective Date.
5. Click Apply.

To demote an item to a previous phase:

1. Locate the item that you wish to demote to the previous lifecycle phase.
2. On the item's **Primary Attributes** page, click the Lifecycle tab.
3. On the **Item Phases** page, click Demote.

The Demote button is available only if the item is under lifecycle control, but does not have a lifecycle tracking project associated with it. If the item already has a lifecycle tracking project associated with it, you will only be able to demote the item to the previous phase from the Projects workbench.

4. Provide the effective date.
5. Click Apply.

To view an item change policy :

1. Locate the item for which you wish to view the change policy.
2. On the **Item Detail** page, click the Lifecycle tab.
3. Click the "Change Policy" link.

To change the item status:

1. Locate the item for which you wish to change the status.
2. On the item's **Primary Attributes** page, click the Lifecycle tab.
3. On the **Item Phases** page, click the "Status" link.
4. Click Demote.
5. Click Change Status.
6. Update the status and effective date.
7. Click Apply.

To implement the phase/item status changes:

1. Locate the item for which you wish to implement the phase/item status.
2. On the item's **Primary Attributes** page, click the Lifecycle tab.
3. On the **Item Phases** page, click the "History" link.

4. Click Implement.

Managing AMLs

You can associate a list of manufacturers and their corresponding part numbers with any item. You can also specify the manufacturer's approval status, preference level, and identify whether or not the first article has been completed. This list of manufacturers and part numbers is called an *Approved Manufacturers List* (AML). The AML for an item is often defined during the new item creation and request process. The AML is thereby reviewed and approved by all necessary people. An item AML may be updated after item creation either manually or through a change order. The item's change policy determines for each phase of an item's lifecycle whether or not an AML can be updated and if a change order is required.

For more details about item change policies, see *Managing Item Change Policies*, page 1-24.

To specify manufacturer part numbers when creating an item:

1. On the **Create Item: Review Item Information** page (typically the second step in the create item process), click the Manufacturer Part Number tab.
2. When the page refreshes, click Add Another Row.
3. In the empty fields for the row, provide the required information.

Status

If you know the approval status of the manufacturer and manufacturer part number, select it. Otherwise, leave this field blank.

Preference Level

The Preference Level indicates whether or not the manufacturer has been designated as preferred in the item catalog category. Preference Levels range from High (most desirable) to Low (least desirable). A manufacturer can have different Preference Levels for different items--this is a result of the items being in different item catalog categories. Hence, the Preference Level is specified at the item catalog category and not editable in this context.

First Article Status

First Article Status is a milestone that indicates whether or not a manufacturer has built and/or provided the first article.

Creating Item Revisions

Items undergo changes that you may want to track using item revisions. You can associate both structured and unstructured information with item revisions.

Note: You can automatically trigger actions based on an item revision change. See: Item Business Events, *Oracle Product Lifecycle Management Implementation Guide* or Oracle Product Information Management *Implementation Guide* and Managing Business Events, *Oracle Workflow Developer's Guide*.

To create an item revision:

1. Locate the item for which you wish to create a revision.
2. On the item's **Primary Attributes** page, select the Revise action and click Go.
3. On the **Revise Item** page, provide in the required information and click Apply.

To update an item revision:

1. Locate the item for which you wish to create a revision.
2. On the item's **Primary Attributes** page, click the Revisions tab.
3. On the **Revisions** page, click the revision's name link.
4. Click Update.
5. On the **Update Revision** page, update the relevant information and click Apply.

Managing Item Attachments

The specifications of an item are divided into structured and unstructured information. You can add unstructured information to the item as an attachment. Attachments include files, folders, text, and URLs. All management of item attachments occurs from the **Attachments** page. To navigate to this page, locate the item. On the item's **Primary Attributes** page, click the Attachments tab.

You can add attachments to items at the item revision level as well, enabling you to track specification information by item revision. Most tasks related to item attachments are the same as those for attachments to any other business object. For an explanation of all tasks related to attachments to any business object, see: Using E-Business Suite Attachments, page 13-1.

You can also use a Change Management approval and review process to control the changes to item attachments. Change Management for item attachments provides change control functionality for all types of attachments, a crucial and important piece of non-structured information about the product.

Types of attachment changes supported using a change order include:

- adding a specific version of an attachment at the item or item revision level
- creating a new version for an existing attachment by checking out the current version and checking in a new version.
- changing the attached version for an existing attachment.
- changing attachment attributes. Supported attributes include Name, Description, and Attachment Category.
- deleting attachments.

Change control is achieved by providing a mechanism to author, track and manage changes to attachments through a change order approval and implementation process. You can:

- Specify items and attachments that are effected in a change order.
- Author and specify the exact changes that are desired or required to resolve an issue or change request.
- Route the change order for approval to the appropriate people responsible for the revised item based on item roles, change desired and lifecycle of item.

Warning: If the lifecycle of the item requires the approval of attachment changes, the project associated with the file approval must have a progress cycle set to Daily or null. If the progress cycle is set to As Of Date, then you can only update the project on valid As Of Dates. See: *Selecting Progress Options for a Workplan Structure, Oracle Project Management User Guide*

Once the change order is approved, implement the changes manually or automatically on the specified implementation date.

Change Management for item attachments is supported through the Change Management functionality. User can create a change order and specify changes to the attachments of a reviewed item. There are no additional steps required in the setting up of a change order to be able to do attachment changes for a revised item.

To request review or approval of an attachment:

You can request approval or a review of a file version, URL, or text using workflows. Each approval or review consists of a number of phases; you can associate a workflow approval with each phase.

The workflow lists the steps in the approval process. You can add steps to the process only if a workflow routing is associated with the particular phase. You cannot delete predefined steps. You can add additional assignees to a step, but you cannot delete

predefined assignees. For more details about approvals, see *Managing Workflows*, page 10-40.

When you send a file version stored in a WeBservices-integrated content repository through a review or approval process, the same status is reflected everywhere else this file version is attached. The process is the same for both reviews and approvals, but the following steps use the request approval action to explain the process.

1. In the **Attachments** page, find and select the files that you want to approve or review.
2. In the Select Attachments field, select either Request Approval or Request Review, then click Go.

The screenshot shows the Oracle Item Catalog interface. At the top, it displays 'ORACLE Item Catalog' and 'Item: VI40001 Revision: B'. Below this, there are navigation tabs for 'Item', 'Lifecycle', 'Change Management', and 'Configuration'. The 'Attachments' tab is active. A table of attachments is visible, with columns: Name, Description, Version, Category, Attachment Modified By, Last Modified Date, Status, Control, and Repository. A dropdown menu is open over the 'Select Attachments' field, showing options: Request Approval, Request Review, Change Attached Version, and Cancel Check Out. The 'Request Approval' option is highlighted.

Select	Name	Description	Version	Attachment Category	Last Modified By	Last Modified Date	Status	Control	Repository
<input type="checkbox"/>	Motherboard	Motherboard		CADView-3D Model	Steve Williams	25-Jan-2007 20:33:16			CDBWS
<input type="checkbox"/>	01_25_2007 Mtg Min	01_25_2007 Product Meeting ...		Miscellaneous	Steve Williams	25-Jan-2007 20:38:00			EBS
<input checked="" type="checkbox"/>	Data sheet	Motherboard product data sheet		Datasheet	Steve Williams	25-Jan-2007 20:36:04			EBS
<input checked="" type="checkbox"/>	r12_ebs_attachments_toi_func_2.ppt		1	CADView-3D Model	Steve Williams	25-Jan-2007 20:33:16			CDBWS

3. In the **Create File Approval: Select File Approval Type** page, select the file approval type from the dropdown list. Click Continue.

4. In the Create File Approval page, enter a file approval name.

Optionally, enter values in the following fields:

- Description
- Priority
- Reason

- Need By Date

Create File Approval
 * Indicates required field

File Approval Type **Datasheet Approval** File Approval Number **DSA101**

* File Approval Name

Description

Priority Need By Date Select to access date picker
(example: 25-Jan-2007 19:45:00)

Reason

Subject

Item Number **V140001** Revision **B**
 Item Description **Motherboard - 700 Series**

Requestor

Files **Workflow Approval**

Name	Repository	Location	Version	Attachment Category	Last Modified By
r12_ebs_attachments_toi_func_2.ppt	CDBWS	/us/EBS.Container/Product	1	CADView-3D Model	Steve Williams
Data sheet	EBS			Datasheet	Steve Williams

5. In the Create File Approval page, click the Workflow Approval tab to add update, add, or delete any workflow steps. For more information about workflows, see:
 - *Managing Workflows*, page 10-40
 - *Defining Workflow Templates*, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*

Subject

Item Number **VI40001** Revision **B**

Item Description **Motherboard - 700 Series**

Requestor

Files | **Workflow Approval**

Phase Approval ▼

Workflow Template **Marketing Document Approval**

Workflow Type **Approval**

Description **Marketing Document Approval**

Add Step

[Show All Details](#) | [Hide All Details](#)

Details	Step	Workflow Process	Response Required	Type	Name	Assigned To	Action Required	Date	Update	Delete
Show	10	Request Approval	Optional	Item Role	Product Manager	Steve Williams				
Show	10	Request Approval	Mandatory	Item Role	Marketing Manager	Cathy Price				

6. Click Submit.

In the Attachments page, the status of the selected files has changed to Submitted for Approval.

To view the status of a review or approval:

You can view the review or approval status of a particular attachment from the Attachments page Status column. By moving your cursor over a status icon in the Status column, you can see the status of a particular attachment. If you click on the status icon for an attachment going through the review or approval process, the system takes you to a review or approval summary page

You can also view the status of a review or approval by clicking on the Attachment Details icon in the Details column for a particular attachment. From the Details page, click either the Reviews or Approvals tab. Each tab lists all reviews or approvals associated with the attachment.

View pending attachment changes:

The screenshot shows the Oracle Item Catalog interface. At the top, there are navigation tabs: Specifications, Revisions, Attachments (selected), Organizations, People, Associations, and Syndication. Below the tabs is a search bar with a dropdown menu set to 'Item' and a 'Go' button. The main content area is titled 'Attachments' and includes a 'View' section with a dropdown menu set to 'AC11' and a 'Go' button. Below this is a table of attachment changes:

Action	Name	Description	Attachment Category	Last Modified By	Last Modified Date	Status	Repository	Details
	about_workflow.gif		Image	Jonathan Smith	19-Apr-2005	Unapproved	EBS	link
Attach	attach_repository_documents.gif		Miscellaneous	Jonathan Smith	19-Apr-2005	Unapproved	EBS	link

At the bottom of the page, there is a footer with copyright information: Copyright 2000-2004 Oracle Corporation. All rights reserved. and a link to the Privacy Statement.

You can view pending attachment changes for an item from the attachments sub-tab in the item workbench. You can select a pending change from the attachments drop-down list in the View section and view change details.

Using Item Business Events

Using Oracle Workflow, you can automatically trigger actions after the following item business events occur:

- item creation
- item approval
- item creation using bulkload
- item role change
- item update
- related item change
- item revision change
- item cross reference change
- customer item cross reference change
- item attribute change
- item approved manufacturer list change
- item catalog assignment change

- UCCNet Global Data Synchronization (registering an item with GDSN)
- catalog category change (creating, updating, or deleting a catalog category)
- GTIN attribute change
- valid category change (adding or removing a category from a catalog)
- pre-item attribute change (event raised before changing the item attribute)

In one case, business event `oracle.apps.ego.item.preAttributeChange`, you can trigger actions before a business event occurs. Before changing an item attribute, you can test a proposed attribute change against your validating criteria before committing the attribute value to the database. This business event requires one extra step: checking the Raise Pre Attribute Change Event box (see: *User-Defined Attributes*, page 6-1). Examples of actions you can trigger include issuing notifications or launching a workflow.

Business Event Examples

The following scenarios show how subscribing to a business event can simplify business processes:

- A business needs to notify the people involved every time an item role change occurs. The business can set up Oracle Workflow to automatically send the people involved an email each time this occurs.
- A business maintains items in the master organization. Every time an item is created in the master organization, the business needs to copy the item into the child organizations.

For more information about setting up and subscribing to business events, see the related topics listed below.

Related Topics

Item Business Events, *Oracle Product Lifecycle Management Implementation Guide* or *Product Information Management Implementation Guide*

Managing Business Events, *Oracle Workflow Developer's Guide*

Defining Procedures and Functions for Oracle Workflow, *Oracle Workflow Developer's Guide*

Enabling Organization Assignments

Items are engineered, manufactured and distributed by physical facilities called "organizations." To enable an organization to perform one of these functions on an item, you have to first enable the item into that organization with the appropriate attributes. Some of the attributes are modifiable at the organization level. These are called

organization-level attributes.

To enable an item in an organization:

1. Locate the item you wish to enable.
2. On the item's **Primary Attributes** page, click the Organizations tab.
3. On the **Assigned Organizations** page, click Assign to Organization.
4. On the **Organization Assignment** page, click Assigned in the row of each organization to which you want to assign the item. Click Assign All to assign the item to all organizations.
5. Click Apply.

Adding People

You can control the access to each individual item using data security.

Internal users are applications users with an employee reference. All internal users are granted an implicit role on all items.

External users are applications users with a supplier or customer reference. External users must be associated with each item or organization explicitly.

In addition to the people who are added explicitly at each item level, you can also add organization level roles, which provide access to all the items in that organization. Likewise, roles can be assigned at the catalog category level, in which case, any item of that catalog category will have those roles.

To add people to an item:

1. Locate the item to which you wish to add people.
2. On the item's **Primary Attributes** page, click People.
3. On the **People** page, click Update.
4. After the **People** page refreshes, click Add People. Provide the following information:

Role

Specify the role of the person you are adding.

Type

Specify the type of person you are adding (All Users, Company, Person, Group).

Start Date

Specify the date on which the person/group gains access to the item.

End Date

Specify the date on which the person/group no longer has access to the item.

5. Click Apply.

To update a person's/group's period of access:

1. Locate the item to which you wish to add people.
2. On the item's **Primary Attributes** page, click People.
3. On the **People** page, click Update.
4. After the **People** page refreshes, update the start and end dates.
5. Click Apply.

Managing Revision Phases

Lifecycles enable you to model the lifecycle phases of your item revisions in a flexible manner. You can pre-establish phase level controls that determine the behavior of an item revision in the different modules.

You can promote or demote an item revision from its current phase. When an item enters a new phase, based on the control factors of the new phase and status, the behavior of the item revision changes. For example, when you move an item from the engineering phase to the production phase, you may want to place tighter controls on changes to product specifications, since that will entail significant change management efforts and costs.

You can optionally define a tracking project that will track the lifecycle of an item revision in a much more detailed manner. The high level phases of the project correspond to the lifecycle phases of the associated item revision. The project may have a detailed work breakdown structure that correspond to the tasks taking place during various lifecycle phases of an item revision.

To promote an item revision to the next phase:

1. Locate the item for which you wish to promote the item revision.
2. On the item's **Primary Attributes** page, click the Lifecycle tab.
3. On the **Item Phases** page, click the Revision Phases tab.
4. On the **Revision Phases** page, click Promote.

5. On the **Promote Item** page, provide the Effective Date.
6. Click Apply.

To demote an item revision to the previous phase:

1. Locate the item for which you wish to demote the item revision.
2. On the item's **Primary Attributes** page, click the Lifecycle tab.
3. On the **Item Phases** page, click the Revision Phases tab.
4. On the **Revision Phases** page, click Demote.
5. On the **Demote Item** page, provide the Effective Date.
6. Click Apply.

To implement the phase changes:

1. Locate the item for which you wish to implement phase changes.
2. On the item's **Primary Attributes** page, click the Lifecycle tab.
3. On the **Item Phases** page, click the Revision Phases tab.
4. On the **Revision Phases** page, click "Phase History" link.
5. Click Implement.

To create a lifecycle tracking project for an item revision:

1. Locate the item for which you wish to create a lifecycle tracking project for the revision.
2. On the item's **Primary Attributes** page, click the Lifecycle tab.
3. On the **Item Phases** page, click the Revision Phases tab.
4. Click Create Project.
5. Create a project from either a template or another project by providing either the template or project name.
6. Provide the project name, description, project manager and other required attributes.

7. Based on the template chosen, there is a prompt for more information. Provide all the necessary information.
8. Click Apply.

Managing Projects

In addition to associating a lifecycle tracking project with an item, you can also associate multiple projects with items and item revisions. This association can be identified with a purpose. You can define your own purposes. Examples of purposes are engineering, prototyping, sourcing, and field testing.

To associate a project to an item/item revision:

1. Locate the item for which you wish to associate a project.
2. On the item's **Specifications** page, click the Lifecycle tab.
3. On the **Item Phases** page, click Projects.
4. On the **Project and Task Associations** page, click Add Project Association.
5. On the Add Project Association page, provide the following:

Item Revision

Select the particular item revision that you wish to associate with a project.

Purpose

Specify the purpose.

Project

Specify the project to be associated.

6. Select Across Organizations to enable access to this project from all organizations where this item is enabled.
7. Click Apply.

To view the projects associated with an item revision:

1. Locate the item for which you wish to view the associated project.
2. On the item's **Specifications** page, click the Lifecycle tab.
3. On the **Item Phases** page, click Projects.
4. On the **Project and Task Associations** page, select the item revision associated with

the project, and click Go.

To navigate to a project from project associations:

1. Locate the item from which you wish to navigate to associated projects.
2. On the item's **Specifications** page, click the Lifecycle tab.
3. On the **Item Phases** page, click Projects.
4. On the **Project and Task Associations** page, click the project's name link.

To associate an item to a project task:

You can associate an item and its' components to any group of tasks in one or more projects.

1. Locate the item that you want to associate to a project task. See: Searching for Items, page 8-5
2. On the item's **Specifications** page, click the Lifecycle tab.
3. On the **Item Phases** page, click Projects.

ORACLE Item Catalog
 Item: VI40001 Revision: B
 Organization: Vision Operations (V1) Recent Home Logout Preferences Help D

Item Lifecycle Change Management Configuration
 Item Phases | Revision Phases | **Projects** | Change Policy

Search [Advanced Search](#) [Shortcuts](#) [Browse Catalog](#)

Project and Task Associations Item Revision **B - B**

Project Associations

Select Projects: |

Select All | Select None | Show All Details | Hide All Details

Select	Details	Associated Revision	Purpose	Project Name	Project/Task Manager	Project/Task Status	Complete (%)	Progress Status	Last Published Date
<input type="checkbox"/>	+ Show	B - B	Deliverable Tracking	VI40001 Lifecycle Tracking Prj	Williams, Steve	Active	10		15-Aug-2003

Task Associations

Select Projects: |

Select All | Select None | Show All Details | Hide All Details

Select	Details	Associated Revision	Purpose	Project Name	Task Name	Project/Task Manager	Project/Task Status	Complete (%)	Progress Status
<input type="checkbox"/>	+ Show	B - B	Deliverable Tracking	VI40001 Lifecycle Tracking Pri	Create High Level Design	Robinson, Mary	Completed	100	

4. On the **Project and Task Associations** page, click Add Task Association.
5. On the **Add Task Association** page, click Add Tasks.

ORACLE® Item Catalog
 Item: VI40001 Revision: B
 Organization: Vision Operations (V1) Recent Home Logout Preferen

Item Lifecycle Change Management Configuration
 Item Phases | Revision Phases | **Projects** | Change Policy
 Lifecycle: Projects >

Add Task Association

* Indicates required field Cancel Save Apply

Item Revision **B - B**
 * Project VI40001 Lifecycle Trackir 🔍

Add Tasks

Task Name	Purpose	Across Organizations	Task Number	Task Description	Remove
Define Requirements 🔍	Deliverable Tracking ▼	<input type="checkbox"/>	01.02		

Cancel Save Apply

6. Search for and select the project that contains the tasks you want to add.
7. Search for and select a project task to add.
8. Once you have added all tasks, perform the following for each task:
 - Purpose - select the purpose of each task
 - Across Organizations - check Across Organizations if this task applies to all organizations that contain the item.
9. Click Apply.

To create a tasks tracking report using XML Publisher:

As a product transitions from phase to phase in a lifecycle, you can review the readiness of the product before promoting it to the next phase. A promotion may require the completion of several deliverables and tasks before promoting the product within the lifecycle. You can generate a status report of the tasks related to an item, showing the structure component-related tasks, too. Using Oracle XML Publisher, specify the number of levels in the structure, then select a report layout (template) and a report format (pdf, doc, rtf), just as you would for any XML Publisher report. See: 'Using the Concurrent Manager to Generate Your Custom Output, *Oracle XML Publisher Users Guide*

1. Locate the item for which you want to generate a tasks tracking report.
2. On the item's **Specifications** page, click the Configuration tab.

3. On the **Structures** page, select the following:
 - the structure type for which you want to generate a tasks tracking report
 - Generate Report from the Select Structures pull down list. Click Go.

ORACLE® Item Catalog
 Item: V140001 Revision: B
 Organization: Vision Operations (V1)
 Recent Home Logout Preferences Help Di

Item Lifecycle Change Management Configuration

Structures | Where Used

Search Item [Go] Advanced Search Shortcuts Browse Catalog

Structure List Item Revision B-B [Go]

View By Structure Type All

Select Structures: Generate Report [Go] | Create Structure

Select All | Select None

Select	Name	Type	Description	Change Control	First Level Components	Change Orders	Attachments	Details	Update
<input checked="" type="checkbox"/>	EBOM	Engineering BOM			26	2			
<input type="checkbox"/>	MBOM	Manufacturing BOM			26	1			
<input type="checkbox"/>	Primary	Root			25	0			

TIP Indicates structure is under change policy.
 Indicates structure is pending creation on a change order.

4. On the **Generate Report** page, enter the following:
 - Number of Levels
 - Search Criteria
 - Export Template

Note: The Deliverables Tracking Report template is provided with Oracle Product Lifecycle Management, but you can create your own custom template by copying, then modifying the provided template or by creating a new template. If you create a new template, specify the Oracle Bills of Material application and the data definition object equal to Product Structure Data Definition. See: *Using the Template Manager, Oracle XML Publisher User's Guide*.

- Output Format

ORACLE® Item Catalog
 Item: VI40001 Revision: B
 Organization: Vision Operations (V1) Recent Home Logout Preferences Help Di

Item Lifecycle Change Management Configuration

Structures | Where Used

Search Item [Go] Advanced Search Shortcuts Browse Catalog

Configuration: Structures >

Generate Report

Structure Name EBOM
 Number of Levels 2
 Search Criteria EBOM Criteria Template
 Export Template Deliverables Tracking Report
 Output Format Adobe Acrobat (*.pdf)

Cancel Apply

Cancel Apply

5. Click Apply.

Viewing Item Transaction Information

Using the Oracle Transaction Viewer, you can present real-time item transaction information gathered from the entire Oracle E-Business Suite within the Item workbench. View transactions from various functional areas such as Sales, Inventory, Purchasing, Install Base, Service, and others. The Oracle Transaction Viewer, shared by Oracle Customer Data Hub, enables users to configure views of their product data across all spoke systems, providing a 360 degree transactional view of the product within a single Item Workbench tab.

Prerequisites

- To view transactions, you must set up the Oracle Transaction Viewer for use with the Item Workbench. Set up the Transaction Viewer as described in Transactions Viewer, *Oracle Customer Data Hub Implementation Concepts and Strategies White Paper* at <http://metalink.oracle.com> (search for Metalink Note #312811.1), except substitute the be_code field value of IMC_TXN_BE_PARTY with the value IMC_TXN_BE_ITEM.

To view item-related transaction information:

1. Find the item for which you want to view item transaction information. See: Searching for Items, page 8-5.
2. On the item's **Specifications** page, click the Transactions tab.

You can view transaction information under the Open Orders, OnHand Quantities, and Open Returns sections of the **Transactions** page.

Important: The Transactions tab remains hidden by default, but becomes visible once you seed a transaction for IMC_TXN_BE_ITEM.

ORACLE Item Catalog
 Item: VI40001 Revision: B
 Organization: Vision Operations (V1)

Item Lifecycle Change Management Configuration **Transactions**

Transactions

Transactions: Item
 You may select a particular transaction type to view a specific transaction history or

Select
 * Transaction Type

Open Orders

Customer Name	Account Number	Order Type	Order Number	Backlog Quantity	List UOM Price
No results found.					

Onhand Quantities

Organization	Item Revision	Quantity
No results found.		

Open Returns

Customer Name	Account Number	Order Number	Quantity	UOM	Ar
No results found.					

Generating Reports

Item reports can be generated for one or more items from Item search results, Browse Catalog category, and Item Detail pages. You can export these Item reports in various formats like Adobe Acrobat, Rich Text format, Web page, Microsoft Excel, or XML using custom report formats. You can design report formats using familiar desktop tools such as Adobe Acrobat and Microsoft Word.

Report security is consistent with search security. You can only generate reports for item objects on which you have the required role. Also, you can only export item

information in the report on which you have the required role.

You can export or generate the following item-related reports:

- Item primary and operational attribute groups
- Item-level user defined attribute groups
- GDSN attribute groups

To generate a report:

1. Using Item simple or advanced search, find the Items for which you want to generate the report.
2. Select Items from the search results, and click Generate Report.
3. Select the Report template and Output format.
4. Upon export, the report will be generated in the required format.

Note: You can also generate report from Browse Catalog Category and Item detail page.

Global Data Synchronization Network

This chapter covers the following topics:

- Managing Items for GDSN Syndication
- Associating GTINS for GDSN Syndication
- Managing GTIN Cross References
- Managing GDSN Attributes
- Managing the Packaging Hierarchy
- Registering Items With GDSN
- Managing Customer Subscriptions
- Publishing Items to a Customer
- Query

Managing Items for GDSN Syndication

Important: To use these features except GTIN Cross References, you must have licensed Oracle Product Data Synchronization for GDSN and 1SYNC Services. You must also set the "EGO GDSN Enabled" profile option to "Yes."

Any item in your item catalog can be enabled for GDSN syndication by assigning it to the catalog associated with the GDSN Syndication Functional Area. Once an Item is classified as GDSN Syndicated, GDSN attributes are displayed and you can begin defining GDSN attributes.

To create an item for GDSN syndication:

1. On the create Item page, select Item Catalog Category or existing Item.

2. Select GDSN syndicated.
3. On the Create Item: Enter Item/Description page, select Trade Item Unit Descriptor.
4. Add or copy GDSN attributes in the copy step.
5. In the Review Item information, view and update GDSN attributes.
6. In the Categories sub tab, view default GDSN Catalog and category assignments. You can update the category assignment, but cannot delete the GDSN Catalog assignment.
7. In the Association sub tab, add GTIN Cross-References. To find details on how to add GTIN cross-references, see *Managing GTIN Cross-References.*, page 9-4

Note: The GDSN Syndicated flag applies only when the Item you are creating is an approved Item and doesn't require a New Item Request approval.

The GDSN Syndicated flag does not apply when creating multiple Items.

To enable an existing Item for GDSN syndication:

1. Find the item that you want to enable for GDSN syndication.
2. On the Item's overview page, click the Classification and Categories tab.
3. Check whether the item has been already enabled.
4. Click Update.
5. On selecting the GDSN Syndicated check box, the categories assignments region gets refreshed with GDSN Catalog and default category assignment.
6. You can update the category assignment, however you cannot delete the GDSN Catalog assignment.
7. Adding a GDSN Catalog Category assignment automatically selects the GDSN Syndicated checkbox.
8. Click Apply to save your changes.

Note: Once you enable an Item for GDSN Syndication, you cannot remove it. You cannot de-select the GDSN Syndication, nor delete the GDSN Catalog Category assignment. You can update the

GDSN Catalog category assignments to a new GDSN category.

Import of Item Catalog Category assignments to the GDSN Catalog using Microsoft Excel automatically enables Items for GDSN Syndication.

Associating GTINS for GDSN Syndication

A GTIN uniquely identifies a trade item in the Global Registry. A GTIN is associated with each Item in the packaging hierarchy. In Product Data Synchronization for GDSN and 1SYNC Services, you associate a unique GTIN number to each Item that you plan to syndicate with GDSN.

To associate a GTIN to a GDSN Syndicated Item:

1. Locate the item with which you want to associate a GTIN.
2. On the Item's Overview page, click any GDSN attributes page.
3. Click 'Associate GTIN'.
4. Associate an existing GTIN, or create a new GTIN.

- Associate an existing GTIN:

More than one GTIN can be associated to an Item as Cross-References. In most cases, these GTINs are at a different level of the packaging hierarchy for the same product.

1. Select the Unit of Measure.
2. Select the GTIN.
3. Select Item revision, if applicable.
4. Click Apply.

- Create a new GTIN:

1. The GTIN Number generation varies according to your setup. If your setup specifies that the GTIN is User Entered, then enter a 14-digit GTIN number. Otherwise, your GTIN is function-generated after GTIN attributes are entered.

5. Enter a GTIN description.

6. You can also associate a GTIN to a specific Item Revision.
7. Enter any other required attributes.
8. Click Apply to associate a GTIN.

Note: This GTIN association is also visible from the GTIN Cross-reference page under the Association tab. A GTIN's cross-reference unit of measure for this association is defaulted to the Item's Unit of Measure. Details on how to associate more than one GTIN cross-reference to an item can be found at *Managing GTIN Cross-References*, page 9-4.

Note: A GTIN whose unit of measure is the same as the Item unit of measure is sent during the registration and publication process to the Global Registry and to customers.

Managing GTIN Cross References

Associate GTIN numbers with any approved item or item revision. Specify a GTIN cross-reference Unit of Measure and description during the process. A GTIN cross-reference for an item can also be defined during the new item creation process.

To add a GTIN cross-reference:

1. Locate the item whose GTIN Cross-reference you wish to add.
2. On the Item's overview page, click the Association tab.
3. Click the GTIN cross-reference tab.
4. Click Add GTIN cross-reference. For details about the Add GTIN cross-reference page, see *Associating GTINS for GDSN Syndication.*, page 9-3
5. In contrast to the GTIN association from the GDSN pages, here you must select a Unit of Measure.

Note: If a GTIN cross reference has the same unit of measure as the item, you cannot remove it once the Item-GTIN has been registered with the Global Registry.

GTIN setup for Oracle Warehouse Management:

Oracle Warehouse Management module uses the profile option

"INV:GTIN_CROSS_REFERENCE_TYPE" to identify the cross reference type used to populate GTINs. This profile option should not be set to 'GTIN' to avoid data conflicts between Oracle Warehouse Management and the system.

Managing GDSN Attributes

Product Data Synchronization for GDSN and 1SYNC Services includes 150+ GDSN Attributes, such as:

- Core registration attributes
- Industry neutral and trading partner/customer neutral extension attributes
- Trading partner/customer specific attributes
- Hardlines industry extension attributes
- FMCG industry extension attributes

The included attributes are grouped into a number of seeded attribute groups, which are themselves functionally grouped into seeded Item Attribute pages.

The included Item Attribute pages are:

- 'GDSN Registration', which includes the 35 registration attributes that are essential for registering into the Global Registry using the RCIR (Registry Catalog Item Registration) message
- 'GDSN Physical Attributes', which includes attributes that physically describe an Item-GTIN, such as the Trade Item Description, and the Trade Item Measurements.
- 'GDSN Order Information', which includes attribute groups such as Price Information, Order Information, and Price Date Information.
- 'GDSN Packaging', which includes attribute groups such as Packaging Marking, Packaging Material, and Trade Item hierarchy.
- 'GDSN Hazardous', which includes attribute groups such as Hazardous Goods Indicator and Hazardous Information
- 'GDSN Industry', which includes industry-specific attribute groups, such as Hardlines, FMCG, and SBDH.
- 'Customer Specific', which includes attributes whose values are specific to a customer.

The Registration attributes that are part of the RCIR message are:

- Name of Information Provider

- GLN of Information Provider
- Target Market
- GTIN
- Quantity Of Next Lower Level Trade Item
- Net Content/Net Content UOM
- Trade Item Unit Descriptor
- Brand Name
- Consumer Unit
- OrderableUnit
- NetWeight
- GrossWeight
- Height
- Length
- Width
- Dimension Unit Of Measure
- Volume
- Size Code Value
- Size Code List Agency
- Private Flag
- Effective Date
- EANUCC Type
- EANUCC Code
- GLN of Brand Owner
- Brand Owner

- Additional Trade Item Description
- Description Short
- GLN of Data Pool
- Name of Data Pool
- Catalog Item Classification
- Discontinued Date
- Canceled Date

The supported Hardlines Industry Attributes are:

- Trade Item Recall Indicator
- Model Number
- Pieces Per Trade Item
- Nesting Increment
- Is Out Of Box Provided
- URL For Warranty
- Warranty Description
- Department of Transportation Dangerous Goods Number
- Return Goods Policy

The supported FMCG (Fast moving consumer goods) Industry Attributes are:

- Degree Of Original Wort
- Fat Percent In Dry Matter
- Percent Of Alcohol By Vol
- ISBN Number
- ISSN Number
- Ingredient Irradiated
- Raw Material Irradiated

- Trade Item genetically modified
- Trade Item irradiated

The supported SBDH Industry Attributes are:

- Trade Item Information
- Composition Width
- Marketing Message
- Peg Hole Number
- Allowance Charge Description
- Link to External Description
- Payment Method Information Type
- Automated Clearing House Format
- Size Based Pricing
- Measure Type
- Variable Type
- Deposit Value Effective Date
- Deposit Value End Date
- Returnable Package Deposit Code
- Returnable Package Deposit Amount
- Maximum Buying Quantity End Date
- Minimum Buying Quantity End Date
- Maximum Buying Quantity Start Date
- Minimum Buying Quantity Start Date
- Agreed Minimum Buying Quantity
- Agreed Maximum Buying Quantity
- First Ship Date

- Last Ship Date
- Exclusive End Date and Time
- First Delivery Date Time
- Goods Pick Up Lead Time
- First Order Date
- Last Order Date
- Reorderable
- Minimum Trade Item Life Span From Time Of Production
- Comparison Content Type
- Comparison Measurement
- Minimum Humidity
- Maximum Humidity
- Regulation Code
- Country of Assembly
- Campaign Name
- Campaign Start Date
- Campaign End Date
- Feature Benefit
- Agency Code
- Material Code
- Material Content
- Material Percentage
- Thread Count
- Weight

- Size Group
- Size System
- Size Type
- Descriptive Size Dimension
- Seasonal Availability Start Date
- Seasonal Availability End Date
- Season Name
- Calendar Year
- Parameter
- Target Consumer Age
- Target Consumer Gender
- Special Item Code

Optionally, you can trigger an action when changing GDSN attributes using Oracle Workflow. See: *Using Item Business Events*, page 8-67

Caution: You can only edit certain GDSN attributes at certain levels in the packaging hierarchy, for example, at their base unit (Each) level. The following table describes where you can edit and view changes to these attribute values.

GDSN Attribute	Make edits at this level:	View edits at this level:
Country	Base Unit or Each	Base Unit or Each
ISBN Number	Base Unit or Each	Base Unit or Each
ISSN Number	Base Unit or Each	Base Unit or Each
Ingredient Irradiated	Base Unit or Each	Base Unit or Each
Raw Material Irradiated	Base Unit or Each	Base Unit or Each

GDSN Attribute	Make edits at this level:	View edits at this level:
Trade Item genetically modified	Base Unit or Each	Base Unit or Each
Trade Item irradiated	Base Unit or Each	Base Unit or Each
Fat Percent In Dry Matter	Base Unit or Each	Base Unit or Each
Percent Of Alcohol By Vol	Base Unit or Each	Base Unit or Each
Color Code List Agency	Base Unit or Each	Base Unit or Each
Color Code Description	Base Unit or Each	Base Unit or Each
Handling Instructions Code	Base Unit or Each	Base Unit or Each
Manufacturer GLN	Base Unit or Each. The attribute value change is made throughout the packaging hierarchy.	All levels
Manufacturer Name	Base Unit or Each. The attribute value change is made throughout the packaging hierarchy.	All levels
Marked with Expiration Date	Base Unit or Each	Base Unit or Each
Marked with Green Dot	Base Unit or Each	Base Unit or Each
Marked with Ingredients	Base Unit or Each	Base Unit or Each
Size Code List Agency	Base Unit or Each	Base Unit or Each
Size Code Value	Base Unit or Each	Base Unit or Each

GDSN Attribute	Make edits at this level:	View edits at this level:
Delivery To Distribution Center Temperature Maximum	Base Unit or Each	Base Unit or Each
Delivery To Distribution Center Temperature Minimum	Base Unit or Each	Base Unit or Each
Delivery To Market Temperature Maximum	Base Unit or Each	Base Unit or Each
Delivery To Market Temperature Minimum	Base Unit or Each	Base Unit or Each
Storage Handling Temperature Maximum	Base Unit or Each. The attribute value change is made throughout the packaging hierarchy.	All levels
Storage Handling Temperature Minimum	Base Unit or Each. The attribute value change is made throughout the packaging hierarchy.	All levels
Unit	Base Unit or Each	Base Unit or Each
Unit	Base Unit or Each	Base Unit or Each
Unit	Base Unit or Each	Base Unit or Each
Unit	Base Unit or Each	Base Unit or Each
Unit	Base Unit or Each. The attribute value change is made throughout the packaging hierarchy.	All levels

GDSN Attribute	Make edits at this level:	View edits at this level:
Unit	Base Unit or Each. The attribute value change is made throughout the packaging hierarchy.	All levels
Functional Name	Base Unit or Each. The attribute value change is made throughout the packaging hierarchy.	All levels
GLN of Brand Owner	Base Unit or Each. The attribute value change is made throughout the packaging hierarchy.	All levels
Name of Brand Owner	Base Unit or Each. The attribute value change is made throughout the packaging hierarchy.	All levels
Sub Brand Name	Base Unit or Each. The attribute value change is made throughout the packaging hierarchy.	All levels
Coupon Family Code	Base Unit or Each	Base Unit or Each
Trade Item Form Description	Base Unit or Each	Base Unit or Each
Number of Trade Items contained in a complete layer	Any level other than the Base Unit or Each level	Any level other than the Base Unit or Each level
Number of completed layers contained in a Trade Item	Any level other than the Base Unit or Each level	Any level other than the Base Unit or Each level
Has Batch Number	Base Unit or Each	Base Unit or Each

GDSN Attribute	Make edits at this level:	View edits at this level:
Non Sold Item Returnable	Base Unit or Each	Base Unit or Each
Recyclable	Base Unit or Each	Base Unit or Each
Diameter	Base Unit or Each	Base Unit or Each
Drained Weight	Base Unit or Each	Base Unit or Each
Generic Ingredient	Base Unit or Each	Base Unit or Each
Generic Ingredient Strength	Base Unit or Each	Base Unit or Each
Ingredient Strength	Base Unit or Each	Base Unit or Each
Peg Horizontal	Base Unit or Each	Base Unit or Each
Peg Vertical	Base Unit or Each	Base Unit or Each

To update GDSN Attributes:

1. Locate the item whose attributes you wish to Update.
2. On the appropriate GDSN attributes page, click update.
3. On the Update page, update the attributes and click Apply.

Product Data Synchronization for GDSN and 1SYNC Services applies validation rules to meet the GDSN Synchronization standards. As a result, you may not be able to edit some attributes on the higher Item-GTINS, or some might be derived from the packaging hierarchy.

The following attributes are propagated across the packaging hierarchy, since their values should be the same across the Item-GTINS included in the packaging hierarchy. Update these attributes values for an Item-GTIN whose Trade Item Descriptor is 'EACH':

- Brand Owner Name
- Brand Owner GLN

- Functional Name
- Manufacturer GLN
- Manufacturer Name
- Storage Handling Temperature Minimum
- Storage Handling Temperature Maximum

The following packaging and weight attributes are computed using the packaging hierarchy. They cannot be edited from a GDSN attributes page:

- Total Quantity of Next Level Trade Item
- Net Weight – It is computed for higher-level Item-GTINS using lower-level Net weight and the component quantity. Net weight can be edited only on those Item-GTINs whose Trade Item Unit Descriptor is 'EACH'.

The following attribute values are shared with Item operational attributes, as functionally they are the same attributes. Update these attributes from the Operational attribute pages as well as the GDSN attribute pages, however Product Data Synchronization for GDSN and 1SYNC Services makes sure their values remain the same.

Item Master Attribute Group	Item Master Attribute	GDSN Attribute Group	GDSN Attribute
Physical Attributes	Length	TradeItemMeasurements	Depth
Physical Attributes	Height	TradeItemMeasurements	Height
Physical Attributes	Weight	TradeItemMeasurements	Net Weight
Physical Attributes	Width	TradeItemMeasurements	Width
Physical Attributes	Volume	TradeItemMeasurements	Volume
Order Management	Shippable	TradeItemUnitIndicator	IsTradeItemADespatchUnit

Invoicing	Invoiceable Item	TradeItemUnitIndicator	IsTradeItemAnInvoiceUnit
Order Management	Customer Orders Enabled	TradeItemUnitIndicator	IsTradeItemAnOrderableUnit

Note: You can import these GDSN attributes using Product Data Synchronization for GDSN and 1SYNC Services import functionality. For import details, see *Importing Items Using a Spreadsheet*, page 8-28

The supported Trading Partner/Customer specific attributes are:

- Start Availability Date Time
- End Availability Date Time
- Order Quantity Maximum
- Order Quantity Minimum
- Dispatch Unit
- Invoice Unit
- Orderable Unit

The Trading Partner/Customer specific attributes are also available at the Item level along with other GDSN attributes. By default, Item level attribute values are communicated to the customer. However, if you specify these attributes at the Customer level, then those values will be communicated to the customer.

To update customer specific attributes:

1. Locate the item whose customer attributes you wish to Update.
2. On the Item's **overview** page, click the **Syndication** tab.
3. Click the Details icon available under the Attributes column for each Customer.
4. On Customers attributes page, click update.
5. On the Update Customer Attributes page, update the attributes and click Apply.

Managing GDSN Attribute Changes

You can use change orders to manage changes to GDSN attributes, regardless of your

role or privileges. This change control process ensures that the proposed attribute values have been reviewed, before they are changed.

Note: Before you use change orders to manage GDSN attributes, you must set up change policies for the attribute group.

For more information about change orders, see: *Creating Change Orders*, page 10-20.

Managing the Packaging Hierarchy

Important: The seeded structure type of Packaging Hierarchy is only available to customers who have licensed Product Information Management, and it is not available to licensees of Product Lifecycle Management excepting those that have licensed both Product Lifecycle Management and its option, Product Data Synchronization for Global Data Synchronization Network and 1SYNC Services.

Configuration Management enables you to view multiple Packaging Hierarchies for an item.

Product Data Synchronization for GDSN and 1SYNC Services includes a structure type called 'Packaging BOM' for constructing Packaging Hierarchies. Each structure type has a preferred structure name. During publication, the packaging hierarchy information from the preferred structure name is sent to the customer as part of the CIN message.

The Packaging Hierarchy view allows you to manage packaging hierarchies from the top down, for example, from 'Pallet' to 'Each'. This is the traditional structure creation approach, where you have a top assembly Item, and you add components to it.

The Where Used view allows you to manage packaging hierarchies from the bottom up, for example, from 'Each' to 'Pallet'. For example, suppose you have an 'EACH' Item that you manufacture. Before shipping the finished good, you need to decide its packaging. You decide to package it as 'PACK of 6', which in turn is packaged in a 'CASE containing 6 packs'. This approach allows you to construct your packaging hierarchy from your final finished good Item-GTIN, and then add PACK and CASE as its next level.

Depending upon your business needs, use either of the following two approaches:

To create a packaging hierarchy from Where Used / bottom up view:

1. Locate the item for which you want to Create Packaging Hierarchy.
2. On the Item's overview page, click the Configuration tab.
3. Click the Where Used tab.

4. Select Structure type 'Packaging BOM' and Structure Name.
5. The Item-GTIN region is displayed, which provides information about the GTIN Number, UDEX Category, Registration Status, and Trade Item Unit Descriptor.
6. Add Next level allows you to search and find an Item-GTIN, and add it as the next level in the Packaging Hierarchy.
7. Create Next level allows you to create an Item-GTIN, and add it as the next level in the Packaging Hierarchy.
8. Enter Quantity, which is the number of component Item-GTINs that are packaged in the parent Item-GTIN.

Note: Product Data Synchronization for GDSN and 1SYNC Services tries to derive the component quantity using Unit of Measure (UOM) conversion rules between the Parent Item-GTIN and Component Item-GTIN, provided both have a unit of measure belonging to the same UOM class.

9. Upon adding the component, the packaging hierarchy gets saved.
10. You can update Inner Unit quantity and save the packaging hierarchy.

To create a packaging hierarchy from the Top down / Structure view:

1. Locate the item for which you want to Create Packaging Hierarchy.
2. On the Item's overview page, click the Configuration tab.
3. Click Create Structure.
4. Select Structure type 'Packaging BOM'. Structure Name defaults to the preferred structure name. Select a different structure name if you prefer.
5. Optionally select this structure to be the preferred structure.
6. Common Structure functionality enables you to point your packaging BOM to your Manufacturing BOM, allowing BOM reuse. See: Referencing Common Bills and Routings, *Oracle Bills of Material User's Guide*.
7. Click Apply.
8. On the Structure page, the Item-GTIN region is displayed, which provides information about the GTIN Number, UDEX Category, Registration Status and Trade Item Unit Descriptor.

9. Add Component allows you to find an Item-GTIN and add it as the next level in the Packaging Hierarchy.
10. Create Component allows you to create an Item-GTIN and add it as the next level in the Packaging Hierarchy.
11. Enter Component Quantity, which is the number of component Item-GTINs that are packaged in the parent Item-GTIN.
12. Upon adding the component, the packaging hierarchy is saved.
13. Update the component quantity and save the packaging hierarchy.

Note: For more information about Packaging, see: Setting Up Packaging Structure in the *Oracle Product Lifecycle Management Implementation Guide* or the *Oracle Product Information Management Implementation Guide*.

Note: You cannot update the Item-GTIN components of the Packaging Hierarchy once the Item-GTIN is successfully published to a customer.

The following Trade Item Unit Descriptor validations are applied:

Product Type	Description	Parents	Parents Instance	Children	Children Instance	Orderable	Consumable
(MX) Mixed Module	A 'mixed mod' or 'display ready pallet' that is not the normal 'turn' for ordering	None	N/A	CA, DS, MP, PK, SP, EA	Multiple	True	False
(PL) Pallet	A pallet of turn product	None	N/A	CA, DS, MP, PK, SP, EA	Single	True or False	False

(DS) Display/ Shipper	A display or shipper	PL	N/A	CA, MP, SP, EA	Single/M ultiple	True	True or False
(CA) Case	The standard shipping unit level.	PL, MX, DS	Multiple	MP, PK, SP, EA	Single	True or False	True or False
Multipack (MP)	Group of trade items	CA, PL, MX, DS	Multiple	EA, PK	Single/M ultiple	True or False	True or False
(PK) Pack/Innerpack	A logistical unit between case and each	DS, CA, MP	Multiple	EA, SP	Single	True or False	True or False
Set Pack (SP)	Contains multiple EACH Item	CA, PL, MX, DSPK	Multiple	EA	Single/M ultiple	True or False	True or False
(EA) Each	The lowest level of the item hierarchy intended or labeled for individu al resale	PK, CA, DS, PL, MX	Multiple	None	N/A	True or False	True

Related Topics

Defining Structures, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*

Publish the Registered Information to Trading Partners, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*

Registering Items With GDSN

Using Product Data Synchronization for GDSN and 1SYNC Services, you can register Item-GTIN information into the Global Registry to notify the community of any new or changed Item-GTINs. Product Data Synchronization for GDSN and 1SYNC Services is an efficient platform for all Item-GTIN registration processing and messaging, allowing you to:

- Find all new or updated Item-GTINs that need to be registered or updated to the Global Registry
- Track registration event history, with transaction disposition, for each Item-GTIN

Product Data Synchronization for GDSN and 1SYNC Services allows you to register a single Item-GTIN, or multiple Item-GTINs in a batch. Product Data Synchronization for GDSN and 1SYNC Services' advanced parametric search allows you to use Item-GTIN Attributes, like brand name and registration status, to select all the Item-GTINs that require registration. You can automatically trigger actions based on an Item-GTIN registration. See: *Item Business Events, Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide and Managing Business Events, Oracle Workflow Developer's Guide*.

Product Data Synchronization for GDSN and 1SYNC Services automatically determines the action for the RCIR registration message allowing you to quickly register Item-GTINs with the Global Registry. If an Item-GTIN has never been registered the action given is "Add" and a new Item-GTIN is created in the Global Registry. If an Item-GTIN was previously registered, Product Data Synchronization for GDSN and 1SYNC Services defaults either a "change" or "correct" action on the RCIR message. A change to an item-GTIN is considered a data correction rather than a product update if one of the following attributes is changed :

- UDEX Category
- Brand Name
- Quantity of next lower level trade item
- Net weight
- Net Content
- EANUCC Code
- EANUCC Type
- Trade Item Unit Descriptor

- GLN of Brand Owner
- Gross weight changed by more than 20 %
- Height changed by more than 20 %
- Depth changed by more than 20 %
- Width changed by more than 20 %
- Volume changed by more than 20%

When you click 'Submit,' an RCIR message is sent to the data pool. The data pool receives the message and returns its disposition to you. The disposition statuses are:

- Processed
- Failed

Note, you need Registration Management function security, and View Item privilege in the Master Organization, to register an Item. You can only register an Item from the Master Organization.

Situations can arise where you need to cancel or discontinue an item. When you cancel or discontinue an item, the item is no longer available for order or sale. You can only cancel items that have never been manufactured. Discontinue items that you no longer want to manufacture. An example of a discontinued item is an item that has not been selling well, so you decide to stop producing the item. Discontinued items are removed from the 1SYNC Data Pool and the GS1 Global Registry 48 months after the cancel date. You can then reuse the GTIN number after 48 months.

Canceled Item Example

An item was registered in the 1SYNC Data Pool in anticipation of a future launch of the product, but the product did not perform well in test marketing. You decide not to manufacture the item after all. The item is removed from the 1SYNC Data Pool and the GS1 Global Registry 12 months from the cancel date. After 12 months, you can then reuse the GTIN number.

In order to reinstate a canceled item within the 12-month time frame or a discontinued item within the 48-month time frame, before deletion from the system, the source trading partner must prepare and submit a valid RCI Correct message to the 1SYNC Data Pool. Use an item state of Registered and do not include the cancel date tag (for canceled items) or the discontinued date tag (for discontinued items) in the message.

To register an item:

1. From the Item Detail page, go to the GDSN Registration page. Check that the item has a Registration (DVE) Validation status equal to 'Compliant' which means that the Item-GTIN has passed data validation. If the Registration (DVE) Validation

status is 'Non-Compliant', then examine the data validation errors. You must resolve all data validation errors before registering an item with a GDSN data pool (for example, 1SYNC)

Note: The GDSN Registration page is only available for 'GDSN Syndicated' items.

2. To submit an item for registration, click the Register Items icon.

Upon submitting the Item-GTIN for registration, an RCIR message is sent to the data pool. A message group id is generated to track the Item-GTIN Registration.



3. If the registration is successful, registration status is automatically changed to 'Registered'. If registration fails, registration status assumes its previous value.
4. Click the message group id and navigate to the collaboration events page to check the message detail. Click the message payload icon to view the entire XML payload that was sent to the GDSN data pool.
5. There are four registration statuses to identify the current state of the Item-GTIN registration:
 - Not Registered
 - Registered
 - Registration in Progress
 - Re-registration Needed

Note: Product Data Synchronization for GDSN and 1SYNC Services does not allow you to re-register an already-registered item unless you change one or more of its attributes.

Note: When you update the Item-GDSN attribute for a registered Item, its registration status is automatically changed to 'Re-registration Needed'. Depending on which Item attribute is changed and by how much, Product Data Synchronization for GDSN and 1SYNC Services automatically determines whether it a 'Change' or a 'Correct' action has occurred.

To cancel or discontinue an item:

1. From the Item Overview page, go to the GDSN Registration page. Click Update.
2. Enter either the Canceled Date or the Discontinued Date. Click Apply.
3. Click the Registered Items icon next to the Registration Status field.

Upon submitting the Item-GTIN for cancellation or discontinuation, a message is sent to the data pool. A message group ID is generated to track the Item-GTIN cancellation or discontinuation.

To register multiple items:

1. The registration workbench allows you to register multiple Items at the same time. Using Product Data Synchronization for GDSN and 1SYNC Services' parametric search capabilities, find all Item-GTINS that are "Not Registered" or have a status of "Re-registration Needed", and register those items. Refine your search by any GDSN attribute, such as Brand Name, Trade Item Unit Descriptor, and so on.
2. Select more than one Item, and register them to GDSN at the same time.
3. Non-compliant Item-GTINS are filtered from the Registration list. Check data validation errors for those Items and resolve them before registering the Items.

Managing Registration User Level Search Criteria:

Create personalized search criteria. For details on creating and managing search criteria, see *Managing Search Criteria*, page 7-1

Note the following about Registration search criteria.

1. These search criteria span all Item Catalog Categories.
2. Construct search criteria by including:

- Item primary attributes
 - Operational attributes
 - GDSN Attributes
 - GTIN Attributes
 - Messaging Attributes
3. Set user-defined search criteria as the default for an object by selecting 'Set as Default'.

Managing Registration User Level Display Formats:

Create personalized display formats. For details on creating and managing display formats to assist in your search, see *Managing Display Formats*, page 7-5.

Note the following about Registration Display Formats:

1. These Display Formats span all Item Catalog Categories.
2. Construct your Display Format by including:
 - Item primary attributes
 - Operational attributes
 - GDSN Attributes
 - GTIN Attributes
 - Registration Messaging Attributes
3. Select History as one of the display sections to view all the messages sent for that Item-GTIN.
4. Set a user-defined display format as the default display format by selecting Set as Default.

Managing Customer Subscriptions

You set up a customer subscription for each Item-GTIN you would like to publish.

To add a GLN to a Customer Address:

Using the Customer online screens you can enter a GLN for a Customer address.

1. Select "Oracle Customers Online User" responsibility.
2. Navigate to the customer tab.
3. Search and find the Customer to which you want to add a GLN.
4. On the customer overview page, click the addresses tab.
5. Click update for the customer address for which you want to add a GLN.
6. Enter Global Location Number (GLN) and save the record.

To subscribe a customer to an item:

1. On the **Item Detail** page, go to the **Syndication** page.
2. View the customer subscription for this Item-GTIN and click 'Update'.
3. Search and add additional customers to this Item-GTIN. Delete subscriptions for any customer to whom you have not published.

Note: Only a customer that has a GLN appears on the search screen. Using the Oracle Customer Online Update Address page, you can enter a GLN for each customer address.

Note: You need View Item privilege and Edit Customer Item Cross-reference privilege in the Master Organization to associate customers with an Item-GTIN.

Add multiple items to a customer:

1. On the Publication Management page, view the Items to which a customer has subscribed.
2. Using simple and advanced search, Add Items to a customer.

Customer Items Comparison:

Customer Items Comparison allows you to compare customer item subscriptions. It also highlights which Item information you are not publishing to customers in the same line of business. You can compare between the same customer stores that have different GLNS.

To compare Customer Item:

1. On the Publication Management page, click Compare Customers Items.
2. Find the Customers you want to Compare.
3. On the Review Customer Items Comparison page, view which Items are associated with the selected Customer.
4. Click update to add Items to, or remove Items from, your customers.

Note: You can compare only five customers at a time.

Publishing Items to a Customer

Using Product Data Synchronization for GDSN and 1SYNC Services, you can publish Item-GTIN information to customers to inform them of:

- New Item-GTINs being offered
- Changes to existing Item-GTINs
- Withdrawal of Item-GTINs from a specific customer, or delisting of Item-GTINs from the market.

Product Data Synchronization for GDSN and 1SYNC Services is an efficient platform for all Item-GTIN publication processing and messaging, allowing you to:

- Find all new or updated Item-GTINs that need to be published to customers
- Track publication event history, with transaction disposition, for each Item-GTIN customer combination

Product Data Synchronization for GDSN and 1SYNC Services allows you to publish a single Item-GTIN, or multiple Item-GTINs in a batch. Upon 'Publication', a CIN message is sent to your customer for each Item-GTIN via a GDSN data pool. Your customer can review each message, and decide whether to 'Accept', 'Reject', 'Synchronize' or 'Review' the Item-GTIN. The customer's response is returned via a confirming CIC message, and is stored in your work list on the GDSN data pool. These global registry messages are transferred from the data pool to Product Data Synchronization for GDSN and 1SYNC Services, where the message content and disposition status can be viewed for each Item-GTIN customer combination.

Disposition statuses are:

- Processed

- Failed
- Customer-Accepted
- Customer-Rejected
- Customer-Review
- Customer-Synchronized

Note: You will need Publication Management function security, View Item privilege, and View Customer Item cross-reference privilege in the Master Organization to perform the following actions on an Item-GTIN for a customer:

- Initial load
- Publish
- Withdraw

To publish an Item-GTIN to customers:

You must set up customer subscriptions for each Item-GTIN before you begin the publication process. For details on how to create and manage customer subscriptions, see *Managing Customer Subscriptions*, page 9-25.

The publication status for a customer indicates whether the Item-GTIN requires publication. The publication validation status on the GDSN Attribute pages and syndication page indicates whether the Item-GTIN packaging hierarchy is compliant for publication.

Note: You must always publish from the top Item-GTIN of a valid packaging hierarchy to a customer, as the entire packaging hierarchy must be included in the CIN message.

A valid packaging hierarchy is one that contains at least one consumable and one orderable GTIN. A Top GTIN is an item that is not a component in a packaging hierarchy, that has at least one orderable and one consumable unit in its packaging hierarchy.

1. From the top Item-GTIN page, navigate to the Customer Syndication page. This page displays the list of customers to whom you have already published or plan to publish the Item-GTIN packaging hierarchy.

Note: For details about creating and maintaining customer syndication, see Managing Customer Syndication.

2. For each customer, there is a publication status and a corresponding disposition status. From the Publication status, you can determine which customers the Item-GTIN has not been published to, or requires re-publication. Publication statuses are:
 - Published
 - Not Published
 - Re-publication Needed
 - Publication In Progress
 - Withdrawn
 - Delisted
 - Rejected

Note: You cannot publish information to customers to whom you have previously published that information if no new GDSN attribute changes have occurred since your last publication.

3. Click the Publish action icon to publish the Item-GTIN to a customer. On the Publish Items page, you can view the entire packaging hierarchy and the list of customers for each packaging hierarchy.
4. You can review the name and GLN of the data pool to which the Item is being published, as well as the customer's name, address and GLN.
5. After you submit the Item-GTIN for publication, a CIN message is sent for each customer that the Item-GTIN is being published to. A message group id is generated to track all Item-GTIN publication messages sent in this transaction.
6. The Disposition status for each message is updated with the response that is received from the customer via the data pool.

Note: If a customer rejects an Item-GTIN publication, Product Data Synchronization for GDSN and 1SYNC Services will not allow you to re-publish the Item-GTIN to the same customer.

Note: A first time publication message to a customer is sent with a 'New Item' or an 'Initial Load' action. Subsequent re-publication messages are sent with a 'Data Change' action. Product Data Synchronization for GDSN and 1SYNC Services automatically derives these actions.

Note: When you update the Item-GDSN attributes for a published Item, its publication status is automatically changed to 'Re-publication Needed' for all customers. However, if you update a customer-specific Item-GDSN attribute, then the publication status is automatically changed to 'Re-publication Needed' for that particular customer only.

To withdraw an Item-GTIN from a customer:

The withdraw action allows you to temporarily discontinue an Item-GTIN synchronization process with one or more customers. Once you have successfully withdrawn the top Item-GTIN from a customer, the Item-GTIN is not published to the customer until you explicitly re-publish the Item-GTIN to this customer.

Note: You can only withdraw Item-GTINS whose publication status is 'Published' and disposition status is 'Not Rejected'.

1. From the top Item-GTIN page, navigate to the Customer Syndication page. This page displays the list of customers to whom you have already published or plan to publish the Item-GTIN packaging hierarchy.
2. For the customers that you have already published to, select those from you which you want to withdraw the Item-GTIN, and click Withdraw.
3. The Withdraw from Customers page allows you to view the entire Item-GTIN packaging hierarchy and the customers from whom you are withdrawing the Item-GTIN.
4. A CIN message is sent to each customer from whom the Item-GTIN is being withdrawn. A message group id is generated to track all messages sent in this transaction

To delist an Item-GTIN from customers:

The delist action permanently discontinues the synchronization process with all customers for this Item-GTIN. Once you successfully delist the top Item-GTIN, Product Data Synchronization for GDSN and 1SYNC Services does not allow you to publish this Item-GTIN to any customer.

Note: You can only delist the Item-GTINS whose publication status is published and disposition status is not rejected.

1. From the top Item-GTIN page, navigate to the Customer Syndication page. This page displays the list of customers to whom you have already published or plan to publish the Item-GTIN packaging hierarchy.
2. Click Delist from the customer syndication page.
3. All customers to whom the Item-GTIN was previously published will be delisted.
4. A CIN message is sent to each customer from whom the Item-GTIN is being delisted. A message group id is generated to track all messages sent in this transaction.

To publish multiple Item-GTINS to customers:

The publication workbench allows you to view multiple Item-GTINS for a customer. Similar to the registration workbench, you can search for Item-GTINS that are associated with the customer.

Note: You can only search for top Item-GTINS in the publication workbench.

You can Publish, Withdraw, and Delist Item-GTINS from this workbench. These actions are described in the section To publish an Item-GTIN to customers, page 9-27.

1. On the Publication Management page, select the Item-GTINS you want to publish and click Publish.
2. On the Publish to Customers page, a list of all the top Item-GTINS you have selected is displayed with its entire packaging hierarchy.
3. Review the list of customers per each Item-GTIN packaging hierarchy.

On the publication workbench, you can select top Item-GTINS and click Check Data Validation to see whether the Item-GTIN packaging hierarchy you plan to publish is compliant.

To publish an Item-GTIN to customers with Initial load action:

If a supplier who has recently joined a data pool, such as 1SYNC, wants to establish item synchronization with an existing Demand Side customer through the data pool, they can use the Initial Item load publication to synchronize data for items currently being traded between the two organizations.

1. On the Publication Management page, find the Items you want to publish.

2. Select the Items you want to publish with the Initial load action, click Initial load.
3. On the Publish (Initial Load) to Customers page, a list of all the top Item-GTINS you selected is displayed with their packaging hierarchy.
4. Review the list of customers for each Item-GTIN packaging hierarchy.

Note: Initial load action is only performed for the first time publication with the customer.

Note: For details about how to create and manage search criteria to assist in your Search, see Managing Registration User Level Search Criteria, page 9-24.

Note: For details about how to create and manage Display Format to assist in your Search, see Managing Registration User level Display Formats, page 7-5.

Query

Query messages are used to retrieve information from the GLOBALregistry or notifications sent to an organization

Query worklist

An XML schema message (.xsd) is used to transmit the query request. The sample messages utilized in training class are TrainingQuery1.xml (Retailer Querying Worklist), Training Query2.xml (Supplier Querying Worklist).

Query Item using IP GLN

This functionality allows schema-based trading partners the ability to query the 1SYNC GLOBAL registry Service. What is returned in the query response message can vary depending on who is querying the GTIN within 1SYNC GLOBALregistry Service to retrieve item related data. The Information Provider that added the GTIN to the 1SYNC GLOBALregistry Service can execute a query and receive full item details (i.e. all attributes) in a query response message. All other partners (i.e., Data Pool, Data Recipient, etc) executing queries will receive only the following attributes in a query response:

- GTIN
- GLN of the data source

- GLN of the Source Data Pool
- Target Market Classification
- Item State (registered)
- Item Dates – (not all dates fully implemented)
- Registration Date
- Last Change Date
- Deletion Date
- Cancel Date
- Discontinue Date

Query GLN

This query request is used to retrieve organizational attributes associated with GLN. It returns all parties matching the given criteria based on the following fields.

Field Name	Description	Value
City	Optional. The party's city.	a String, e.g. "Laurel"
DUNS	Optional. The party's DUNS.	Valid DUNS
globalLocationNumber	Optional. The party's global location number.	Valid GLN
organizationName	Optional. The party's name.	a String, e.g. "ACME, INC."
postalCode	Optional. The party's postal code.	a String, e.g. "20707"

Change Management

This chapter covers the following topics:

- Change Management Overview
- Searching for Ideas, Issues, and Changes
- Creating Issues
- Creating Ideas
- Creating Change Requests
- Creating Change Orders
- Performing Actions
- Managing the Action Log
- Creating Change Revisions
- Managing Change Header Attachments
- Managing People and Roles
- Managing Issue and Change Request Lines
- Managing Change Order Revised Items
- Managing Change Tasks
- Creating Relationships
- Managing Workflows
- Importing Changes
- Importing Changes Using the Engineering Change Order Open Interfaces
- Engineering Change Order Open Interface Tables
- Managing Reports

Change Management Overview

Change Management enables you to centrally set up, track and manage the changes that occur within and outside of your organization.

Change Management provides a workflow-based, collaborative change management system that enables you to track, manage, and resolve various product and process issues, Change Requests, and Change Orders across your organization. You can also use Change Management to manage changes to documents.

Change Management also enables you to manage changes externally, with suppliers and customers. Using Change Management you can capture and track ideas, investigate them with issues, evaluate changes for them on engineering Change Requests, and then implement the desired changes with a change order.

Once submitted, a change tracked through Change Management is visible throughout the lifecycle of the product or document. For example, a product change approved by Engineering will be visible through the item's entire lifecycle. Because of this long-term visibility, during the maintenance phase of the item, even field service representatives can review the change that occurred earlier in the item's lifecycle.

Searching for Ideas, Issues, and Changes

You can search for ideas, issues, change requests, and change orders using either a simple or advanced search. Simple search enables you to search for ideas, issues, change requests, and change orders using a keyword search, wildcard search, search excluding keywords, fuzzy search, and stemming search.

To perform a simple search:

1. On the **Simple Search** page, search using one or more of the following options:

Keyword Search

Enter a partial or whole value for the idea, issue, change request, or change order's number, name, or description in the Search field. You can narrow your search results by entering as many keywords as possible.

- Select "Match all word(s) (AND)" to search for ideas, issues, change requests, and change orders containing all the keywords entered as search criteria. This is the default value.
- Select "Match any word(s) (OR)" to search for ideas, issues, change requests, and change orders containing any one of the keywords entered.

Wildcard Search

Use "%", also known as the wildcard character, to enter partial searches as part of your search criteria. For example, you can search for all change requests that have

"Engine" and "Overheating" in the name as follows: %Engine%Overheating.

Search Excluding Keywords

Refine your queries by excluding certain keywords from your search. For example, you can search for issues containing the keyword DEF-3% and exclude issues that contain the keyword DEF-32%.

Fuzzy Search

Enter '?' before the keywords to perform a fuzzy search. Use keywords that sound similar to the word you are searching for. For example, enter "?Clik" to search for an issue containing the word "click."

Stemming Search

Enter '\$' before the keywords to perform a stemming search on the name, number, description, line name, or line description of the change category selected.

Stemming Search allows you to search for words whose spelling is derived, or stems from the keyword. For example, a search on the keyword "\$contract" could return: "contract," "contracts," "contracted," and "contracting."

2. Click Search. Simple search returns all matching results for the search criteria entered. You can view these search results using different results formats. For details about how you can personalize and create result formats see *Managing User Level Display Formats*, page 7-5.

To perform an advanced search:

1. On the **Advanced Search** page, select the change category (such as issue, change request, or change order) from the list of categories and click Go.

Choose criteria templates to change the criteria fields for your search. For details about how to define and personalize criteria templates, see *Managing User Level Search Criteria*, page 7-1.

2. Add the criteria fields to be used in the search and click Add Criteria.
3. Use the shuttle on the **Add Criteria** page to:
 - Add/Remove Criteria
To clear the criteria values, select the criteria and click Clear.
 - Delete Criteria
To delete criteria, select it and click Delete. Note that deleting criteria from this page doesn't remove it from the criteria template that you selected for the search.
 - Duplicate Criteria

To duplicate criteria, select it and click Duplicate. When you duplicate criteria, the search uses an OR condition between the different duplicates. For example, if you include an attribute called "Priority" twice, with values "High" and "Medium," the result will contain change objects that are either "High" or "Medium."

4. The display format enables you to switch between different views of the search results. The view on the Display Format page shows the columns in the results table without any data. For information about defining and personalizing display formats, see *Managing User Level Display Formats*, page 7-5.
5. Click Search to perform the search. You can switch between results formats to view the results on the **Search Results** page.

Creating Issues

The system provides a workflow-based collaborative issue management system that enables you to track, manage, and resolve various product/process related issues across your enterprise as well as with suppliers and customers. The system issue management helps to speed identification, communication, and resolution of quality problems or design changes to your product.

Your system administrator has configured the issue creation process so that it is optimized for your enterprise. For example, in a company that designs or manufactures computer motherboards, you may have the issue types: Design, Defect, Documentation, and Implementation. Depending on the issue type selected, the workflow processes for each status may already be defined by default, thereby ensuring that all new issues are captured and managed in a way that is consistent with your company's product development processes.

You can link issues to new change requests and change orders, effectively copying required information from the issue to the new change request or change order.

To create an issue:

1. On the **Create Issue: Select Issue Type** page, select the appropriate Issue Type and click Continue.

User-defined issue types enable your enterprise to build categorizations for different types of issues so that you can apply consistent review and approval processes to different categories of issues. For example, for each issue type, there is a specialized workflow that best suits the review and resolution process required by the particular type of issue. Issue types best suited for your enterprise's product development processes are listed in the Issue Type field. For details about your enterprise's issue types, contact your system administrator.

2. On the **Create Issue** page, provide the required base attribute information, as well

as any required user-defined attribute information. Depending on the configuration of the issue type selected, you can specify a subject for the issue. Following are the possible subjects of an issue:

- Item Number
- Item Revision
- Component
- None

The person or group in the Assigned To field is defaulted based on the item or component role specified in the assignment rule for the issue type. If no item or component is selected, you can enter a valid assignee name.

Note: You are not required to select a subject for the issue. If you prefer not to assign a subject to the issue, select the blank or empty value. If no item or component is selected, then your (the requestor's) name becomes the default value in the Assigned To field.

3. Depending on the configuration of the issue type selected, you may be required to provide data in any of the following sections (in addition to any user-defined sections or pages) when creating an issue:

- Lines

Issue Lines capture all the details that comprise an issue--lines make up a "to do" list for a particular issue. Just as there are types of issues, you have types of issue lines. These issue line types have been configured by your system administrator to best serve the needs of your business. Optionally, click Add Line Subjects to create multiple lines for the selected line type. In the Search and Select: Add Line Subjects page, you can select multiple line subjects at once to add to the issue. Start After and Complete Before fields on the line enable you to manage the line based on header statuses. If you are using a line workflow, these fields enable you to manage the line workflow initiation automatically. The line workflow starts once the header enters the Start After status specified on the line.

- Dependencies

The resolution of an issue may depend upon a particular Idea, New Item Request, Change Request, or Change Order being approved. An issue may also be required by or implemented by a change request, change order, or project. To ensure this relationship is captured in a new issue, specify what the issue is related to (for example, a change request, change order, or project), and then

specify the nature of the dependency.

- References

You can specify that the issue references an item or project. Any reference to an item may also include the item revision.

- Workflow Approval

Workflow Routings or Approvals may be defined for any status of the issue based on the issue type. The issue type selected determines the workflow process steps defaulted in for each status. A workflow process may include steps to request approval, request comment, FYI, or a custom workflow process. For some steps you may be required to select an assignee and specify whether the assignee is mandatory or optional. You can add additional workflow process steps and update a step to add Assignees if a workflow is associated with the status; however, you cannot delete any assignees or steps that were defaulted in based on the issue type. You can remove any Steps or Assignees that you add.

- Attached Documents

You can attach documents from your desktop or Oracle Files Online. You can also attach text or URL documents. When you attach a document you can specify an Attachment Category to classify the document. The valid Attachment Categories are created by your system administrator.

Note: During issue creation you cannot attach folders from Oracle Files Online. However, after the issue has been created, you can attach folders (from Oracle Files Online) to it.

After providing the required information you can Submit the new issue, which starts the Workflow for the first status and notifies the assignee. If you have not completed adding all the information, click Save for Later. You or anyone with the appropriate role can update the issue later on.

4. After submitting and creating an issue, you can view and update the following information:

- People

You can directly add people to an issue and assign them a role. Depending on how the issue type was configured, a number of people may inherit a role on the issue (based on the issue type). You cannot delete inherited people or modify their roles. If you specify an item as the subject of the issue, all people with a role on that item may also inherit a role on the issue if their item role has been mapped to an issue role; to change the role or delete any of these people from the issue, their roles must be changed or deleted at the item level.

- **Action Log**

The Action Log displays all actions (and associated comments) executed against or posted to the issue in a threaded discussion format. You can respond to requested comments or reply to specific comments, thereby creating a threaded discussion within the context of the issue.

- **Workflow**

Issues are managed through their statuses and associated workflow processes. Each status can have one workflow associated with it, and that workflow is automatically launched when issues achieve a particular status. You can explicitly promote or demote an issue to its different statuses (defined by the issue type). Issues may automatically be promoted (or demoted) to the next status after the completion of the workflow in a specific status (as defined by the issue type).

If you abort an issue, that issue's status is changed to Not Submitted for Approval, and all dates are reset. You can reset and restart a workflow; if an aborted or reset workflow is restarted, a new instance of the workflow begins with the first step.

If you add or remove people from a step in the workflow, be sure to Refresh Assignees--doing so ensures all new assignees are added to steps in the workflow before it is submitted.

To perform an action:

See: Performing Actions, page 10-23

To create a relationship:

See: Creating Relationships, page 10-39

To add an attachment to an issue line:

See: To add an attachment to a change line:, page 10-31

To create a change order from an issue:

See: To create a change order from a change request/issue/idea, page 10-14

Creating Ideas

Ideas capture suggestions for improving products or processes. Ideas can also capture suggestions, innovations, and improvements.

The system provides a workflow-based collaborative idea management system that enables you to track, manage, and implement ideas across the enterprise, as well as

with suppliers and customers.

Your system administrator has configured the idea creation process so that it is optimized for your enterprise.

To create an idea:

1. On the **Create Idea: Select Idea Type** page, select the appropriate Idea Type and click Continue.

User-defined idea types enable your enterprise to build categorizations for different types of issues so that you can apply consistent review and approval processes to different categories of issues. For example, for each idea type, there is a specialized workflow that best suits the review and implementation process required by the particular type of idea. For details about your enterprise's idea types, contact your system administrator.

2. On the **Create Idea** page, provide the required base attribute information, as well as any required user-defined attribute information. Depending on the of the idea type selected, you can specify a subject for the idea.

The person or group in the Assigned To field is defaulted based the idea type.

Note: You are not required to select a subject for the idea. If you prefer not to assign a subject to the idea, select the blank or empty value. If no item or component is selected, then your (the requestor's) name becomes the default value in the Assigned To field.

3. Depending on the configuration of the idea type selected, you might be required to provide the following data related to the idea:

- Lines

Lines capture all the details that comprise an idea--lines make up a "to do" list for a particular idea. Just as there are types of ideas, you have types of idea lines. These idea line types have been configured by your system administrator to best serve the needs of your business. Optionally, click Add Line Subjects to create multiple lines for the selected line type. In the Search and Select: Add Line Subjects page, you can select multiple line subjects at once to add to the idea. Start After and Complete Before fields on the line enable you to manage the line based on header statuses. If you are using a line workflow, these fields enable you to manage the line workflow initiation automatically. The line workflow starts once the header enters the Start After status specified on the line.

- Dependencies

The resolution of an idea may depend upon a particular issue, New Item Request, Change Request, or Change Order being approved. An idea might also originate from a change request, change order, or project. To ensure this relationship is captured in a new idea, specify what the idea is related to (for example, a change request, change order, or project), and then specify the nature of the dependency.

- References

You can specify whether the idea references an item or project. Any reference to an item might also include the item revision.

- Workflow Approval

Workflow Routings or Approvals can be defined for any status of the idea. The idea type selected determines the default workflow process steps. A workflow process might include steps to request approval, request comment, FYI, or a custom workflow process. For some steps you might be required to select an assignee and specify whether the assignee is mandatory or optional. You can add additional workflow process steps and update a step to add Assignees if a workflow is associated with the status; however, you cannot delete any assignees or steps that were defaulted in based on the idea type. You can remove any Steps or Assignees that you add.

- Attached Documents

You can attach documents from your desktop or Oracle Files Online. You can also attach text or URL documents. When you attach a document, you can specify an Attachment Category to classify the document. The valid Attachment Categories are created by your system administrator.

Note: During idea creation you cannot attach folders from Oracle Files Online. However, after the idea has been created, you can attach folders (from Oracle Files Online) to it.

- Strategic Impact

After providing the required information you can Submit the new idea, which starts the Workflow for the first status and notifies the assignee. If you have not completed adding all the information, click Save for Later. You or anyone with the appropriate role can update the idea later..

4. After submitting and creating an idea, you can view and update the following information:

- People

You can directly add people to an idea and assign them a role. Depending on

how the idea type was configured, a number of people might inherit a role on the idea (based on the idea type). You cannot delete inherited people or modify their roles. If you specify an item as the subject of the idea, all people with a role on that item can also inherit a role on the idea if their item role has been mapped to an idea role; to change the role or delete any of these people from the idea, their roles must be changed or deleted at the item level.

- **Action Log**

The Action Log displays all actions (and associated comments) executed against or posted to the idea in a threaded discussion format. You can respond to requested comments or reply to specific comments, thereby creating a threaded discussion within the context of the idea.

- **Workflow**

Ideas are managed through their statuses and associated workflow processes. Each status can have one workflow associated with it, and that workflow is automatically launched when ideas achieve a particular status. You can explicitly promote or demote an idea to its different statuses (defined by the idea type). Ideas may automatically be promoted (or demoted) to the next status after the completion of the workflow in a specific status (as defined by the idea type).

If you abort an idea, that idea's status is changed to Not Submitted for Approval, and all dates are reset. You can reset and restart a workflow; if an aborted or reset workflow is restarted, a new instance of the workflow begins with the first step.

If you add or remove people from a step in the workflow, be sure to Refresh Assignees--doing so ensures all new assignees are added to steps in the workflow before it is submitted.

To perform an action:

See: Performing Actions, page 10-23

To create a relationship:

See: Creating Relationships, page 10-39

To add an attachment to an idea line:

See: To add an attachment to a change line:, page 10-31

To create a change order from an idea:

See: To create a change order from a change request/issue/idea, page 10-14

Creating Change Requests

The system provides a workflow-based collaborative change request management system that enables you to track, manage, and analyze solutions to various product/process related issues within your enterprise. After an issue is closed, appropriate parties can analyze proposed solutions via change requests; analysis can be conducted and proposals routed to relevant parties for review and approval.

You can link issues to new change orders, effectively copying required information from the change request to the new change order.

To create a change request:

1. On the **Create Change Request: Select Change Request Type** page, select the appropriate Change Request Type and click Continue.

User-defined change request types enable your enterprise to build categorizations for different types of change requests so that you can apply consistent review and approval processes to different categories of change requests. For example, for each change request type, there is a specialized workflow that best suits the review and resolution process required by the particular type of change request. Change request types best suited for your enterprise's product development processes are listed in the Change Request Type field. For details about your enterprise's change request types, contact your system administrator.

2. On the **Create Change Request** page, provide the required base attribute information, as well as any required user-defined attribute information. Depending on the configuration of the change request type selected, you can specify a subject for the change request. Following are the possible subjects of a change request:

- Item Number
- Item Revision
- Component
- None

The person or group in the Assigned To field is defaulted based on the item or component role specified in the assignment rule for the change request type. If no item or component is selected, you can enter a valid assignee name.

Note: You are not required to select a subject for the change request. If you prefer not to assign a subject to the change request, select the null or empty value. If no item or component is selected, then your (the requestor's) name becomes the default value in the

Assigned To field.

3. Depending on the configuration of the change request type selected, you may be required to provide data in any of the following sections (in addition to any user-defined sections or pages) when creating a change request:

- Lines

Change Request Lines capture all the details that comprise a change request—lines make up a "to do" list for a particular change request. Just as there are types of change requests, you have types of change request lines. These change request line types have been configured by your system administrator to best serve the needs of your business. Optionally, click Add Line Subjects to create multiple lines for the selected line type. In the Search and Select: Add Line Subjects page, you can select multiple line subjects at once to add to the change request. Start After and Complete Before fields on the line enable you to manage the line based on header statuses. If you are using a line workflow, these fields enable you to manage the line workflow initiation automatically. The line workflow starts once the header enters the Start After status specified on the line.

- Dependencies

The final approval or resolution of a change request may depend upon a particular Issue, Idea, New Item Request, or Change Order being approved. A change request may also be required by or implemented by another change object or project. To ensure this relationship is captured in a new change request, specify what the change request is related to (for example, another change object, or project), and then specify the nature of the dependency.

- References

You can specify that the change request references an item or project. Any reference to an item may also include the item revision.

- Workflow Approval

Workflow Routings or Approvals may be defined for any status of the change request based on the change request type. The change request type selected determines the workflow process steps defaulted in for each status. A workflow process may include steps to request approval, request comment, FYI, or a custom workflow process. For some steps you may be required to select an assignee and specify whether the assignee is mandatory or optional. You can add additional workflow process steps and update a step to add Assignees if a workflow is associated with the status; however, you cannot delete any assignees or steps that were defaulted in based on the change request type. You can remove any Steps or Assignees that you add.

- Attached Documents

You can attach documents from your desktop or Oracle Files Online. You can also attach text or URL documents. When you attach a document you can specify an Attachment Category to classify the document. The valid Attachment Categories are created by your system administrator.

Note: During the creation of a change request you cannot attach folders from Oracle Files Online. However, after the change request has been created, you can attach folders (from Oracle Files Online) to it.

After providing the required information you can Submit the new change request, which starts the Workflow for the first status and notifies the assignee. If you have not completed adding all the information, click Save for Later. You or anyone with the appropriate role can update the change request later on.

4. After submitting and creating a change request, you can view and update the following information:

- People

You can directly add people to a change request and assign them a role. Depending on how the change request type was configured, a number of people may inherit a role on the change request (based on the change request type). You cannot delete inherited people or modify their roles. If you specify an item as the subject of the change request, all people with a role on that item may also inherit a role on the change request if their item role has been mapped to a change request role; to change the role or delete any of these people from the change request, their roles must be changed or deleted at the item level.

- Action Log

The Action Log displays all actions (and associated comments) executed against or posted to the change request in a threaded discussion format. You can respond to requested comments or reply to specific comments, thereby creating a threaded discussion within the context of the change request.

- Workflow

A change request is managed via its statuses and associated workflow processes. Each status can have one workflow associated with it, and that workflow is automatically launched when a change request enters into the status. You can explicitly promote or demote a change request to its different statuses (defined by the change request type). Change requests may automatically be promoted (or demoted) to the next status after the completion of the workflow with a specific status (as defined by the change request type).

If you abort a change request, that change request's status is changed to Not Submitted for Approval, and all dates are reset. You can reset and restart a workflow; if an aborted or reset workflow is restarted, a new instance of the workflow begins with the first step.

If you add or remove people from a step in the workflow, be sure to Refresh Assignees--doing so ensures all new assignees are added to steps in the workflow before it is submitted.

To perform an action

See: Performing Actions, page 10-23

To create a change request from a 3D model in the CADView-3D DeskTop:

1. Open the CADView-3D DeskTop by launching a model that has been attached to an item. If you do not have the CADView-3D client installed, you will be prompted to install it.
2. In the Window menu, double-click Change Management.
3. In the Change Management window, select change request, then click Create. A corresponding page in the system is opened in a separate browser window.
4. Create your change request and save it. The corresponding change request appears in the Change Management list in the CADView-3D desktop.

Note: All change requests that you have permission to view and which are associated with a given item are displayed. Double-click an entry in the list to display a page for that change request inside the system.

To create a change order from a change request/issue/idea:

The system provides a workflow-based collaborative change management system that enables you to track, manage, and resolve various product/process related issues, change requests and change orders, across your enterprise as well as with suppliers and customers. The system change management helps to speed identification, communication, and resolution of quality problems or design changes to your product.

A simple change cycle includes the following:

1. Customers log issues against a product and/or new ideas related to the product are collected from all stakeholders
2. The issues and ideas are consolidated and analyzed
3. A change request is created to request changes to the product design to address the

ideas and issue

4. Based on the change request, a change order is created to implement the design changes.

The system provides the ability to copy information from source change objects (like issues and ideas in the above cycle) and default them on to appropriate destination change objects like change requests and change orders. Thus new change objects can be quickly created with minimal data entry and with appropriate relationships established with the source change objects.

The following copy actions are allowed:

- Add a change request/Issue/Idea to a change order
- Add a change order to another change order
- Add a change request/Issue/Idea to another change request
- Add an issue/idea to another issue
- Add an idea to another idea

1. To add a change request detail page, select the action, Add to Change Order, and then choose the Go button.



2. On the Add to Change Order page

- Select the change order category
 You can add the change request information to a change order belonging to either the seeded change order category or any user defined change order categories.
- You can choose to add the change request information to a new change order or append relevant information to an existing change order.
 If you are adding the change request information to a new change order, then highlight the 'Create New' radio button and select the change order type.
 User-defined change order types enable your enterprise to build categorizations for different types of change orders so that you can improve the accuracy of change orders with review and approval workflows, and automatically implement changes on a scheduled effective date. For example, for each change order type, there is a specialized workflow that best suits the review and resolution process required by the particular type of change order. Change order types best suited for your enterprise's product development processes are listed in the Change Order Type pop list.
 If you are adding the change request information to an existing change order, then highlight the 'Add to Existing' radio button, search and select the appropriate change order.

Note: You can add to an existing change order only if the change order is in 'Draft' or 'Open' status
- By default, a dependency of type 'Implemented By' would be created on the change request. A complementary dependency of type 'Implements' would be created on the change order. You can choose not to create any dependency by

unchecking the dependency check box

- Specify what attribute values should be copied over from the source change request to the destination change order and click Continue

If you are copying the change request to a new change order, then the following attributes are available for selection

- Project/Task

The Project/Task information entered on the change request would be copied over to the corresponding fields on the change order

- Header Attributes

The attributes entered for the change request header will be copied to the change order. These attributes include: Name, Description, Source Type, Source Name, Priority, Need By Date, Reason and Assigned To. You can overwrite these attribute values on the change order.

Note: If the change order type is configured such that some of the attribute values entered on the change request are not valid for the change order, then the appropriate attribute value which has the lowest sequence number is defaulted on the change order. For eg: If the priority of a change request is 'High' and this value is not defined as a valid value for the change order type, then the priority value with the lowest sequence number defined for the change order type is defaulted on the change order.

- Header Item

The header item number, item description, and revision entered on the change request are copied over to the change order

Note: If the subject selection criteria of the change request is 'Item and Component', then the component information is ignored when adding to a change order. Also, if the header item entered on the change request does not satisfy the subject selection criteria specified for the change order type, then you cannot copy the item to the change order.

- Line Items (as Revised Items)

Items specified as subjects on the open change request lines are copied to the change order as revised items.

Change order revised items list changes to specific items. For each revised item you can specify changes to item attributes, attachments, AMLs, and structures. The revised item changes are implemented when the change order is implemented either manually or on the scheduled effective date. You can optionally schedule item changes at the revised item level. Revised items can be promoted or demoted on an individual basis.

Note: If the item entered as a subject on the change request line does not satisfy the subject selection criteria specified for the change order type, then you cannot copy the line item as a revised item on the change order.

If you are copying the change request to an existing change order, then only the 'LineItems (as Revised Items)' is available for selection. The other attribute values are not copied from the change request. Instead, the existing attribute values of the change order are preserved.

3. On the 'Create Change Order' page enter/modify data in any of the sections. For details about creating change orders refer 'Creating Change Orders'

4. Similarly, you can add an issue or an idea to a change order:

The process is similar to adding a change request to a change order, except for the following differences:

- revised items in the source change order, which are in open status, are copied to the destination change order.

Note: A change order cannot have lines

- A dependency of type 'Composed of' is created on the change order. A complementary dependency of type 'Composes' is created on the destination change order.

To add an issue/idea/change request to another change request:

- The issue lines in the source issue, which are in open status, are copied to the destination change request, provided the same line types are defined for both the change categories.

Note: An Issue, Change Request or an Idea cannot have revised items.

- A dependency of type 'Resolved By' is created on the issue. A complementary dependency of type 'Resolves' is created on the destination change request.

- You can copy the following additional header item information:
 - Structure
 - Component

Note: The issue and change request types should be appropriately configured to include these attributes

To add an issue/idea to another issue:

The process is similar to adding a change request to a change order.

- The issue lines in the source issue, which are in open status, are copied to the destination issue, provided the same line types are defined for both the change categories.
- A dependency of type 'Resolved By' is created on the issue. A complementary dependency of type 'Resolves' is created on the destination change request.
- You can copy the following additional header item information:
 - Structure
 - Component

Note: The issue and change request types should be appropriately configured to include these attributes

- Similarly, you can copy an idea to an issue.

To add an idea to another idea:

The process is similar to adding a change request to a change order.

- The idea lines in the source idea, which are in open status, are copied to the destination idea.
- A dependency of type Required By is created on the source idea. A complementary dependency of type Requires is created on the destination idea.
- You can copy the following additional header item information:
 - Structure
 - Component

Note: The source and destination idea types should be appropriately configured to include these.

Creating Change Orders

You can use change orders to specify and implement changes for item attributes, attachments, AMLs, and structures. For a specific change order you can specify changes for several items, route the change order for approval, schedule the effective date, and automatically implement the changes on the scheduled effective date. A change order also can be propagated to many organizations within your company; depending on how your company's organization policy is defined, a change order can be automatically propagated to other organizations in your company hierarchy whenever it reaches a particular status.

To create a change order:

1. On the **Create Change Order: Select Change Order Type** page, select the appropriate Change Order Type and click Continue.

User-defined change order types enable your enterprise to build categorizations for different types of change orders so that you can improve the accuracy of change orders with review and approval workflows, and automatically implement changes on a scheduled effective date. For example, for each change order type, there is a specialized workflow that best suits the review and resolution process required by the particular type of change order. Change order types best suited for your enterprise's product development processes are listed in the Change Order Type field. For details about your enterprise's change order types, contact your system administrator.

2. On the **Create Change Order** page, provide the required base attribute information, as well as any required user-defined attribute information. Depending on the configuration of the change order type selected, you can specify a subject for the change order. Following are the possible subjects:
 - Item
 - Item Revision
 - None

The person or group in the Assigned To field is defaulted based on the item role specified in the assignment rule for the change order type, or it can be explicitly entered. If no item is selected, you can enter a valid assignee name.

Note: You are not required to select a subject for the change order. If you prefer not to assign a subject to the change order, select the null or empty value. If no item is selected, then your (the requestor's) name becomes the default value in the Assigned To field.

3. Depending on the configuration of the change order type selected, you may be required to provide data in any of the following sections (in addition to any user-defined sections or pages) when creating a change order:

- Revised Items

Change order revised items list changes to specific items. For each revised item you can specify changes to item attributes (both operational and user-defined), attachments, AMLs, and structures. The revised item changes are implemented when the change order is implemented either manually or on the scheduled effective date. You can optionally schedule item changes at the revised item level. You can specify revised item details such as Use-up item, WIP details, and corresponding dates. You can also create new item revisions within the change order and define changes for those revisions, as well as schedule changes by providing a scheduled date. Revised items can be promoted or demoted on an individual basis.

- Change Tasks

Change tasks help ensure that mandatory work is completed before a change order is implemented or promoted to the next status. You can use change tasks to create and assign work to individuals or groups. Each change task must be started after and completed before specific statuses. Before you promote a change order through its various statuses, its Mandatory change tasks must be completed. If a task is listed, but is not Mandatory, the change order can be promoted to the next status without completion of the task.

- Dependencies

The final approval or implementation of a change order may depend upon a particular Issue, Idea, New Item Request, or another Change Order being approved. A change order may also be required by or implemented by another change object or project. To ensure this relationship is captured in a new change order, specify what the change order is related to (for example, another change order, item, or project), and then specify the nature of the dependency.

- References

You can specify that the change order references an item or project. Any reference to an item may also include the item revision.

- Workflow Approvals

Workflow Routings or Approvals may be defined for any status of the change order based on the change order type. The change order type selected determines the workflow process steps defaulted in for each status. A workflow process may include steps to request approval, request comment, or FYI. For some steps you may be required to select an assignee. You can add additional workflow process steps and update a step to add Assignees if a workflow is associated with the status; however, you cannot delete any assignees or steps that were defaulted in based on the change order type. You can remove any Steps or Assignees that you add.

- Attached Documents

You can attach documents from your desktop or Oracle Files Online. You can also attach text or URL documents. When you attach a document you can specify an Attachment Category to classify the document. The valid Attachment Categories are created by your system administrator.

Note: During the creation of a change order you cannot attach folders from Oracle Files Online. However, after the change order has been created, you can attach folders (from Oracle Files Online) to it.

After providing the required information you can Submit the new change order, which starts the Workflow for the first status and notifies the assignee. If you have not completed adding all the information, click Save and Continue. You can then add revised items and save the change order in Draft status. You or anyone with the appropriate role can submit the change order later on.

- Organization Hierarchy

Depending on how the change order type is defined, you may view and select from a list of valid organization hierarchies. If you select an organization hierarchy from this list, the change order can be propagated to all of the organizations within that hierarchy. Again, depending how the change order type is defined, a change order may also automatically be propagated through an organization hierarchy when it reaches a certain status. To view the organizations to which a change order can be propagated, click the Organizations tab on the change order's detail page.

4. After creating a change order, you can view and update the following information:

- People

You can directly add people to a change order and assign them a role. Depending on how the change order type was configured, a number of people may inherit a role on the change order (based on the change order type). You

cannot delete inherited people or modify their roles. If you specify an item as the subject of the change order, all people with a role on that item may also inherit a role on the change order if the item role has been mapped to a change order role; to change the role or delete any of these people from the change order, their roles must be changed or deleted at the item level.

- **Action Log**

The Action Log displays all actions (and associated comments) executed against or posted to the change order in a threaded discussion format. You can respond to requested comments or reply to specific comments, thereby creating a threaded discussion within the context of the change order.

- **Workflow**

A change order is managed through its workflow with statuses and associated workflow processes. Each status can have one workflow associated with it, and that workflow is automatically launched when a change order enters into the status. You can explicitly promote or demote a change order to its different statuses (defined by the change order type). Change orders may automatically be promoted (or demoted) to the next status after the completion of the workflow in a specific status(as defined by the change order type).

If you abort a change order, that change order's status is changed to Not Submitted for Approval, and all dates are reset. You can update and restart a workflow; if an aborted or updated workflow is restarted, a new instance of the workflow begins with the first step.

If you add or remove people from a step in the workflow, be sure to Refresh Assignees--doing so ensures all new assignees are added to steps in the workflow before it is submitted.

To perform an action:

See: Performing Actions, page 10-23

To create a relationship:

See: Creating Relationships, page 10-39

Performing Actions

You can manage the workflow of a an issue, change request, or change order using change management actions. Change management actions can be executed from change detail pages, item change lists, and change management search results lists.

Typically, actions are used to update, reassign, or change the priority or status of an issue, change request, or change order. Some actions, such as schedule, release, and implement, are only available to issues, change requests, or change orders with revised

items enabled. All actions are recorded in the action log.

The following actions are available to all change categories:

Submit

Submits an issue, change request, or change order to an assigned person or group.

Submit for Approval

Submits a change object for approval.

Update

Updates the primary attributes of an issue, change request, or change order.

Reassign

Reassigns an issue, change request, or change order to a person or group.

Change Priority

Changes the priority of the issue, change request, or change order.

Change Status

Changes the status of the issue, change request, or change order.

Request/Post Comment

Requests a comment from one or more people.

The following actions are available to change categories with revised items enabled:

Release

Releases all revised item changes for implementation. The status is changed to Released.

Schedule

Schedules implementation based on the effective date. The status is changed to Scheduled.

Put On Hold

Places the issue, change request, or change order on hold. The status is changed to On Hold.

Cancel

Cancels all changes. The status is changed to Cancelled.

Implement

Implements the revised item changes. The status is changed to Implemented.

Reschedule

The issue, change request, or change order is rescheduled for implementation based on the effective date.

Change Effectivity Date

Changes the effective date for all revised items. Propagate ECO propagates the ECO to other organizations. Reopen changes the status to Open.

Generate Report

Generate report creates a report with specified issue or change information. You can choose to generate a report by selecting report templates defining the change information the report will contain and a report output format such as pdf, html, rtf, xls, and xml.

You can also generate a change report from change search results page.

Add to Change Order

Add the issue or idea to a change order.

Add to Change Request

Associate the issue or idea with a change request

Promote

Change the issue or idea's status. For example from Review to Approval.

The following action is available for only **Change Issues** and **Change Ideas**:

Add to Issue

Associate the issue or idea with another issue.

To perform an action:

1. On an issue, change request, or change order detail page, select an Action and click Go.
2. Enter information in the required fields.
3. Optionally, enter a comment and click Apply.

Managing the Action Log

For tracing and auditing efficiency, you can maintain a complete history of all actions and comments related to a change object. All actions such as reassignments, status and priority changes, along with comments and responses to requests, are posted in the action log. The name of the action, who performed the action, a date/time stamp, and all comments are recorded in the action log.

You can filter and sort the action log to show only certain actions such as approval requests, status and priority changes, comments from specific people, and reassignments.

To view the action log:

1. On an issue, change request, or change order detail page, click the Workflow tab, then click Action Log.
2. Expand or collapse any or all entries in the action log to view responses, replies to requests, and comments.

To request a comment:

1. On an issue, change request, or change order detail page, select Request Comment and click Go.
2. Enter a person's or group's name.
3. Enter a subject and click Apply.

To post a comment in the action log:

1. On an issue, change request, or change order detail page, click the Workflow tab, then click Action Log.
2. Click Post Comment.
3. Enter a comment then click Apply.

To post a reply in the action log:

1. On an issue, change request, or change order detail page, click the Workflow tab, then click Action Log.
2. Click the Reply icon in the Action Log row to which you would like to reply.
3. Enter a comment then click Apply.

Creating Change Revisions

You can create revisions for issues, change requests, or change orders to track and audit modifications. When you create a new revision the approval status is reset to Not Submitted for Approval, thereby enabling you to make additional edits to the change object.

To create a revision for an issue, change request or change order:

1. On an issue, change request or change order detail page, click the Revisions tab.

2. On the **Revisions** page, click Create.
3. On the **Create Revision** page, enter a Revision and a Start Date. Optionally, enter Comments describing the purpose for the new revision.
4. Click Apply.

To update a revision for an issue, change request or change order:

1. On an issue, change request or change order detail page, click the Revisions tab.
2. On the **Revisions** page, click the Update icon.
3. Update the comments for the revision.
4. Click Apply.

To delete a revision for an issue, change request or change order:

1. On an issue, change request or change order detail page, click the Revisions tab.
2. On the **Revisions** page, select the revision you wish to delete and click the Delete icon.

Note: You can only delete future effective revisions.

Managing Change Header Attachments

An attachment is unstructured information related to a change object. For example, unstructured information attached to a change object could be a marked up CAD drawing, test results, a specification sheet, or a URL. You can add attachments to an issue, change request, or change order from your desktop or a repository (such as Oracle Content DB). You can also attach folders, text, or URLs. When you add an attachment, you can specify an attachment category to classify the attachment. The valid attachment categories are created by your system administrator. Folders can only be attached from an Oracle repository such as Oracle Content DB; files within such folders are not attached.

To manage attachments to a change header:

1. On an issue, change request, or change order's **Overview** page, click the Attachments tab.

This brings you to the **Attachments** page.

ORACLE Change Management
 Change Order: 323
 Organization: Vision Operations (V1)
 Change Order | Lines | Relationships | Workflow
 Overview | Action Log | **Attachments** | Revisions | People | Organizations

Recent Home Logout Preferences Help D

Attachments

View

Category: All [Go]
 Show More Search Criteria

Select Attachments: Change Attached Version [Go] | Add Attachment Desktop Files [Go]

Select All | Select None

Select	Name	Description	Version	Attachment Category	Last Modified By	Last Modified Date	Version Control	Repository	Det
<input type="checkbox"/>	r12_ebs_attachments_toi_func 2.ppt		1	Datasheet	Steve Williams	05-Feb-2007 22:32:32		CDBWS	

Show Key Notation

2. In the Attachments page, you can perform all of the actions described below. Please note that some tasks vary, depending on whether your system is integrated with Oracle Content DB.

- Adding Attachments, page 13-3
- Managing Attachments, page 13-13, which includes:
 - viewing the contents of an attachment
 - searching for attachments
 - requesting review or approval of an attachment
 - updating attachment attributes
 - changing the attached version of a file
 - checking files in and out of the repository
 - managing all file versions (version history)
 - granting access to attached folders in Oracle Content DB
 - viewing all objects associated with the attachment
 - detaching attachments from an object

Related Topics

Using E-Business Suite Attachments, page 13-1

Managing Attachments, page 13-10

Logging On to Repositories, page 13-23

Troubleshooting Attachments, page 13-23

Setting Up E-Business Suite Attachments, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management User's Guide*

Defining Item Attachment Categories, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management User's Guide*

Managing People and Roles

Change management enables you to secure issues, change request, and change orders through role-based data level security. You can grant roles explicitly or implicitly to people and groups associated with an issue, change request, or change order. A change management role determines whether or not you can simply view an issue, change request, or change order, or view *and* edit it.

You can grant all people within an organization a role for all issue, change request, or change orders within a specific change category. You can map item roles to change roles. For example, if the Design Engineer item role is mapped to the Change Manager change role for change orders, you will be granted a Change Manager role on all change orders related to an item for which you have a Design Engineer role. The creator, requestor, and assignee of an issue, change request, or change order are always granted a role on it. These scenarios are "implicit role grants" added by the system.

Of course you can always grant an explicit change role to a person or group for any issue, change request, or change order. For example, you may grant a Change Reviewer role to a supplier engineer on a specific change order.

To view people who have access to an issue, change request, or change order:

1. On an issue, change request, or change order detail page, click the People tab.
2. On the **People** page, in the Direct Change Roles section you can view people and groups explicitly granted a role by a user on the issue, change request, or change order. In the Inherited Change Roles section you can view people and groups implicitly granted a role by the system on the issue, change request, or change order. For example, the system automatically grants a role to the creator, assignee, and requestor.

Note: You can view each person's or group's role on the issue, change request, or change order, the start and end date of their assigned role, and their company.

To provide a person or group access to an issue, change request, or change order:

1. On an issue, change request, or change order detail page, click the People tab.
2. On the **People** page, click Update, then click Add People. When the page refreshes, select a role, people type (such as person or group), and then choose a person or group.

Enter a start date and optionally, an end date, specifying when the role for the person or group is to be effective.

3. Click Apply.

Note: People can also be implicitly granted a role by the system. For more information on roles granted to people by the system see Types and Adding People and Roles.

To delete a person or group from an issue, change request, or change order:

1. On an issue, change request, or change order detail page, click the People tab.
2. On the **People** page, select one or more people and click Delete.

Note: You cannot delete people or groups added by the system.

Managing Issue and Change Request Lines

You can add lines to any issue or change request that has line types configured for the change category. Lines are useful for specifying details and assigning responsibility for completion of tasks related to an issue or change request. For example, you can assign a line to an engineer to investigate and report on the cost of a change.

You can add a line of any valid line type to an issue or change request. You can edit a line as long as the approval status is not 'Submitted for approval' or 'Approved.' If you are assigned a line you automatically get a Reviewer role on the issue or change request, which enables you to view the details and edit the assigned line. Notifications are sent to inform assignees of their line assignments.

When you add or edit a line for an issue or change request you can specify a name, description, item number, assigned to, need by date, and estimated completion date. You can also attach files and folders to a line. The assignee may be defaulted in based on line type rules set up by a system administrator (for example, a specific item role).

To add an attachment to a change line:

1. On the idea, issue, change request or change notification **Overview** page, click the Lines tab.
2. Select a line, then drill into the Line page using one of the following methods:
 - Select Update in the Select Line field, then click Go.
 - Click the line's Name link.
3. In the Attachments region, in the Add Attachment field, select the source of the attachment you want to add, then click Go.

Attachment Sources

- Desktop Files
- Repository Files and Folders
- New Folder
- URL
- Text

ORACLE Change Management
 Change Request: ECR102
 Organization: Vision Operations (V1) Recent Home Logout Preferences Help Diagnostics

Change Request **Lines** Relationships Workflow

Lines
 Lines: Lines >

Line: 6.1 Speaker support should be removed from the requirements BOM. (10)

Type: **Spec Chng** Actions: Change Status Go

Name: **6.1 Speaker support should be removed from the requirements BOM.**
 Description: **6.1 Speaker support should be removed from the requirements BOM.**
 Item Number: [VI41005](#)
 Item Description: **Vision MX2000 Desktop**
 Revision: [ZX6000](#)

Status: **Open** Need By Date: **24-Sep-2003 10:30:00**
 Assigned To: Estimated Completion Date: **17-Sep-2003 10:30:00**
 Start From Status: Complete Before Status:

Attachments

View
 Category: All Go
 Show More Search Criteria

Select Attachments: Change Attached Version Go Add Attachment Desktop Files Go

Select All Select None

Select	Name	Description	Version	Attachment Category	Last Modified By	Last Modified Date	Version Control	Repository	Details	Detach
...

Managing Change Order Revised Items

Change order revised items list changes to specific items. For each revised item you can specify changes to item attributes, attachments, AMLs, and structures. The revised item changes are implemented when the change order is implemented either manually or on the scheduled effective date. You can optionally schedule item changes at the revised item level.

To manage change order revised items:

1. On the change order's **Overview** page, click the **Lines** tab. On the **Revised Items** page you can view, edit, and add revised items depending on the role you are assigned on the change order. Optionally, you can add revised items from a spreadsheet. You can view and edit the following information for each revised item:

- Revised Item Details

You can view the Use Up Details, Work in Progress information, and the Cancel Details.

- Structure Changes

You can view the structure changes for the change order revised item in this context, but to perform any updates on a structure, you must click Update in

Forms or Launch Product Workbench. The following structure changes can be authored:

- Creation of New Structure
- Component changes including adding new component, changing primary attributes of the component and disabling the component.
- Reference Designator and Substitute component changes
- Changes to component attributes on a common structure. The component attributes that you can change are:
 - WIP Supply Type
 - Supply Sub inventory
 - Supply Locator
 - Operation Sequence
 - Include in cost rollup
- Attribute Changes
All changes to operational and user-defined attribute groups associated with an item are listed here. You can update both single and multi-row attributes.
- Attachment Changes
You can specify attachment changes by adding and removing attachments to the revised item.
- AML Changes
You can specify to add, remove or update approved manufacturers. Only valid or approved manufacturers appear in the list of Manufacturer Names.
- Routing Changes
You can view the routing changes for the change order revised item in this context, but to perform any updates on a routing, you must click Update in Forms.

To upload revised items to a change order:

Upload a text file containing revised item information directly to the ENG_REVISIED_ITEMS_INTERFACE table. The text file must contain the ENG_REVISIED_ITEMS_INTERFACE table column values separated by commas. For

1. On the change order's Overview page, click the Lines tab

Change Management Lines Tab

The screenshot shows the Oracle Change Management interface. At the top, there's a navigation bar with 'Change Order' selected. Below it, a search bar contains 'Change Order'. The main content area is titled 'Overview' and displays the following details:

- Change Order Type: **CO-1**
- Change Order Name: **N2**
- Description: [Blank]
- Assigned To: **Satish Rao**
- Requestor: **Satish Rao**
- Priority: **High**
- Status: **Open**
- Creation Date: **19-Apr-2005 17:59:24**
- Reason: **Aesthetics**
- Organization Hierarchy: [Blank]
- Item Number: [Blank]
- Item Description: [Blank]
- Project: [Blank]
- Source Type: [Blank]
- Source Name: [Blank]
- Need By Date: [Blank]
- Classification Code: [Blank]
- Approval Status: **Not submitted for approval**
- Current Revision: [Blank]
- Department: [Blank]
- Task: [Blank]

At the bottom right, there are 'Actions' buttons: 'Add to Change Order' and 'Go'.

2. On the Revised Items page, select Item Where Used from the tableaction drop-down list, and then click the Go button.

Items Where Used Example

The screenshot shows the Oracle Change Management interface for the 'Revised Items' page. The 'Change Order' is 'C01-12'. The 'Revised Items' table is displayed with the following data:

Select Item	Description	Catalog Category	Lifecycle Phase	From Revision	New Revision	Schedule Date and Time	Status
<input checked="" type="radio"/> SMC1000	Raw Wafer	Motherboards	Production	AA		20-Apr-2005 11:47:46	Open

Below the table, there are tabs for 'Revised Item Details', 'Structure Changes', 'Item Attribute Changes', 'Item Attachment Changes', 'Item AML Changes', and 'Routing Changes'. The 'Revised Item Details' tab is active, showing the following information for item SMC1000:

- Item Catalog Category: **Computer Parts and Components > Motherboards**
- Primary Unit of Measure: **Each**
- User Item Type: **Purchased item**
- Item Status: **Active**
- Lifecycle Phase: **Production**

At the bottom, there are 'New Revision Details' fields for 'Revision Description' and 'Revision Label Reason'.

The Revised Item Where Used page appears.

Revised Items Where Used Page

ORACLE Item Catalog Recent Home Logout Preferences Help Diagnostics
 Item: SMC1000 Revision: A
 Organization: Vision Operations (V1) Summary Lines Relationships Workflow
 Revised Items | Lines | Change Tasks
 Lines: Revised Items >

Revised Item Where-used Structure Type Structure Name

View
 Date
(example: 19-Apr-2005 19:45:00)
 From Unit Number
 To Unit Number
 Display
 View Top Items Only

| | |

Select	Name	Description	Organization	Structure Name	Category	Revision	Type	Status	LifeCycle	LifeCycle Phase
<input type="checkbox"/>	▼ SMC1000	Raw Wafer	Vision Operations		Motherboards	A	Purchased item	Active	Computer Component LifeCycle	Production
<input type="checkbox"/>	Indica_Sat_01	Indica_Sat_01	Vision Operations	ProtoBOM	Motherboards	A		Engineer	Computer Component LifeCycle	Concept
<input type="checkbox"/>	Indica_Sat_01	Indica_Sat_01	Vision Operations	MBOM	Motherboards	A		Engineer	Computer Component LifeCycle	Concept

On the Revised Item Where Used page, you can do the following:

- You can select a Structure Type and an appropriate Structure Name to narrow the where used search of the context revised item.

Specifying a structure name returns all the structures with this name in which the context revised item appears as a component. The search can be further narrowed down by specifying criteria which are listed below.

Note: A structure type may have a number of structure names associated with it. When the structure type is selected in the pop list, only those structure names which are associated with the structure type are listed in the structure name pop list.

- You can specify a date in the Date field. A where used search is launched on the basis of this date. All the assemblies/sub-assemblies in which the revised item is effective (as a component) on this date are returned in the where used search. By default, the system date and time is displayed in this field.
- You can specify a range of unit numbers in whose bill the revised item appears as a component
- You can choose a format to display the where used search results through the 'Display' pop list. The seeded formats available are: Item Detail and Structure Detail.

- You can choose to display only the top most items in the where used search results by checking the 'View Top Items Only' check box

Example

Assume a sample bill as below: K0 (Level 0)->K1(Level 1)->K2 (Level 2)->K3(Level 3). A where used search for K3 with 'Top Items Only' set to 'Yes' would return only item#K0. The intermediate assemblies K2 and K1 will not be listed

- Clicking 'Go' returns the appropriate assemblies and sub-assemblies based on the criteria specified earlier.

Note: Only those items on which the user has a 'View' privilege are listed in the search results. Also, only assemblies/sub-assemblies in the current org are listed in the search results

- You can select any set of items returned in the where used search and add them as a revised item to the change order by clicking 'Apply'.

On the Update Revised Items page, you can specify other details of the newly added revised item.

Note: The date specified in the 'Date' field is defaulted as the Scheduled date for the new revised item. If this date is in the past, then the system date is defaulted as the scheduled date for the new revised item

Update Revised Items Page

ORACLE Change Management [Recent](#) [Home](#) [Logout](#) [Preferences](#) [Help](#) [Diagnostics](#)

Change Order: CO1-12

Organization: Vision Operations (V1)

[Change Order](#)

Lines

[Relationships](#)

[Workflow](#)

Revised Items | Change Tasks

Lines Revised Items > Where Used >

Update Revised Items

* Indicates required field

[Cancel](#) [Apply](#)

Select Revised Item: [Remove](#) | Actions: [Search and Add Revised Items](#) [Go](#)

Select	Item	Description	Item Type	Current Lifecycle Phase	From Revision	New Revision Label	New Revision Code	*Schedule Date and Time
<input type="radio"/>	Inca Sat_01	Indica_Sat_1		Concept	A-A			20-Apr-2005 15:22:22
<input type="radio"/>	Inca Sat_01	Indica_Sat_1		Concept	A-A			20-Apr-2005 15:22:22
<input checked="" type="radio"/>	SVC1000	Faw Wafer	Purchase Item	Production	A-A			20-Apr-2005 11:47:4E

[Add 3 Rows](#)

TIP date format example: 20-Apr-2005 13:22:22

Revised Item: Indica_Sat_01

New Revision Details

Description

Reason

Dates

Earliest Schedule Date and Time

Use Up Details

Use Up Item Number

Plar Name

YRF Active

For detailing and managing the changes to the newly added revised item, see [Managing Change Order Revised Items](#), page 10-32.

To access the Product Workbench:

1. Create a change order.
2. Click on the change order number link.
3. You can view the workbench of the change order.
4. Click on the Lines tab.
5. Update and add a revised item.

Note: Once a revised item is added, a Product Workbench button appears.

Managing Change Tasks

Change tasks help ensure that mandatory work is completed before a change order is implemented or promoted to the next status. You can use change tasks to create and assign work to individuals or groups. Each change task must be started after and completed before specific statuses. Before you promote a change order through its various statuses, its Mandatory change tasks must be completed. If a task is listed, but is not Mandatory, the change order can be promoted to the next status without the task being completed.

You can change the status of an existing change task, reassign it, update it, or delete it.

To manage change tasks:

1. On the change order's **Overview** page, click the Lines tab. Then, on the **Revised Items** page, click the Change Tasks tab.
2. On the **Lines: Change Tasks** page, select the change task whose status you wish to edit, reassign, update, or delete.

Creating Relationships

You can link one or more change objects (such as an issue, change request, or change order) to each other as dependencies. You can specify the type of dependency to describe how the linked change objects are related to each other. For example, a dependency can show the number, name, and status of change order that implements a change request, or it can show an issue that is required by a change order.

Following are the Dependency Types:

Implemented By

A change object is implemented by the dependent change object.

Implements

A change object implements the dependent change object.

Required By

A change object that is required by the dependent change object.

Requires

A change object that requires the dependent change object.

Resolved By

An issue is resolved by a change request or change order.

Resolves

A change request or change order resolves an issue

To view a change object's dependencies, navigate to a change object's detail page, click the Relationships tab, then click Dependencies.

To link a dependency to a change object:

1. On a change object's detail page, click the Relationships tab, then click Dependencies.
2. Select a Change Category and click Go.
3. Select a Relationship Type.
4. Enter a change object number.
5. Click Apply.

To add a reporting reference to an issue, change request, or change order:

You can add one or more reporting references to an issue, change request, or change order. Reporting references show items, projects, and tasks that are related to an issue, change request, or change order in context. For example, a change order may implement several component item changes required for a prototype assembly managed by an item lifecycle tracking project. In such a case, the assembly item and tracking project may be listed as reporting references to provide convenient access to the item or project details.

To view an issue, change request, or change order's reporting references, navigate to an issue, change request, or change order detail page, click the Relationships tab, then click Reporting References.

1. On an issue, change request, or change order detail page, click the Relationships tab, then click References.
2. Select an object to reference, such as an item or project, and click Go.
3. Enter information in the required fields.
4. Click Apply.

Managing Workflows

An issue, change request, or change order can only be approved through the successful completion of an approval routing. When you create an issue, change request, or change order, an approval routing is created automatically based on a template, or manually by any user granted an edit privilege on the issue, change request, or change

order.

An approval routing consists of one or more approval steps. Each approval step specifies a workflow process and to whom it is assigned. For example, you can create steps to request approval, request comment, or send an FYI notification. You can create custom activities using Oracle Workflow Builder.

The approval status of an issue, change request, or change order reports the progress of the approval. For example, when you submit a change object for approval, the approval status changes to Submitted for Approval, and then Approved or Rejected, depending on the outcome of the approval routing workflow. Every time a new revision is created for an issue, change request, or change order, the approval status is reset to Not Submitted for Approval. You cannot edit an issue, change request, or change order's attributes, lines, or attachments after it has been approved. However, you can perform actions (such as reassign, change status, change priority, and request comment) to manage the workflow of the issue, change request, or change order.

Notifications are sent to each of the assignees of a step when the step is started. Each assignee is requested to respond by the Date Required. If an assignee does not respond by the Date Required, then they will receive a reminder notification every N days, where N is the value specified for Response Required in N Days. The Date Required for a step is calculated to be the date/time the step is submitted, plus the Response Required in N Days. You can respond either through the email notification or directly from the workflow notification. When the issue, change request, or change order is approved or rejected, a notification is sent to the Creator, Requestor, and Assignee. If the approval routing workflow is aborted, then a notification is sent to all people in the approval routing that were previously notified regarding an assigned workflow process in a step.

A workflow consists of one or more steps. Each step specifies a workflow process and to whom it is assigned. For example, you can create steps to request approval, request comment, or send an FYI notification. Notifications are sent to each of the assignees of a step when the step is started.

To edit a step in an approval routing:

1. On an issue, change request, or change order's detail page, click the Workflow tab, then click Approval.
2. On the **Approval** page, click the Update icon for the approval process you wish to edit.
3. On the **Update Step** page, make updates to any of the following fields:

Response Required From

Selecting all means all assignees must respond. Selecting One means only one of the assignees must respond.

Response Required in N Days

A response is required D days from the date the workflow is submitted.

Instructions

Provide any instructions you have for assignees.

Add Assignee

Select and add assignees to include in the approval workflow. You can add assignees through a group, role, or person. When using a group or role, you can add individual assignees.

4. Click Apply.

Note: You can edit steps that have not yet begun in an approval routing, even after the workflow is started. For steps derived from the approval routing template, you cannot change the Workflow Process or Response Required From, nor can you delete the derived Assignees.

To insert a step in an approval routing:

1. On an issue, change request, or change order's detail page, click the Workflow tab, then click Approval.
2. On the **Approval** page, click Add Step.
3. On the Add Step page, provide the following information:

Step Number

The step number determines the order in which steps are executed in the approval routing.

Workflow Process

Select a workflow process (such as Request Approval, Request Comment, or FYI).

Response Required From

If the workflow process is Request Approval or Request Comment, then choose whether responses are required from all or one of the assignees.

Response required in N Days

Enter the number of days, from the time the step is submitted, that all responses are required.

Instructions

Enter any instructions to be included in the notifications sent to assignees.

Add Assignee

Click Add to add an assignee. You can add assignees through group, role, or person. When using a group or role, you can add individual assignees.

4. Click Apply.

Note: Steps must be inserted after the last completed step or step that is currently in process.

To delete a step in an approval routing:

1. On an issue, change request, or change order's detail page, click the Workflow tab, then click Approval.
2. On the **Approval** page, click the Update icon for the step you wish to delete.
3. On the **Update Step** page select all assignees you wish to delete and click Delete, then click Apply.
4. On the **Approval** page, click the Delete icon for the step you wish to delete.

Note: You must delete all assignees for a step before you can delete the step.

To start or stop an approval:

1. On an issue, change request, or change order's **Overview** page, click the Workflow tab, then select the Approval status.
2. In the Status: Approval region of the **Statuses** page, click Start Approval to start the approval workflow.
3. If the approval workflow is running, click Abort Approval to stop the workflow.

Note: If the status of an issue, change request, or change order is Draft, then you cannot start the approval process. Also, it is recommended that you click Refresh Assignees before starting the approval process (in case there have been any changes in item or change role assignments).

To view the progress of an approval:

1. On an issue, change request, or change order's detail page, click the Workflow tab, then click Approval.

2. On the **Approval** page, you can view all the steps in the approval routing, the date required to respond, and the response outcome for each workflow process assigned in the step.

Click the Show link to view the date the step was submitted on, the date of the response, instructions, and response comments.

Note: The Date Required of a step is based on the date the step is started plus the number of days a response is required.

To switch a template:

You can set up workflow templates to use when requesting approval or review of an issue, change request, or change order. This enables reviewers and approvers to select the template with the steps that best meets their needs. You can also assign steps in the workflow to certain people, based on role, group, and person filters.

Within Setup Workbench, you can associate multiple workflow templates to a given change type. Once these associations are made, when creating an individual change object within that type, the system picks up the default template automatically. Optionally, the system provides a drop-down list where you can select from various workflow options.

1. On an issue, change request, or change order's detail page, click the Workflow tab, then click Approval.
2. On the **Approval** page, click Switch Template.
3. On the **Switch Template** page, select the approval routing template to associate with the change type. The currently applied template does not appear in the list of templates.
4. Click Apply.

Note: When you switch templates, all current steps/assignees--whether derived from the previous template or added after creation (ad-hoc)--are deleted.

To switch templates before moving to the Approval status:

1. Navigate to Change Simple Search.
2. Search for a Change Request.
3. Select the Number link for a particular change request.

4. In the Change Request Summary page, click the Change Request Number link.
5. Select the Workflow tab.
6. Select the Approval status. This change request is not yet at this status. Previously, we set up some default workflow templates for change requests at this status
7. In the Status: Approval region, click Switch Template.
8. In the Workflow field, select a different template using the drop-down list. The workflow steps for the selected template are shown below.
9. Click Apply.

To switch templates when the Approval status is in process:

You should have adequate permissions to abort the workflow within a status to choose a different template. After applying the new template, it can be used for the approval status for the particular change object.

Note: To use the new template, restart the Workflow and the change object will flow through the steps for this template for the Approval Status. At this point, you can designate new assignees based on the newly selected workflow template.

1. From the Workflow tab, Statuses page, click Abort Workflow.
2. Click Switch Template.
3. In the Workflow field, select a different template using the drop-down list. The workflow steps for the selected template are shown below.
4. Click Apply.
5. Click Start Workflow.

To view the approval history:

You can submit an issue, change request, or change order for approval multiple times. The approval history lists a summary of all past and present approval workflows. The approval history displays for each approval workflow the issue, change request, or change order revision at the time the approval was submitted, who submitted the approval, the date submitted and completed, and the final result of the approval workflow. The result of a workflow may be Approved, Rejected, or Aborted.

1. On an issue, change request, or change order detail page click the Workflow tab, then click Approval History.

2. On the **Approval** page, click the Details icon to view the complete approval routing for a specific approval workflow.

To transfer workflow notifications:

If you are one of the step assignees, then you can transfer these notifications to another user (transferee) who you feel is more qualified to take the decision. The transferee receives a notification requesting approval or comment. Thus, the onus for approving a change or commenting on it, is shifted to the transferee.

1. To transfer a notification, you must access the Notifications list from the Home page and launch the notification detail page of the relevant notification

The screenshot shows the Oracle Workflow and Request interface. At the top, there is a navigation bar with 'ORACLE Workflow and Request' and links for 'Diagnostics', 'Home', 'Logout', 'Preferences', and 'Help'. Below this, the notification title is 'Change Order CO1-14 requires approval'. There are three buttons: 'Approve', 'Reject', and 'Transfer'. The notification details are as follows:

From	Rao, Satish	Priority	High
To	Rao, Satish	Status	Approval
Sent	20-Apr-2005 15:42:22	Assigned To	Satish Rao
Due	22-Apr-2005 15:42:22	Reason	Aesthetics
ID	415695	Attachments	

Below the details is a 'Change Order Overview' section with the following information:

Type	CO-1
Name	NN2
Description	
Organization	Vision Operations(V1)
Item Number	
Item Description	
Instructions	

At the bottom, there is a 'Revised Items' table with the following columns: Item, Description, Catalog Category, Lifecycle Phase, From Revision, New Revision, Schedule Date and Time, and Status. The table currently contains the text 'No data exists.'

2. Choose the Transfer button to transfer this notification to another user.

Note: The transfer button is available only for To Do notifications, such as Request Comment or Request Approval notifications.

3. On the Transfer Notification page, select a person to transfer the notification to. You can optionally enter comments and then choose the Submit button to transfer the notification.

The person, to whom the notification is transferred to, automatically gets an appropriate role on the change object. If the original notification is an approval notification, the original assignee no longer has the privilege to approve the change object after the notification is transferred.

Transfer Notification

Notifications > RequestApproval >

Transfer Notification: Change Order CO1-14 requires approval

* Indicates required field

Cancel Submit

* Assignee All Employees and Users

Comments

Return to Worklist

Cancel Submit

Note: You cannot transfer notifications to a group or to a role. You can notifications only to other individuals.

On transfer, the transferee gets an approval or request comment notification. A new workflow step assignee record with the same step number is inserted in the workflow table on the notification details page in order to capture the response from the transferee.

After transfer, the 'to do' notifications related to the change object in the original assignees worklist, no longer remain in the open status.

Change Order - Approval Request

Change Order CO1-14 requires approval

Approve Reject Transfer

From Rao, Satish
 To Narasimhan, Nagesh
 Sent 20-Apr-2005 03:12:22
 Due 22-Apr-2005 03:12:22
 ID 415695

Priority High
 Status Approval
 Assigned To Satish Rao
 Reason Aesthetics
 Attachments

Change Order Overview

Type CO-1
 Name NN2
 Description
 Organization Vision Operations(V1)
 Item Number
 Item Description
 Instructions

Revised Items

Item	Description	Catalog Category	Lifecycle Phase	From Revision	New Revision	Schedule Date and Time	Status
No data exists.							

Workflow/Approval Sequence

Show All Details | Hide All Details

Details	Step	Workflow Process	Response Required	Type	Name	Assigned To	Action	Date Required
Show	10	Request Approval	One Assignee	Person	Satish Rao		Transferred to: Nagesh Narasimhan	22-Apr-2005 03:12:22
Show	10	Request Approval	One Assignee	Person	Nagesh Narasimhan		Submitted	22-Apr-2005 03:12:22
Show	20	Request Approval	One Assignee	Person	Umashankar Ulaganathan			

When the notification is transferred, the action is recorded in the Action Log.

Change Order - Action Log

ORACLE Change Management Recent Home Logout Preferences Help Diagnostics
Change Order: CO1-14
Organization: Vision Operations (V1) Change Order Lines Relationships Workflow

Overview | Action Log | Attachments | Revisions | People | Organizations

Action Log

View: Post Comment Request Comment

[Expand All](#) | [Collapse All](#)

Focus	Action	Comment	Who	Date/Time	Reply
CO1-14					
1	Workflow Started for Status: Approval ECO Approval		Satish Rao	20-Apr-2005 03:12:21	
	Transferred to: Nagesh Narasimhan		Satish Rao	20-Apr-2005 03:47:26	
2	Status Promoted to: Approval		Satish Rao	20-Apr-2005 03:12:17	
3	Submitted		Satish Rao	20-Apr-2005 03:11:59	

[Post Comment](#) [Request Comment](#)

To set vacation rules:

You can set vacation rules to redirect or auto-respond to workflow notifications. You set vacation rules using the Worklist page.

1. On the Worklist page, select the Vacation Rules link.
2. Create a vacation rule on the Vacation Rules page.
3. By selecting an Item Type, you can specify the type of notification that will activate this rule.
4. Select a notification format to activate this rule.
5. Specify a message, set the validity period of the rule, and specify who the appropriate notifications should be transferred to.

Note: The functional rule governing the transfer of notifications are listed in the Transfer Workflow Notifications section.

How to Set the Digital Signing Option:

Digital Certificates provide a means of proving your identity in electronic transactions. With a Digital Certificate, you can assure other stakeholders that the electronic information they receive from you are authentic.

The most widely accepted format for Digital Certificates is defined by the CCITT X.509 international standard; thus certificates can be read or written by any application complying with X.509.

The system enables users to set up digital signature options for a change type. Thus, a

response to any approval or request comment notifications for a change object belonging to this change type, would require a certificate-based signature from the stakeholder.

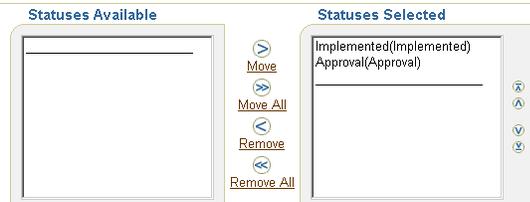
1. To set this option, you have to navigate to the Status Property page of a status associated with a change type

Note: Navigation: Setup Workbench -> 'Change Management' tab -> 'Categories' sub-tab -> Highlight a change category -> click on 'Types' -> Click on any change type link -> click on 'Workflow' link in the bin -> click on 'Update Properties' icon for any Status)

Status Properties Page



Valid Statuses for Promotion



Status Properties

Valid Statuses for Demotion



Workflow

Workflow Template: CoreCMGeneric
Enable Digital Signature: [dropdown menu]
 Allow Updates
 Auto Promote

Cancel Apply

2. Select one of the three options from the Enable Digital Signature drop-down list.
 - **Empty** - Digital Signature is not enabled if 'Enable Digital Signature' field is empty

- **Password Based Signature** - The user needs to respond to a notification with his password
- **Certificate Based Signature** - The user needs to respond to a notification with a certificate-based signature

Note: The default value is **Empty**.

If you enable the digital signature for a change type, then all the request comment and approval notifications for changes belonging to this change type will need to be commented on or approved with a certificate based digital signature

How to Use Digital Certificates for Signing

3. Navigate to the Worklist page, and select any Request Comment or Request Approval notification.

Workflow Worklist Page

ORACLE [Diagnostics](#) [Home](#) [Logout](#) [Preferences](#) [Help](#)

Notifications

Worklist

View | Open Notifications

Select Notifications:

[Select All](#) | [Select None](#)

Select From	Type	Subject	Sent	Due
<input type="checkbox"/> Rao, Satish	Change Workflow Routing Step	Change Order ECO9 requires approval	21-Apr-2005	23-Apr-2005
<input type="checkbox"/> Rao, Satish	Change Workflow Routing Step	Change Order CO1-15 requires comment	21-Apr-2005	22-Apr-2005
<input type="checkbox"/> Rao, Satish	Change Workflow Routing Step	Change Order CO1-16 requires comment	21-Apr-2005	22-Apr-2005
<input type="checkbox"/> Rao, Satish	Change Workflow Routing Step	Change Order CO1-14 requires approval	20-Apr-2005	22-Apr-2005

[TIP Vacation Rules](#) - Redirect or auto-respond to notifications.

[TIP Worklist Access](#) - Specify which users can view and act upon your notifications.

[Notifications](#) | [Diagnostics](#) | [Home](#) | [Logout](#) | [Preferences](#) | [Help](#)

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4. On the notification detail page, choose the Approve/Reject/Reply/Transfer button (whichever is appropriate).

Notifications Detail Page



[Notifications](#) >

Change Order ECO9 requires approval

From **Rao, Satish** Priority **High**
To **Narasimhan, Nagesh** Status **Approval**
Sent **21-Apr-2005 05:20:02** Assigned To **Maloy Sarkhel**
Due **23-Apr-2005 05:20:02** Reason **Aesthetics**
ID **415851** Attachments

Change Order Overview

Type **ECO**
Name **Test1**
Description **Test**

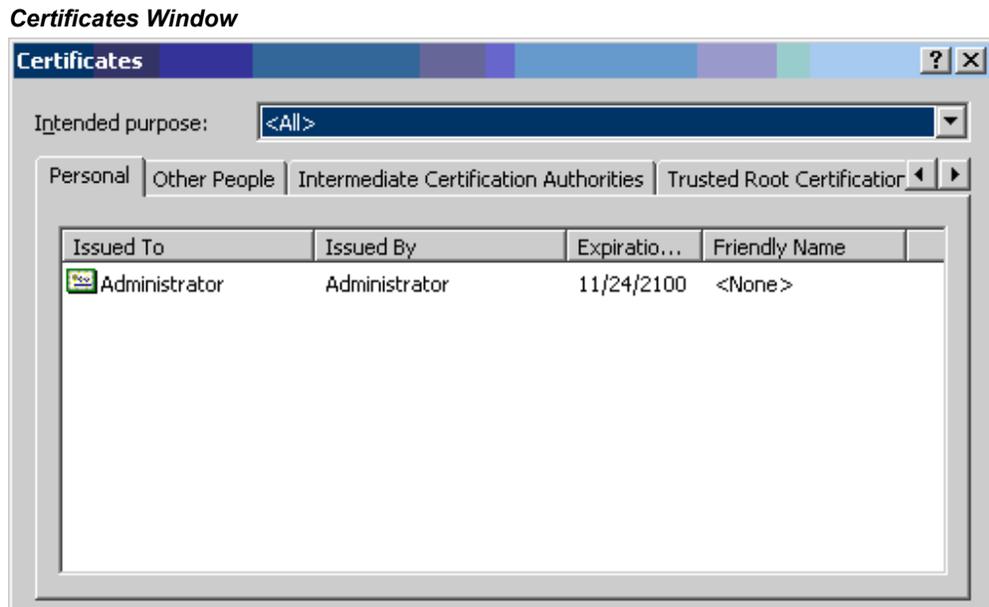
Organization **Vision Operations(V1)**
Item Number
Item Description
Instructions

Revised Items

Item	Description	Catalog Category	Lifecycle Phase	From Revision	New Revision	Schedule Date and Time	Status
CM00037	CD Writer	Server		A.A		13-Apr-2005 03:46:28	Approval

The notification signing page appears

5. Choose the Sign button.
6. Select the appropriate certificate in the Certificates window, and then choose the OK button.



After the signing process, the system automatically returns to the Worklist page.

Importing Changes

You can import issues, change requests and change orders using the Engineering Change Order Open Interface, or through the Import Workbench.

You can also import people and user attributes for issues, change requests and change orders.

Importing Changes Using the Engineering Change Order Open Interfaces

Instead of requiring you to enter cryptic ID and system-specific values, the ECO Business Object Interface enables you to enter only the necessary business information that defines your changes. The Open Interface program validates all data before importing it into the production tables.

To import issues, change requests and change orders:

1. Load the Engineering Open Interface tables with the data you want to import. For detailed help on loading the Open Interface tables, refer to the *Oracle Manufacturing Open Interfaces and APIs Manual* or the Oracle Integration Repository.
2. Navigate to the Engineering Responsibility in Oracle Applications.
3. Navigate to the Submit a New Request window by selecting Other from the

Requests menu.

4. Click Submit New Request.
5. Select the request option to submit a single request, or submit a predefined group of requests by selecting Request Set.
6. Click OK.
7. Select Import Changes for the name of the request.

Note: A parameters window automatically appears if you select a request that requires parameter values.

8. After entering the values in the required parameter fields, click OK.
9. Click Submit.

To import user attributes for changes:

1. Load the Engineering Open Interface table (ENG_CHG_USR_ATR_INTERFACE Column Details, page 10-57) with the data you want to import. For detailed help on loading the Open Interface tables, refer to the *Oracle Manufacturing Open Interfaces and APIs Manual* or the Oracle Integration Repository.
2. Navigate to the Engineering Responsibility in Oracle Applications.
3. Navigate to the Submit a New Request window by selecting Other in the Requests menu.
4. Click Submit New Request.
5. Select the request option to submit a single request, or submit a predefined group of requests by selecting Request Set.
6. Click OK.
7. Select Change User Attributes Import for the name of the request.

Note: A parameters window automatically appears if you select a request that requires parameter values.

8. After entering the values in the required parameter fields, click OK.
9. Click Submit.

To import change people:

1. Load the Engineering Open Interface table (ENG_CHANGE_PEOPLE_INTF, page 10-60) with the data you want to import. For detailed help on loading the Open Interface tables, refer to the *Oracle Manufacturing Open Interfaces and APIs Manual* or the Oracle Integration Repository.
2. Navigate to the Engineering Responsibility in Oracle Applications.
3. Navigate to the Submit a New Request window by selecting Other in the Requests menu.
4. Click Submit New Request.
5. Select the request option to submit a single request, or submit a predefined group of requests by selecting Request Set.
6. Click OK.
7. Select Change People Import for the name of the request.

Note: A parameters window automatically appears if you select a request that requires parameter values.

8. After entering the values in the required parameter fields, click OK.
9. Click Submit.

To import change lines:

1. Load the Engineering Open Interface table (ENG_CHANGE_LINES_INTERFACE, page 10-64) with the data you want to import. For detailed help on loading the Open Interface tables, refer to the *Oracle Manufacturing Open Interfaces and APIs Manual* or the Oracle Integration Repository.
2. Navigate to the Engineering Responsibility in Oracle Applications.
3. Navigate to the Submit a New Request window by selecting Other from the Requests menu.
4. Click Submit New Request.
5. Select the request option to submit a single request, or submit a predefined group of requests by selecting Request Set.
6. Click OK.

7. Select Import Changes for the name of the request.

Note: A parameters window automatically appears if you select a request that requires parameter values.

8. After entering the values in the required parameter fields, click OK.
9. Click Submit.

Engineering Change Order Open Interface Tables

ENG_CHG_USR_ATR_INTERFACE

The following table shows the columns in the ENG_CHG_USR_ATR_INTERFACE database table. For more details about the columns in ENG_CHG_USR_ATR_INTERFACE, see ENG_CHG_USR_ATR_INTERFACE Details, page 10-57.

ENG_CHG_USR_ATR_INTERFACE table

Column Name	Data Type	Required?
TRANSACTION_ID	NUMBER(15)	Yes
PROCESS_STATUS	NUMBER(9)	Yes
DATA_SET_ID	NUMBER(15)	Yes
ORGANIZATION_CODE	VARCHAR2(3)	Yes
CHANGE_NUMBER	VARCHAR2(10)	Yes
CHANGE_MGMT_TYPE_CODE	VARCHAR2(30)	Yes
CHANGE_LINE_NAME	VARCHAR2(240)	
ROW_IDENTIFIER	NUMBER(38)	Yes
ATTR_GROUP_INT_NAME	VARCHAR2(30)	Yes

Column Name	Data Type	Required?
ATTR_INT_NAME	VARCHAR2(30)	Yes
ATTR_VALUE_STR	VARCHAR2(150)	
ATTR_VALUE_NUM	NUMBER(38)	
ATTR_VALUE_DATE	DATE	
ATTR_DISP_VALUE	VARCHAR2(150)	
TRANSACTION_TYPE	VARCHAR2(10)	Yes
ORGANIZATION_ID	NUMBER(15)	
CHANGE_ID	NUMBER(15)	
CHANGE_TYPE_ID	NUMBER(15)	
REVISION_ID	NUMBER	
ATTR_GROUP_ID	NUMBER(15)	
REQUEST_ID	NUMBER(15)	
PROGRAM_APPLICATION_ID	NUMBER(15)	
PROGRAM_ID	NUMBER(15)	
PROGRAM_UPDATE_DATE	Date	
CREATED_BY	NUMBER(15)	Yes
CREATION_DATE	DATE	Yes
LAST_UPDATED_BY	NUMBER(15)	Yes
LAST_UPDATE_DATE	DATE	Yes
LAST_UPDATE_LOGIN	NUMBER(15)	

Column Name	Data Type	Required?
CHANGE_LINE_ID	NUMBER	
CHANGE_LINE_SEQUENCE _NUMBER	NUMBER (15)	

ENG_CHG_USR_ATTR_INTERFACE Column Details

TRANSACTION_ID

The primary key for this table; its value should be generated from the sequence ENG_CUA_TRANSACTION_ID_S.

PROCESS_STATUS

Whether this row has yet to be processed, is currently being processed, encountered an error, or was successfully processed. The value of this column should correspond to the following constants in EGO_CHANGE_USER_ATTRS_PUB:

- G_PS_TO_BE_PROCESSED (actual value = 1)
- G_PS_IN_PROCESS (actual value = 2)
- G_PS_ERROR (actual value = 3)
- G_PS_SUCCESS (actual value = 4)

DATA_SET_ID

The data set identifier. Identifies a group of rows to be processed together; all rows being processed as part of a single request must share the same DATA_SET_ID, whose value must be generated from the sequence ENG_CUA_DATA_SET_ID_S.

ORGANIZATION_CODE

The organization to which the change belongs.

CHANGE_NUMBER

The engineering change number/notice.

CHANGE_MGMT_TYPE_CODE

The internal category name of the engineering change.

CHANGE_LINE_SEQUENCE_NUMBER

If the change line name is provided along with the change number and organization information, then the program will identify that this particular row needs to be processed for change line user attributes import. Both change and change line user

attributes are supported through this interface table.

Because the user-defined attributes framework is so flexible, its structure must be flattened out for this interface table. To understand this flattening it is useful to first define a logical attribute group row. For single-row attribute groups, the logical attribute group row is just the collection of attributes in the attribute group, but for multi-row attribute groups, each row in the attribute group is a logical attribute group row. For example, the single-row attribute group "Dimensions," with Attributes "Width" and "Height" has only one logical attribute group row, but multi-row attribute group "Orders," with attributes "Date" and "Price" has as many logical attribute group rows as there are separate orders to be recorded.

Every interface table row contains data for one attribute in a logical attribute group row, and a logical attribute group row spans as many interface table rows as there are attributes in the logical attribute group row. To keep these flattened-out logical attribute group rows in order, there is the ROW_IDENTIFIER column, which uniquely identifies each logical attribute group row (for example, all attributes with the same ROW_IDENTIFIER value will belong to the same logical attribute group row). Thus, if a multi-row attribute group has ten attributes and three rows of values (for example, three logical attribute group rows), then there will be thirty interface table rows for the attribute group and three distinct ROW_IDENTIFIER values in those thirty rows.

ROW_IDENTIFIER

The grouping identifier for a logical attribute group row; its value must be the same for all interface table rows in the logical attribute group row, and no two logical attribute group rows in the same data set may share the same ROW_IDENTIFIER value.

ATTR_GROUP_INT_NAME

The internal name of the attribute group to which the current interface table row's attribute belongs.

ATTR_INT_NAME

The internal name of the attribute for which the current interface table row holds a value.

ATTR_VALUE_STR

If its data type is string, the value of the current interface table row's attribute.

ATTR_VALUE_NUM

If its data type is number, the value of the current interface table row's attribute.

ATTR_VALUE_DATE

If its data type is date, the value of the current interface table row's attribute. Values are converted to and from date data types using the format specified in EGO_USER_ATTRS_DATA_PVT.G_DATE_FORMAT.

ATTR_DISP_VALUE

The value of the current interface table row's attribute (as a string, regardless of its data

type) if the attribute has a value set with separate display and internal values (for example, value sets with validation type of independent or table). In all other cases, use the preceding three columns.

TRANSACTION_TYPE

The mode of processing for a logical attribute group row; its value should correspond to the following constants in EGO_USER_ATTRS_DATA_PVT:

- G_DELETE_MODE (DELETE)
- G_UPDATE_MODE (UPDATE)
- G_SYNC_MODE (which either creates or updates, as appropriate) (SYNC)
- G_CREATE_MODE (CREATE)

Note that rows will be processed in the order they were just presented (for example, deletion first, followed by updates and synchronization, with creation last), in accordance to Oracle Applications standards.

ORGANIZATION_ID

This column is for internal use; any user-entered values are ignored.

CHANGE_ID

This column is also for internal use, but you may enter the CHANGE_ID if it is known. If the change ID is passed for a given change number, then it may save on conversion time. It is validated using CHANGE_NUMBER and ORGANIZATION_ID.

CHANGE_TYPE_ID

This column is for internal use; any user-entered values are ignored.

ATTR_GROUP_ID

This column is provided in case you know the attribute group ID for this interface table row's attribute group. If left blank, the attribute group internal name is used to identify the attribute group.

CHANGE_LINE_ID

The change line identifier. Calculation is based on the CHANGE_LINE_NAME, CHANGE_NUMBER, and ORGANIZATION_ID.

CHANGE_LINE_SEQUENCE_NUMBER

The change line sequence number uniquely identifies the change line for a change header. It is validated using CHANGE_NUMBER and ORGANIZATION_ID.

REQUEST_ID

This column is for internal use (to record the concurrent program request that ordered the processing of this row).

PROGRAM_APPLICATION_ID

This column is for internal use (to record the application ID of the concurrent program that processed this row).

PROGRAM_ID

This column is for internal use (to record the ID of the concurrent program that processed this row).

PROGRAM_UPDATE_DATE

This column is for internal use (to record the time the concurrent program processed this row).

CREATED_BY

A standard "Who" column whose value must be entered when you load the interface table.

CREATION_DATE

A standard "Who" column whose value must be entered when you load the interface table.

LAST_UPDATED_BY

A standard "Who" column whose value must be entered when you load the interface table.

LAST_UPDATE_DATE

A standard "Who" column whose value must be entered when you load the interface table.

LAST_UPDATE_LOGIN

A standard "Who" column whose value must be entered when you load the interface table.

ENG_CHANGE_PEOPLE_INF

The following table shows the columns in the ENG_CHANGE_PEOPLE_INTF database table. For more details about the columns in ENG_CHANGE_PEOPLE_INTF, see ENG_CHANGE_PEOPLE_INTF Details, page 10-62.

ENG_CHANGE_PEOPLE_INTF table

Column Name	Data Type	Required?
CHANGE_ID	NUMBER(15)	
CHANGE_NOTICE	VARCHAR2(10)	Yes

Column Name	Data Type	Required?
CHANGE_MGMT_TYPE_CODE	VARCHAR2(30)	Yes
ORGANIZATION_ID	NUMBER(15)	
GRANTEE_PARTY_ID	NUMBER(15)	
INTERNAL_ROLE_ID	NUMBER(15)	
INTERNAL_ROLE_NAME	VARCHAR2(30)	
LAST_UPDATE_DATE	DATE	
LAST_UPDATED_BY	NUMBER(15)	
CREATION_DATE	DATE	
CREATED_BY	NUMBER(15)	
LAST_UPDATE_LOGIN	NUMBER(15)	
REQUEST_ID	NUMBER(15)	
PROGRAM_APPLICATION_ID	NUMBER(15)	
PROGRAM_ID	NUMBER(15)	
PROGRAM_UPDATE_DATE	DATE	
ORGANIZATION_CODE	VARCHAR2(3)	Yes
DISPLAY_ROLE_NAME	VARCHAR2(80)	Yes
GRANTEE_TYPE	VARCHAR2(8)	Yes
GRANTEE_NAME	VARCHAR2(360)	Yes
START_DATE	DATE	Yes

Column Name	Data Type	Required?
END_DATE	DATE	
TRANSACTION_TYPE	VARCHAR2(10)	Yes
TRANSACTION_ID	NUMBER(15)	Yes
PROCESS_STATUS	NUMBER(15)	Yes
DATA_SET_ID	NUMBER(15)	Yes

ENG_CHANGE_PEOPLE_INTF Column Details

CHANGE_ID

The change identifier. The import program populates the CHANGE_ID for the corresponding CHANGE_NOTICE.

CHANGE_NOTICE

The engineering change notice. CHANGE_NOTICE must be valid (in other words, it has already been created).

CHANGE_MGMT_TYPE_CODE

The internal category name of the engineering change. This column should be a valid entry in the ENG_CHANGE_MGMT_TYPES table.

ORGANIZATION_ID

The organization identifier. The import program populates this column for the corresponding organization code.

GRANTEE_PARTY_ID

The party identifier of the grantee. Populated by the import program.

INTERNAL_ROLE_ID

The internal role identifier. Populated by the import program.

INTERNAL_ROLE_NAME The internal role name. Populated by the import program.

LAST_UPDATE_DATE

A standard "Who" column.

LAST_UPDATED_BY

A standard "Who" column.

CREATION_DATE

A standard "Who" column.

CREATED_BY

A standard "Who" column.

LAST_UPDATE_LOGIN

A standard "Who" column.

REQUEST_ID

A concurrent "Who" column.

PROGRAM_APPLICATION_ID

A concurrent "Who" column.

PROGRAM_ID

A concurrent "Who" column.

PROGRAM_UPDATE_DATE

A concurrent "Who" column.

ORGANIZATION_CODE

The organization code.

DISPLAY_ROLE_NAME

The display name of the role.

GRANTEE_TYPE

The type of grantee. Valid values are: USER, GROUP, COMPANY, or GLOBAL.

GRANTEE_NAME

The name of the grantee. Value will be the name of the user/group/company.

START_DATE

The start date of the grant to user/group/company/global.

END_DATE

The end date of the grant to user/group/company/global.

TRANSACTION_TYPE

The type of action. Valid values are: SYNC, CREATE, UPDATE or DELETE. SYNC will create grants if not existent; otherwise, it will update grants.

TRANSACTION_ID

The transaction identifier.

PROCESS_STATUS

The row status as input by the user. Valid values are 1, 2, 3, and 4. Records with the value 1 are processed by the import program. The value of this column will be updated

to 2, 3 or 4 by the import program as follows:

- 2 - In process. This is the status when the record has a valid user name, item name, organization code and role name.
- 3 - Error. The given record is invalid.
- 4 - Success. After inserting the record, the grant is successful.

DATA_SET_ID

The identifier of the data set.

ENG_CHANGE_LINES_INTERFACE

The following table shows the columns in the ENG_CHANGE_LINES_INTERFACE database table. For more details about the columns in ENG_CHANGE_LINES_INTERFACE, see ENG_CHANGE_LINES_INTERFACE Details, page 10-66.

ENG_CHANGE_LINES_INTERFACE table

Column Name	Data Type	Required?
ECO_NAME	VARCHAR2(10)	
ORGANIZATION_CODE	VARCHAR2(3)	
CHANGE_TYPE_CODE	VARCHAR2(10)	
NAME	VARCHAR2(240)	
DESCRIPTION	VARCHAR2(2000)	
SEQUENCE_NUMBER	NUMBER	
ORIGINAL_SYSTEM_REFERENCE	VARCHAR2(50)	
RETURN_STATUS	VARCHAR2(1)	
TRANSACTION_TYPE	VARCHAR2(30)	
TRANSACTION_ID	NUMBER	

Column Name	Data Type	Required?
CHANGE_MGMT_TYPE_NAME	VARCHAR2(45)	
ORGANIZATION_ID	NUMBER	
ENG_CHANGES_IFCE_KEY	VARCHAR2(30)	
PROCESS_FLAG	NUMBER	
STATUS_NAME	VARCHAR2(80)	
OBJECT_DISPLAY_NAME	VARCHAR2(240)	
PK1_NAME	VARCHAR2(240)	
PK2_NAME	VARCHAR2(240)	
PK3_NAME	VARCHAR2(240)	
PK4_NAME	VARCHAR2(240)	
PK5_NAME	VARCHAR2(240)	
ASSIGNEE_NAME	VARCHAR2(360)	
NEED_BY_DATE	DATE	
SCHEDULED_DATE	DATE	
IMPLEMENTATION_DATE	DATE	
CANCELATION_DATE	VARCHAR2(240)	
COMPLETE_BEFORE_STATUS_CODE	NUMBER	
START_AFTER_STATUS_CODE	NUMBER	
TYPE_CLASSIFICATION	VARCHAR2(30)	

ENG_CHANGE_LINES_INTERFACE_Column Details

ECO_NAME

The Change notice. A not-null value is required.

ORGANIZATION_CODE

The 3-character Organization code. A not-null value is required.

CHANGE_TYPE_CODE

The Change Type of this Change Line. A not-null value is required.

NAME

The Name of this Change Line. A not-null value is required.

DESCRIPTION

A Description of this Change Line. May be null.

SEQUENCE_NUMBER

Sequence Number of this Change Line (typically 10, 20, 30, ...). A not-null value is required.

ORIGINAL_SYSTEM_REFERENCE

In case this information comes from a migration from a different system, the identifier of this Change Line in the previous system. May be null.

RETURN_STATUS

The result of importing this Change Line into the system; only used internally, a user provided value will be ignored.

TRANSACTION_TYPE

The mode of processing this Change Line; its value should correspond to the following constants in ENG_ECO_PVT: G_DELETE_MODE, G_UPDATE_MODE, G_SYNC_MODE (which either creates or updates, as appropriate), and G_CREATE_MODE. Note that rows will be processed in the order they were just presented (for example, deletion first, followed by updates and synchronization, with creation last), in accordance with Oracle Applications standards. A not-null value is required.

TRANSACTION_ID

The Primary Key for this table; its value should be generated from the sequence MTL_SYSTEM_ITEMS_B_S. A not-null value is required.

CHANGE_MGMT_TYPE_NAME

The Change Category to which the Change belongs. A not-null value is required.

Note: A null value is required if submitting the import request directly from Oracle Engineering instead of from Oracle Product Lifecycle Management. Change categories do not exist in Oracle Engineering.

ORGANIZATION_ID

This column is for internal use, and any user-entered values are ignored.

ENG_CHANGES_IFCE_KEY

If this Change Line is imported at the same time as its Change Header, the value in this column must match the sequence-generated value of the ENG_CHANGES_IFCE_KEY in the ENG_ENG_CHANGES_INTERFACE table. A not-null value is required.

PROCESS_FLAG

Whether this row has yet to be processed, is currently being processed, encountered an error, or was successfully processed; its value should correspond to the following constants in EGO_CHANGE_USER_ATTRS_PUB: G_PS_TO_BE_PROCESSED, G_PS_IN_PROCESS, G_PS_ERROR, and G_PS_SUCCESS.

STATUS_NAME

The Status Name of this Change Line. A not-null value is required.

OBJECT_DISPLAY_NAME

The Display Name of the Type of subject: Item, Document. May be null if there is no subject for this Change Line.

PK1_NAME

The first part of the identifier for the subject of this Change Line. May be null if there is no subject for this Change Line.

PK2_NAME

The second part of the identifier for the subject of this Change Line. May be null.

PK3_NAME

The third part of the identifier for the subject of this Change Line. May be null.

PK4_NAME

The fourth part of the identifier for the subject of this Change Line. May be null.

PK5_NAME

The fifth part of the identifier for the subject of this Change Line. May be null.

ASSIGNEE_NAME

The User Name of the person to whom this Change Line is assigned. A not-null value is required.

NEED_BY_DATE

The Date by which this Change Line has to be completed. A not-null value is required.

SCHEDULED_DATE

The Date by which this Change Line is expected to be completed. A not-null value is required.

IMPLEMENTATION_DATE

The Date on which this Change Line was implemented. A not-null value is required.

CANCELATION_DATE

The Date on which this Change Line was cancelled. A not-null value is required.

COMPLETE_BEFORE_STATUS_CODE

Column not supported.

START_AFTER_STATUS_CODE

Column not supported.

TYPE_CLASSIFICATION

Column not supported.

Managing Reports

Change management reports are basically search results that you can save, browse, email, or print. You can create reports for any change management category (issues, change requests, and change orders). You can browse a report sequentially or using a summary view. Browsing a report sequentially enables you to step through the contents of a report in page layout format. A summary view displays the report in tabular column format. You can send a report to other users including registered suppliers and customers. You can export change management and issue reports to Adobe Acrobat or XML using custom report formats. Design your report formats using familiar desktop tools such as Adobe Acrobat and Microsoft Word.

Creating a report from your most common or frequent searches saves you the time of selecting a change category, criteria template and results format and repeating the same search over and over again. You can give reports meaningful names as well. For example, a search for all open change orders may yield dozens of change orders, each identified by change order name and number. You can simply name the report "Open Change Orders."

Report security is consistent with search security: you can only access change objects on which you have the required role.

Before creating a report, you must have a Display Format defined for the change categories in which you intend to generate reports.

To create a report:

1. In the Applications tree menu, click the "Change Reports" link.
2. On the **Reports** page, click Create Report.
3. On the **Create Report** page, select the change category in which the report will be generated and click Go. Any search criteria or display formats that exist in the selected change category will appear in the Search Criteria and Display Format pulldowns.
4. When the **Create Report** page refreshes, provide the following:

Name

Provide a name for the Report.

Description

Optionally, provide a description of the Report.

Criteria

Select the criteria to be used in the search. You can use an existing search criteria template (if one exists for the change category selected), or add criteria here by clicking Add Criteria.

Format

Select a format for the report. You can use an existing display format by selecting it from the Display Format pulldown and clicking Go.

Optionally, select the Preview mode for the report and click Go. It is recommended that you preview the report before it is actually created to make sure it contains all the information you want in the format that you want it. Previewing a report sequentially enables you to step through the contents of a report in page layout format. A summary view displays the report in tabular column format.

You can also create reports based on search results or item change management lists.

5. In the **Export Format** section, you can optionally select an export template and output format, such as .pdf or .xml, in which you want to generate the report.
6. Click Apply.

To browse a report:

You have the option of browsing your reports in either Inline or Sequential format.

1. In the Applications tree menu, click the "Change Reports" link.

2. On the **Reports** page, select the report you want to browse:

Inline View

Click the Inline View icon to browse the report in tabular column format.

Browse Sequentially

The Browse Sequentially option enables you to browse a report sequentially by scrolling through the contents of a report in page layout format. You can scroll through and view each change order in a report as you would on a **Summary** page.

Export File

If the Export File icon is enabled, you have the option to create an Export File for the report. The Export File icon is only enabled if an export template and output format are specified for the report.

To send a report:

You can send a report to any registered user.

1. In the Applications tree menu, click the "Change Reports" link.
2. On the **Reports** page, select the report you wish to send, select the Send action, and then click Go.
3. On the **Send Report** page, provide the following:

Name

Enter the name(s) of the people or groups to which you wish to send the report. If you wish to send the report to more people than listed in the fields provided, click Add People.

Subject

The default Subject for the email is the report name--you are free to edit it.

Browse

Select the Browse mode you wish the report to appear in.

Message

The message that you enter here precedes the report when delivered to recipients.

4. Click Send.

To update a report:

As time and business dictates, you may want to revise the criteria or results for a report.

1. In the Applications tree menu, click the "Change Reports" link.

2. On the **Reports** page, select the report you wish to update, select the Update action, and click Go.
3. On the **Update Report** page, update the criteria or the display format. You can add additional criteria attributes, update criteria operators or values, and select different results formats.
4. After completing your revisions, click Apply.

Note: Only the administrator can update reports created by the administrator.

To export a report:

1. In the Applications tree menu, click the "Change Reports" link.
2. On the **Reports** page, select the report you want to export, select the Export action, and then click Go.
3. On the **Export** page, select an export template and an output format for the report.
4. Click Export.

To print a report:

1. In the Applications tree menu, click the "Change Reports" link.
2. On the **Reports** page, select the report you want to print, select the Inline View or Browse Sequential action, and then click Go.
3. On the **Report** page, click Printable Page to display the report in a printer-friendly format. Print the report from your web browser.

To delete a report:

1. In the Applications tree menu, click the "Change Reports" link.
2. On the **Reports** page, select the report you wish to delete, select the Delete action, and click Go.

To create a report list:

The **Reports** page allows you to create personalized report lists. These lists are displayed in the View pulldown on the **Reports** page. You can add or remove reports that you have added to the lists.

1. In the Applications tree menu, click the "Change Reports" link.
2. On the **Reports** page, click Personalize.
3. On the **Report Lists** page, click Create List.
4. On the **Create Report List** page, provide the following:
 - Name**
Enter a name for the report list. This will be displayed in the View pulldown on the **Reports** page.
 - Description**
Enter a description for the report list.
5. Click Add Reports to add existing reports to the report list.
6. On the **Add Reports** page, select the reports you want to add to the list.
7. Click Apply.

To update a report list:

1. In the Applications tree menu, click the "Change Reports" link.
2. On the **Reports** page, click Personalize.
3. On the **Report Lists** page, click the Update action corresponding to the report list you want to update.
4. On the **Update Report List** page, make the necessary changes and click Apply.

To delete a report list:

1. In the Applications tree menu, click the "Change Reports" link.
2. On the **Reports** page, click Personalize.
3. On the **Report Lists** page, click the Delete action corresponding to the report list you want to delete.

Configuration Management

This chapter covers the following topics:

- Searching for Items in a Structure
- Viewing Item Structures
- Managing Item Structures
- Performing Item 'Where Used' Inquiries

Searching for Items in a Structure

You can search for items in a structure using component and item attributes, as well as other additional criteria. These searches are performed within the context of a selected item structure.

To perform a simple search:

1. Locate an item that is in the structure you wish to view by clicking the "Simple Search" link in the Item menu.
2. On the item's **Search Results** page, click the item's name link.
3. On the **Primary Attributes** page for the item, click the Configuration tab.
4. On the **Structures** page, click the icon in the Hierarchy View column.
5. On the **Structure Components** page, click Modify Search.
6. On the **Advanced Search** page, click Simple Search.
7. On the **Simple Search** page, enter the name of the item structure you wish to locate and click Search.

To perform an advanced search:

1. Locate an item that is in the structure you wish to view by clicking the "Simple Search" link in the Item menu.
2. On the item's **Search Results** page, click the item's name link.
3. On the **Primary Attributes** page for the item, click the Configuration tab.
4. On the **Structures** page, click Modify Search.
5. On the **Advanced Search** page, select a criteria template to use for your search. You must either select an existing criteria template, or create one of your own. When you select a criteria template and click Go, the attributes, components and catalog category defined for that criteria template populate the remaining attribute, component and catalog category fields on the page. For details about how to define criteria templates, see *Creating Criteria Templates*, page 7-1.

A default criteria template may be defined by the administrator. In cases where there is both a default criteria template and user-defined criteria template, the user-defined template takes precedence.

6. Click Search.

Viewing Item Structures

Configuration Management enables you to view multiple BOMs (product structures) defined for an item. You can view indented structures of those BOMs. You can also manage attachments to those structures. Configuration Management also provides you the capability to view items where used to view an imploded list of all the items using assemblies for a specified component.

To view structure details:

1. Use any of the search methods (simple or advanced search) within the system and locate the item in which you are interested.
2. Click the Configuration tab. You can see one or more product structures defined for the item.
3. Click the Detail icon. You can view the structure's details on the **Structure Detail** page.

To view indented structures:

1. Use any of the search methods (simple or advanced search) within the system and

locate the item in which you are interested.

2. Click the Configuration tab. You can see one or more product structures defined for the item.
3. Click the structure name.
4. On the **Structure Components** page, select the Filter and Display Option.
5. Click Go to explode the structure in the hierarchy view. You can expand or collapse portions of the indented structure.
6. View the indented structure for other structures and item revisions of this item by switching options in the quick search sandbox.

To locate components or subassemblies in indented structures:

1. In the indented structure, click Search.
2. In the Search field, provide the search criteria and click Go.
3. Click the View in Hierarchy icon in the search results table to focus the indented structure on the selected component or subassembly.
4. Click Criteria to return to indented structure options.

To view the structure list by item revision:

1. Locate an item that is in the structure you wish to view by clicking the "Simple Search" link in the Item menu.
2. On the item's **Search Results** page, click the item's name link.
3. On the **Primary Attributes** page for the item, click the Configuration tab.
4. On the **Structures** page, select the specific Item Revision you wish to view and click Go.

Note: Each item has a specific revision (the Item Revision menu defaults to the current revision), and there is an effectivity date for each of these item revisions. Each component that is part of the item structure also has an effectivity date. As long as the component has an effectivity date that occurs on or before the date of the item revision, that component will appear in the item structure.

To reclassify structures:

Reclassify a structure by changing the structure type. For details about this task, see: *Creating Structure Types*, page 4-2

Managing Item Structures

Define structures in the Product Workbench (see: *Creating Structures*, page 12-52) or in Oracle Bills of Material (see: *Creating a Bill of Material*, *Oracle Bills of Material User's Guide*). Once the structure is defined, you can manage the following from the Setup Workbench:

- adding attachment categories to a structure type

This enables you to add attachments to a component. See: *Adding Attachments*, page 13-3

- displaying attachments
- updating a structure

To add attachment categories to a structure type:

An attachment category must be created by the system administrator before it can be associated with a structure type. For more information, see the Attachments chapter in the *Oracle Applications Developer's Guide*. Once an attachment category is associated with a structure type, you can add attachments to a component within a structure of that type.

1. In the Applications tree menu, click the Setup Workbench link.
2. On the **Search: Item Catalog Categories** page, click the Structures tab.
3. On the **Search: Structure Types** page, click on the name of the structure type to which you wish to add an attachment category.
4. On the **Basic Information** page, click the Item Attachment Categories link.
5. On the **Item Attachment Categories** page, select the attachment category you wish to add. If it does not appear in the list, enter the name in the Search field and click Go.
6. After locating the correct attachment category, select it and click Add.

To display structure component attachments:

You cannot view attachments for a structure unless an attachment category has already been created and added to the structure type. To create an attachment category, contact

your system administrator.

1. Use any of the search methods (simple or advanced search) within the system and locate an item that is part of the structure in which you are interested.
2. Click the Configuration tab. You can see one or more product structures defined for the item.
3. On the **Structures** page, click the First Level Components icon for the structure whose attachments you wish to view.
4. On the **Structure Components** page, locate the component whose attachments you wish to display and click the Show (+) icon preceding the component name to open the attachments display.

Note: In a hierarchical grid display, attachments appear as nodes in the component.

To update a structure:

1. Locate the item whose structure you wish to update.
2. Click the structure you want to update

The Update button appears when:

- a user's role has privileges to update the item and
- the item is in a lifecycle phase where direct updates are allowed

The Create Change Order button appears when:

- a user's role does not have privileges to update the item or, even if you do have privileges,
- the attribute group's change policy is set to Change Order Required and the item is in a lifecycle phase that requires change orders.

If both the Update and the Create Change Order buttons appear, then you can choose whether to create a change order before updating the structures or not.

Performing Item 'Where Used' Inquiries

You can view assemblies where a component is used throughout all BOM structures. You can search for assemblies in the component Where Used hierarchy.

To view items where used:

1. Use any of the search methods (simple or advanced search) within the system and locate the item in which you are interested.
2. On the **Primary Attributes** page, click the Configuration tab.
3. On the **Structures** page, click the Where Used tab.
4. On the **Item Where Used** page, select one of the following:

Current

Select to inquire about component usage in the current organization.

All

Select to inquire about the current organization and all subordinate organizations in the chosen organization hierarchy.

Hierarchy

Select to inquire about all organizations having the same item master organization as the current organization. Enter the organization hierarchy name because current organizations can be accessed from more than one organization hierarchy.

5. Select the display option.
6. Click Go. You can expand or collapse portions of the indented item usages.

To locate assembly items in indented item usages:

1. In the indented item usages, click Search Item.
2. In the search field, provide search criteria and click Go.
3. Click the View in Hierarchy icon in the search results table to focus the indented item usages on the assembly item.
4. Click Criteria to return to Where Used.

Product Workbench

This chapter covers the following topics:

- Product Workbench Overview
- Item Management
- Creating Items
- Overview of Product Structure and Bills of Material Management
- Managing Bills of Material/Product Structures
- Importing Product Structure/BOM
- Using Multilevel Structures
- Managing Structures Using Effectivity Control
- Excluding Structures
- Exclusion Rules by Product Revisions
- Creating Structures
- Viewing Structure Information
- Editing Structure Information
- Using Defined Structure Names and Types
- Viewing Structures in the Context of a Change Order
- Marking Up Structures
- Creating New Issues or Change Orders
- Valid Component Types

Product Workbench Overview

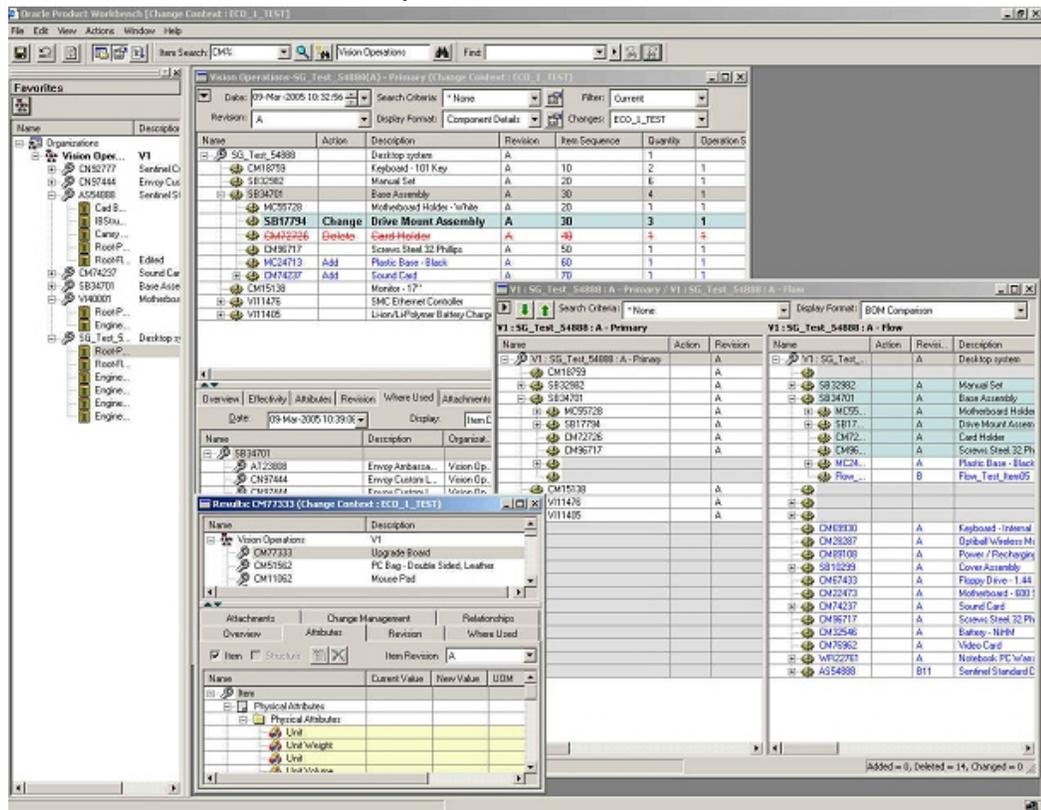
You can use the Product Workbench to edit, view, and manage product information, including product structures/bills of material and structured attributes using the

feature-rich graphical user interface. You can use the drag & drop, and red-lining/markup inside a familiar interface. This tool is for users who frequently need to work with complex product structures and need quick response time and extra flexibility that a windows based UI can provide.

Product Workbench's Advanced Graphical User Interface

Oracle Product Workbench's graphical interface improves productivity and enables easy access to critical information. The windowing, mouse actions, icons, and built-in drilldowns enable easy transactions and inquiries. The workbench provides all the relevant information in different windows that can be displayed simultaneously. You can resize, minimize, maximize and close these windows based on your requirement. The interface is also available in multiple languages with natural language support (NLS). NLS enables users to decide how they want, for example, to format their date field values

Product Workbench Advanced Graphical User Interface



Item Management

Favorites List

Oracle Product Workbench allows users to view and edit the list of favorite items for different organizations. The Favorites list comprises a list of the frequently accessed items per user per organization. It is intended to reduce the effort in locating an item every time the user wants to refer/edit information related to it. Through this list, the user can access the information quickly without searching for items.

Editing Favorites List

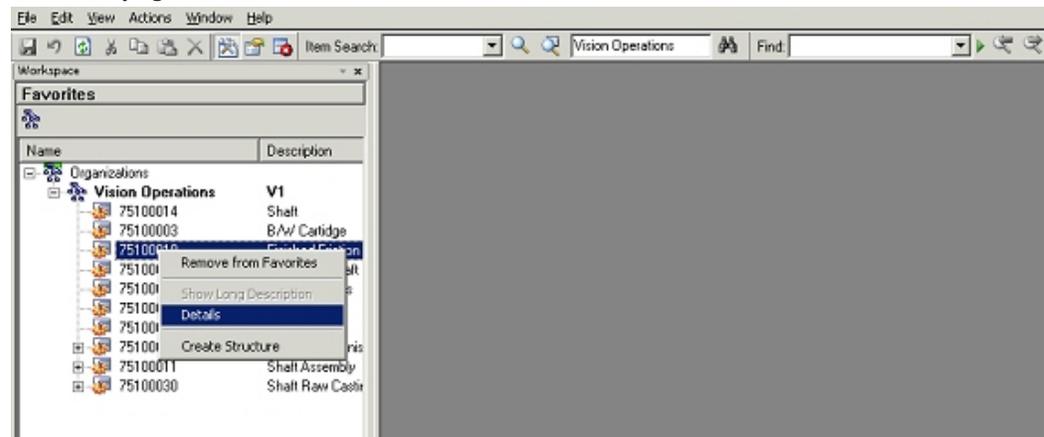
Users can select an item from the item search results or from the structure window and add the selected item to this list by a right click menu action.

Similarly, users can select an entry from the Favorites list and remove the selected item from the list by another right click menu action.

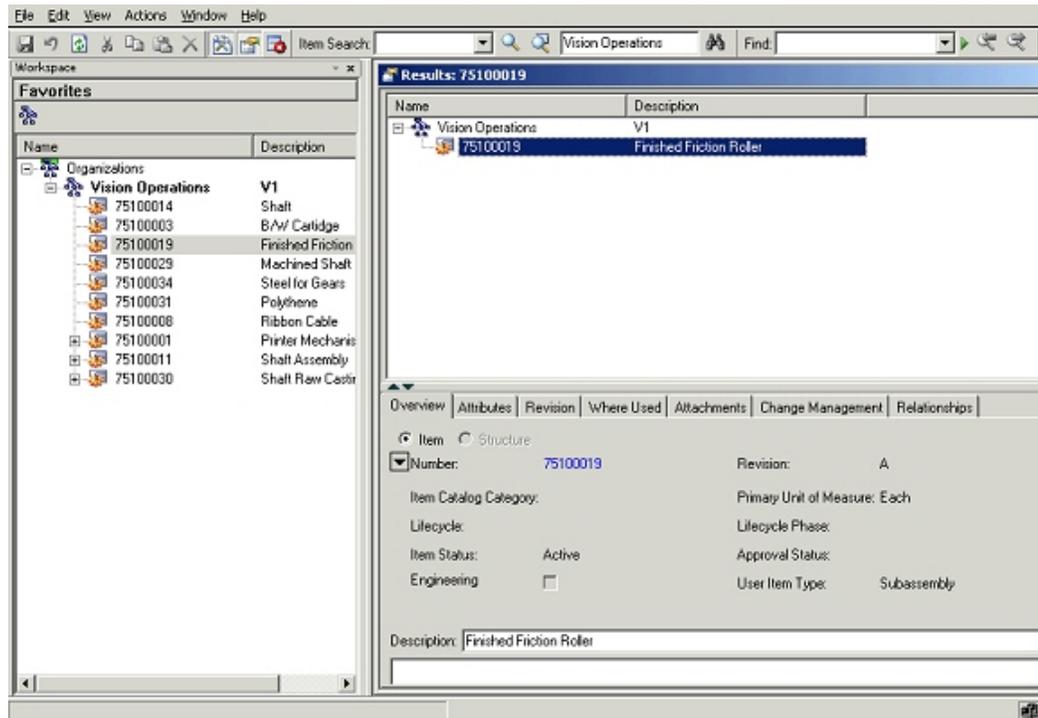
Viewing Items from Favorite List

Users can select an entry from the Favorites list and invoke the details window by a right click action. A new window is opened displaying the item information organized over different TABs. If the user changes the selection in the favorites list, the item information being displayed in the details window also changes appropriately.

Favorites page

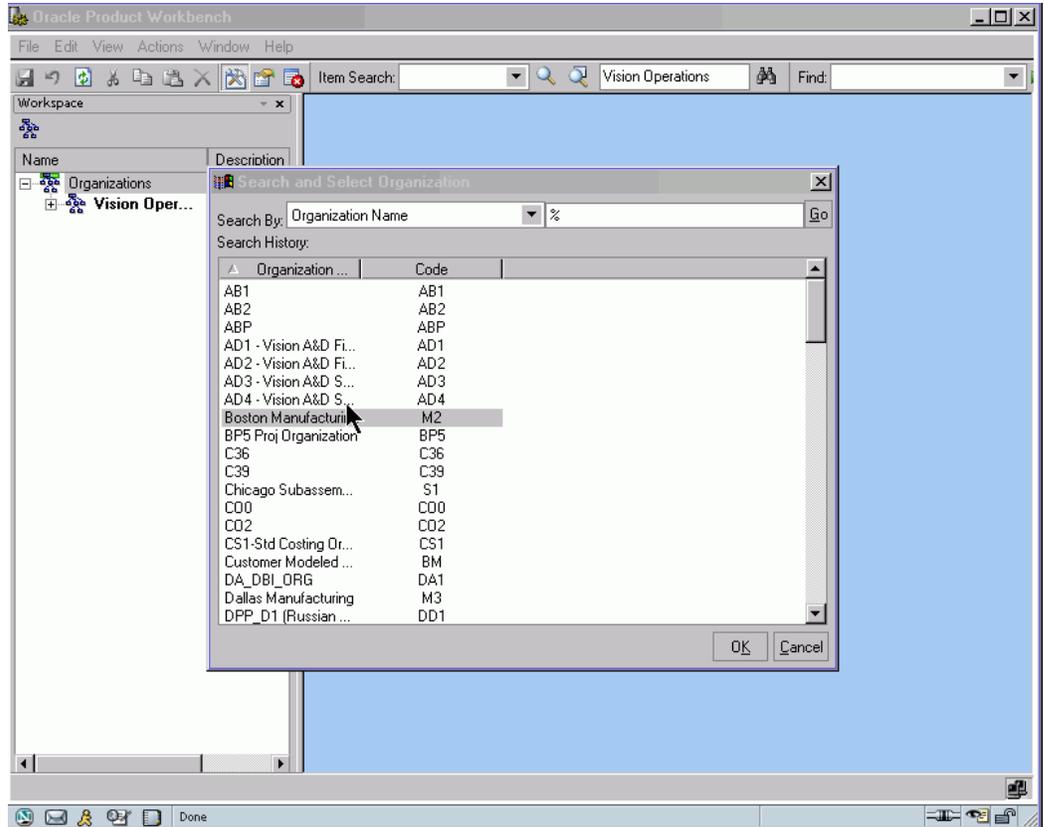


Item Details

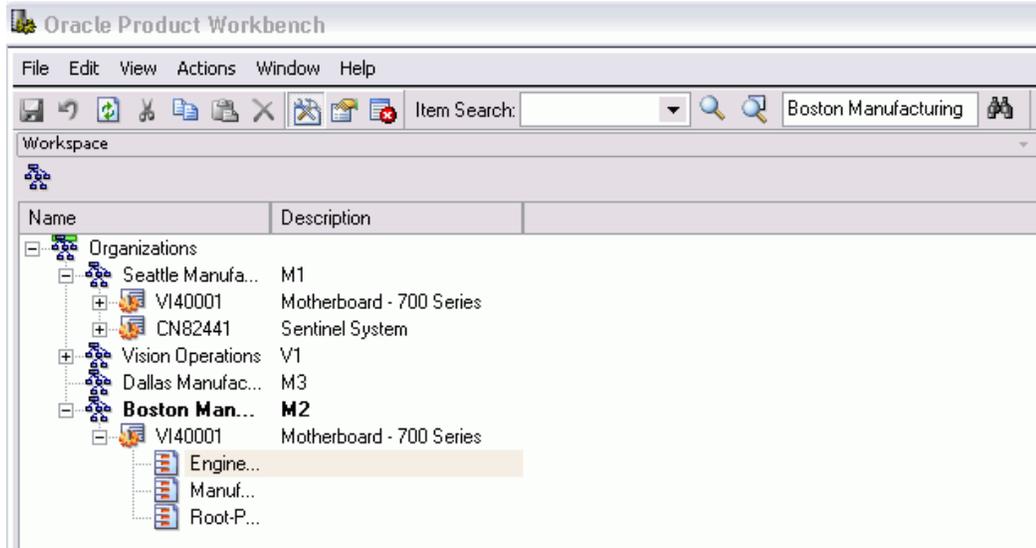


Selecting Multiple Organizations

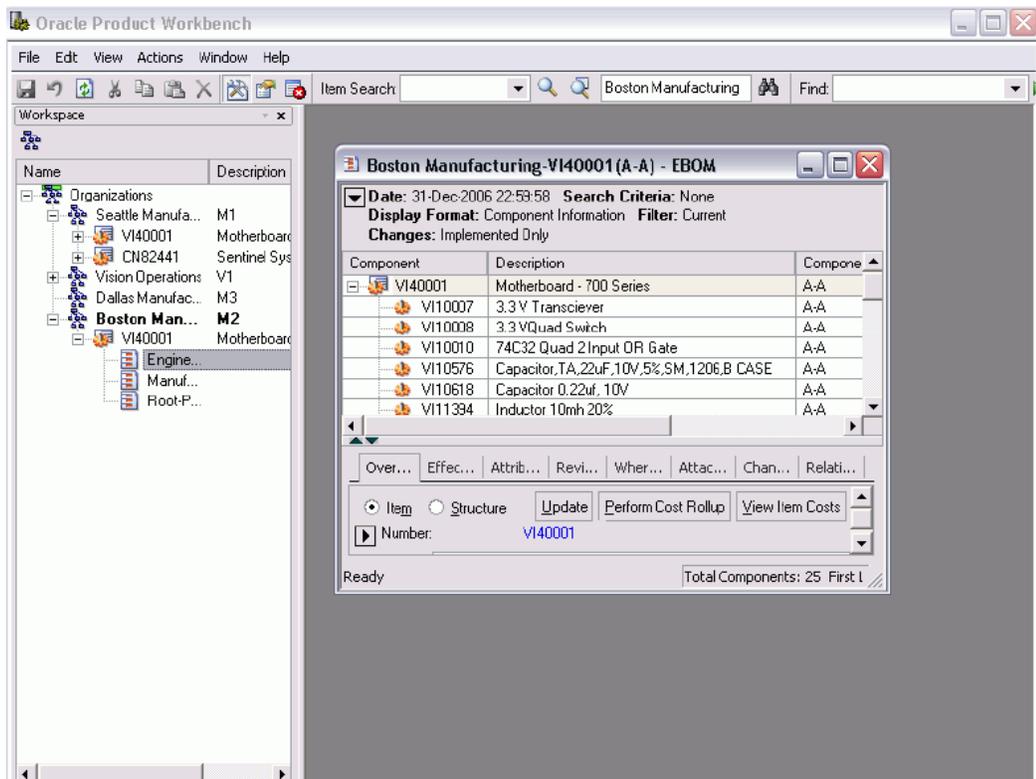
You can select and work in multiple organizations in the Product workbench. In the left pane of the Product Workbench, you can use the right click mouse function to Search and Select Organization. This will allow you to select another organization other than the default organization already displayed.



The organization and its items you have now selected will display in the Product Workbench.



You can select and open these items in the structure windows.



Note: When you set the organization active in the left pane, all further action like Item Search that you select from the Edit menu are by default performed on your active organization. If you have a Structure

already open in organization M1 and now set the active organization to V1, action(s) that you perform in that Structure Window would continue to be performed only in M1 and would not switch to V1.

(In the Product Workbench you can conduct multiple Item searches, each with a specific purpose like search for components or verses searching for items.)

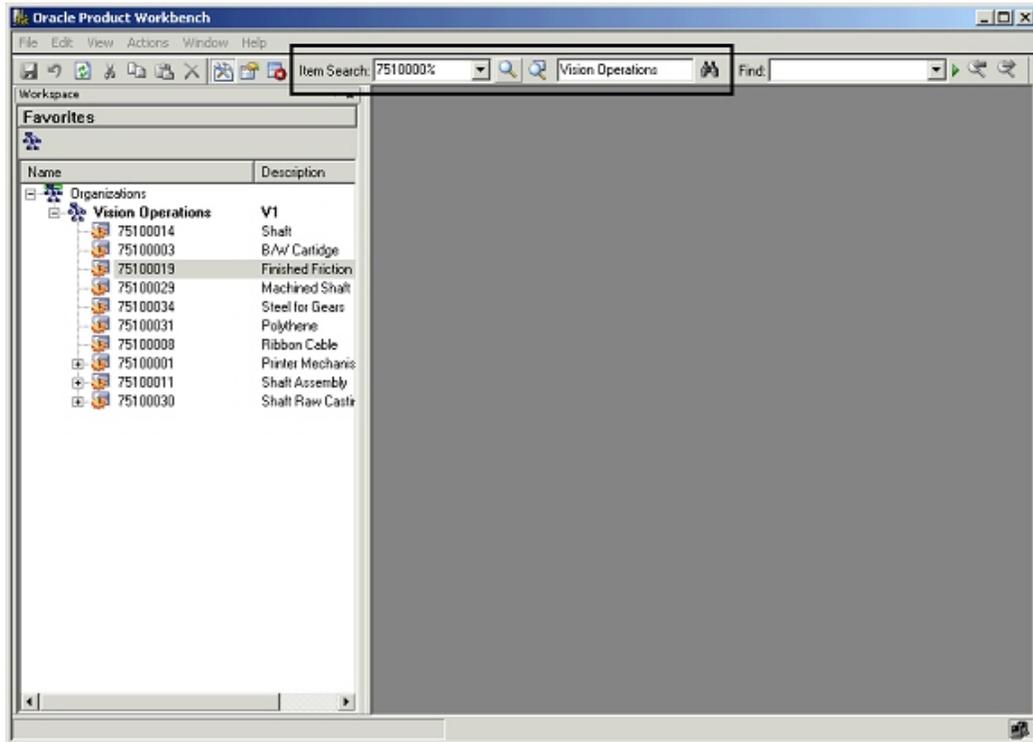
Item Search

Oracle Product Workbench allows user to search for items in different organizations. You can execute both simple and advanced search from Oracle Product Workbench.

To perform Simple Search:

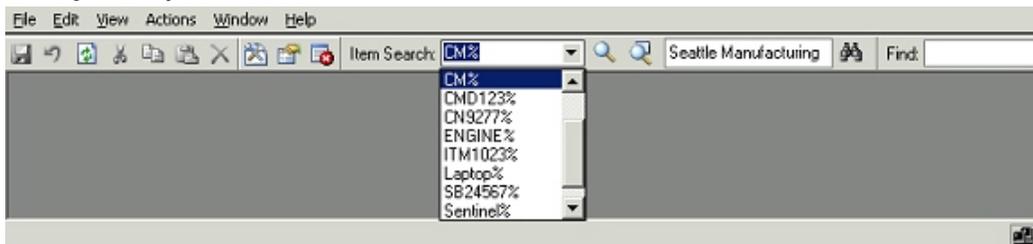
1. Select an organization and then enter a partial or complete item name you want to search for. Use "%" as the wildcard character to enter partial searches as part of the search criteria.
2. Click the simple search toolbar menu. All items matching the specified criterion are listed in the search result window.

Simple search



Important: History of the above searches is maintained for each user and is displayed in the search poplist. To repeat the query, select the previously used string, and click the simple search toolbar button.

History of Simple Search



To perform Advanced Search:

1. Select an organization and then click on the advanced search icon in the toolbar menu.
2. Specify the search criteria, and choose a display format.

3. Click Search.

Advanced Search

ORACLE Item Catalog
Organization: Vision Operations (V1)

Search >
Advanced Search
For any duplicated attribute the search will be conducted on both attribute values. Cancel Simple Search Search

^Item Catalog Category Go
Revision

Search Criteria
Search Criteria Go

Select Criteria: Clear Delete Duplicate | Add Criteria

Select All | Select None

Select Attribute Group	Attribute	Operator	Value
<input type="checkbox"/> Primary	^ Item	starts with	PR
<input type="checkbox"/> Primary	^ Item Status	is	Active
<input type="checkbox"/> Primary	^ Description	is	
<input type="checkbox"/> Primary	Primary Unit of Measure	is	Each
<input type="checkbox"/> Primary	User Item Type	is	

TIP ^ Indicates indexed attribute. You must enter at least one indexed attribute to perform a search.

Display Format
Display Format Go

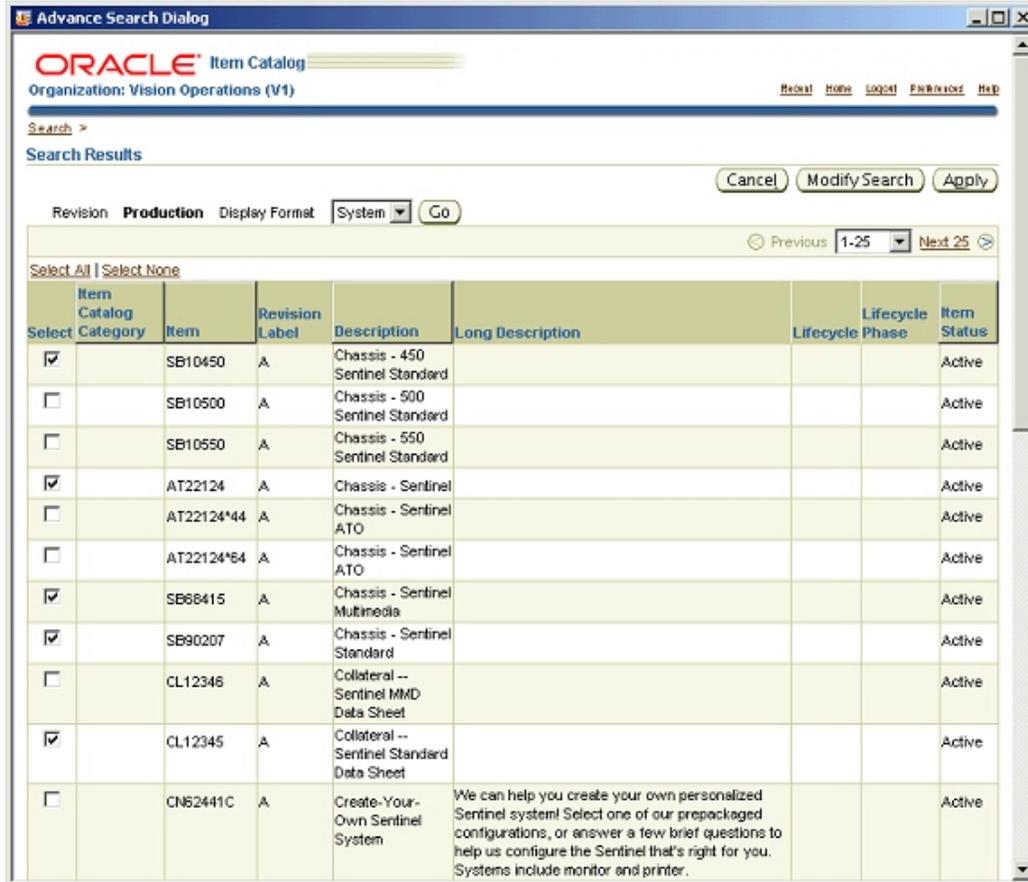
Item Catalog Category	Item Revision Label	Description	Long Description	Lifecycle	Lifecycle Phase	Item Status

Cancel Simple Search Search

Copyright 2000-2004 Oracle Corporation. All rights reserved. Print/Status

Note: You can review these results and then select one or more results, and click Apply. The selected items will be displayed in the search results/item details window.

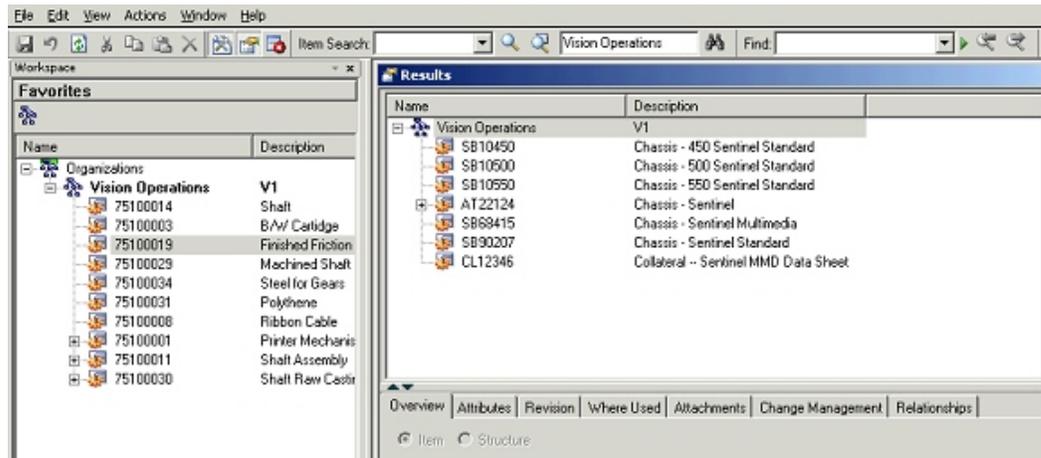
Intermediate UI for Advanced Search Results



Search Results

The search results are displayed as nodes under the organization name in a hierarchical format. These results can be sorted on item number or description. Structures created for an item get listed when the node corresponding to the item is expanded. If the user changes the selection in the search results, the item information being displayed in the details window changes appropriately.

Search Results



Viewing and Editing Item Information

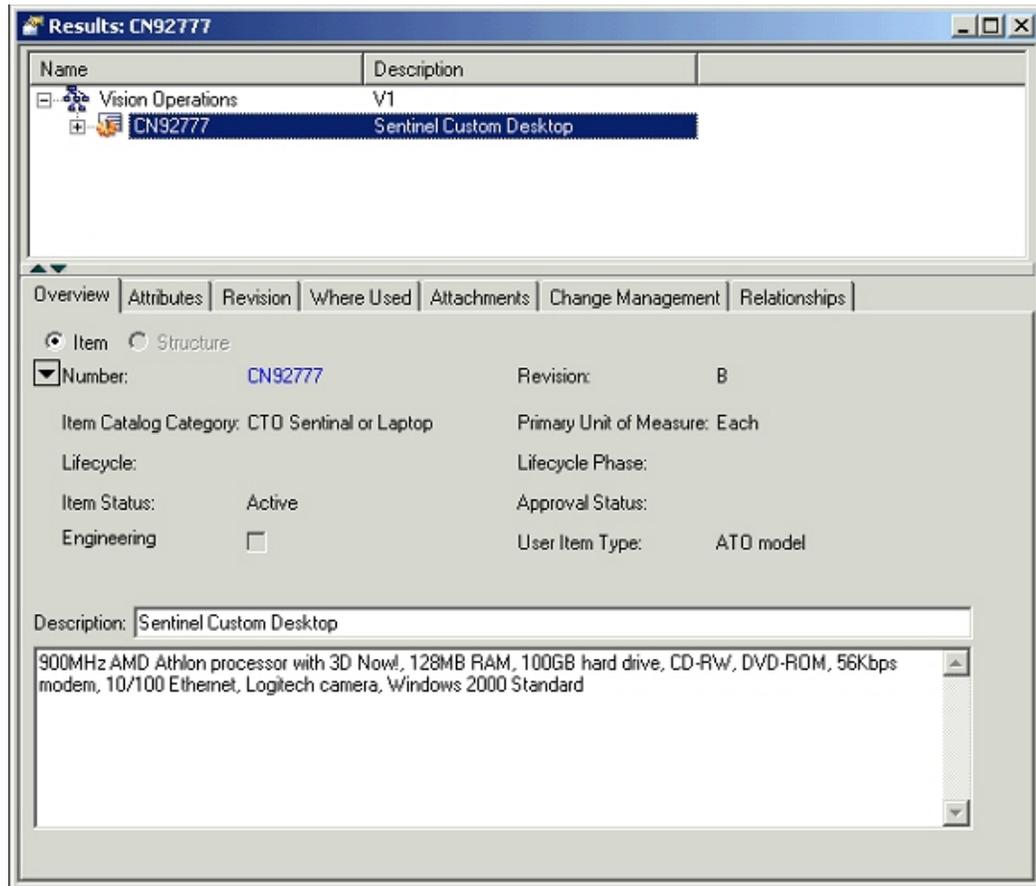
Users can view and modify item information in Oracle Product Workbench based on their privileges on this information. The item information is organized on the following tabs in the 'Details' window:

Overview Tab

Item Number, Current Revision, Description, Long Description, Primary UOM, Item Catalog category, Lifecycle etc for the selected item are displayed. Select the icon in the attribute tab to show the complete information.

Users with editing privileges can edit the description and long description of the context item. Users can also navigate to html item information pages by clicking the hyperlink against the item number.

Overview Tab



Attributes Tab

This tab shows the item attributes (both seeded and user-defined) in a hierarchical view under the "Item" node. Different Item attributes are grouped under an attribute group, multiple attribute groups are grouped under an item page, and different item pages are listed under the item node. An Item revision context switcher is provided on this tab to enable users to view the revision level attribute values for the selected revision.

Only those attribute groups are shown on which the user has at-least view privilege. The revision level attribute groups, org-controlled attributes, multi-row attribute groups and the attribute groups under change control are visually indicated through different icons against the attribute group node.

Attributes Tab

Item Search: Vision Operations Find:

Date: 2006-Dec-31 20:59:58 Search Criteria: None Display Format: SelvaltemDF1 Filter: Current Change

Component	SelvaltemAttr1	SelvaltemAttr2
VI40001		
VI11442		
VI10008		
VI10007		
VI10006		
VI11476		
VI11472		

Overview Effectivity Attributes Revision Where Used Attachments Change Management Relationships

Item Component Structure

Name	Current Value	New Value
Item		
Physical Attributes		
Physical Attributes		
Sales and Order Manage...		
Invoicing		
Web Store		
Order Management		
Planning		
Technology & Layout		
Purchasing		
RoHS / WEEE		
Manufacturing		
Ratings		
Part Change Notifications		
Service		
Inventory/WMS		

In-place editing of attributes is supported in product workbench. Double click on an attribute value to modify the same. Based on the value set attached to the attribute, the values that the user can specify are restricted.

On modification, the values are not directly saved; they are retained in the markup mode (as per the color scheme configured on a per user basis) and the user can save these changes directly or through a change order based on the change policies.

Editing attribute values

Name	Current Value	New Value	Unit of Measure
Item			
Revision Level Specificati...			
Technical Specifications			
Motherboard Specific...			
Chipset			
CacheMemory		1000	
System Memory			
VGA			
PCIIDEInterface			
ProcessorSocket			
WatchdogTimer			
Operating Conditions			

Item attributes cannot be edited in any of the following scenarios:

- Master Org controlled attributes in Child organizations
- User does not have edit privileges on the attribute group.
- Attribute changes are not allowed in the current lifecycle state of the item as per the change policy.

These attributes are indicated with a yellow background. Double clicking on the field will not change the field to the edit mode.

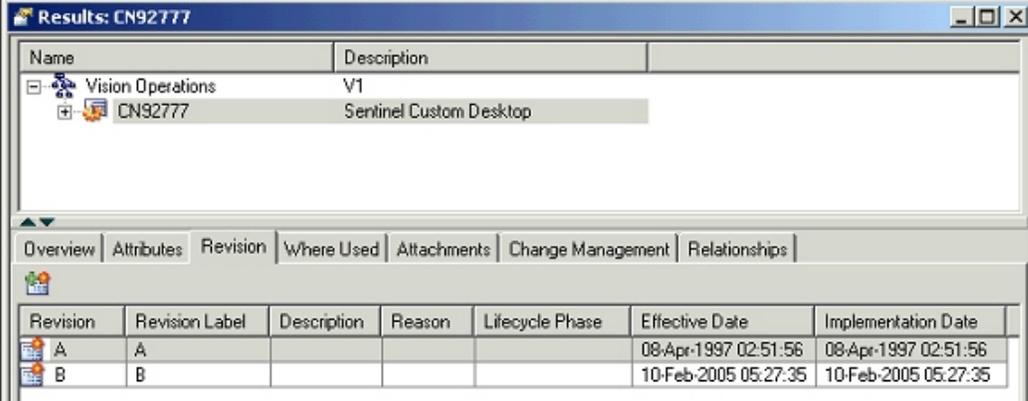
Item attributes that cannot be edited

Name	Current Value	New Value
Item		
Revision Level Specification		
JBMotherboard Specifications		
Chipset		
CacheMemory		
System Memory		
VGA		
PCIIDEInterface		
ProcessorSocket		
WatchdogTimer		
Technical Specifications		
Physical Attributes		

Item Revisions Tab

All revisions that have or have not been implemented are listed on this TAB. Users with appropriate privileges can also create new revisions for the selected item.

Item Revisions tab



Revision	Revision Label	Description	Reason	Lifecycle Phase	Effective Date	Implementation Date
A	A				08-Apr-1997 02:51:56	08-Apr-1997 02:51:56
B	B				10-Feb-2005 05:27:35	10-Feb-2005 05:27:35

Where Used Tab

An imploded list of all the assemblies using the selected item as a component is shown on this TAB. Users can view the where-used report for a an implosion date/unit number different from the defaulted ones by selecting the values appropriately.

Display format has been seeded to restrict the attributes shown in the report.

Top item check box is provided to show only the end assemblies (without the hierarchy) in this report.

To open the structure in a new window, select an assembly in the where-used report and right click on the "open" /"open with" menu option.

Item Where Used tab

Name	Description	Structure N...	Item Catalog...	Revision	Status	Lifecycle
75100003	B/W Cartridge					
75100001	Printer Mechanism	Flow		A	Active	
AB21feb-03	Test FG Item	Primary		A	Active	
AB21feb-03	Test FG Item	Primary		A	Active	
2-0	sdsdffs	Primary		A	Active	
2-1	Non BOM Allowed...	Primary		A	Active	
AB-Engine-01	AB-Engine-01	Primary	Diesel Engines	A	Active	
AB-Engine-01	AB-Engine-01	Primary	Diesel Engines	A	Active	
AB-Engine-01	AB-Engine-01	Primary	Diesel Engines	A	Active	
AB17m-46Test	AB Test	Primary	AB-Test	A	Active	Computer C...
AB-17feb-FG2	AB-17feb-FG	Primary		A	Active	
AB-17feb-FG1	AB-17feb-FG1	Primary		A	Active	
AB-17feb-FG8	AB Test	Primary		A	Active	
AB-17feb-FG6	AB-17feb-FG	Primary		A	Active	
AB-17feb-FG7	AB Test	Primary		A	Active	

Item where-used functionality supports components of End Item Revision effective structure. On a given implosion date, you can check a parent revision against from and to effective revision for the component. If component is effective, the parent will be included in the item where-used tree. For a component of a fixed revision parent, the component's effectivity is checked on the end date of fixed revision irrespective of implosion date.

The Current Organization option has a Revision filter that selects first level parents having the selected revision of the component as fixed revision. After the first level, implosion will be carried out normally.

The columns Revision and Component Revision in BOM in the where-used table, show the item revision and component's fixed revision in the structure information.

To support Exclusion Rules for where-used, for a excluded component in Product Workbench, the end item from which the component is excluded is displayed in italics.

You can use the Unit option as a filter to control the display on from/to Unit number to support unit effectively.

Attachments Tab

An attachment is unstructured information related to an item. For example, unstructured information attached to an item could be a marked up CAD drawing, test results document, specification sheet, or URL.

In the current release of Product workbench only the EBS repository is supported. Product Workbench supports viewing, adding and detaching these attachments.

All the item attachments are listed on this TAB. User can filter these attachments on the basis of item revision by selecting appropriate value from the item revision context switcher.

Adding Attachments

User clicks the appropriate icon to attach a desktop file, text or URL document to the selected item. When a document is being attached, the user can specify an Attachment Category to classify the document.

Viewing Attachments

User can select an attachment from the list and click the View Attachment icon to view the attachment in a new window.

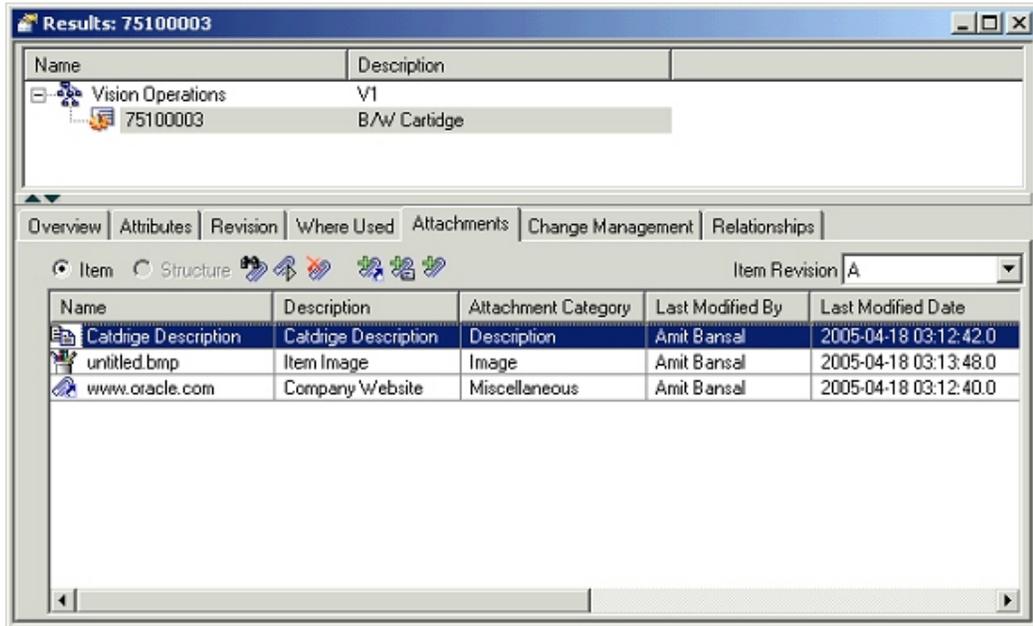
Detaching attachments

User can select an attachment from the list and click the Detach icon for the document that needs to be detached.

Viewing the attachment list in HTML

User can click on the View attachment list icon to launch the list in html workbench. This workbench also lists the Oracle Files (OF) as well as the EBS attachments.

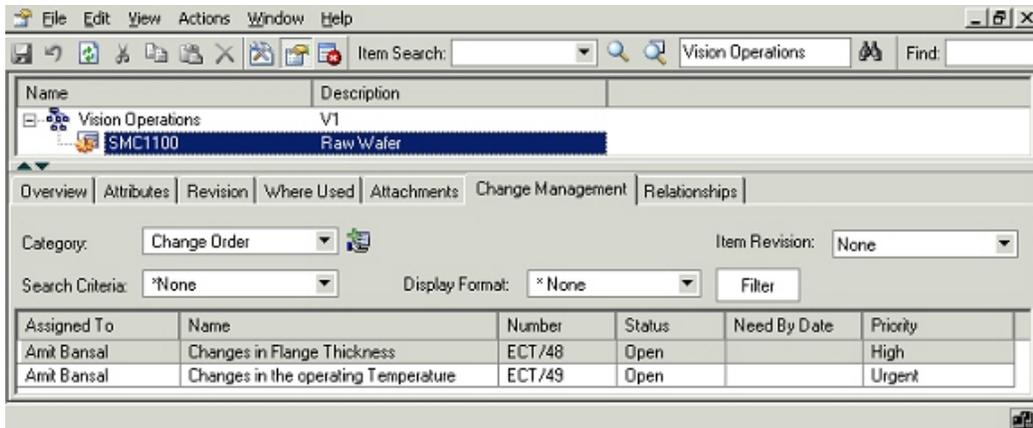
Item Attachments tab



Change Management Tab

The Change Management tab lists the pending change objects for the selected item. The user can view only those change objects on which at-least view privilege has been granted to the user.

Item Change Management tab



- User can create new changes for change order and issue based categories from this TAB.

- User can change the selection in "Change Category" poplist to view the change categories like change orders created for the selected item for the selected category.
- User can use the Search Criteria to filter the change order by type.
- User can use Create Change Order icon to create a new change order.
- User can choose a display format to restrict the columns being displayed in the list.
- User can sort the list on any one of the displayed columns.
- User can choose to hide one or more of the available columns on display. User can also unhide a hidden column.
- Different resize actions are possible on the columns.
- User can filter the list of issues by selecting a value in the search criteria poplist.
- User can use the filter to define a filter as well as a right click function.
- User can filter the filtered results by selecting a value displayed in a column and doing a right click action "Filter". E.g. If "Assigned To" field is being displayed in the issues list and user selects a value say "Sachin Patel" and does a filter, only those issues are listed that are assigned to Sachin Patel. Filters get progressively applied using this functionality.
- User can apply additional filters against one or more of the following three change attributes irrespective of whether these attributes are displayed or not:
 - Status
 - Assigned to
 - Priority
- User can view changes created for a specific item revision by selecting appropriate value in the revision poplist. Besides specific revisions created for the item, values "None" and "All" are also available in this poplist.
- User can double click on an entry in the list of change to launch the change details in html UI.

Relationships Tab

Use the Relationships tab to view the reference designators, component operations and substitute components associated with the structure.

Creating Items

You can invoke the create Item dialog from the main menu or from the favorites window as a right click action. The favorites item window is a non-modal one, which means that you can create multiple items one after the other, without having to wait for the completion of creation of previous or perform other actions in Product workbench without having to close this window. The status of each of the item being created is displayed in the create item dialog.

Note: Items can be created in the item master organizations only. User needs to navigate to the html pages to assign the item to different children organizations. Product workbench doesn't support item assignment to different children organizations.

Create Item

*Indicates a required field

Create Item From:

- Item Catalog Category: Motherboards
- Existing Item:

Functional Classification:

- Engineering Item

*Item Number: Motherboard ATX 4975

*Description: Motherboard ATX 4975

Long Description: Motherboard ATX 4975 for high end laptop computers

Template: Purchased Item

Primary Attributes:

- Lifecycle: Computer Component
- *Primary Unit of Measure: Each
- Lifecycle Phase: Concept
- *Item Status: Active

List of Items to Create

Item Catalog Cate...	Item	Create Status
Motherboards	Motherboard ATX 4975	Pending
Motherboards	Motherboard ATX 4952	Succeed
Motherboards	Motherboard ATX 4954	Succeed

Add successfully created items to favorite window.

Create Close

To create items:

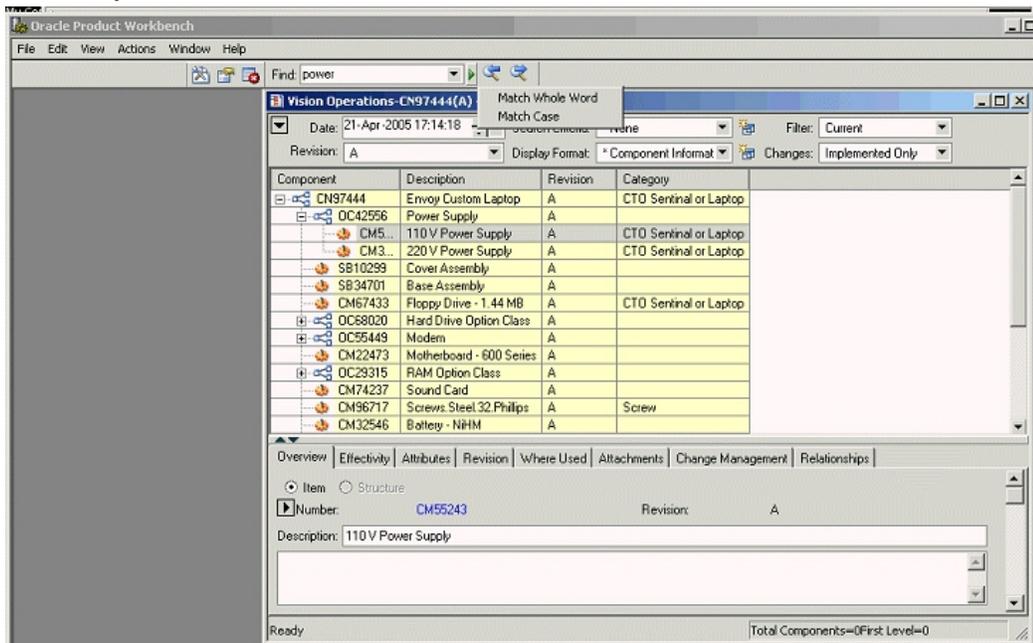
1. You can provide either an item catalog category (only those item catalog categories that have an item catalog category user role can be selected), or an existing item to create a new item from. If you select an item catalog category, different fields are defaulted as setup for the selection. Examples include Item Number/Description (in case they are sequence generated), item template etc
2. You can choose whether the newly created item is engineering or a manufacturing item by appropriately selecting or clearing the Engineering Item check box.
3. You can then provide the item number, description and long description for the item being created. You can also set up the system for auto numbering.
4. You can optionally choose an item template to be applied while creating the item
5. You can specify a lifecycle or lifecycle phase that the item being created, needs to follow. This is allowed only if the item is being created in a catalog category is associated with valid lifecycles.
6. The Primary UOM and the Item status attribute values are defaulted. You can review these defaults and change them, if required.
7. You can add the newly created items to the favorite list by checking the "Add successfully created items to favorite list". The items get added to the favorite list as soon as they are created.

Overview of Product Structure and Bills of Material Management

Find Components in Structure

The Product Workbench enables you to quickly Find Components in a Structure. It is text search within the structure window, wherever the text appears, the corresponding item row is highlighted.

Find Components

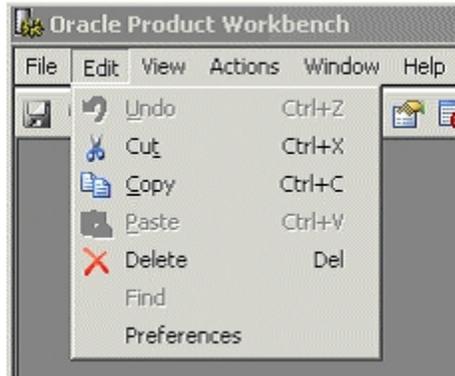


- For example if you provide the text "power" in the text field to search, all the components containing the word "power" will be highlighted one by one.
- The navigation to search result is provided by **Previous** and **Next** arrow button next to the Find text field. Using this button you view the search results one by one.
- It also remembers the all the searches that has been done in the past and shows a drop-down menu to select any of those searches.
- It allows you to perform both case-sensitive and non-case-sensitive searches.
- It also allows you to match the whole word or partial words from the text.
- The text is searched within the columns available in the current display formats and search criteria.
- If there are no components containing the text provided by the user, it shows a dialog indicating no such text has been found in the current structure.

Setting Preferences

The Product Workbench enables you to set preference for various actions. You invoke the preference menu from the Edit top menu.

Preferences

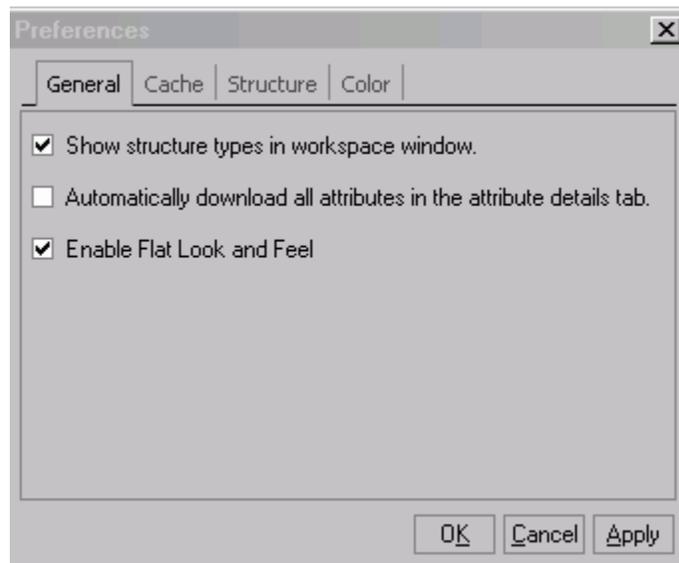


There are four section/tabs for the preference dialog.

General Preference

General Preference enables you to set the general behavior of the Product Workbench Windows client.

General Preference



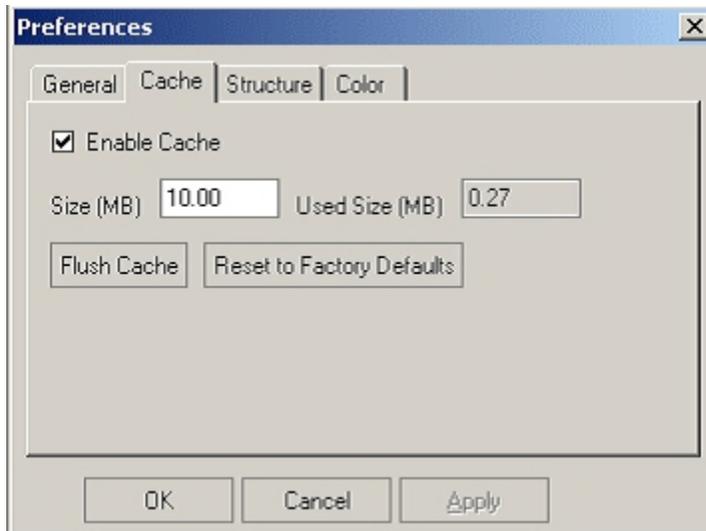
- You may or may not choose to view the splash screen on start up of the client.
- You may or may not choose to download all the attribute values in the Attribute tab in the Details section for a structure/search results window. This impacts the first time performance however subsequent view of the attribute details for the item is faster.

- You can enable or disable the flat "look and feel." This is the default.

Cache Preference

Cache Preference enables you to set the Caching of the data for the performance reason. The data may not be real-time uptime up-to-date, but access to all item/component/structure/change information will be faster.

Cache Preference

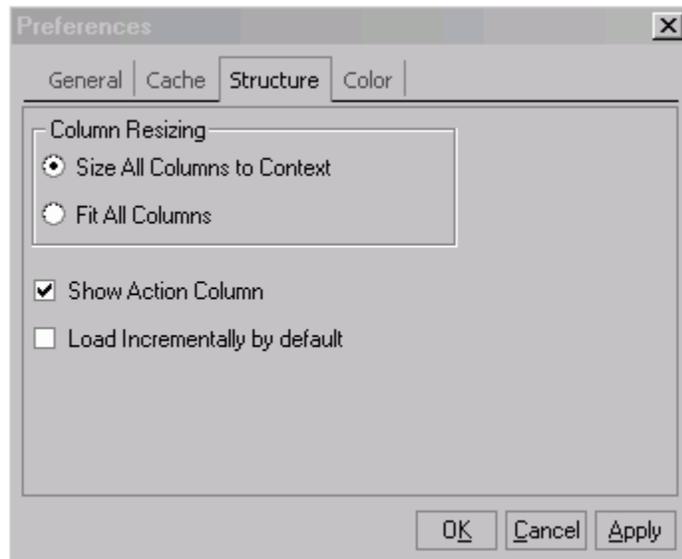


- You can set the Cache size limit. Cached data are stored in XML files in the user desktop. You can also view the current size of the cached data.
- You can periodically flush the cached data to download up-to-date information.

Structure Preference

Structure preference enables you to perform column re-sizing in the structure window and control the structure window behavior.

Structure Preference

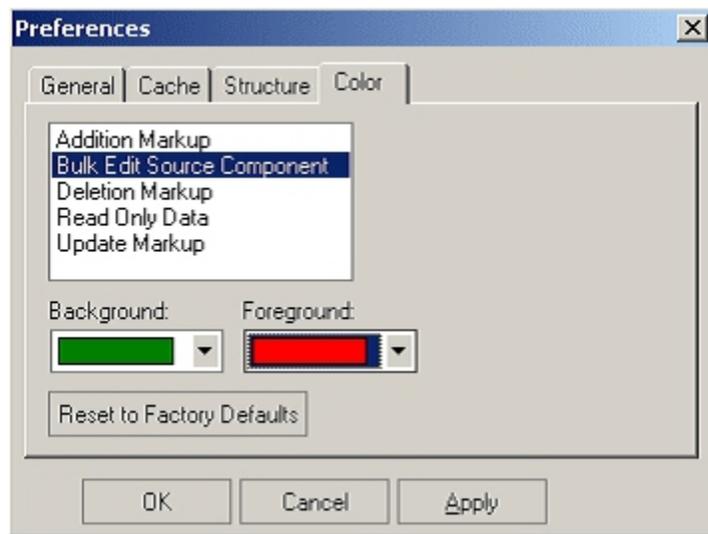


- You can set preference to size the columns according to its content value size Or Fit the all the columns in the display format to become visible within the window of current size.
- You can set to reload the structure on the event of changing the drop-downs of any field in the Structure header section like Display format/Selection Criteria/Filter/Changes/Revision/Effectivity etc. Or you can choose to change and explicitly reload the structure by pressing the **Go** button next the fields.
- You may choose to hide the Structure header section by default, in the structure window, to have more real-estate in the structure window.
- You may choose to hide the **Action** column (which explicitly shows whether the component is *Added/Updated/Deleted*)

Color Preference

Color preference enables you set different colors for different actions and behaviors. You can set both the background and foreground color for each action and behavior.

Color Preference



The actions are:

- Component addition markups could be shown in the color of your choice.
- Update of Components as markups could be shown in the color of your choice.
- Deletion of Components as markups could be shown in the color of your choice.
- Read-Only data, which you do not have access to modify, could be shown in the color of your choice.
- If you perform **Bulk Edit** and update the components with the same values, all of them could be shown in the color of your choice.

Managing Bills of Material/Product Structures

The Product Workbench enables you to work with and manage Bills of Material/product structures. With the Product Workbench, you can:

- Perform multilevel structure copy and compare
- Manage structures using effectivity control
- Modify structures using the Exclude feature
- Create structures
- Edit structures

- Classify structures
- Import Product Structures/bill of materials using spread sheet or Item Open interface

For information about Creating Structures, see, To Create Common Structures, in the Bills of Material User's Guide.

Importing Product Structure/BOM

You can use any of the following two methods to import items into the system:

- Microsoft® Office Excel spreadsheet
- Item Open Interface

To import product structure using a spreadsheet:

You can use a Microsoft® Excel spreadsheet to import items into the system. Before doing so, you must first have the appropriate version of the Excel spreadsheet installed. Defining of a Display Format is optional if the seeded display formats suite the requirement. Alternately, you can define Display formats to include specific attributes that you would like to export and update. Structure display formats allow you to combine Item base and user defined attributes, as well as Component base attributes in one spreadsheet.

You can use the same spreadsheet for multiple uploads, and also across different sessions for the same user. To upload the same spreadsheet during another session, open the spreadsheet you wish to upload, and select Upload from the Oracle menu in the menu bar. After you log in and choose the appropriate responsibility, you can immediately begin to upload this spreadsheet again.

Whenever you enter new or existing data in the spreadsheet, the Upl column displays a flag, making it easier to scan the spreadsheet and for rows that have been changed.

Caution: Item multi-row attribute groups cannot be imported at this time using the Product Structure display formats.

Items uploaded to the system from a spreadsheet become, by default, Engineering items. If you wish to upload a non-Engineering item, then include an available base attribute column called "Engineering Item Flag" in your display format. When uploading the spreadsheet, identify such items in this column by specifying the value "Yes" or "No" in this column. If you leave the column blank, the item once again defaults to an Engineering item.

You can also assign a default template to the Catalog Category and using the Catalog Category attribute in the spreadsheet you can assign component items to a Catalog Category. While creation of the component Item, the attributes of the default template would be applied to the Item.

Note: Structure import allows you to create new items or update existing items. This greatly simplifies the maintenance of the BOM and the items that make up the product structure.

1. In the HTML Structure pages, choose an assembly item and navigate to the Configurations tab
2. Create a Structure header for creating a new product structures and click the 'First Level Components' link
3. On the **First Level Components** page, select the Display format that you want to use for exporting to Excel. You can personalize a display format if required before exporting.
4. Select Export to Excel in the action drop list. On the **Export to Excel** page, enter the numbers of levels of the product structure that should be exported. A default value of 60 is already set. This is the maximum number of levels you can enter. Then click Continue.
5. On the **Select Settings** page, select the version of Excel that you are using and click Next. You cannot enable or disable Reporting. Also, Language has only one choice, which is already selected.
6. A download window presents processing messages. Click Close when the transfer is complete. The Excel spreadsheet also opens.
7. In the spreadsheet, base attributes are listed first (on the left), and user-defined attributes appear after (on the right). When entering values into the spreadsheet, you must use one of the following Transaction Types:

Sync

If the component already exists, the spreadsheet values are used to update it. If the component does not already exist, a new one is created using the spreadsheet values. If the Sync creates a new item, then the mandatory attributes for Create are also mandatory for the Sync. If the Sync updates an existing item, then the mandatory attributes for Update are also mandatory for the Sync.

Sync will also create new component items using the defaults in the spreadsheet if the component items do not already exist.

Note: To delete an existing value in a record, enter the following data in the appropriate column of the spreadsheet:

For field type:	Enter value:
Date	31-DEC-9999
Character	!
Numeric	9.99E125

If you want to retain an existing value in a record, enter NULL in the appropriate column of the spreadsheet.

Exception: In the user defined attributes interface table, when you want to delete an existing value in any of the following fields, use the value !. If you want to retain an existing value in a record, no entry is necessary.

- ATTR_DISP_VALUE
- ATTR_VALUE_STR
- ATTR_NUM_VALUE
- ATTR_VALUE_DATE

Create

A new item is created using the values entered in the spreadsheet. A new component entry is created using the values entered in the spreadsheet. The following attributes are mandatory when using this transaction type and the component items don't already exist:

- Item
- Organization Code
- Primary Unit of Measure
- Description

Note: Description is a base attribute, but appears on the right side of the spreadsheet among the user-defined attributes. It is placed here so that long descriptions will not disrupt the flow of the spreadsheet.

Make a note of the Result Format Usage ID at the top of the spreadsheet. You will need this ID later when you upload the spreadsheet in the system.

8. After data entry is complete, select Upload from the Oracle menu in the toolbar.
9. In the **Upload Parameters** window, enter the Result Format Usage ID and check the Automatically Submit Concurrent Process box, and then click Proceed to Upload.
10. In the **Oracle Web ADI** window, click Upload. After the upload process completes, a message appears with the Concurrent Request number. Make a note of this number, as you will need it later when you access the view log for the concurrent request. Click Close when the process messages complete.
11. Return to the Applications tree menu and click the View Concurrent Requests link.

Important: It is recommended that you review the concurrent process view log to ensure that the upload process was successful.

12. On the **View Concurrent Requests** page, click Details.
13. On the **Request Details** page, click View Log.
14. Here two requests are launched; one for defining the component items if new items have to be created, or any items have to be updated. The second is for processing the product structure. Both requests must be completed successfully for the structure to be created or updated.
15. From the View Log, paste the URL string in a web browser to view any errors. If no errors appear, the upload was successful.

Update

Attributes of existing item and component will be updated to the values in the spreadsheet. If an Item does not exist or a component does not exist, the import process will fail with an error.

Add

Often times the Items in the system are reused in different assemblies. To create product structure by simply adding already existing items you can use a transaction type of **Add**. This does not create any items or will not update any item attributes, even if the values in the spreadsheet are changed. The assumption with using this transaction type is that you are reusing the items and that the item attributes are not being changed. If you wish to do so either use the transaction type of **Sync** or **Update**.

To import product structure using Item Open Interface:

This topic discusses the availability of multilevel Copy API for copying a structure. You

can copy structures within an organization or across organizations. When you import items through the Item Open Interface, you create new items in your item master organization, update existing items, or assign existing items to additional organizations. You can specify values for all the item attributes, or you can specify just a few attributes and let the remainder default.

The Open Interface program validates all data before importing it into the production tables.

1. Use `oracle.apps.bom.structure.copy.server.BomCopyStructureAM` to copy single or multilevel structures.
2. Load the Item Open Interface table (`MTL_SYSTEM_ITEMS_INTERFACE`) with the data you want to import.
3. Navigate to the Inventory Responsibility in Oracle Applications, and click the Inventory link. Then click the Items link.
4. Click the Import link.
5. Click the Import Items link

Note: The Parameters form automatically appears when you select a request that requires parameter values.

6. Enter the required values in the parameter fields
7. Click OK and then click Submit

Using Multilevel Structures

Multilevel structures, or indented structures, enable you to view all component levels of an item, through multiple levels of subassemblies to the raw materials. You can also view multilevel structures across multiple organizations, copy, and compare them.

To use multilevel structure copy:

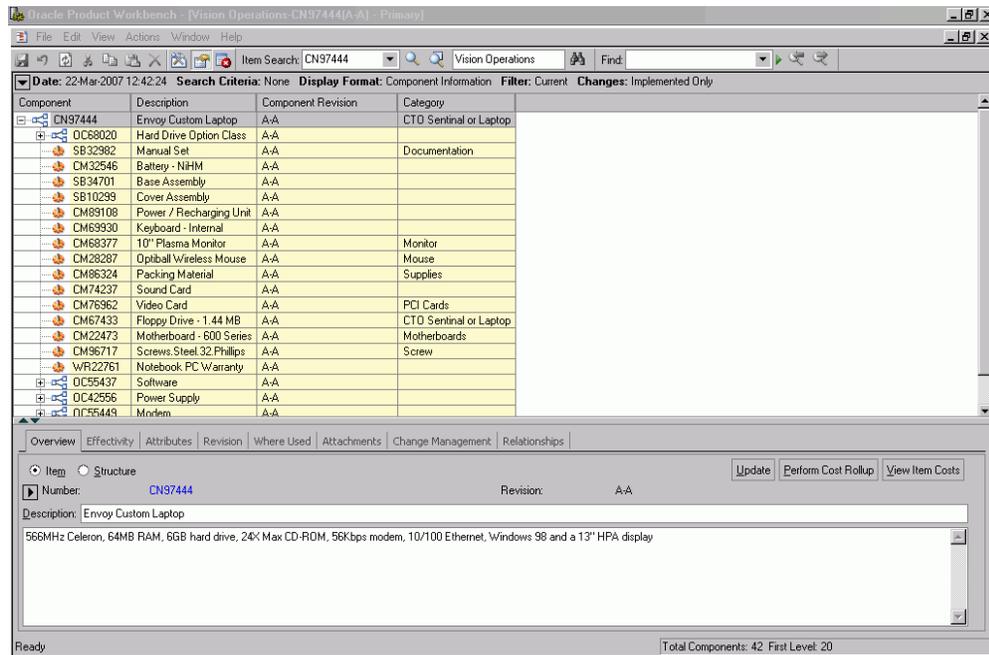
Performing a structure copy is a productive way for reusing existing structures to define new structures for an item. Copying a multilevel structure enables you to create a new structure or to copy specific subassemblies to any level of a multilevel structure within the same organization or across multiple organizations.

For example, you can manufacture an item in different organizations than the engineering organization. You can copy past, current and future item revisions to other organizations. If certain engineering components are not enabled in the other organizations, they are enabled as part of the copying process.

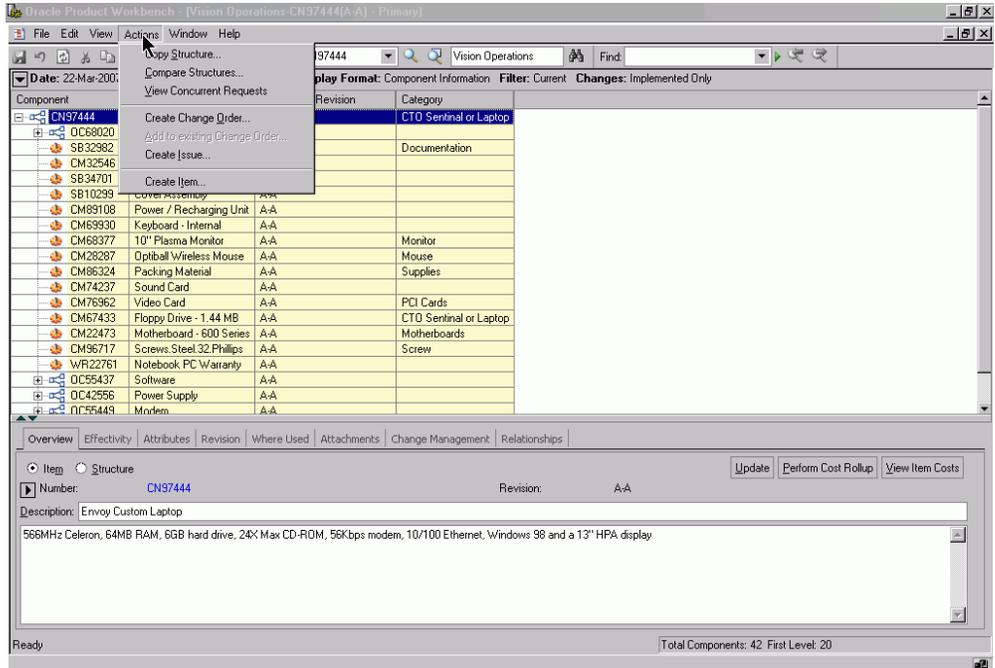
This functionality can improve your organization's efficiency by enabling the copying of

items and their structures across multiple organizations.

1. Select item with the context organization. You can view the common structure information. Note that the shading indicates common structure information.



2. From the Actions menu select Copy Structure. You can also use the right click to select copy structure from the Structure menu item.



3. Enter the Copy From (source) structure information to be copied in the left pane. The selected item is defaulted. Optionally you can select any item manually. Enter the Copy to (target) structure information in the right pane which indicates the components or structure to be copied.

Copy Structure: Select Structures

Copy From

Organization: Vision Operations

Item: CN97444

Revision: A-A

Structure Type: Root

Structure Name: Primary

Structure Description:

Engineering

Date: 03-Aug-2006 23:38:59

Filter: Current

Changes: Implemented Only

Copy To

Master Organization: Vision Operations

Item: CN97444

Revision: A-A

Structure Type: Engineering BOM

Structure Name: EBOM

Structure Description: This is a copy of Primary from Master Org

Engineering

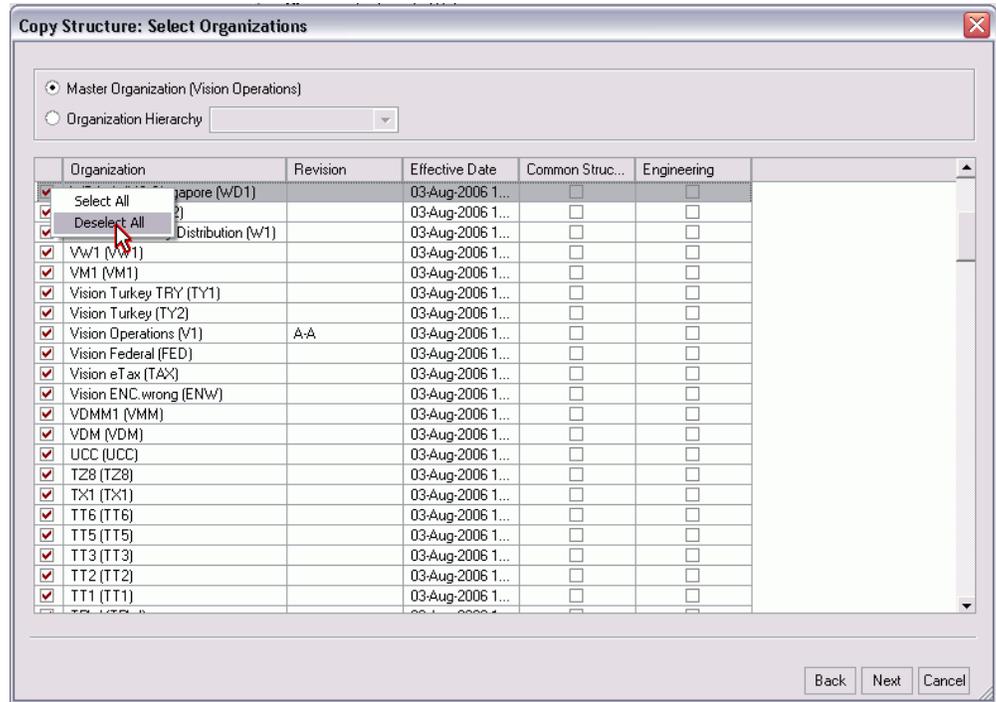
Date: 03-Aug-2006 23:38:59

Back Next Cancel

Structure information includes:

- Organization
 - Item
 - Revision
 - Structure Type
 - Structure Name
 - Engineering - engineering structure or manufacturing structure.
 - Effectivity Date (based on the type of effectivity control whether date or serial number or model/unit number), this field is appropriately rendered.
 - Filter (Current, Current and Future or All)
 - Changes
4. The target structure type and name is a filtered list for only the empty/new structure of the target Item.
 5. In the target structure, you can optionally provide structure description.

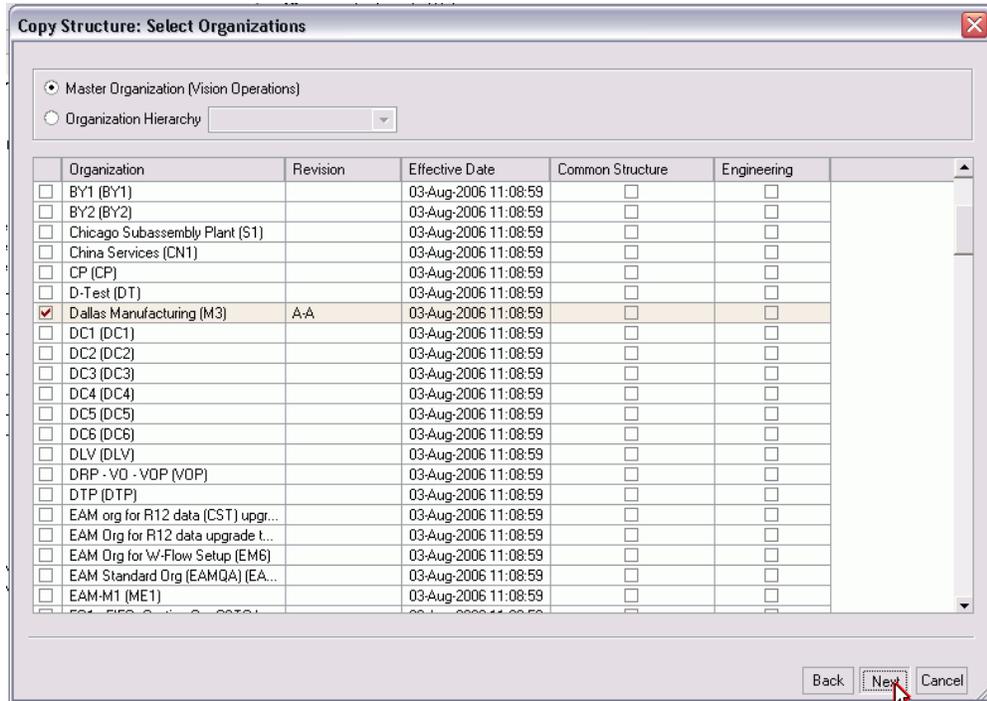
6. If you select the Unchecked check box next to Engineering, this will indicate that the structure is to be used in Engineering and the field changes to Checked.
7. Select the Next button, and the Copy Structure: Select Organization form appears.



8. Select one of these options:
 - Master Organization: Select this option to include all items in all levels of the master organization.
 - Organization Hierarchy: Select this option to include a specific level within your organization.

9. Select the check box next to the organization from which you want to copy a structure.

Right-click in the check box column to Select all or Deselect All organizations.



- Optionally, select the Common Structure and Engineering check boxes for the organization from which you want to copy a structure.

The Common Structure check box creates a common structure based on the target structure in the selected organization and assigns the items to the organizations if they do not exist.

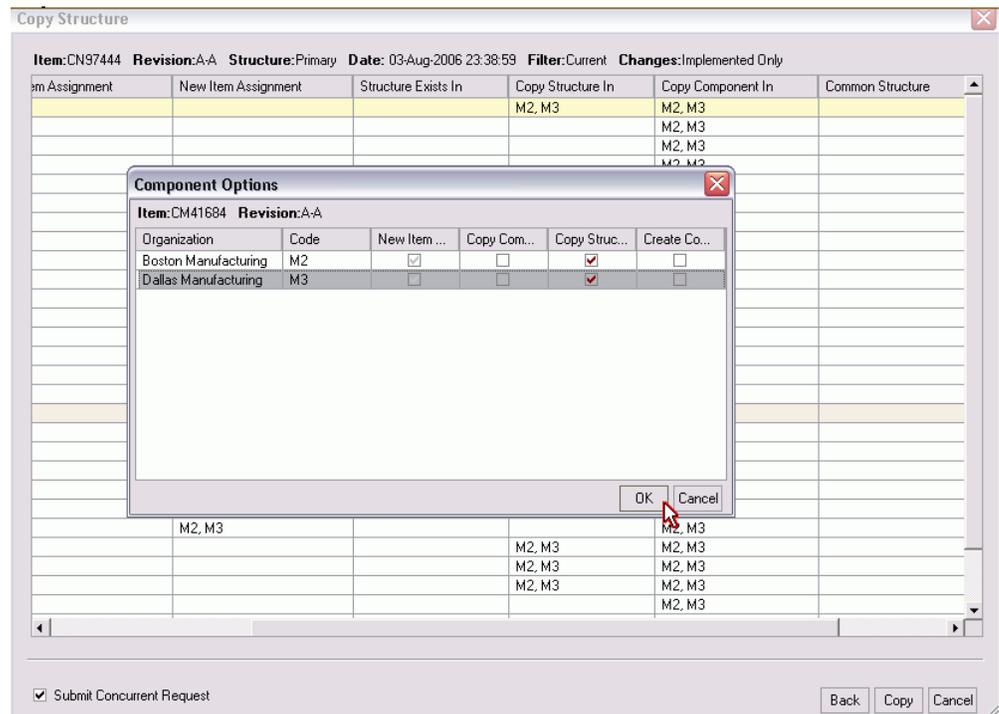
The Engineering check box enables you to set the engineering type for the structure in the selected organizations. If the source structure is a manufacturing structure, you can choose to copy the source structure to a manufacturing or engineering structure.

- Click the Next button, and the Copy Structure form appears. The Copy Structure form displays:

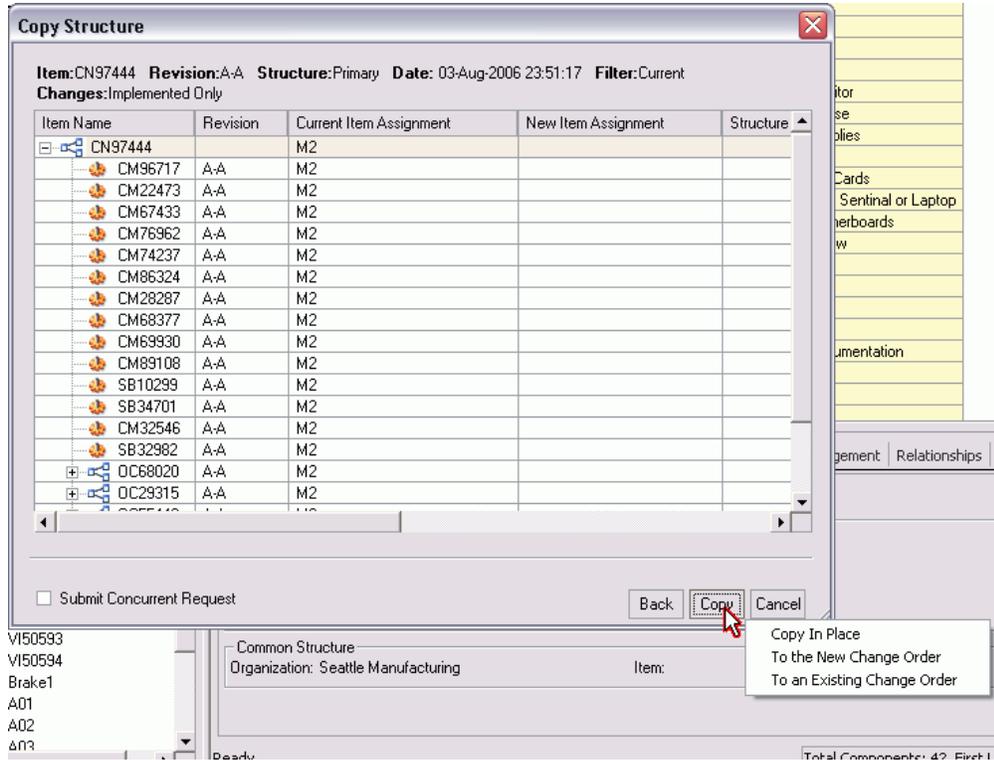
- All of the organizations that the copy/common function will use
- The components and sub-assemblies for the structure revisions for the components
- The current item assignment
- The organizations in which new item assignments will be made, for each component
- The organizations in which the structure current exists

- The organizations in which the component or subassembly will be copied to
 - The organizations that the component or subassembly currently is common in and the organizations that they will be common in after the copy
12. Complete selection of release options for end Items and sub-assemblies.

Double clicking on a component row will bring up the Component Option form. You can use this form to control each organization at a the component level. For example you can control how the component in each organization will be managed during the copy. Unchecking the options (which vary on the copy options selected) will exclude operations on the component during the copy.



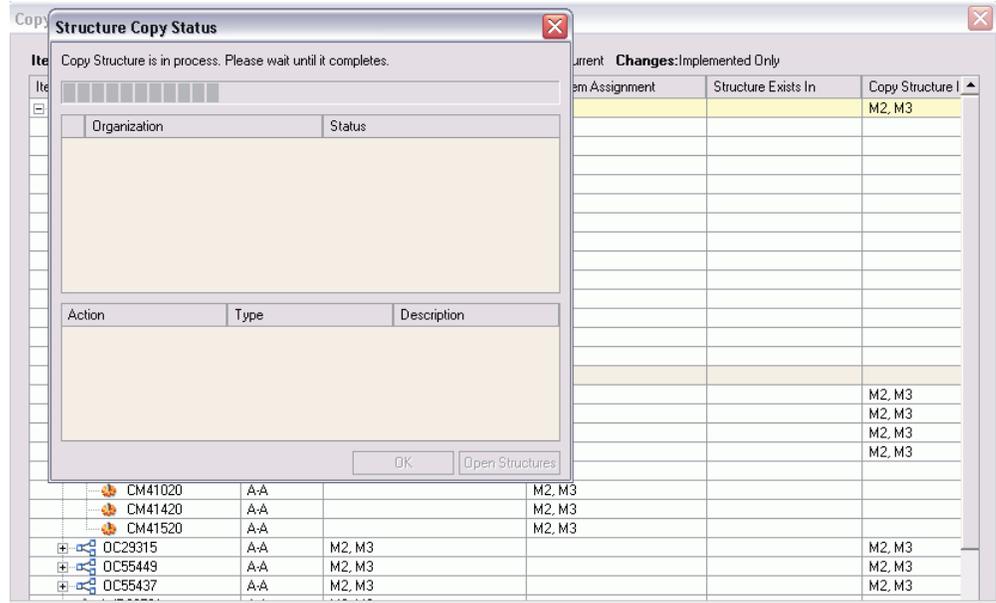
13. Click the Copy button. A popup menu appears, and you can chose from the following options:
- Copy in Place
 - To the New change Order
 - To an Existing Change Order



14. (Optional) Select the Submit Concurrent Request check box if you want to perform the copy structure process immediately. If you select Submit Concurrent job checkbox and select the copy, you get the three options: Select Copy button, Choose from options (the option will determine how the copy operation will be processed) and Copy In Place which will create a concurrent request. The other two will allow you manage the copy through a new or existing change order.

If you do not check the Submit Concurrent job check box and select copy, then you have the three options as before. If you choose copy in place the system proceeds with the copy.

15. Click the Copy button.
16. Copy In Place generates concurrent request and errors and details reports.



The structure will be copied and the new structure window will open.

Note: Structure is copied immediately and it does not create a redlined BOM.

The structure is also copied in place and can be added to a new or an existing change order.

When the source structure is copied into the target structure, the source component revision must be valid for the target parent item revision.

If the target structure name is available in the sub-assemblies, all the sub-assemblies, their hierarchies and components will be available in the target structure as well.

The effectivity of the components are created according to the value as given by the user in the copy dialog.

To use multilevel structure compare:

Product Workbench's feature-rich graphical user interface allows you to perform a side-by-side comparison of structures across multiple organizations. You can compare two structures of the same item, two structures of different revisions of the same item, or compare structures of two different items, all accomplished by using the source and target structures you have selected for comparison in the same interface.

To compare two structures, either click the **Compare Structures** menu from the **Action** menu, or select a structure, right-click and then select **Compare Structure** as a context action.

Select Structures to be Compared

The dialog box titled "Select structures to be compared" contains the following fields:

Field	First Structure	Second Structure
Organization	Vision Operations	Boston Manufacturing
Item	AS54888	AS18947
Revision	A-A	A-A
Structure	Primary	Primary
Date	01-Dec-2006 08:00:32	30-Sep-1997 23:59:59
Filter	Current	Current

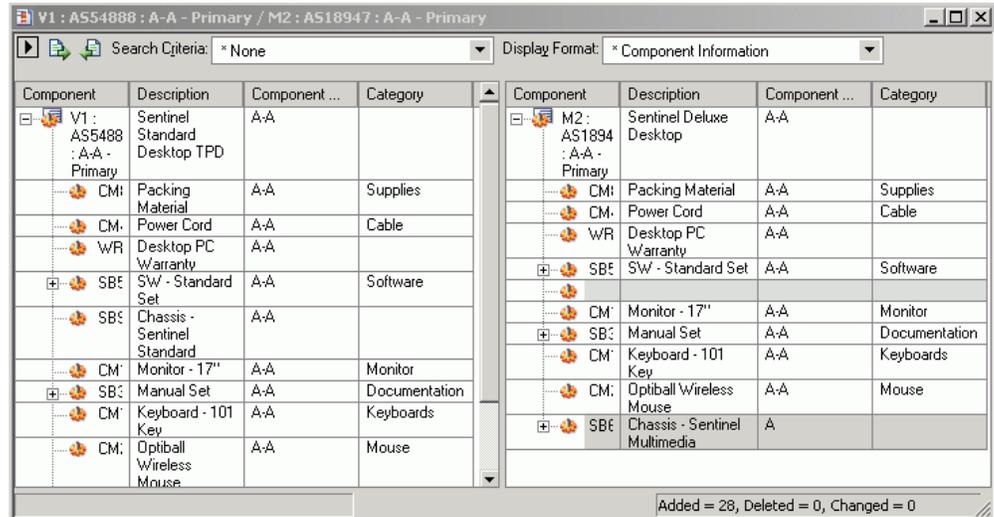
Compare Options:

Search criteria	* None	Display Format	* Component Information
-----------------	--------	----------------	-------------------------

Buttons: Compare, Cancel

1. Enter the Source Structure information for which comparison needs to be done in the left pane and the target structure information with which the comparison will be done. Structure information includes:
 - Organization
 - Item
 - Revision
 - Structure Name
 - Filter (Current, Current and Future or All)
 - Effectivity Date (based on the type of effectivity control whether Date or Serial number or Model/Unit number, this field is appropriately rendered)
 - Compare Options
 - Search Criteria
 - Display Format
2. Specify the search criteria (BOM filter) and display format (all the columns you want to see in the comparison results window) for the structure.
3. Click Compare button in the dialog to view the results. Depending on the size of

both structures, this may take some time to display the results.



The overall difference summary is shown in the status line indicating how many components have been added/deleted/changed between the two structures.

The differences between the two structures are visually indicated according to the difference. For example, components that exist in one structure only are indicated in blue.

4. When comparing structures, you can easily browse through the next and previous differences between the two structures using the Previous and Next icon/button on the top of the window.

Expanding a node in the source structure will automatically expand the corresponding node in the target structure to maintain a one to one correspondence between the levels of the two structures being compared.

5. You can also change the comparison criteria for the source and target structures you have selected earlier in the results window, as well using the collapsible hide/show section in the top part of the results window.

Managing Structures Using Effectivity Control

You can manage product structures using the following effectivities:

Date Effectivity allows you to create structures in which components are effective based on dates. You can create and view date effective structures in Oracle Product Workbench.

Revision Effectivity allows you to create structure in which components are effective based on revisions of the parent item. During the concept & design/development phases of a product, revision effectivity is generally used for configuration management of

engineering product structures. Revision effectivity, controls the effectivity of the components relative to its parent item's revision. You can create and view revision effective structure in Oracle Product Workbench. In the Design cycle, users can maintain the Product Structure by Revision Effectivity such that the components of an Assembly can be made effective using revisions of the Assembly. This features allows users to clearly define the components specific to the revision of the parent without having to know the dates of the parent item's revision. For example, Engine has Revisions 001 and 002:

Piston (Engine.001 - Engine.001)

Piston1 (Engine.002 -)

Shaft (Engine.001 -)

This shows that users can phase in/phase out the components by simply giving the revision of the parent.

Important: Revision Effective structures cannot be defined for manufacturing (released) BOMs, but only for Engineering BOMs or for Items in an Engineering Phase. This is a design time usage feature only and is not supported by Manufacturing, Planning etc. downstream applications.

Note: You can use change control with revision effectivity.

Unit Effectivity allows you to create structures in which components are effective based on Model/Unit Numbers. You can view and edit unit effective structures in Oracle Product Workbench.

Serial Effectivity allow you to create structures in which components are effective based on serial numbers. You can only view serial effective structures in Oracle Product Workbench.

Excluding Structures

To exclude structures:

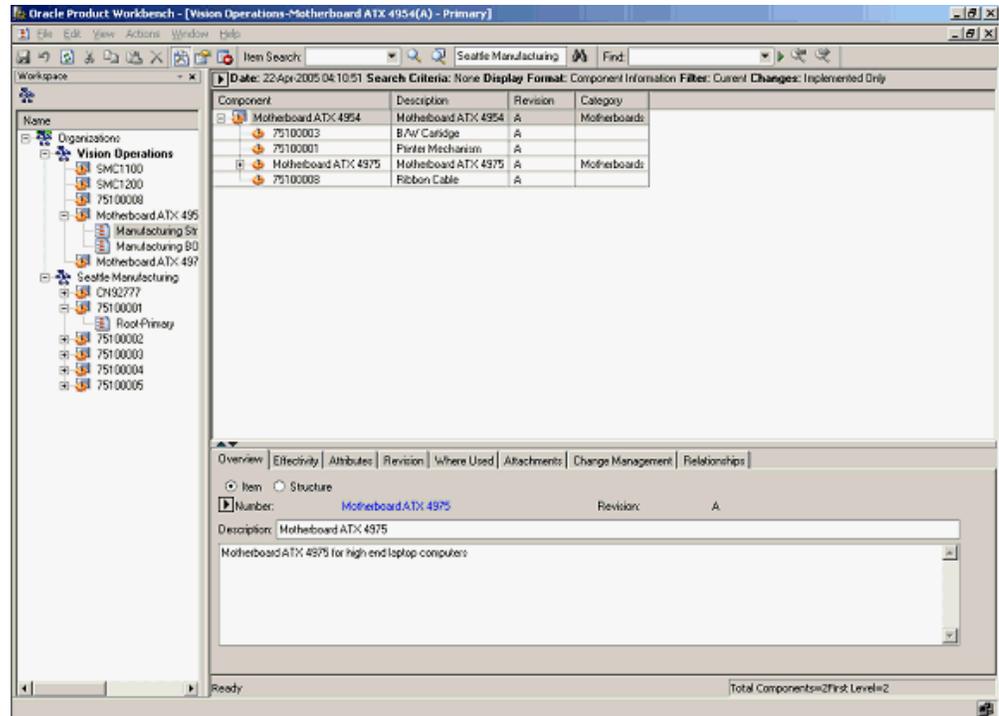
A structure contains information on the parent item, components, and optionally, attachments and descriptive elements. You can modify a structure using the Exclusion feature. You can create an engineering or manufacturing structure by manually defining all of the components for the structure, or copying from an existing structure, or referencing another structure.

Sometimes minor changes need to be made to existing structures to meet business needs. In Product workbench, you can use an existing bill and define minor variations in the bill through the exclusion feature.

To exclude a component from a bill:

1. Select an item from the Favorites list, and launch its bill.

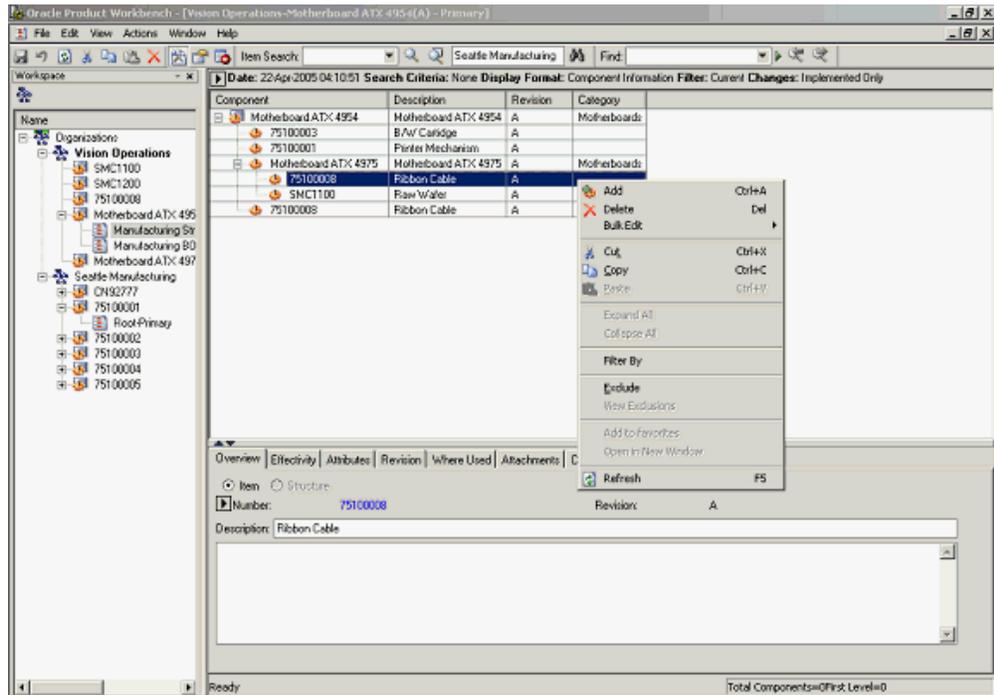
Launch Bill



2. Highlight the component to be excluded from the bill, and launch the Exclude action from the right click menu.

The structure is displayed in markup mode, with the excluded component highlighted.

Excluded Components

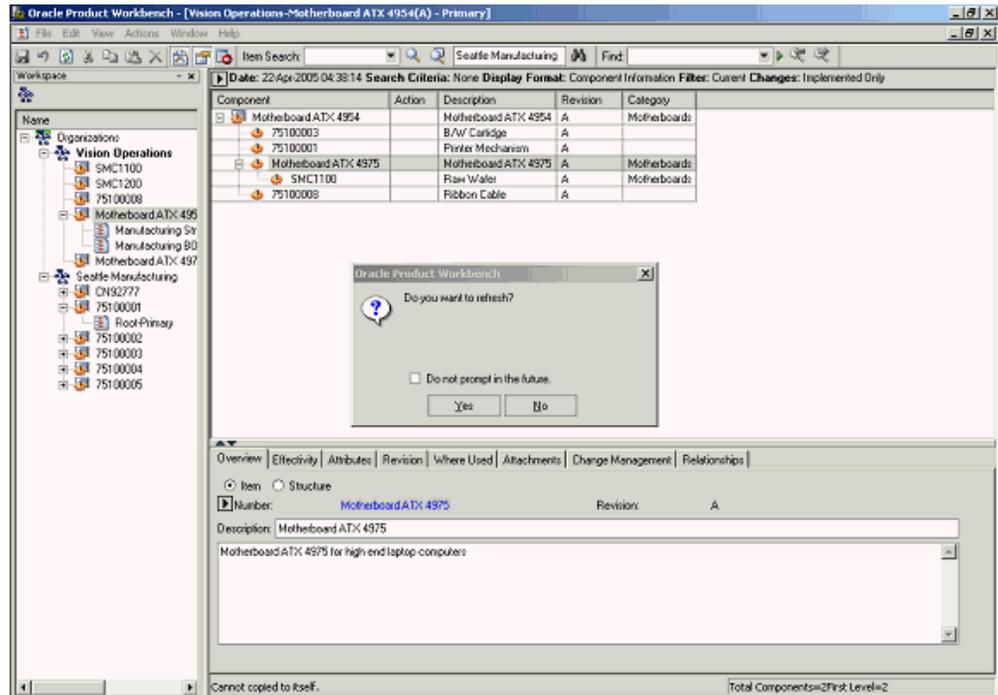


Note: You cannot exclude components in a bill that is common to another (source) bill.

3. Save your work.

You will be prompted to refresh in order to re-explode the bill to reflect all the changes to the bill. Click Yes

Save and Refresh



The Bill is displayed without the excluded component.

Note: The scope of the exclusion is restricted to the structure of the top item in the structure window.

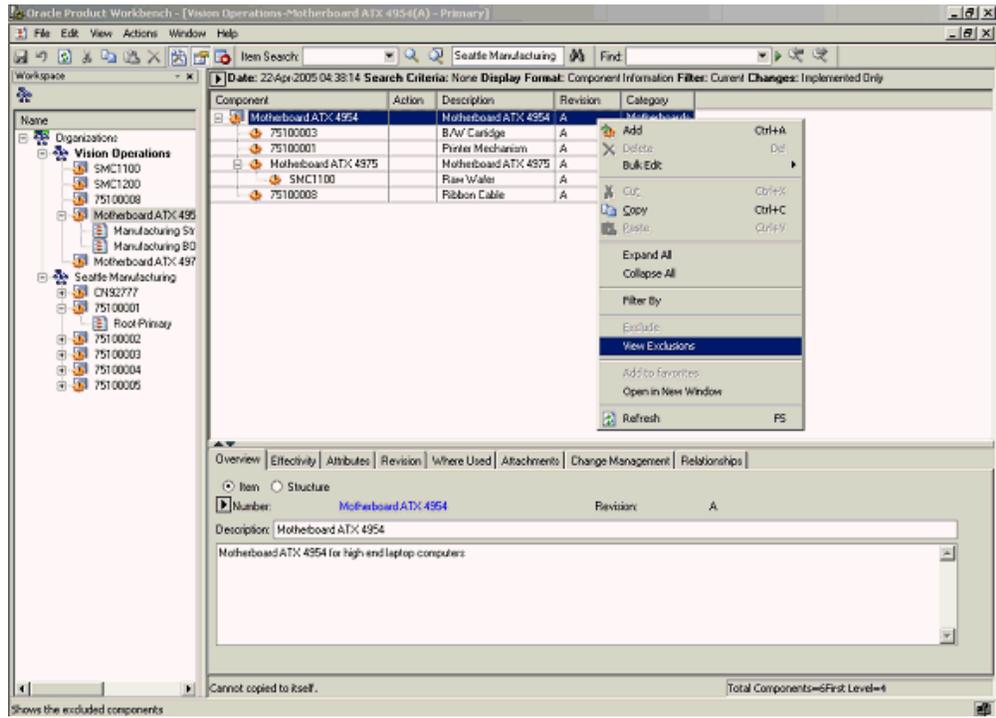
Thus in the above example, item#75100008 is excluded from the primary structure of the top item in the window (item#Motherboard ATX 4954). But, if you separately launch the structure for item(sub-assembly)#Motherboard ATX 4975, item#75100008 would continue to be shown in the structure of the sub-assembly. In other words, the scope of the exclusion is restricted to the primary structure of the top item in the structure window and is not applicable to intermediate sub-assemblies.

To view, hide, or remove structure exclusions:

1. Launch the structure of the item whose exclusions you want to view.
2. Select the top item in the structure and launch the View Exclusions action from the right click menu.

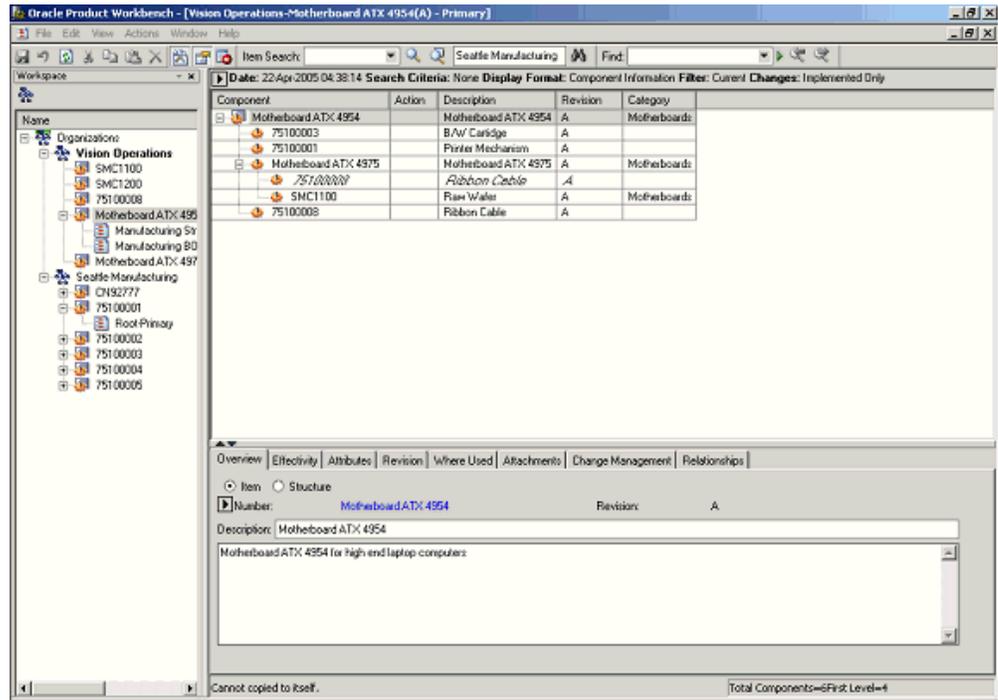
Note: You cannot use Expand all. If you have an excluded component at a lower level, explode parent subassembly by manually expanding the parent node to enable View Exclusions.

View Exclusions



3. The structure is displayed with all the excluded components suitably highlighted.

Excluded Components



4. You can hide the exclusions by highlighting the top item, and then launching the Hide Exclusions action from the right click menu.
5. You can remove exclusions that have been previously defined for a structure. Highlight the top item and view exclusions defined for the structure of the item (as described previously). Select any exclusion and launch the Remove Exclusion action from the right click menu.

Hide Exclusions

Oracle Product Workbench - [Vision Operations-Motherboard ATX 4954(A) - Primary]

File Edit View Actions Window Help

Item Search: Seattle Manufacturing Find

Date: 22-Apr-2005 04:38:14 Search Criteria: None Display Format: Component Information Filter: Current Changes: Implemented Only

Component	Action	Description	Revision	Category
Motherboard ATX 4954		Motherboard ATX 4954	A	Motherboards
75100003		RAW Cartridge	A	
75100001		Printer Mechanism	A	
Motherboard ATX 4975		Motherboard ATX 4975	A	Mo
75100007		Ribbon Cable	A	
SMC1100		Raw Writer	A	Mo
75100005		Ribbon Cable	A	

Context Menu:

- Add (Ctrl+A)
- Delete (Del)
- Bulk Edit
- Cut (Ctrl+X)
- Copy (Ctrl+C)
- Paste (Ctrl+V)
- Expand All
- Collapse All
- Filter By
- Exclude
- Hide Exclusions**
- Add to Favorites
- Open in New Window
- Refresh (F5)

Overview | Effectivity | Attributes | Revision | Where Used | Attachments | Change Management | Relationships

Item Structure

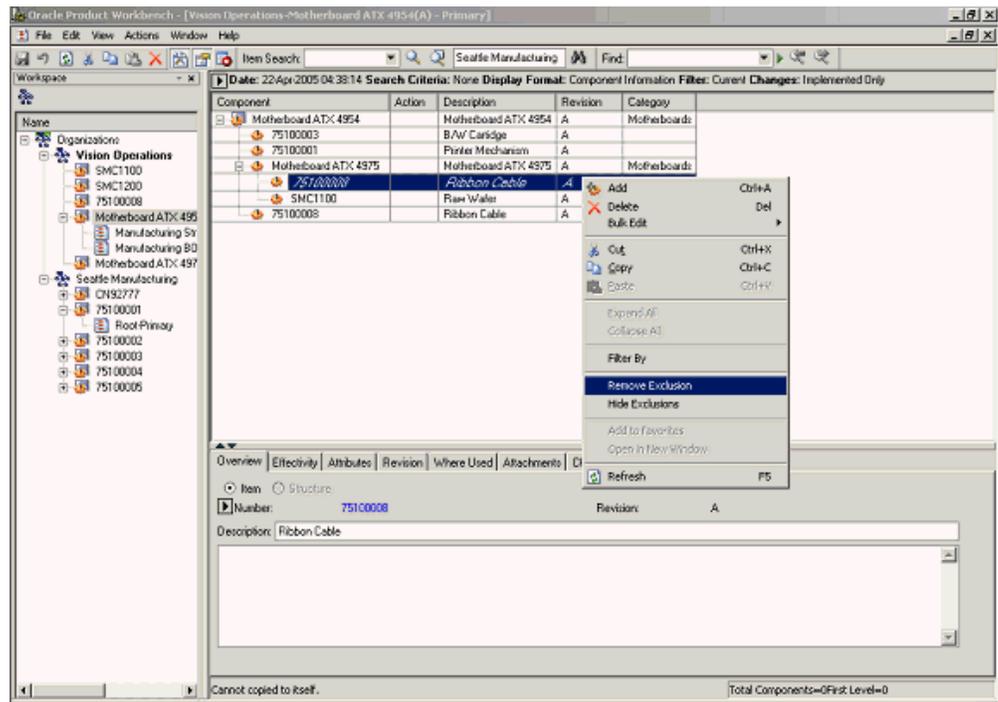
Number: Motherboard ATX 4954 Revision: A

Description: Motherboard ATX 4954
Motherboard ATX 4954 for high end laptop computers

Cannot copied to itself. Total Components=6First Level=6

Shows the excluded components

Remove Exclusion



6. The structure of the top item is displayed in mark up mode with the previously excluded component appearing again in the structure of the top item. Save your work. You will be prompted to refresh the window. Click Yes.

The component which was excluded from the structure of the top item previously is now included in the structure.

What's Next

Using exclusion rules components can be excluded/included at any level in the product structure with effectivity relative to an end item. This allows you to define different configurations for the same end item using different components rather than defining/maintaining multiple product structure definitions for variants of the end item. You can choose to hide or view excluded components when viewing a product structure. You can remove the exclusion rule on a previously excluded component. Exclusion rules are specific to an end item, which allows you to reuse the same subassemblies with different configurations in different products

Exclusion Rules by Product Revisions

The system enables you to exclude components from specific revisions of end items.

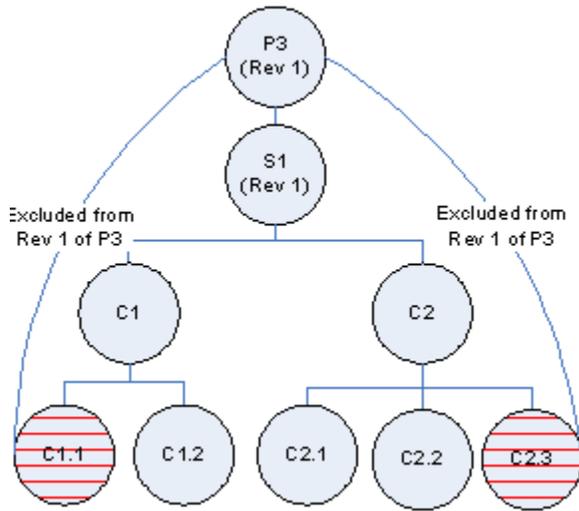
Example: Exclude Components from a Specific Revision of an End Item (Product)

For Product P3 Components C1.2 from subassembly C1 and C2.3 from subassembly C2 have been excluded. Now if the user creates a new revision 2 of Product P3, the exclusion rules are automatically excluded from this new revision. The user can further exclude more components from revision 2. Specific component revisions will not be excluded from the end item revision.

Tabular view of structure/component information for product "P3" revision "1"

Parent	Child Component	Effective From	Status	Effective To
P3	S1: Rev1	P3: Rev1		-----
S1	C1	S1: Rev1		-----
S1	C2	S1: Rev1		-----
C1	C1.1	C1: Rev1	Excluded P3: Rev1	-----
C1	C1.2	C1: Rev1		-----
C2	C2.1	C2: Rev1		-----
C2	C2.2	C2: Rev1		-----
C2	C2.3	C2: Rev1	Excluded P3: Rev1	-----

Pictorial view for structure for Revision "1" of product "P3"



A variation of product P3 has the following differences with reference to the structure for Revision 1 of product "P3" as shown above:

- Additional Component S2 as immediate child component
- Component C2.2 (P3: Rev 2>S1>C2>C2.2) has been excluded

To achieve this configuration, do the following:

- Create Revision "2" for the end item "P3"
- Exclude Component C2.2 from Revision 2 of Product P3.
- Add Component S2 with effect from revision "2" of end item "P3".

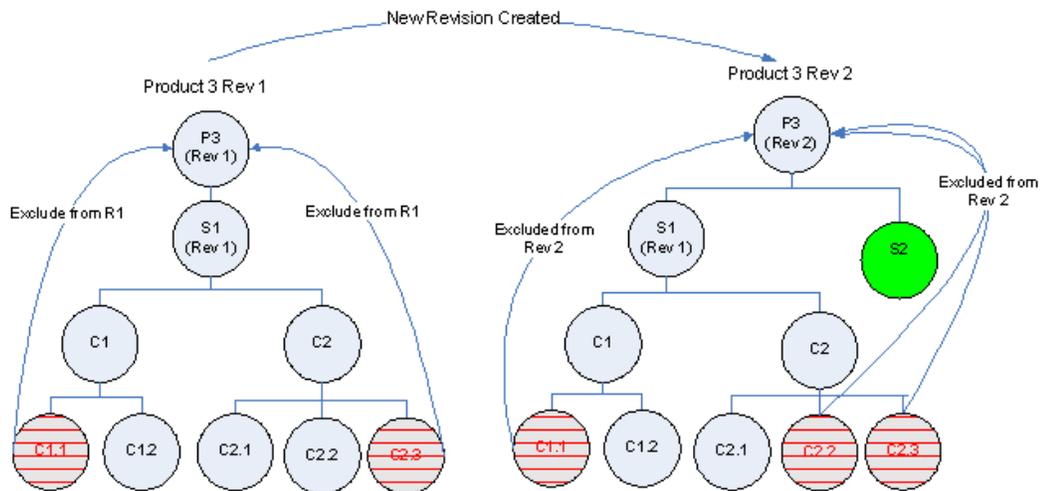
The following table and pictorial show data for the structure for revision "2" of product "P3":

Tabular view of structure/component information for revision "2" of product "P3"

Parent	Child Component	Effective From	Effective To	Status
P3	S1: Rev1	P3: Rev1	----	
P3	S2	P3: Rev2	----	
S1	C1	S1: Rev1	----	

S1	C2	S1: Rev1	----	
C1	C1.1	C1: Rev1	----	Exclude-P3:Rev2
C1	C1.2	C1: Rev1	----	
C2	C2.1	C2: Rev1	----	
C2	C2.2	C2: Rev1	----	Exclude-P3:Rev2
C2	C2.3	C2: Rev1	----	Exclude-P3:Rev2

Pictorial view for differences between structure for different revisions of product "P3"



Creating Structures

A structure contains information on the parent item, components, attachments, and descriptive elements. Each standard component on a structure can have multiple reference designators and substitute components.

User can create either an engineering or manufacturing structure, copy an existing structure, or reference a common structure. When a user creates a structure, it exists only in the current organization. To use a structure in another organization, user must either copy it or reference it as a common. User can create structures for only those items on which the user has edit privileges.

All types of bills (standard, model, option class and planning) except the product family bills can be created in product Workbench. Date, revision, and unit effective structures can be created. Creation of serial effective structure is not supported in the current release of Product Workbench.

To create a structure:

1. Select an item from favorite items list or from item search results and invoke the create structure dialog through the right click 'create structure' action.

Create Structure

Create Structure

Item
Name: Motherboard ATX 4954
Description: Motherboard ATX 4954

Structure
 Engineering
Type: Design Structure
Name: eng
Effectivity: Date
Description: As designed structure for Motherboard 4954

Common Structure
Scope
 None Single Organization Hierarchy All Organizations
Organization: Item:
Hierarchy:

Preferred Structure
 Open Structure After Creation

OK Cancel

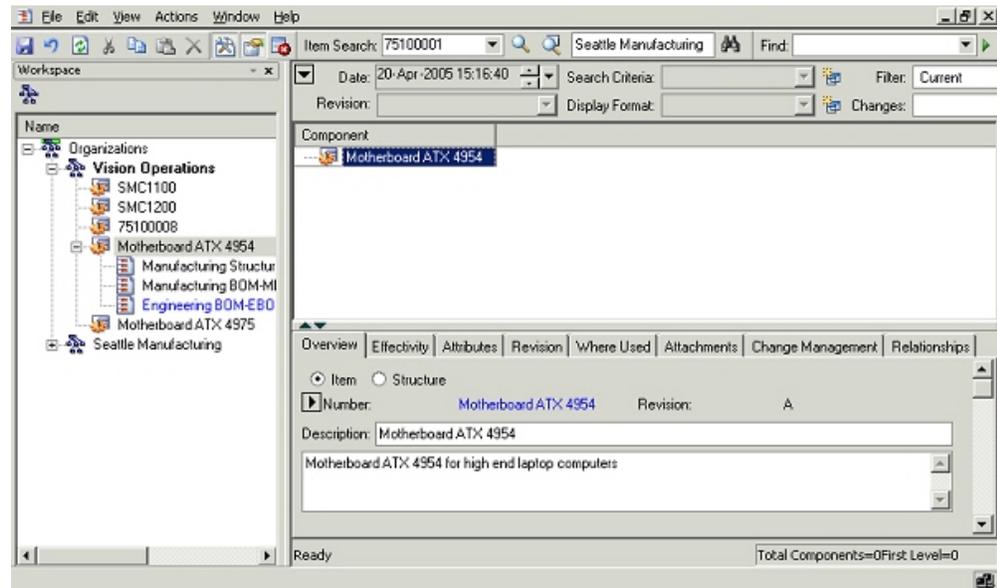
2. If the selected item is an engineering item, the Engineering check box will be selected and cannot be edited. In case of a manufacturing item, user can choose to create a manufacturing or engineering structure.
3. Select a structure type and a structure name. Only those combinations are available for which a structure doesn't already exist for the selected item.
4. Specify the effectivity control for the structure being created. Choose from date or

revision effectivity.

Note: Revision effective structures are always of type Engineering.

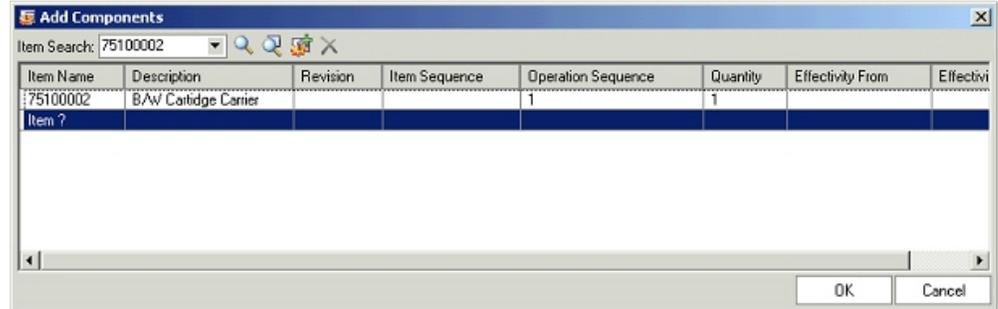
5. Provide a description for the structure.
6. Choose whether the structure being created is a preferred one for the selected structure type.
7. Check the Open structure after creation if you want to continue editing the structure.
8. Click the OK button. This will open up the new window where the user can specify other information related to the structure. The structure is not yet saved.

Newly Created Structure



9. Select the top node, right click, and select Add in the structure window to open the Add Components window. You can also open the Add Components window by dragging and dropping an item from the favorites list, item search results or from another structure window.

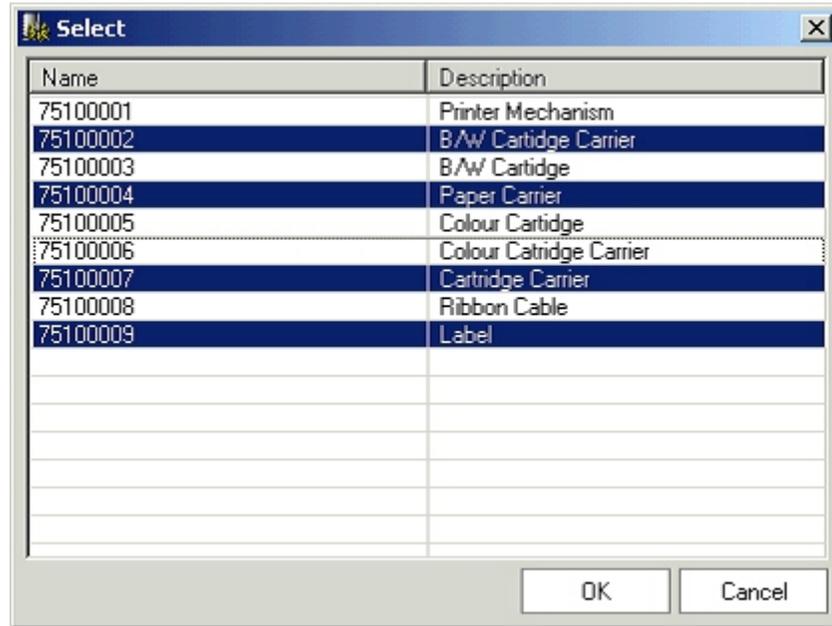
Add Components



In the Add Components window, add one or more components to the node selected in the structure window through the following actions:

- Perform item simple search by providing the complete or partial item number/description and clicking on the simple search button. In case of a single match, the item gets automatically selected in the Add Components window. In case of multiple matches, a new window showing all the search results is shown and the user can select one or more items from this window:
 1. To select a set of adjacent rows, select the first row and hold down the shift key and select the last row to include.
 2. To select non-adjacent rows, select a row or a range of rows and then hold down the Ctrl key and keep selecting the rows to include.

Selecting Items for adding as components from the simple search results



- Perform an advanced parametric search and add one or more items from the search results.
- Create new items and add them as components.
- Provide the complete or partial item number in a new row in the Add Components window, by double clicking on in the Item Name column. Behavior is similar to the simple search described above.

Note: You can only select valid components in the Add Components window. Refer to the Bill of Material User's Guide for these dependencies.

10. Review the components selected in the add component dialog and make necessary changes. The changes that can be done are as follows:
 - Use a fixed component revision instead of floating (default behavior). Users can better manage design configurations with Fixed or Pre-specified revision. During a design phase, subassemblies may go through rapid changes and the consumers of the subassembly can shield themselves from these changes by fixing the revision of the component subassembly until they choose to change it. In case of certain subassemblies, engineers of the consuming subassembly may always want to pick the current revision of the subassembly. A fixed

component revision caters to both usages.

Important: Consuming applications like WIP, APS, MRP, etc EBS applications do not support Fixed Revision of the Component. Manufacturing BOMs therefore cannot have components with a fixed revision.

- Specify an item sequence and/or an operation sequence
 - Modify the default quantity of 1
 - Modify the effectivity range i.e. start and end date in case of a date effective structure and a start and end revision of the parent for revision effective structure.
 - Remove one or more items selected in the add component dialog.
11. Click the OK button to add the selected components to the node selected in the structure window.
 12. Repeat steps 9-11 for adding components to lower level subassemblies to create a multi-level structure.
 13. Optionally specify reference designators, substitute components and optional routing operations for applicable components in the structure.
 14. Review and modify the structure information i.e structure/component attributes, attachments, effectivity etc as per requirements and save the structure in place or on a change order.

To create common structures:

If two or more organizations manufacture the same item using the same bill of material, user can define the bill in one organization and reference it from the other organizations. Necessary changes must then be made to the referenced bill. This greatly reduces the effort involved in maintenance of the structure information by centralizing the controls.

Optionally, you can reference all but the following five fields in a bill, maintaining these fields by individual bill of material:

- Supply Type
- Sub Inventory
- Locator

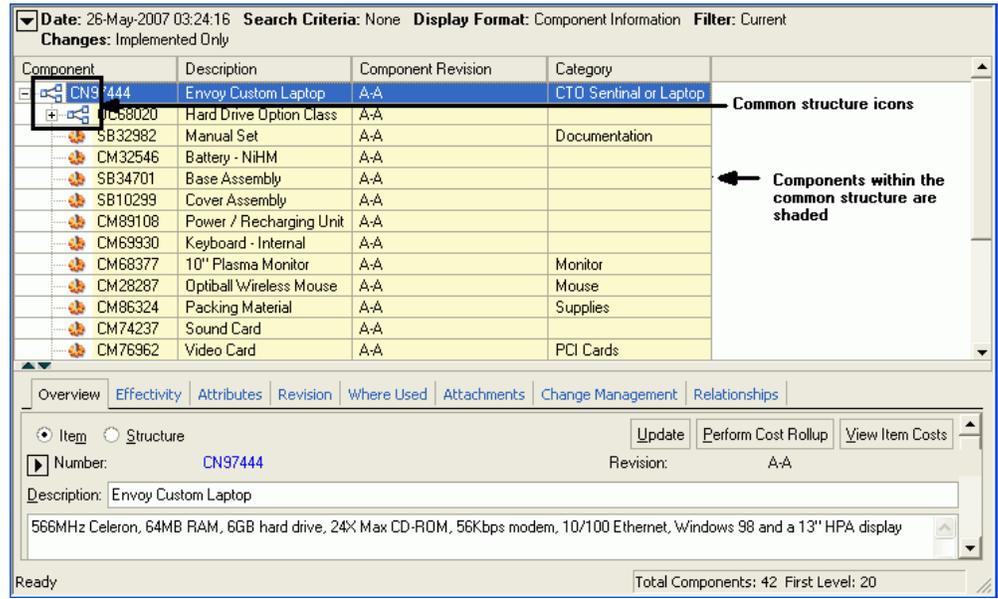
- Operation Sequence
- Include in Cost Rollup

The following notes apply while creating common structures:

- User cannot reference another structure as a common if that structure also references a common. In other words, user cannot create a chain of common references.
 - User can only reference another structure as a common if it has the same structure name assigned to it.
 - If the current structure that a user is creating is a manufacturing bill, the common bill must also be a manufacturing bill.
 - User can only reference bills from organizations that have the same item master organization as the current organization.
 - If components already exist for the new bill, user cannot reference another bill as a common.
 - If the new assembly is in a different organization than the bill you reference, all component items must exist in the new bill's organization. This also applies to substitute components.
1. Open the create structure dialog.
 2. Provide the information related to the structure being created. (Refer previous section for more information)
 3. In the common structure section on the create structure dialog, choose the scope as organization.
 4. Enter the organization for the item to reference as a common bill.
 5. Enter the structure to use as a common.
 6. Optionally, select the Enable Attributes Update box. Selecting this box enables you to update the following fields in the bills that reference this common bill:
 - Supply Type
 - Sub Inventory
 - Locator
 - Operation Sequence

- Include in Cost Rollup
7. Choose OK.

A window opens that displays all components in the structure. The common structure has an icon indicating that it is common and all of the components in the common structure are shaded.



Related Topics

See: Creating Structure Names, page 4-5

See: Viewing Structure Information, page 12-59

See: Defining Structures, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*

Creating a Bill of Material , *Oracle Bills of Material User's Guide*

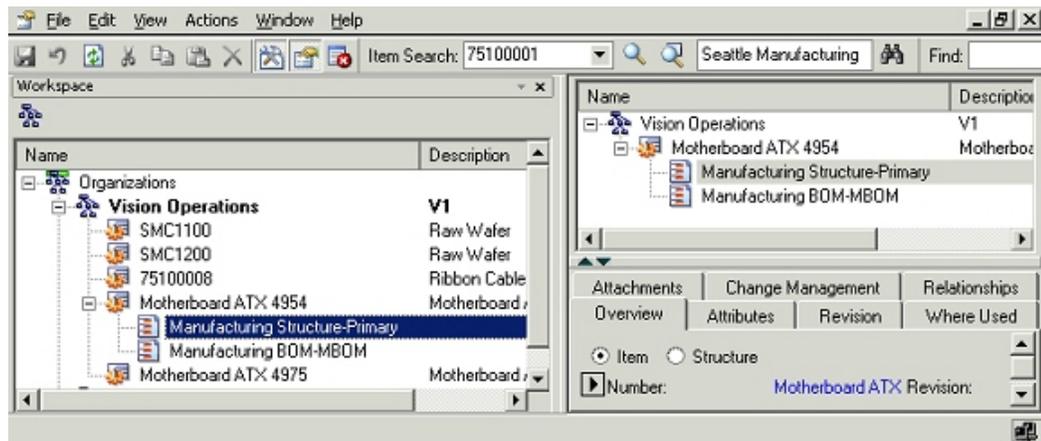
Referencing Common Bills and Routings, *Oracle Bills of Material User's Guide*

Viewing Structure Information

You can use the Product Workbench to view serial, date, revision, and unit effective structures as well as create and edit all but the serial effective structures.

The structures that exist for an item are listed as children nodes under the item node in the favorites list and/or the item search results windows.

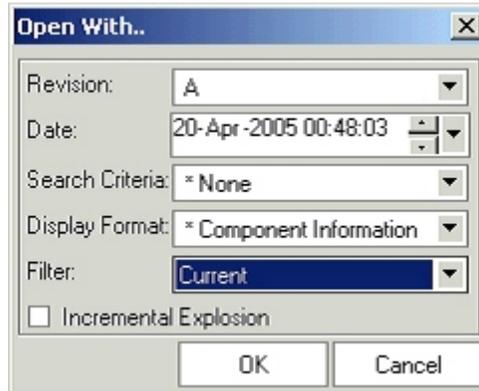
Structure list for an item



To open structures, you can do one of the following:

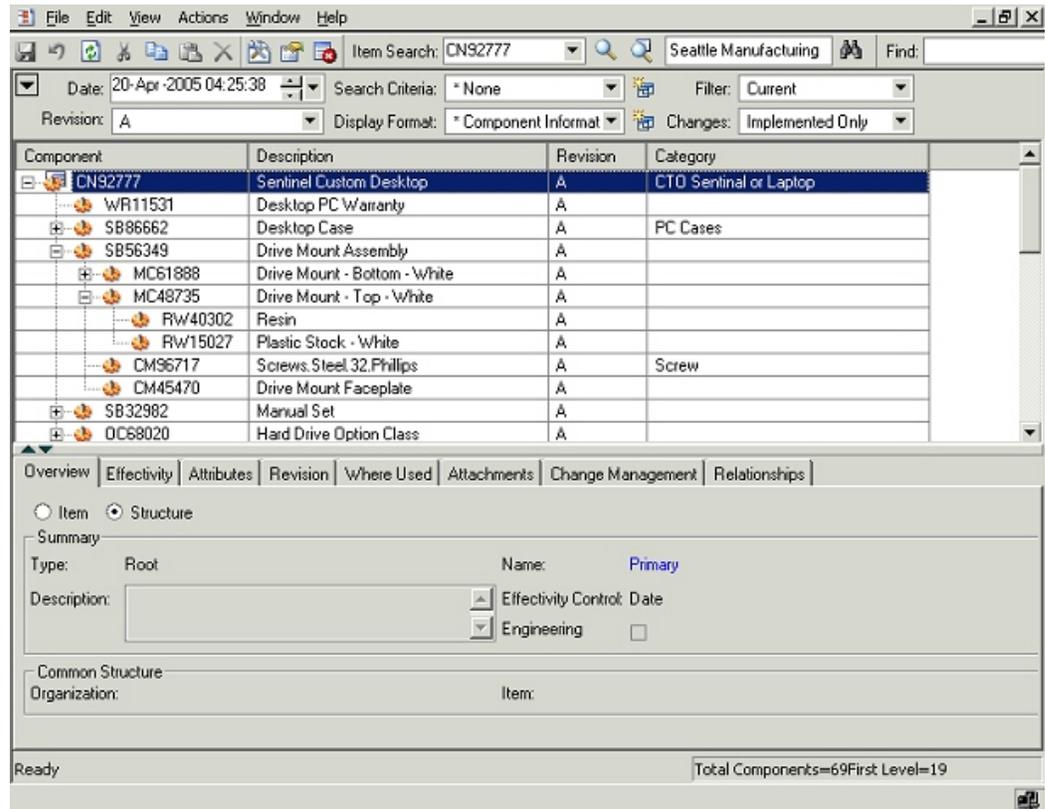
- **Double click the structure node:** Default values for explosion criterion are used to explode the structure. For unit and serial effective structures, user is required to provide unit number/serial number during this action.
- **Select structure node and right click Open action.** Default values for explosion criterion are used to explode the structure. For unit and serial effective structures, user is required to provide unit number/serial number during this action.
- **Select structure node and right click Open with action.** A dialog is opened up with default values for the explosion criterion. User can change these values for exploding the structure against a different criterion.

Open With



The structure is exploded according to the explosion criteria, and is displayed in a new window. This window provides a multi-level view of the exploded structure.

Exploded Structure



Change the selection in any of the following context switchers to change the information seen in the structure window as follows:

- **Revision:**

This poplist lists all the revisions for the end item that have and have not been implemented. Based on the selection in this poplist, revision specific information changes appropriately. If the selected revision was an unimplemented revision, the value selected in the change order poplist will reflect the change order against the unimplemented item revision.

- **Date:**

Specify the date on which the structure needs to be exploded. Based on the selected date, the selection in revision poplist also changes to the revision effective on the selected date.

- **Search Criteria:** This poplist lists the criteria templates created by administrator as well as the user for the structure type. On selecting a criteria template, only those components that satisfy the criteria are listed in the structure. Intermediate nodes are listed even though they do not satisfy the criteria. This functionality is especially

useful to filter only relevant components in a bill having a large number of components.

- **Display Formats:** This poplist lists the display formats created by administrator as well as the user for the structure type. On selecting a value, the columns selected in the format are displayed for the structure. This reduces the clutter in the UI by displaying only that information that the user wants to view.
- **Filter:** This drop list determines which rows to display based on the effective dating. Options include all dates, current and future dates, or the current date only.
- **Unit Number From:**
This context switcher appears only in context of a unit effective structure and lists different unit numbers. User can choose a value to show only those components that are effective from the selected unit number.
- **Changes:** This poplist contains the following values:
 1. **Current:** This value is selected by default when a structure is exploded. On selecting this value, all the implemented components/information as on the explosion date are shown
 2. **Specific change order number:** On selecting a pending change order, the structure is shown in the redline mode. The changes are shown highlighted as per the display scheme. e.g. a newly added component is shown in blue color. Based on the effectivity date of the selected change order, the selection in the item revision poplist changes appropriately.
 3. **Current and Pending:** Selecting this value shows all the implemented information as well as pending changes. The pending changes could have been specified through multiple change orders. The pending changes are shown in redline mode.

Structure information is organized on different tabs in the 'Details' window:

Overview tab

Users need to select a subassembly node in the structure window to enable the structure radio button and then select the radio button. For the leaf nodes in a structure, the radio option is greyed out since they do not have a structure underneath them.

Basic structure header information like structure type, structure name, effectivity control, description and assembly type (engineering/manufacturing) is displayed. In case of a structure referencing another one, the organization and item fields in the common structure section are populated.

Users with edit privileges on the selected item can modify the structure description on this tab. Users can also navigate to html structure details pages by clicking the hyperlink against the structure name.

Overview tab

Component	Description	* Component Information
CN92777	Sentinel Custom Desktop	A CTO Sentinel or Laptop
CM42047	Power Cord	A
CM86324	Packing Material	A
SB56349	Drive Mount Assembly	A
MC48735	Drive Mount - Top - White	A
MC61888	Drive Mount - Bottom - White	A
CM96717	Screws, Steel, 32, Phillips	A Screw
CM45470	Drive Mount Faceplate	A

Overview | Effectivity | Attributes | Revision | Where Used | Attachments | Change Management | Relationships

Item Structure

Summary

Type: Root Name: Primary

Description: [] Effectivity Control: Date
Engineering

Common Structure

Organization: [] Item: []

Ready Total Components=8First Level=4

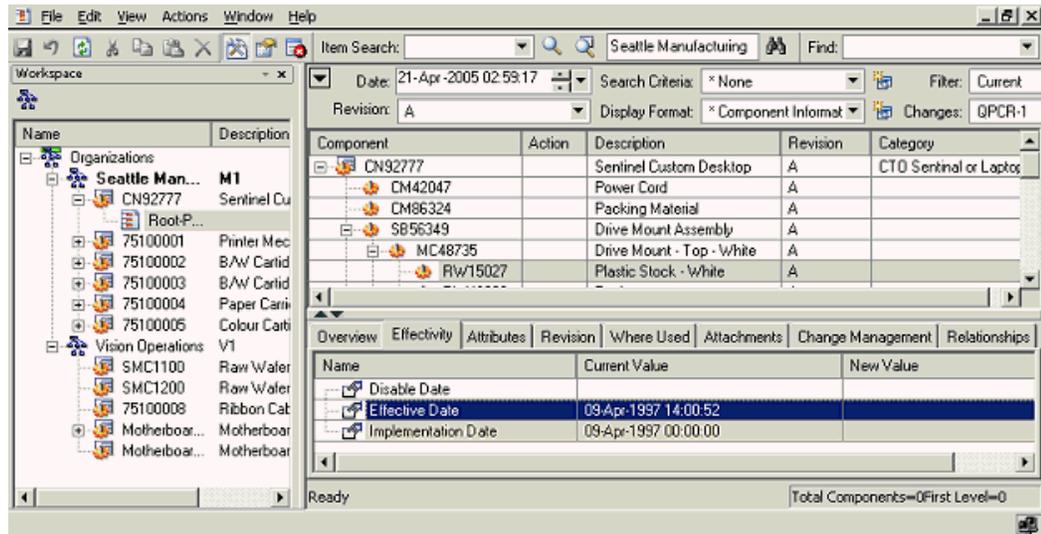
Effectivity tab

Effectivity information represents the rules that govern whether a component is active in the structure hierarchy.

The effectivity from and to information for the component (subassembly as well as leaf nodes) selected in structure window is shown on this TAB. The data type for effectivity information is dependent on the effectivity control for the structure as follows:

- Date Effective Structure - Date.
- Revision Effective Structure - Item revisions of component's immediate parent.
- Serial Effective Structure - Serial numbers of the end item
- Unit Effective Structure - Unit numbers of the end item.

Effectivity tab



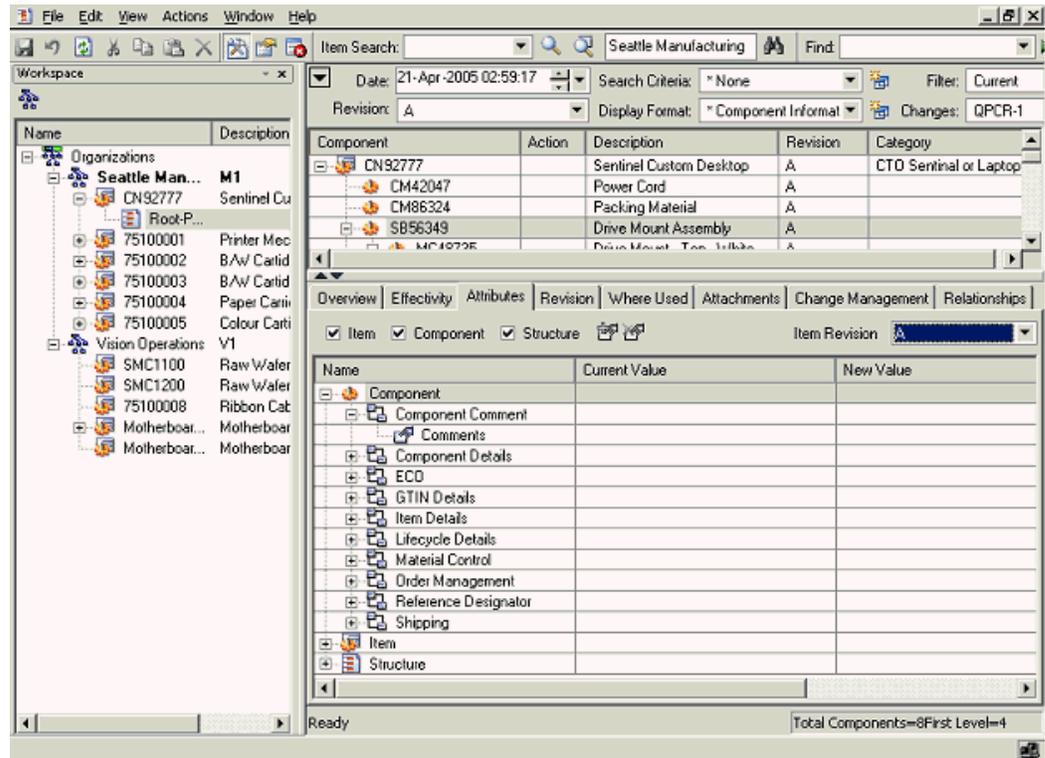
Attributes tab

This tab shows the structure and component attributes (both seeded and user-defined) in a hierarchical view under the "structure" and "component" nodes respectively.

To view structure attributes, select a subassembly node in the structure and check the structure checkbox on the attribute tab. A new node "structure" will appear on the UI and user can expand the node to view different structure pages/attributes.

To view component attributes, select a component (subassembly or leaf level nodes) in the structure and check the component checkbox on the attribute tab. A new node "component" will appear on the UI and user can expand the node to view different component pages/attributes.

Attributes tab



Remaining tabs:

The following tabs function the same for items and structures. For a description of each tab, see: *Viewing and Editing Item Information* within Item Management, page 12-3.

- Revision
- Where Used
- Attachments
- Change Management
- Relationship

Editing Structure Information

Bulk Edit

A structure contains information on the parent item, components, attachments, and descriptive elements.

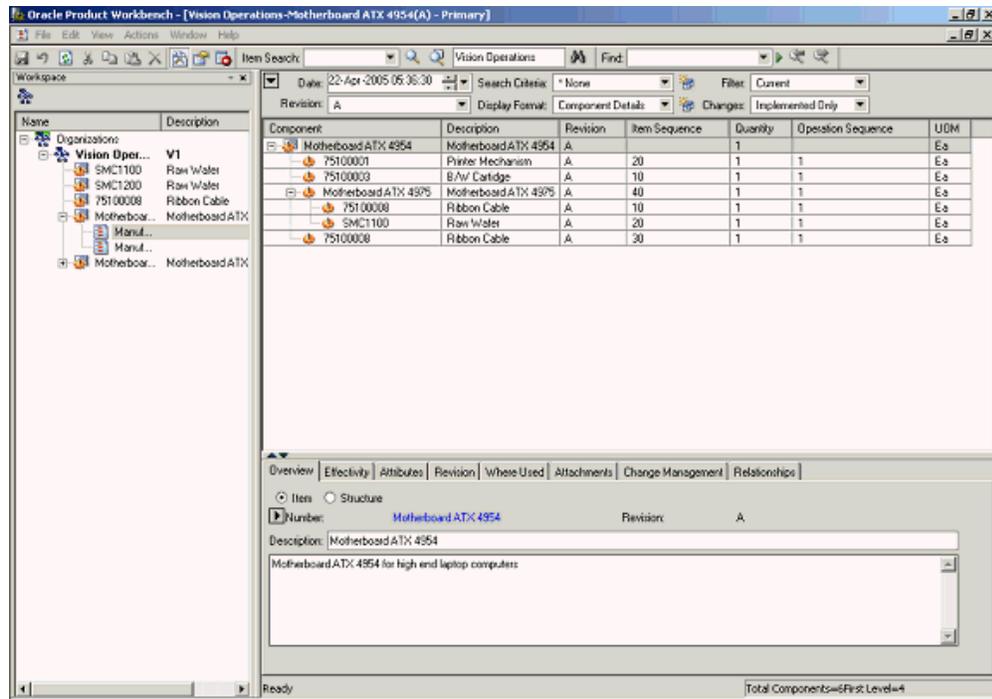
Sometimes, similar changes need to be made to component attributes and item

attributes for a large number of components in the structure. In the Product workbench, you can use the bulk edit feature to simultaneously effect similar changes to a large number of components in a structure.

Using Bulk Edit:

1. Select an item from the Favorites list, and launch its bill.

Bulk Edit: Launch Bill

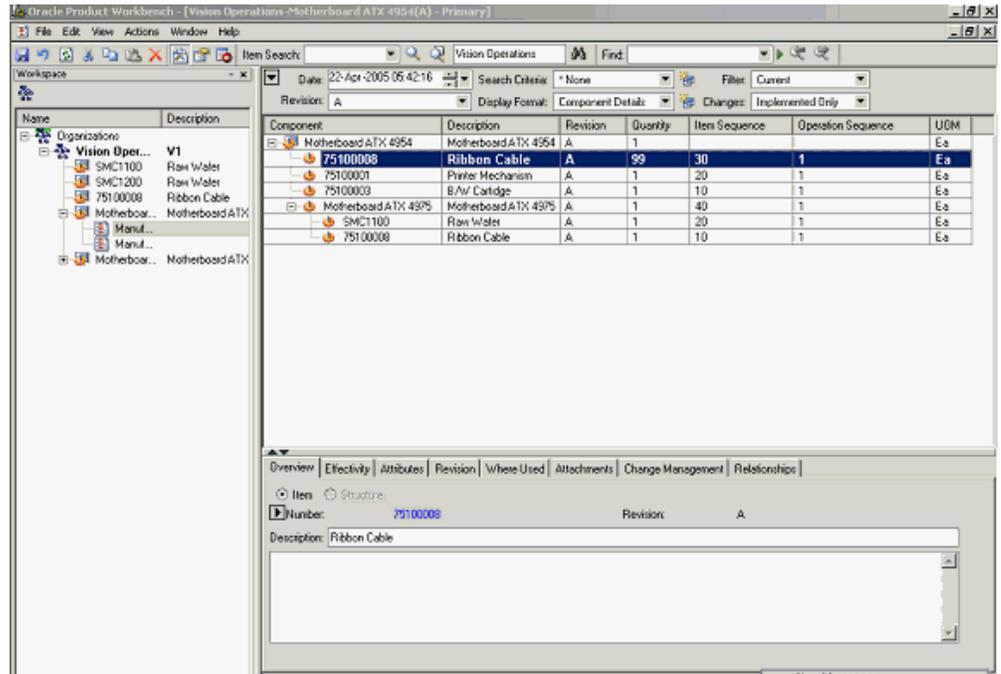


2. Modify any component or item attribute.

The structure is displayed in the mark up mode with the change highlighted.

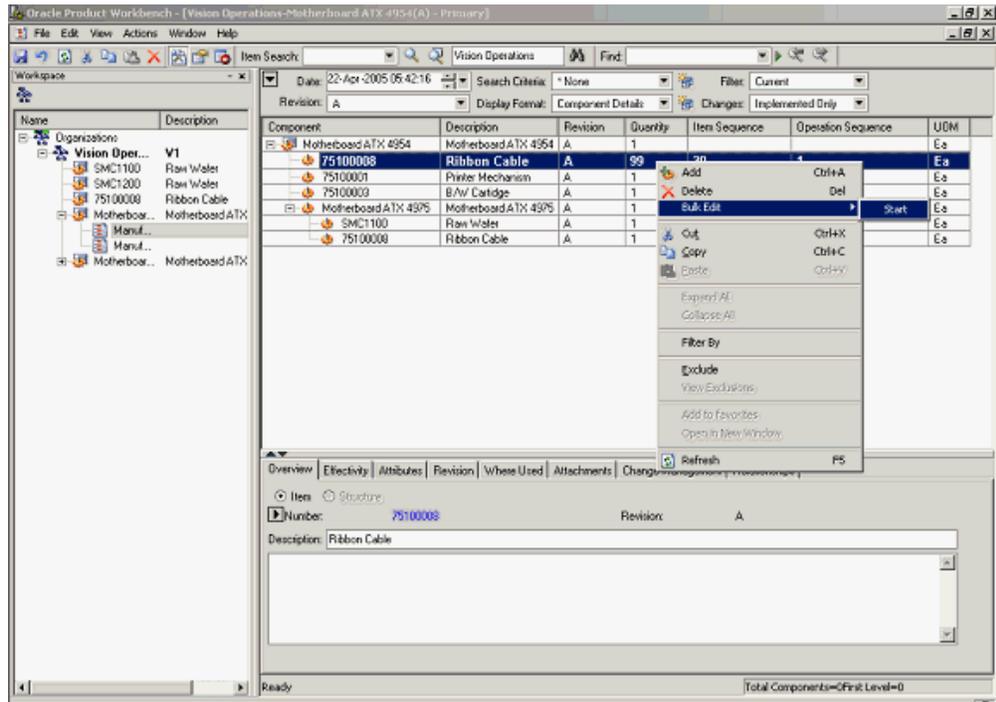
In the example below, the quantity of component#75100008 (at level 1 in the structure) is changed from 1 to 99

Example of Component Modification



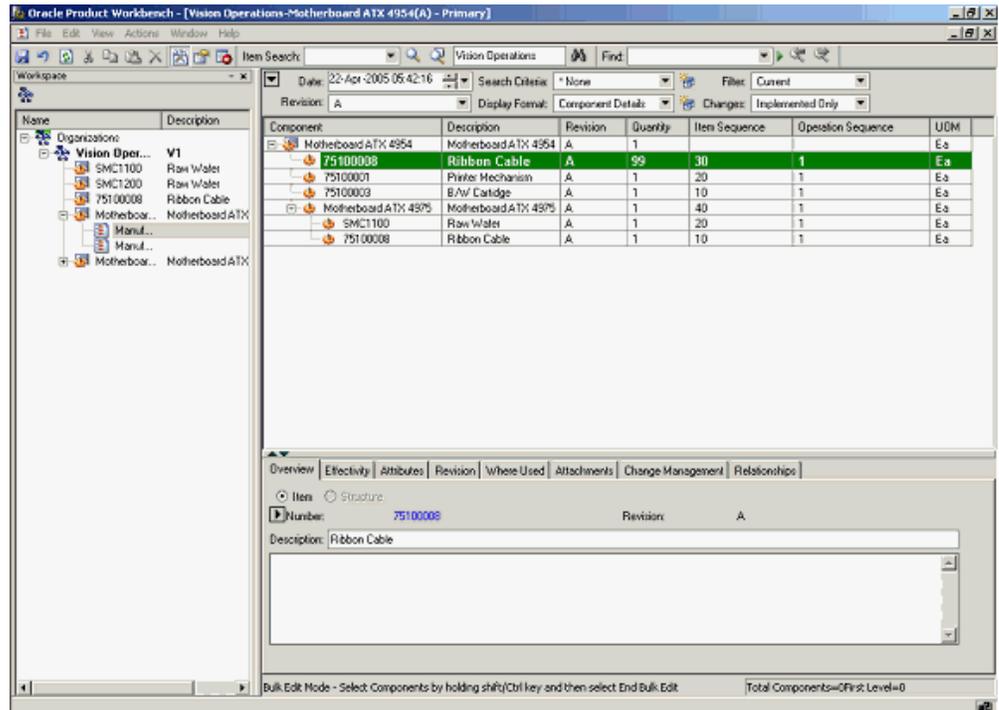
3. Select the component whose attribute value you have just changed, and launch the Bulk Edit Start action from the right click menu.

Bulk Edit - Start



4. The structure is now displayed in the bulk edit mode.

Structure Display in Bulk Edit Mode



5. Select all other components for which this change in attribute value should be implemented.

Note: You can use the [SHIFT] and [CTRL] keys to select the components.

Bulk Edit - Component Selection

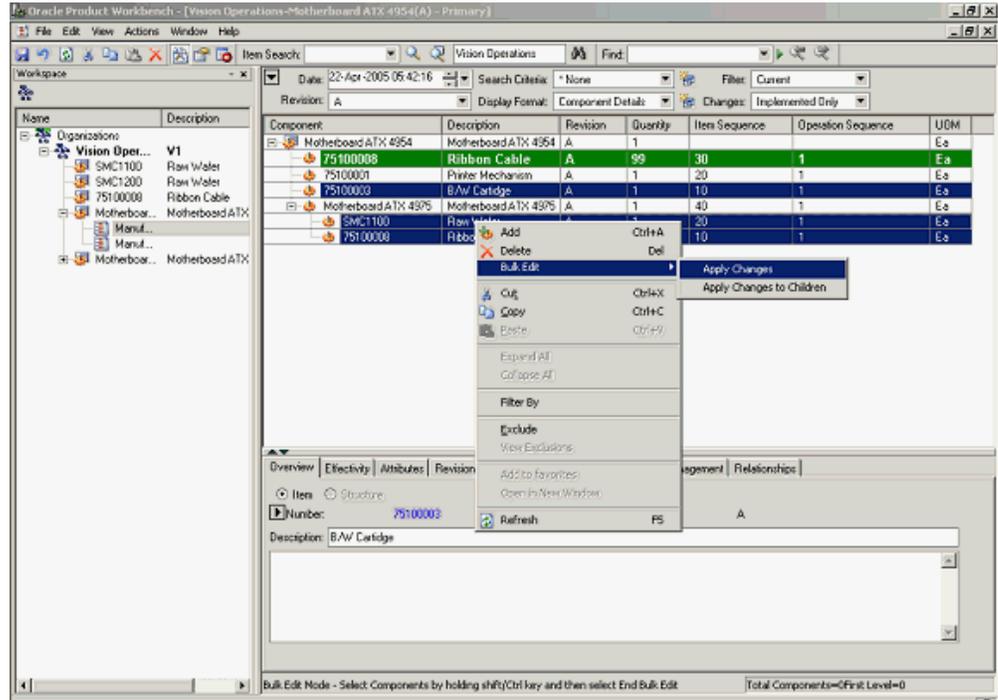
The screenshot displays the Oracle Product Lifecycle Management (PLM) software interface. The main window is titled "Grade Product Workbench - [Vision Operations-Motherboard ATX 4954(A) - Primary]". The interface is divided into several sections:

- Workspace:** A tree view on the left showing the product structure. The selected component is "Motherboard ATX 4954".
- Table:** A table listing components with columns: Component, Description, Revision, Quantity, Item Sequence, Operation Sequence, and UDM. The selected component is "75100008 Ribbon Cable".
- Details:** A detailed view at the bottom showing the selected component's information, including "Number: 75100008" and "Revision: A".

Component	Description	Revision	Quantity	Item Sequence	Operation Sequence	UDM
Motherboard ATX 4954	Motherboard ATX 4954	A	1			E.a
75100008	Ribbon Cable	A	99	30	1	E.a
75100001	Printer Mechanism	A	1	20	1	E.a
75100003	B/W Cartridge	A	1	10	1	E.a
Motherboard ATX 4955	Motherboard ATX 4955	A	1	40	1	E.a
SMC1100	Raw Water	A	1	20	1	E.s
75100008	Ribbon Cable	A	1	10	1	E.s

6. Launch Bulk Edit - Apply Changes action from the right click menu.

Bulk Edit - Apply Changes

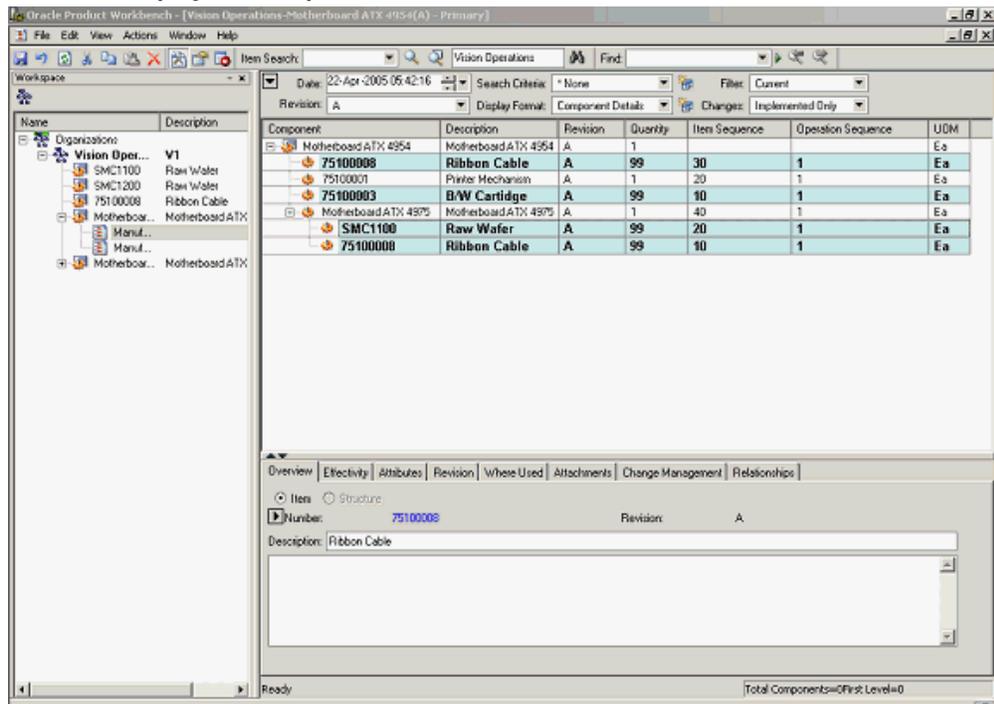


You can also select the **Bulk Edit -- Apply Changes** to Children action from the right click menu to change the attribute value of all children in a sub-assembly.

Thus, instead of independently selecting component 'SMC1100' & '75100008' (which is available in the second level of the structure), you can select just the sub-assembly 'Motherboard ATX 4975' and launch the **Bulk Edit -- Apply Changes** to Children action. This would apply the attribute value changes to the sub-assembly 'Motherboard ATX 4975' as well as its children 'SMC1100' & '75100008'.

7. The structure is displayed in the mark up mode with the attribute values of all the selected components suitable modified.

Structure Display - Mark Up Mode



8. Save your work. The attribute value changes are implemented for all the selected components.

Note: If the structure type is under change control, then you need to create a change order to implement these changes.

Drag and Drop

Drag and drop features in product workbench greatly improve the efficiency during structure editing. User can select an item, then drag and drop it on a node in the structure window. Nodes from favorite items list, item search results and structure window can be dragged and dropped to the target structure. This will add a leaf level node or a subassembly based on the nature of the source item.

The following notes apply while executing drag and drop:

- Drag and drop across organizations is not supported.
- All component validation rules get honored during drag and drop
- Drag and drop between different structure effectivities is not allowed
- A multi-level structure copy gets executed when a user drags and drops a

subassembly from one structure to another.

Deleting or Disabling Components

The procedure below describes how to delete/disable a component from a structure.

1. Select a node in the structure window.
2. Choose delete action from the right-click context menu or hit the delete key.
3. The delete node and components under it are all shown in the markup mode as per the configured color scheme.
4. Save the changes directly or on a change order based on the change policy.

Copy-Paste

The procedure below describes how to copy and paste nodes from one structure to another.

1. Select a node in structure window and perform a copy action from the right click menu. This copies the selection to the clipboard.
2. Select a node in the target structure and perform a paste action from the right click menu. This action adds the copied node to the target node in markup mode.
3. Save the changes directly or on a change order based on the change policy.

Note: Components/subassemblies gets added to the second structure without affecting the first structure. System behavior is same as in case of drag and drop.

Cut-Paste

The procedure below describes how to cut and paste nodes from one structure to another.

1. Select a node in structure window and perform a cut action using the right click option. This copies the selection to the clipboard
2. Select a node in the target structure and perform a paste action using the right click option. This action deletes the cut node from the source structure and adds it to the target structure. The changes in both the target as well as source structure are in markup mode.
3. Save the changes directly or on a change order based on the change policy.

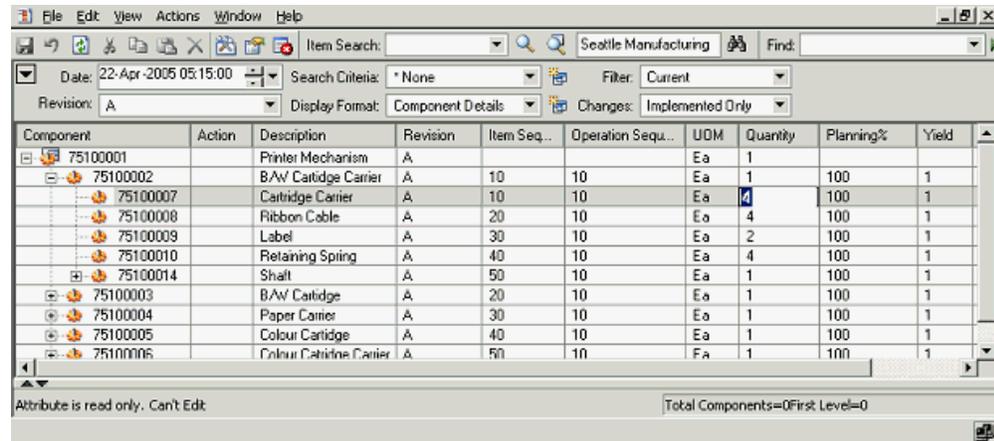
In-place Editing or Excel like Editing

In-place editing of attributes is supported in product workbench. Users can double

click on an attribute value and modify the same "in place". Based on the valueset attached to the attribute, the values that users can specify are restricted. On modification, the values are not directly saved; they are retained in the markup mode (as per the color scheme configured on per user basis) and users can save these changes directly or through a change order based on the change policies.

The following procedure describes how to perform in-place editing of attributes. The same procedure applies to item, component and structure attributes:

In-place Editing



1. Double click on an attribute value displayed in the structure window. The field changes to edit mode based on the display type specified for the attribute. For example, a poplist is available to choose values from in case the display type for the attribute has been set as a poplist.
2. Provide a new value in place. Based on the valueset attached to the attribute, the values that can be specified get restricted.

Note: Certain attributes in the structure window cannot be edited. For e.g. component, description, UOM etc. Double clicking on these values will not open the UI in edit mode.

3. Save the changes directly or on a change order based on the change policy.

Using Defined Structure Names and Types

You can further classify alternate structures within a given structure type using structure names (previously known as "Alternate Designator"). Structure names allow you to create alternate design and manufacturing bills for a given item.

You can classify various structures in your business environments using Structure

Types. Additionally Structure Types allow you to: Control effectivity of the components for a specific structure type, like date effectivity or revision effectivity etc,

User defined attribution – different types of structures and its components will have different attribution requirements, For Example, when performing analysis of various scenarios, every structure may need to capture the weight and cost attributes. Similarly components may need to capture attributes like "Mean Time between failure" which are unique to a component usage in a specific structure.

Attachment Categories – The types of documents required would change by the structure type. For eg. a Requirements structure will require a Marketing Analysis whereas Engineering structure may need a Drawing.

Viewing Structures in the Context of a Change Order

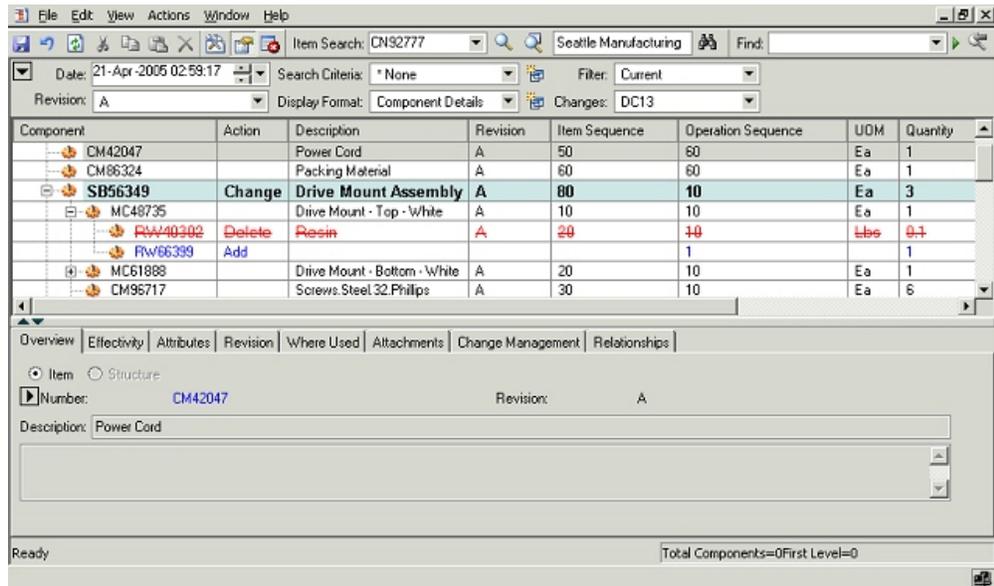
How to view structures in a change order:

You can view a structure in markup mode for changes specified through a change order. You needs to select appropriate value in the "changes" context switcher in structure window. In the markup mode, these changes are shown highlighted (For example, the newly added components be shown in blue color, and deleted components be shown struckthrough in red color etc) and are very easy to visualize.

The procedure below describes how to view structure in context of change orders:

1. Open the structure using the procedure described in the view structure section.
2. Select a change order in the changes poplist available in the header section of the structure window to view the structure in markup mode. All the changes specified in the product information through the selected change order are shown highlighted as per the display scheme configured by the user.

Structure information in context of a change order



- Optionally, specify more changes to the product information and click on save button. These new changes get saved in the change order in whose context the structure was being viewed.

Note: New changes get saved to the change order only if the user has edit privileges on the change order and the change order is in a state where changes are allowed.

How to create a new structure through a change order:

Users with edit privileges on an item can create/edit structure for it. User is enforced to create/edit structure through a change order in case the change policy requires a Change Order for structure changes. User can also create/edit structure through a change order even for those items that do not require change order for structure changes. However, this step is optional and user is not enforced to create a change order in that scenario.

The procedure below describes how to create a new structure through a change order:

- Create/edit a structure in markup mode as per the procedure outlined for the create structure flow.
- Review the structure information and make necessary changes. Note that the structure information is available is displayed in the markup mode at this stage and is not yet saved.

3. Choose to create a change order from the menu (Actions->Create Change Order) to open the create change order dialog. Alternately, go to the change management TAB in the details section of the structure window and create new change order by clicking on appropriate icon.

Create Change Order

The screenshot shows a dialog box titled "Create Change Order - Enter Header Information - Seattle Manufacturing". The dialog contains the following fields and controls:

- Category: Change Order (dropdown)
- Change Type: Design Change (dropdown)
- Change Number: DC13 (text field)
- Change Name: Modifications in Drive Mount of Desktop (text field)
- Description: Modifications in Drive Mount of Desktop (text area)
- Item: CN92777 (text field with selection icon)
- Revision: (empty dropdown)
- Additional Information section:
 - Assigned To: Amit Bansal (text field with selection icon)
 - Requestor: Amit Bansal (text field with selection icon)
 - Priority: High (dropdown)
 - Reason: Quality (dropdown)
 - Source Type: Internal (dropdown)
 - Source Name: Alain Dupont (text field with selection icon)
 - Organization Hierarchy: (empty text field with selection icon)

At the bottom of the dialog are three buttons: "< Back", "Next >", and "Cancel".

4. Choose a change order based category from the category poplist.
5. Choose a change order type from the change type poplist.
6. Specify the change order number, name and description in respective fields. In case of auto generated number, the number field is uneditable and the value is generated based on the auto numbering scheme specified for the selected change order type.
7. The item field gets defaulted to the parent item for which the structure is being created. User can choose a different item also. The revision field is also defaulted to

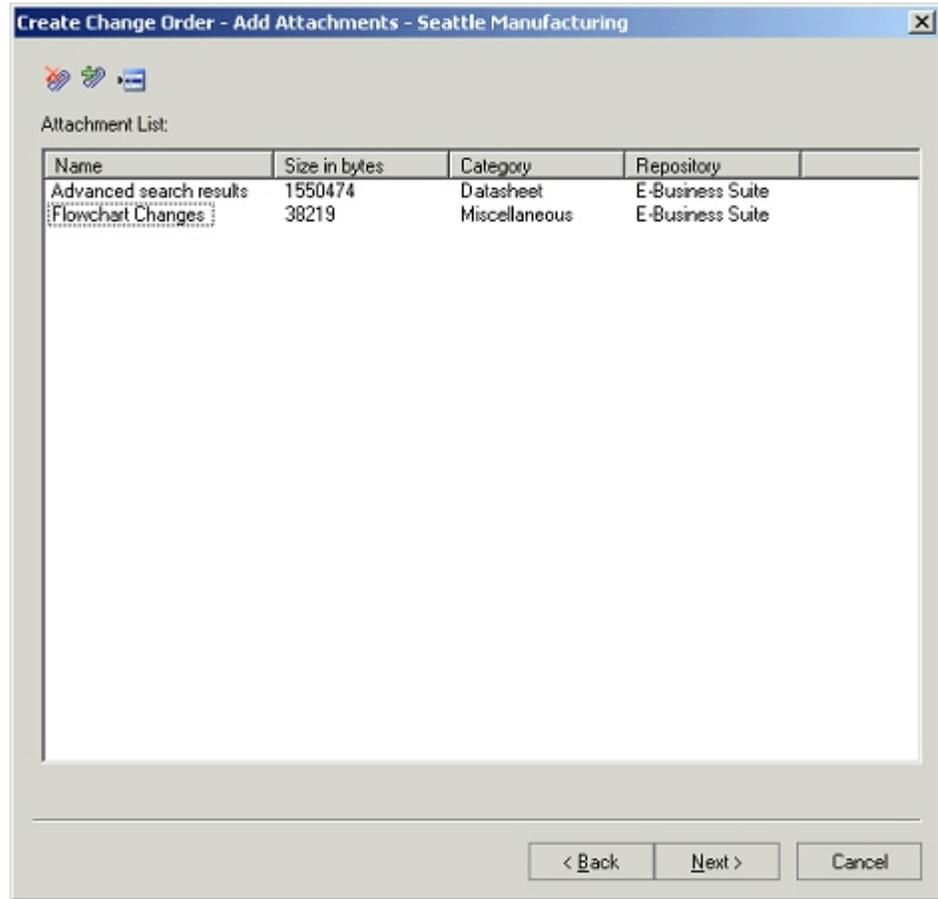
the current item revision. Please note that item and item revision fields are editable based on the subject type specified for the selected change order type.

8. Based on the change order assignment rules specified for the selected change order type, the assigned to field is gets populated. User can change the assignee to a different person or a group.
9. The requestor field is defaulted to the person name from whose login the change order is being created. User can change the requestor to a different person on whose behalf the change order is being requested.
10. Specify a change priority and a reason. The values in the respective poplist are restricted as per the configuration carried out for the change order type.
11. Optionally, specify a source type and a source name.
12. In case of a global change order, specify the organization hierarchy where the change needs to be propagated.

Note: Based on the primary attributes configured for the change order type, certain attributes are shown in uneditable mode on the above dialog

13. Click on the next button to go to the attachment screen in the change order creation flow. User can create image markups and attach them to the change order besides other files. All attachments are stored in EBS repository only. Refer the attaching markups to issues/change order section for detailed procedure on creating and attaching markups.

Change Order Attachment List



14. Click on the next button to go to the revised item screen in the change order creation flow.

Revised Items List

Where Used

Lines

Item	Description	Current Revision	New Revision	Structure N
CN92777	Sentinel Custom Desktop	A	B	Primary
MC48735	Drive Mount - Top - White	A	C	Primary
MC48735	Drive Mount - Top - White	A		Primary

Changes

Structure | Item Attribute Details

Action	Component	Description	Revision	Effectivity From
Change	SB56349	Drive Mount Assembly	A	17-Apr-1997 01:06:38

Launch Workbench Submit

< Back Finish Cancel

15. Review the changes captured on the change order (component changes as well as item attribute changes can be viewed in this release). All the changes specified in the markups should get captured.
16. Optionally, specify new revisions for the revised items. A user needs to double click on the new revision column to open the field in editable mode and then provide a new revision in-place.
17. Optionally, perform the where used query on the revised item and choose to add higher-level assemblies as revised items. Provide a new revision for these assemblies in the revised items list.

Revised Item Where Used

	Description	Structu...	Item Catalog Category	Status	Revisor
[-] CN92777					
[+] CN92777*1	Sentinel Configure to...	Primary		Active	A
[+] CN92777*232	Build Your Own Des...	Primary		Active	A
[+] CN92777*251	Sentinel CTO, 48MB...	Primary	CTO Sentinel or Laptop	Active	A
[+] CN92777*334	CTO Sentinel or Lap...	Primary	CTO Sentinel or Laptop	Active	A
[+] CN92777*335	Build Your Own Des...	Primary	CTO Sentinel or Laptop	Active	A

18. On the revised item list screen, check the submit checkbox to submit change order to workflow upon creation. Unchecking the checkbox will lead to creation of the change order in draft status.
19. Check the launch workbench checkbox to launch the change order details in html workbench upon successful creation.
20. Click on the Finish button to create the change order.

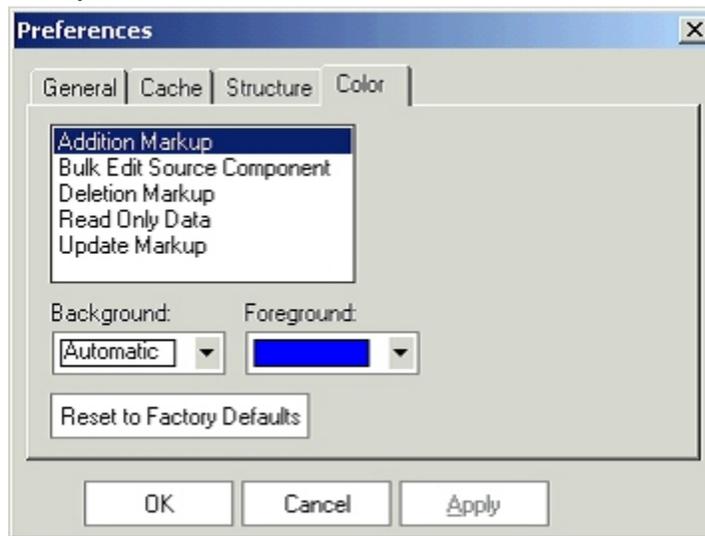
Marking Up Structures

Oracle Product Workbench provides a very intuitive and powerful user interface for authoring structure changes. Changes authored for structures are shown visually using industry standards for redlining and markup. You can author add, disable or modify any component attributes in a single interface. Redline/markup colors can be set based on your own preferences. You can save the changes to a structure inline or choose to process it through a formal change order. You can also review the redlines (changes) for a structures once a change order has been saved in the same interface. Additionally you can make further changes and add them to the same change order or to any existing pending change order.

How to configure markup colors:

Oracle Product workbench enables each user to configure the markup colors as per their preferences. These settings are used to highlight modifications to the product information and help in improving the ease of visualization of changes.

Markup colors



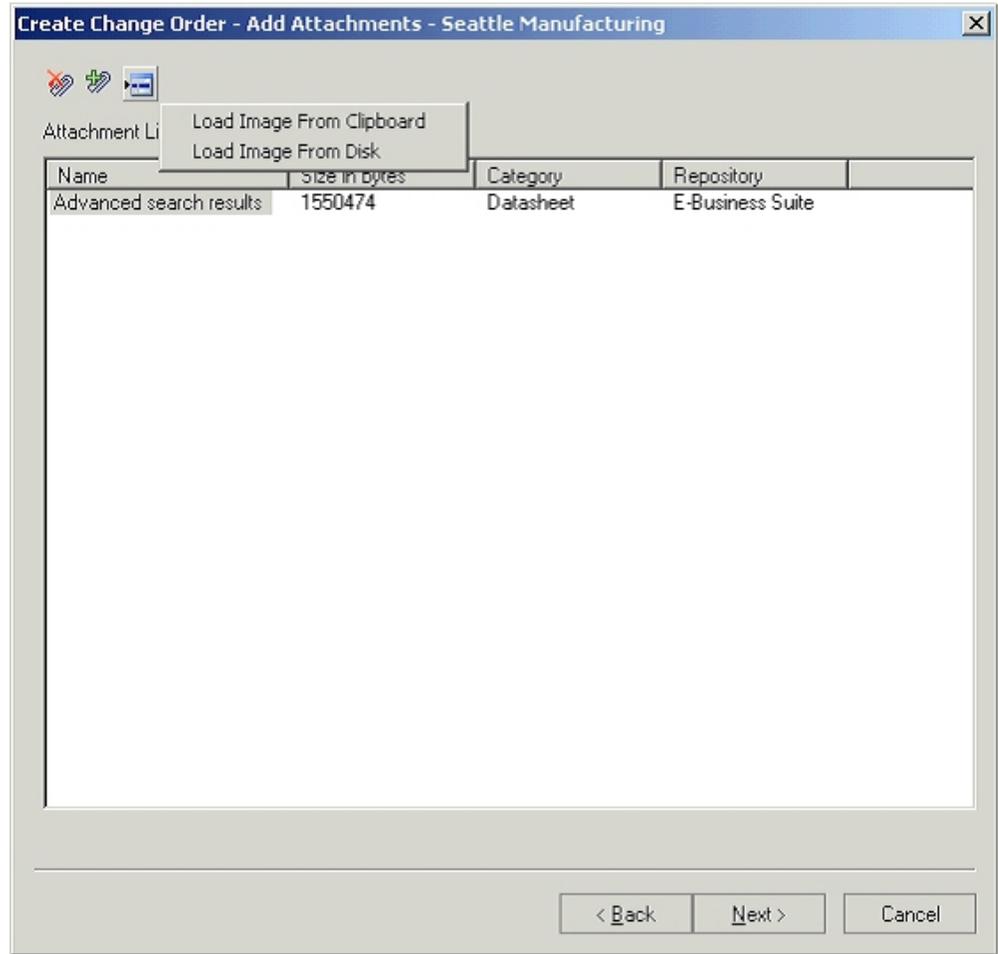
1. In the Product Workbench, invoke the Preferences dialog from the main menu (Edit->Preferences)
2. Navigate to the Color TAB.
3. Select the type of markup and specify a combination of background and foreground colors for the selected markup type. E.g. if the settings for Addition markup is an automatic background and a blue foreground, any new component addition to the structure will be shown in blue font color.
4. Click the Apply button.
5. To clear the user-settings and restore to the seeded color combination, click on the Reset to Factory Defaults button and hit on the apply button.

Attaching markups to change orders and issues:

The procedure below describes how to create image markups and attach them to issues and change orders in Product Workbench:

1. On the create change order/issue flow, navigate to the attachment list screen.
2. Click on the image attachment icon and choose to load an image from the clipboard or from an existing file from the disk.

Image Attachments



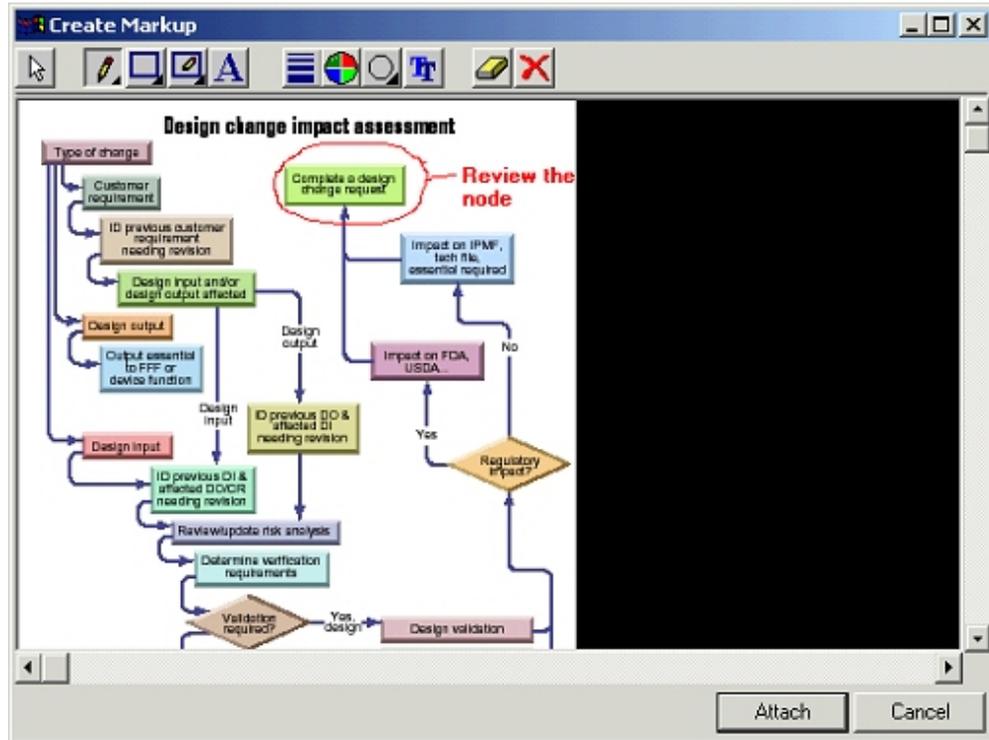
3. On the create markup screen, use the markup tools to draw lines with arrows or outline shapes, for example, to highlight areas in the image.

Markup Toolbar



4. Use the text tool to create text labels to provide a description.
5. You can also pick items, drag them around, and modify line/font colors, font face, line weights, and fill etc.

Create Markup Screen



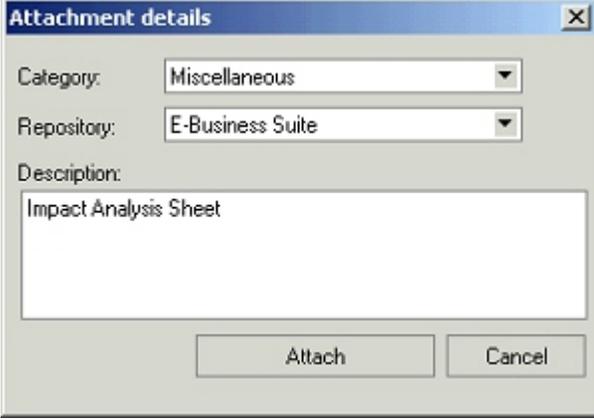
6. After the markup is completed, click on the attach button. Provide a name for the markup in the popup.

Create Markup as

The screenshot shows a dialog box titled "Create Markup As...". It has a "Name:" label followed by a text input field containing the text "Impact Assessment". Below the input field are two buttons: "OK" and "Cancel".

7. Choose the OK button, and provide the attachment category and description on the attachment details dialog. Note that only EBS repository is supported in the current release of Product Workbench.

Attachment details

A dialog box titled "Attachment details" with a close button (X) in the top right corner. It contains three fields: "Category" with a dropdown menu showing "Miscellaneous", "Repository" with a dropdown menu showing "E-Business Suite", and "Description" with a text area containing "Impact Analysis Sheet". At the bottom, there are two buttons: "Attach" and "Cancel".

Attachment details

Category: Miscellaneous

Repository: E-Business Suite

Description: Impact Analysis Sheet

Attach Cancel

8. Choose the Attach button. The markup is listed on change order/issue attachment screen at the end of this step.

Creating New Issues or Change Orders

How to create a new issue or change order in the Product Workbench:

The procedure below describes how to create a new issue or change order in the Product Workbench:

1. Choose to create an issue from the menu (Actions->Create Issue) to open the create issue dialog. Alternately, go to the change management TAB in the details section of the structure window and create new issue by clicking on appropriate icon.

Important: The process used to create a new change order using the Product Workbench is similar to that of creating a new issue. Any differences will be noted.

Create Issue

Create Issue - Enter Header Information - Seattle Manufacturing [X]

Category: Issue

Issue Type: Safety Iss

Issue Number: QPCR-1

Issue Name: Problem Countermeasure report for Safety Sy

Description: Issues with the safety system of Sentinel Desktop

Item: CN92777 Revision:

Additional Information:

Assigned To: Supplier Core Group Source Type: Customer

Requestor: Amit Bansal Source Name: Kim Reynolds

Priority: Urgent

Reason: Function

< Back Next > Cancel

The screenshot shows a software dialog box titled "Create Change Order - Enter Header Information - Boston Manufacturing". It contains several input fields and a text area:

- Category:** A dropdown menu with "Change Order" selected.
- *Change Type:** A dropdown menu with "ECO" selected.
- *Change Number:** A text field containing "ECO137".
- *Change Name:** A text field containing "New component added at Op Seq 25".
- Description:** A large text area containing the text "Supplier has taken the old component out of production, and we will now use the newer version." with a vertical scrollbar on the right.
- Item:** A text field containing "AS54888".
- Revision:** A dropdown menu with "A-A" selected.

2. Choose an issue or change order based category from the category poplist.
3. Choose an issue type or change order type from the change type poplist.
4. Specify the issue or change order number, name and description in respective fields. In case of auto generated number, the number field is uneditable and the value is generated based on the auto numbering scheme specified for the selected issue or change order type.
5. The item field gets defaulted to the selected item. User can choose a different item also. The revision field is also defaulted to the current item revision. Please note that item and item revision fields are editable based on the subject type specified for the selected issue or change order type.
6. Based on the issue or change order assignment rules specified for the selected issue or change order type, the assigned to field is gets populated. Users can change the assignee to a different person or a group.
7. The requestor field is defaulted to the person name from whose login the issue is being created. User can change the requestor to a different person on whose behalf the issue is being requested.
8. Specify a change priority and a reason. The values in the respective poplist are restricted as per the configuration carried out for the issue type.
9. Optionally, specify a source type and a source name.

10. Choose the Next button to go to the attachment screen in the issue creation flow. User can create image markups and attach them to the issue besides other files. All attachments are reposted in EBS repository only. Please refer to the attaching markups to issues/change order section for detailed procedure on creating and attaching markups.

Issue Attachment List

Attachment List:

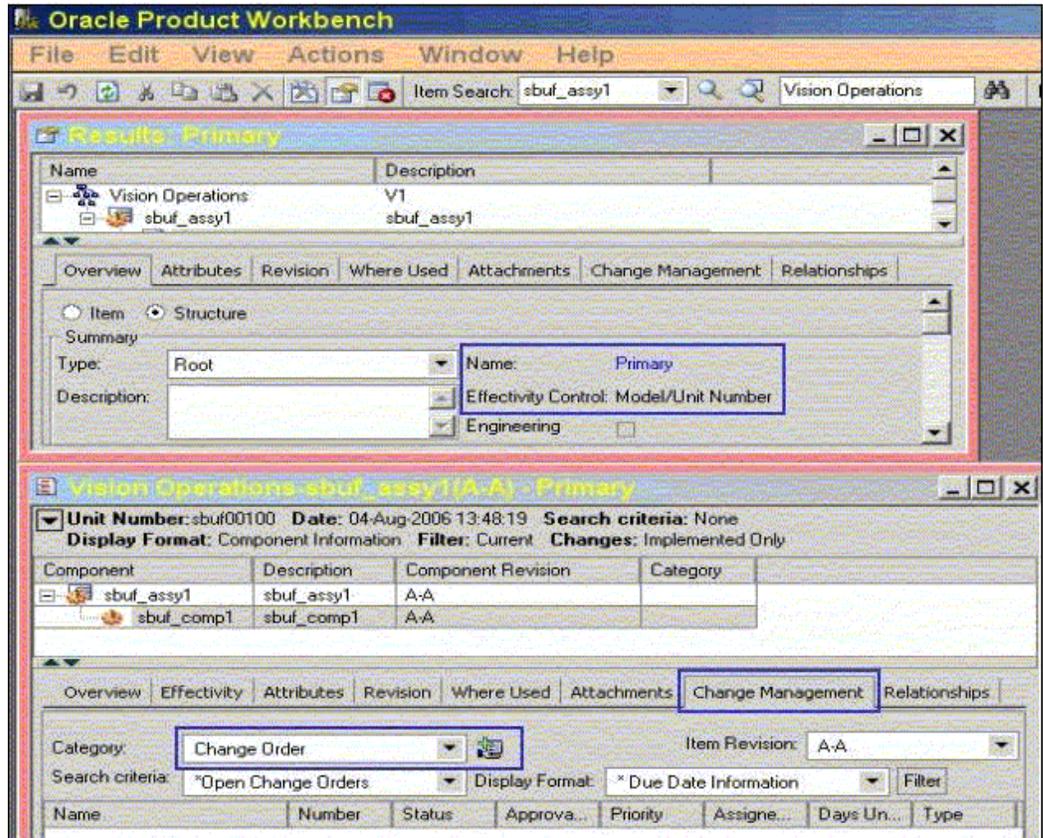
Name	Size in bytes	Category	Repository
Create Item Dialog	958222	Control Plan	E-Business Suite
Item Details	104453	APQPStatus Report	E-Business Suite

Launch HTML Workbench Submit

< Back Create Cancel

Structure Change Management in Product Workbench:

Users can author changes to components such as adding or disabling or modifying components and their effectivity to a specific end item and its revision or its immediate parent in a revision-effective structure. Users can specify the effectivity of these component changes in terms of the 'Effective From Revision' and 'Effective To Revision' of the parent item. These changes can be implemented using a change order.



Valid Component Types

The system enables you to add valid component user items to a structure. It also enables you to copy a structure to a new structure when the item list of values includes only valid items that have defined component types for the parent item type.

Adding Components to a Structure

When adding components to a structure using the 'Add' right click action, the Item Search and Item Advanced Search restricts the list of component items that can be added as components to an item. This list will include only the valid component user items configured for the item type of the parent/subassembly.

When adding components to a structure by dragging and dropping components from Favorites, Item Search Results, the system restricts the list of component items that can be added as components to an item. The component items, which can be dragged and dropped, include only the valid component user items configured for the item type of the parent/subassembly.

Structure Copy

When copying a structure to a new structure, the Item list of values (LOV) for the target structure includes only the valid items that have defined component types for the

parent item type. Therefore, when you are defining the valid component item types for parent item types, if the parent item type is also a valid component item type, define it as a component item type, as well. Complete the same validation when copying a structure for a subassembly , which is added by dragging from another structure window.

Structure Bulkload and Open Interface

When importing a structure through bulkload or the open interface, the system automatically considers item type validations.

Functional Rules for Structure Bulkload and Open Interfaces

- Define User Item Types in the Item Master
- Define Valid Component Item Types for a Parent User Item Type
- Validate a parent item type with multiple component types in an OR condition
- Item LOV's in Add Component and Item Advanced Search will validate the valid component item types for a parent item type to which the component is being added
- Target Structure Item LOV will validate the valid component item types for a parent item type
- Structures created through bulkload or Open interface need to validate the valid component item types
- Once structures have been defined with existing valid component types on deletion of a component user item type for a parent item type, all new structures will honor the new component user item types definition.

E-Business Suite Attachments

This chapter covers the following topics:

- Using E-Business Suite Attachments
- Adding Attachments
- Managing Attachments
- Logging On to Repositories
- Troubleshooting Attachments

Using E-Business Suite Attachments

In HTML-based applications, the Attachments feature gives users the ability to associate files, folders, URLs, and text with business objects. Such files, folders, URLs, and text are referred to as attachments. Attachments are saved in storage systems called repositories.

Integrate the Oracle E-Business Suite (EBS) with the Oracle content repository Oracle Content DB (OCD). Oracle Content DB is an embedded file system within the Oracle Database. Oracle Content DB is certified for use as a content repository in three EBS applications - Oracle Projects, Oracle Internal Controls Manager, and Oracle Product Lifecycle Management.

Terms

- **Attachment:** An attachment is any piece of non-structured data that is linked to more structured application data in order to illustrate or clarify the application data. For example, text files, images, word processing documents, spreadsheets, videos, and Web pages can all be used as attachments.
- **Attachment category:** Attachment categories enable you to classify attachments for organizational purposes. Use them to improve search results and to enforce business processes. The definitions of attachment categories are based on the

common characteristics that a class of attachments can have. For example, you can use the attachment category "mechanical specifications" for attachments that are related to mechanical specifications.

- **Business object:** A business object is an entity in Oracle Applications that has unique characteristics and processes. For example, inventory items, projects, change requests, and purchase orders are all business objects.
- **Repository:** A repository is a storage system that holds files and any other non-structured data.

Managing Attachments with Oracle Content DB

The Oracle Content DB product is part of Oracle Database. It offers advanced file management features, such as:

- Folders and workspaces for file management
- Content updates with file versioning using check in and check out
- Moving and copying files
- Drag-and-drop capability between a user's Windows desktop and the file server
- Searching for content or attributes
- Workspace management features for collaboration among groups of users
- Security based on the item role and single sign-on support
- Content collaboration using Oracle Workflow, including review and approvals
- High availability and scalability

Working in the Attachments pages

You can perform the following tasks in the Attachments pages. Please note that some tasks vary, depending on whether your system is integrated with Oracle Content DB:

- Adding Attachments, page 13-3
- Managing Attachments, page 13-13, which includes:
 - viewing the contents of an attachment
 - searching for attachments

- requesting review or approval of an attachment
- updating attachment attributes
- changing the attached version of a file
- file check in and out of the repository
- managing all file versions (version history)
- granting access to attached folders in Oracle Content DB
- viewing all objects associated with the attachment
- detaching attachments from an object

Related Topics

Logging On to Repositories, page 13-23

Troubleshooting Attachments, page 13-23

Managing Item Attachments, page 8-62

Setting Up a Content Management Repository, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*

Attachments, *Oracle Applications Developer's Guide*

Adding Attachments

You can attach files from your desktop or attach files and folders from a configured repository to a business object. Attachments can be any type of file, folder, notes (text), or URL links.

Use the Add Attachment dropdown list to add an attachment. Adding an attachment can be done in one of several ways, including:

- Upload Desktop Files to a configured repository
- Add Repository Files and Folders from a configured repository
- Add a New Folder to a configured repository
- Attach a URL
- Attach a Text file

You can add an attachment to any record for which attachments are enabled, such as an

item, supplier definition, or order line.

To attach a desktop file:

1. Navigate to the **Attachments** page. Select Desktop Files from the Add Attachment dropdown list, then click Go.

The screenshot shows the Oracle Item Catalog interface. The top navigation bar includes 'Item', 'Lifecycle', 'Change Management', and 'Configuration'. The 'Attachments' tab is active. Below the navigation bar, there are search filters for 'Attachments' (Current) and 'Category' (All). The 'Add Attachment' dropdown menu is open, showing options: Desktop Files, Repository Files and Folders, New Folder, URL, and Text. A table of existing attachments is visible below the dropdown.

Select	Name	Description	Version	Created Date	Modified Date	Status
<input type="checkbox"/>	Motherboard	Motherboard		Functional Design	Steve Williams	23-Jan-2007 21:05:23
<input type="checkbox"/>	38628_r12_ebs_attachments_to_i_func2.ppt			Miscellaneous	Steve Williams	23-Jan-2007 20:54:21
<input type="checkbox"/>	FDD_Business Object APIs_R12.doc	FDD_Business Object APIs_R1...		Assembly Instructions	Steve Williams	23-Jan-2007 20:23:33
<input type="checkbox"/>	FDD_BusinessObject_Events_R12.doc	FDD_BusinessObject_Events_R...		Assembly Instructions	Steve Williams	23-Jan-2007 20:23:33
<input type="checkbox"/>	TechnicalProductSpecification28182002.pdf	TechnicalProductSpecificati...		Technical Design	Steve Williams	23-Jan-2007 20:49:01

2. In the Folder Option field, select the repository location where you want to store the desktop file. Choose from the following two options:
 - Default Folder - if you have a default folder defined, the Repository and Folder Location fields display the default folder's location.
 - Select Folder - if you choose this option, use the Repository field dropdown list to select a repository, then search for a folder location within the repository.

Note: This step is only necessary when using OCD as the content repository.

3. In the File field, browse for the file on your desktop to upload.
4. In the Attachment Category field, use the dropdown list to select an appropriate category for the file.

If you do not select an attachment category, the attachment category defaults to the first attachment category in the list.

Note: Attachment Categories are created by your system administrator. See: *Defining Item Attachment Categories, Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*.

5. Optionally, in the Name field, specify the name of the file as you want it to appear in the repository.

If you leave this field blank, the name defaults to the original name of the file uploaded from the desktop.

6. Optionally, enter a description of the file in the Description field.

7. Enter the file version.

You can choose your own version names. Examples of successive version names include 1, 2, 3 or A, B, C.

Note: You can only specify a file version if storing the file in an Oracle Content DB integrated with WebServices. See: *Setting Up a Content Management Repository, Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*.

8. Click Apply.

To attach a repository file or folder:

1. Navigate to the **Attachments** page. Select Repository Files and Folders from the Add Attachment dropdown list, then click Go.

2. In the Repository field, select the repository from the dropdown list.

The files and folders at the top level of the repository appear.

3. Locate the file or folder that you want to attach.

Browse through the folders and sub-folders by clicking the plus icon next to a folder name.

Optionally, click the plus icon next to the Search region to search for a file or folder using the following criteria:

- Name - file or folder name

- Created Date Within - enter the number of days, weeks, months, or years within which the file or folder was created
- Document Contains - enter a text string contained within the file.
- Description - file or folder description
- Last Modified Date Within - enter the number of days, weeks, months, or years within which the file or folder was modified
- Search Version History - check this box to search all file versions. If you leave this box unchecked, the system only searched the latest version of each file.

Tip: To shorten the list of folders, click on the focus icon in the Focus column next to the folder. This action brings the folder to the top of the list, focusing only on that folder and all files and sub-folders contained within it.

Note: The above advanced file and folder search capabilities are only available in an Oracle Content DB repository integrated with WebServices. See: *Setting Up a Content Management Repository, Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*.

4. In the Select column, check the files or folders that you want to attach.
5. In the Attachment Category column, select the attachment category for each file and folder selected.
6. Optionally, in the Version column, when selecting a file, select the file version to attach.

Choose whether to attach a specific file version or leave the field blank to maintain an attachment to the latest version.

Note: You can only specify a file version if storing the file in an Oracle Content DB integrated with WebServices. See: *Setting Up a Content Management Repository, Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*.

Select Repository

Personalize "Select Repository"

Repository ContentDB WS

Search

Name

Created Date Within Days ▼

Document Contains

Description

Last Modified Date Within

Search Version History

[Select All](#) | [Select None](#)

us > EBS Container >

Select	Focus	Name	Size	Attachment Category	Version	Created Date
<input type="checkbox"/>	<input type="checkbox"/>	Product		CADView-3D Model		21-Oct-2006
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Motherboard		CADView-3D Model		21-Oct-2006
<input type="checkbox"/>	<input type="checkbox"/>	Documentation		CADView-3D Model		21-Oct-2006
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Drawing-thani		CADView-3D Model		07-Nov-2006
<input type="checkbox"/>	<input checked="" type="checkbox"/>	MSS1[MSS1-10]		CADView-3D Model		19-Jan-2007
<input type="checkbox"/>	<input type="checkbox"/>	Motherboard		CADView-3D Model		24-Jan-2007
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Specifications		CADView-3D Model		21-Oct-2006
<input checked="" type="checkbox"/>	<input type="checkbox"/>	CPIM.pdf	2.4 KB	CADView-3D Model	4	19-Jan-2007
<input type="checkbox"/>	<input type="checkbox"/>	cc1.pdf	2.4 KB	CADView-3D Model		26-Nov-2006

7. Click Apply.

To attach a new folder:

1. Navigate to the **Attachments** page. Select New Folder from the Add Attachment dropdown list, then click Go.
2. Specify the new folder location using the following fields:
 - Repository - Select the repository from the dropdown list.

Note: You can only create a new folder and attach it in an Oracle Content DB repository integrated with WebServices. See: *Setting Up a Content Management Repository, Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*.

- Folder Location - Manually type in the location using a forward slash (/) to separate sub-folder names or use the magnifying glass icon to search and select a folder.

If you have defined a default folder for the repository, then that folder location automatically appears.

- Name - Enter the name of the new folder.
- Description - Optionally, enter a description of the new folder.
- Set as Default - Check this box to make this the default folder for the object.
- Attachment Category - Select the attachment category of the new folder.

ORACLE Item Catalog
 Item: VI40001 Revision: B
 Organization: Vision Operations (V1) Personaliz
 Recent Home Logout Preferences Help Page

Item Lifecycle Change Management Configuration Transactions
 Specifications Revisions **Attachments** Organizations People Associations Syndication
 Item: Attachments >

Add Attachment: New Folder

* Indicates required field Cancel Apply

Repository ContentDB WS

* Folder Location /us/EBS Container/Product/Motherboard/Specifications

* Name Functional Specs

Description Functional Specifications

Set as Default

* Attachment Category CADView-3D Model Cancel Apply

3. Click Apply.

To attach a URL:

1. Navigate to the **Attachments** page. Select URL from the Add Attachment dropdown list, then click Go.
2. Enter the following URL information.
 - Name- enter a name for the URL
 - Description
 - Attachment Category - select an attachment category from the dropdown list
 - URL

ORACLE Item Catalog
 Item: V140001 Revision: B
 Organization: Vision Operations (V1) Personalize
Recent Home Logout Preferences Help Page Dia

Item Lifecycle Change Management Configuration Transactions
 Specifications | Revisions | **Attachments** | Organizations | People | Associations | Syndication
 Item: Attachments > Add Attachment: Repository Files and Folders > Attachments >

Add Attachment: URL
 * Indicates required field Cancel Apply

*Name	Description	Attachment Category	*URL
Installation Guide	Installation Guide	Assembly Instructions	https://metalink.oracle.com/met
		Assembly Instructions	

TIP URL example: http://www.oracle.com/ Cancel Apply

3. Click Apply.

To attach text:

1. Navigate to the **Attachments** page. Select Text from the Add Attachment dropdown list, then click Go.
2. Enter the following text information.
 - Name- enter a name for the text entry
 - Description
 - Attachment Category - select an attachment category from the dropdown list
 - Text

ORACLE Item Catalog
 Item: VI40001 Revision: B
 Organization: Vision Operations (V1) Personalize
 Recent Home Logout Preferences Help Page Diag

Item | Lifecycle | Change Management | Configuration | Transactions
 Specifications | Revisions | **Attachments** | Organizations | People | Associations | Syndication
 Item: Attachments > Add Attachment: Repository Files and Folders > Attachments >

Add Attachment: Text
 * Indicates required field Cancel Add Another Apply

* Name
 Description
 Attachment Category
 * Text

- R12 & R12+ projects
- Post R12 planning
- Performance review update
- Roadmap update
- Mgr. meeting updates
- Team projects update

TIP The maximum permitted length for a text attachment is 4000 characters. On exceeding, the entered text will be truncated to the maximum permitted length.

Cancel Add Another Apply

3. Click Add Another to add additional text. Otherwise, click Apply.

Related Topics

- Using E-Business Suite Attachments, page 13-1
- Managing Attachments, page 13-10
- Logging On to Repositories, page 13-23
- Troubleshooting Attachments, page 13-23
- Managing Item Attachments, page 8-62
- Setting Up E-Business Suite Attachments, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*
- Defining Item Attachment Categories, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management User's Guide*

Managing Attachments

From the Attachments page, you can perform various actions on different types of attachments based on your role on the business object.

For a specified business object, view attachments from the Attachments tab. You can choose to sort the list by Attachment Category.

Example: Attachments for Item VI40001, Revision B

The screenshot shows the Oracle Item Catalog interface. At the top, it displays 'ORACLE Item Catalog' and 'Item: VI40001 Revision: B'. The organization is 'Vision Operations (V1)'. The navigation menu includes 'Item', 'Lifecycle', 'Change Management', and 'Configuration'. The 'Attachments' tab is selected. Below the navigation, there are search filters: 'Attachments: Current' and 'Category: All'. A dropdown menu is open for the 'Category' filter, showing options: 'All', 'Assembly Instructions', 'Functional Design', 'Miscellaneous', and 'Technical Design'. Below the search area, there is a table of attachments. The table has columns: 'Select', 'Name', 'Description', 'Version', 'Attachment Category', 'Last Modified By', 'Last Modified Date', and 'Stat'. The table contains three rows of attachments: 'Motherboard' (Functional Design), '38628_r12_ebs_attachments_to_i_func2.ppt' (Miscellaneous), and 'FDD_Business Object APIs_R12.doc' (Assembly Instructions).

Select	Name	Description	Version	Attachment Category	Last Modified By	Last Modified Date	Stat
<input type="checkbox"/>	Motherboard	Motherboard		Functional Design	Steve Williams	23-Jan-2007 21:05:23	
<input type="checkbox"/>	38628_r12_ebs_attachments_to_i_func2.ppt			Miscellaneous	Steve Williams	23-Jan-2007 20:54:21	
<input type="checkbox"/>	FDD_Business Object APIs_R12.doc	FDD_Business Object APIs_R1...		Assembly Instructions	Steve Williams	23-Jan-2007 20:23:33	

The following information, where applicable, is listed for each attachment.

- **Name:** The name of the file, folder, URL, or text attached to the object. You can click an attachment name to view the attachment. See: To view the contents of an attachment, page 13-13.
- **Description:** The description of the file entered in the repository. If no description is entered in the repository, then this field is blank.
- **Version:** Version of the file.

This field is blank if versions are not supported for this type of attachment. For example, folders do not have versions. The following types of values can appear in this column:

- the version value, for example: A, B, or C.
- the latest version value, for example: latest (C). This indicates that the latest version (version C) is attached.
- no value. This type of attachment does not have a version. For example, a folder.
- **Attachment Category:** Attachment categories are defined at the Oracle E-Business

Suite level, but their implementation is product-specific. Therefore, the attachment categories that are available to you depend on how the product you are using has implemented them. See: *Defining Item Attachment Categories*, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*.

- **Last Modified By**
- **Last Modified Date**
- **Status:** Indicates the current status of the file. A file can have a status of Draft, Submitted for Review, Reviewed, Submitted for Approval, Approved, or Rejected. The same status is reflected everywhere the file is attached.
- **Version Control:** Indicates whether the file is checked in or out. Click the icon to initiate the checkin or checkout process. See: *To check files in and out of the repository*, page 13-15.
- **Repository:** The abbreviated name (shortname) of the attachment's repository. Note that EBS refers to the native E-Business Suite repository.
- **Details:** Click on the Details icon to view details on the attachment.
- **Detach:** A paperclip icon which you can click to detach an attachment. See: *To detach attachments from an object*, page 13-16.

File, URL, and Text Attachment Actions

- View the attachment
- Search for attachments
- Request approval (for item attachments only)
- Request review (for item attachments only)
- Change the attached version (files only)
- Check files in and out
- Access the attachment details page to:
 - View all file versions (Version History tab)
 - See a list of all objects where the attachment is attached (Where Attached tab)
 - View the approval, review, and change order status of the file (item attachments only in the Approvals, Reviews, and Changes tabs)

- Detach from the object
- Create a change order (see: Creating Change Orders, page 10-20)

Folder Attachment Actions

- Access the attachment details page to:
 - Grant users access to the folder (Membership tab)
 - See a list of all objects where the folder is attached (Where Attached tab)
 - View the change orders created for the folder (Changes tab)
- Detach from the object
- Create a change order (see: Creating Change Orders, page 10-20)

To view the contents of an attachment:

The Attachments page lists all attachments for the object. You can use the View region to narrow the list of attachments by category, name, description, last modified by, last modified date, attachment status, and repository.

1. From the **Attachments** page, click the name of the attachment you want to view.

If the attachment is a file, then depending on your browser plug-ins and the type of the file, the attachment either opens in the browser or you are given the option to open or download it.

If the attachment is a folder, then the **Browse: (folder name)** page opens. You can perform the following actions on an attached folder:

- Browse the folder by expanding subfolders and by using search criteria to search for files within the folder and subfolders
- Upload desktop files to a selected folder
- Add a subfolder to a selected folder
- Copy a file or folder to another folder location
- Move a file or folder to another folder location
- Delete a file or folder

To search for an attachment:

When you navigate to the Attachments page from an object, all of the object's attachments are listed in the page. If the list is long, you can narrow the list by

specifying certain search criteria.

1. In the **Attachments** page, View region, select a category if you know the category of the attachment you are searching for.
2. In the View region of the Attachments page, click Show More Search Criteria.
3. Enter one or more of the following search criteria:
 - Name - the attachment name
 - Description - the attachment description
 - Last Modified By - the user name of the last person to modify the attachment.
 - Last Modified Date
 - Status - the status of files, URLs, or text
 - Repository
4. Click Go.

To use Advanced Search for an attachment

If you need to narrow your search even further, use the Advanced Search button.

5. In the **Attachments** page, View region, click Advanced Search.
6. In the Advanced Search page, select the search criteria you want to use.

The system provides attributes that you can search on and you have the option to add more attributes using the Add 5 Rows button.

Tip: Use the attribute Contains to search the contents of files.

7. Enter the operator and value of any search criteria attributes selected.
For more information about defining search criteria, see: Managing Search Criteria, page 7-1.
8. Click Search.

To change the attached version of a file:

1. In the **Attachments** page, select the file whose version you want to change.
2. In the Select Attachments field dropdown list, select Change Attached Version and click Go.

ORACLE Item Catalog
 Item: VI40001 Revision: B
 Organization: Vision Operations (V1)
 Item | Lifecycle | Change Management | Configuration

Recent Home Logout Preferences Help

Specifications | Revisions | **Attachments** | Organizations | People | Associations | Syndication

Shortcuts Create Document

Attachments Item Revision

View Create

Attachments: Current Category: All Go

Show More Search Criteria

Select Attachments: Request Approval Go | Add Attachment Repository Files and Folders Go

Select All | Select None

Select	Name	Description	Version	Attachment Category	Last Modified By	Last Modified Date	Status	Version Control	Repository
<input type="checkbox"/>	Motherboard	Motherboard		CADView-3D Model	Steve Williams	25-Jan-2007 20:33:16			CDBWS
<input type="checkbox"/>	01_25_2007 Mtg Min	01_25_2007 Product Meeting ...		Miscellaneous	Steve Williams	25-Jan-2007 20:38:00			EBS
<input checked="" type="checkbox"/>	CPIM.pdf		4	CADView-3D Model	Steve Williams	26-Jan-2007 03:25:33			CDBWS
<input type="checkbox"/>	Data sheet	Motherboard product data sheet		Datasheet	Steve Williams	26-Jan-2007 01:06:42			EBS

3. In the **Attach Repository Files Version** page, enter the new version in the To Version field.

Enter one of the following three options:

- the latest version
- an older version
- no version. If you do not specify a version, the system automatically ensures that the latest version is always attached.

4. Click Apply.

To check files in and out of the repository:

Only one user can check out a file at any given time. You can only check out the latest version of the file, even if you have an older version attached to an object. During checkout, you have the option to download the latest version of the file.

When you check in the file, you must upload the modified content from your desktop. If no changes have been made and there is no need to upload a file from your desktop, you can cancel the checkout.

The system maintains a version history, displaying a list of all previous versions of the file as well as indicating the attached version. You can open an earlier version to access

discarded information or use the earlier version as a basis for creating a new version.
See: To manage all file versions (version history), page 13-18

1. In the **Attachments** page, click the Check Out icon in the Version Control column in the row of the attachment you want to check out.

A message appears, informing you of the version and file that you are checking out.

Tip: Alternatively, you can check in and out a file from the Details page. From the Attachments page, click the Attachment Details icon in the Details column for a particular attachment. Click Check Out. After you have checked out the attachment, you can check it back in from the same page.

2. Optional. In the Information page, click Download to download the latest version of the file.

A file download box appears, giving you the option to either open the file or save it to your desktop.

3. Click Done to end the check out process and return to the **Attachments** page.

To check a file in

4. In the **Attachments** page, click the Check In icon in the Version Control column in the row of the attachment you want to check in.

5. In the Document Checkin page, enter the following:

- Upload File - Required field. Use the Browse button to located the file to upload on your desktop.
- Version - Required field. Enter an alphanumeric version.

The latest version number checked out is displayed below the fields on this page.

- Description - Optional field.

6. Click Apply.

The system returns you to the Attachments page.

To detach attachments from an object:

When you detach an attachment, you remove the association between an object and an attachment. Attachments residing in an Oracle Content DB repository continue to exist in the file system, but E-Business Suite attachments are deleted.

1. In the **Attachments** page, click the Detach icon in the Detach column for a file, folder, URL, or text.

The ability to detach an attachment depends on:

- how the application product you are using implements the current attachment category
 - the review or approval status of the attachment
2. In the Warning page, confirm whether or not you want to detach the attachment.
The system returns you to the Attachment page.

To update attachment attributes:

You can update the following attachment attributes:

- Name
 - Description
 - Attachment category
1. From the **Attachments** page, click the Attachment Details icon in the Details column for a particular attachment.
 2. From the **Details** page, click Update.
 3. Change the following fields as needed:
 - Name
 - Description
 - Attachment category

Note: You can update one additional field for attached folders in this page. Check the Set As Default box if you want to use this folder as the repository's default folder.

4. Click Apply.

To access Oracle Content DB:

1. From the **Attachments** page, click the Attachment Details icon in the Details column for a particular attachment.

2. Click on the Folder Location link.

Oracle Content DB opens in a new page at the particular folder location.

To manage all file versions (version history):

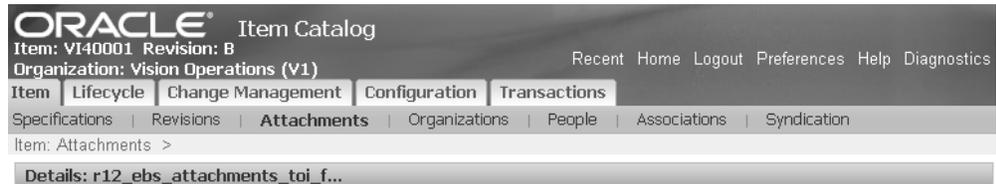
1. In the **Attachments** page, click the Attachment Details icon in the Details column for a particular attachment.

The Details page appears.

2. In the **Details** page, Version History tab, all versions of the attachment are shown.

The Attached Version icon in the Attached column indicates which version is attached to the object. If no Attached Version icon appears, then the latest version is always attached to the object.

The Status column indicates the status of each particular version. If you sent out a particular version for review or approval, The review or approval status displays here.



Basic Information

Name  r12_ebs_attachments_toi_func2.ppt Description
Created By **Steve Williams** Created Date **30-Jan-2007 07:02:23**
Repository **CDBWS** Folder Location /us/EBS_Container/Product

Attachment Information

Last Modified By **Steve Williams** Last Modified Date **30-Jan-2007 00:19:11**
Attached By **Steve Williams** Attached Date **25-Jan-2007 20:33:16**
Attachment Category **CADView-3D Model** Status **Draft**
Version **6**

Version History | **Where Attached** | **Reviews** | **Approvals** | **Changes**

[Check Out](#)

Versions

 Indicates that this Version is attached to the object.

Select Version: [Attach](#) | [Latest Version Attached](#)

Select	Name	Attached Version	Size	Status	Last Modified Date	Last Modified By	Details
<input type="radio"/>	 r12_ebs_attachments_toi_func2.ppt	 6	66 KB		30-Jan-2007 07:22:29	Steve Williams	
<input type="radio"/>	 r12_ebs_attachments_toi_func2.ppt	3	67.5 KB		30-Jan-2007 06:03:51	Steve Williams	
<input type="radio"/>	 r12_ebs_attachments_toi_func2.ppt	5	66 KB		30-Jan-2007 06:02:16	Steve Williams	
<input type="radio"/>	 r12_ebs_attachments_toi_func2.ppt	1	60 KB		30-Jan-2007 05:58:18	Steve Williams	
<input type="radio"/>	 r12_ebs_attachments_toi_func2.ppt	1	53 KB		30-Jan-2007 05:54:06	Steve Williams	
<input type="radio"/>	 r12_ebs_attachments_toi_func2.ppt	1	 Version Hist 53 KB		24-Jan-2007 10:33:15	Steve Williams	

To change the attached version

3. Select the version of the file that you want to attach.
4. Click Attach.

To attach the latest version of the file

5. Click Latest Version Attached.

The Attached Version icon in the Attached column no longer appears next to any version. This implies that the attachment always refers to the latest version.

Basic Information

Name	r12_ebs_attachments_toi_func2.ppt	Description	
Created By	Steve Williams	Created Date	30-Jan-2007 07:02:23
Repository	CDBWS	Folder Location	/us/EBS_Container/Product

Attachment Information

Last Modified By	Steve Williams	Last Modified Date	30-Jan-2007 00:37:27
Attached By	Steve Williams	Attached Date	25-Jan-2007 20:33:16
Attachment Category	CADView-3D Model	Status	Draft
Version	Latest(6)		

Version History | Where Attached | Reviews | Approvals | Changes

Versions

Indicates that this Version is attached to the object.

Select Version: |

Select	Name	Attached Version	Size	Status	Last Modified Date	Last Modified By	Details
<input type="radio"/>	r12_ebs_attachments_toi_func2.ppt	6	66 KB		30-Jan-2007 07:22:29	Steve Williams	
<input type="radio"/>	r12_ebs_attachments_toi_func2.ppt	3	67.5 KB		30-Jan-2007 06:03:51	Steve Williams	
<input type="radio"/>	r12_ebs_attachments_toi_func2.ppt	5	66 KB		30-Jan-2007 06:02:16	Steve Williams	
<input type="radio"/>	r12_ebs_attachments_toi_func2.ppt	1	60 KB		30-Jan-2007 05:58:18	Steve Williams	
<input type="radio"/>	r12_ebs_attachments_toi_func2.ppt	1	53 KB		30-Jan-2007 05:54:06	Steve Williams	
<input type="radio"/>	r12_ebs_attachments_toi_func2.ppt	1	53 KB		24-Jan-2007 10:33:15	Steve Williams	

To view the content of a file version

6. Click on the name of a version to view it.

To update the version descriptor or file version description

7. Click Update.
8. In the **Update Version Details** page, you have the option to enter the following:
 - Version - a new version descriptor
 - Description

To view all objects associated with the attachment:

From the Attachments page, you can navigate to the Where Attached tab, which lists every object that the attachment is attached to.

1. From the **Attachments** page, click the Attachment Details icon for a particular attachment.
2. In the **Details** page, click the Where Attached tab.

You can view all objects where the attachment is attached.

To grant access to an attached folder in Oracle Content DB:

Users are granted access to folders in Oracle Content DB in one or more of the following ways:

- directly, in Oracle Content DB
- by inheriting access from a parent folder in Oracle Content DB
- by mapping the user's role on the business object to the attached folder in the Details page, Membership tab (for more information about roles, see: *Managing and Viewing Roles*, page 5-1)
- by granting the user access to the attached folder in the Details page, Membership tab

Navigate from the Attachments page to the Details page, Membership tab, to manually grant access to users directly or to manually grant access to users and groups of users based on the attached business object's role.

1. From the Attachments page, click the Attachment Details icon in the Details column for a particular folder.

This opens the Details page.

2. Click the Membership tab.

This tab lists the names of each user or group with access to the folder and the type of access, such as Author or Administrator.

3. Click Update Membership.

From Update Membership, you can update the members' current folder access level, add members, remove members, or update role access.

To update folder access

This task enables you to change the access level of a user or group for a particular folder. For example, you can change the access of a user from Reviewer to Approver.

4. In the Folder Access field for a particular user or group, select the appropriate access level from the pull-down list.

To remove members

5. Select the particular names you want to remove in the Select column.
6. Click Remove.

To add one user or group at a time

7. Click Add Another Row.

The system adds one row to the end of the membership list.

8. Enter a new user or group name in the new row and select the appropriate folder access from the dropdown list.

To add multiple users or groups at the same time

9. Click Add Members, then search for the users. From the search results, select one or more users or groups for which to give access to the folder.
10. Enter a new user or group name and select the appropriate folder access from the dropdown list in each row.

To update role access

To quickly grant all users of the business object access to the folder, use the Update Role Access functionality. Update Role Access enables you to give a role on the business object access to the folder. All users with the specific role are granted folder access.

11. Click Update Role Access.
12. In the Folder Access column for the business object roles, select a new folder access.
When you click apply, all users with those roles on the business object are granted the specified folder access.

To view the review, approval, or change status of an attachment:

You can request a review or approval of an item attachment or create a change order for an item attachment. View the status of the attachment in the Attachment Details page Reviews, Approvals, or Changes tabs. For more information, see: Managing Item Attachments, page 8-62.

Related Topics

Using E-Business Suite Attachments, page 13-1

Adding Attachments, page 13-3

Logging On to Repositories, page 13-23

Troubleshooting Attachments, page 13-23

Managing Item Attachments, page 8-62

Setting Up Content Management Repositories, *Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*

Setting Up E-Business Suite Attachments, *Oracle Product Lifecycle Management*

Implementation Guide or Oracle Product Information Management Implementation Guide
Defining Item Attachment Categories, Oracle Product Lifecycle Management
Implementation Guide or Oracle Product Information Management User's Guide

Logging On to Repositories

As you work with attachments, you may be prompted to log in to repositories which require their own user authentications. Use the user name and password that corresponds to the repository that you are trying to access, not the user name and password that applies to your current Oracle Applications session.

If you use Oracle Content DB as the repository, there is no need to sign on if you are already signed on to the EBS Applications. Users log in to Oracle E-Business Suite (EBS) Applications and Oracle Content DB (OCD) using a single sign-on integration built using the Oracle Internet Directory, which holds user information in a common location. You can also use the same user name and password to independently log on to EBS Applications or OCD. See: *Setting Up a Content Management Repository, Oracle Product Lifecycle Management Implementation Guide or Oracle Product Information Management Implementation Guide*

Related Topics

Viewing Attachments, page 13-13

Adding Attachments, page 13-3

Troubleshooting Attachments, page 13-23

Troubleshooting Attachments

This section explains how to resolve some of the problems that you might encounter as you work with attachments.

When Logging On to a Repository

- *I get the error "WebDAV connection failed. Please try again later or contact the Administrator."*

The system was unable to establish a connection with the repository selected. The repository system may be unavailable. Please try your request later or contact your system administrator.

- *I am unable to log in to Oracle Files.*

Please use your Oracle Files user name and password and try again. If you are still unable to log in, please contact your system administrator.

When Uploading Repository Files

- *While trying to upload a file from my local directory, I get the error "There is no file to upload. Please verify the file path(s) and try again."*

The file specified doesn't exist in the directory specified. Please check the file path(s) and try again.

- *I try to upload a file into an Oracle Content DB folder and get a warning that the file already exists in the Oracle Content DB folder.*

The file you are trying to upload already exists in the folder specified. If you want to overwrite this file, then check out the existing file in the Oracle Content DB folder, upload your version from your desktop to replace it, then check it in. You can also use **Add Attachment: Repository Files and Folders** to attach the existing repository file.

- *I am unable to upload files into the Oracle Content DB Repository. I get the error "Upload failed, please check folder permission and ensure that versioning is not set to manual for this folder."*

The system was unable to upload the file. Ensure that sure you have permission to write in the destination folder. You cannot upload a file into the destination folder if you do not have write permission in it.

- *I am unable to attach a file or folder from "My Private Workspace". Files cannot be loaded from "My Private Workspace" or any folder within it.*

Move the file or folder to a workspace or folder that is not in "My Private Workspace" and try again.

When Viewing a File or Folder

- *I am unable to view an attachment. I get a "file not found" error.*

The file or folder may be in a Oracle Content DB workspace that you don't have access to. The file or folder may have been moved or deleted. Please check your access to the file or folder and verify in Oracle Content DB that it exists.

- *I am unable to view a file or folder in a new window. I get a "Page not found" error when using the menu option from right-clicking the mouse.*

This functionality is not yet supported. Please click the file or folder name to view its contents.

- *I do not see the complete list of attachments for my business object.*

You may have used the Simple Search feature to search within the list of attachments. Click the **Go** button in the Simple Search without entering any search

criteria. You should see the complete list of attachments. If you still have problems, please contact your system administrator.

Tip: For files and folders stored in a WebServices-based Content DB Repository, you can only see those files and folders in the Attachments list for which you have view access.

Document Management and Collaboration

This chapter covers the following topics:

- Document Management and Collaboration Overview
- Setting Up Document Management
- Creating User-Defined Attribute Groups
- Setting Up Workflow Templates
- Defining Lifecycle Phases
- Creating Lifecycles
- Creating Primary Categories
- Defining Alternate Categories
- Associating Attribute Groups To Primary Categories
- Assigning People to a Document Primary Category
- Associating Lifecycles with a Document Primary Category
- Managing Document Change Policies
- Assigning Access Policies to a Lifecycle Phase
- Defining Primary Attributes for a Primary Category
- Assigning Oracle XML Publisher Templates to a Document Primary Category
- Creating Display Formats for a Document Primary Category
- Creating Search Criteria for a Document Primary Category
- Using Document Management and Collaboration
- Searching for Documents
- Creating Documents
- Managing Document Lifecycles
- Changing Primary and Alternate Categories

- Using Document Versions and Revisions
- Locking and Unlocking Documents
- Reviewing and Approving Documents
- Associating Documents with Items and Other Documents
- Publishing Documents

Document Management and Collaboration Overview

Oracle Document Management and Collaboration (DOM) is a document management system that enables organizations to manage and securely share their documents across global teams. DOM uses Oracle Database as the repository for documents and Oracle Content DB, a module within Oracle Database, as the repository for document content (files).

DOM enables you to manage documents just as you do items, using:

- simple and advanced search
- user-defined attributes and attribute groups
- lifecycle phases
- revisions and versioning
- change management

Documents and Files

DOM stores both documents and files in Oracle Content DB, but there are distinct differences between a document and a file.

Documents

- A document consists of both metadata and content (files), with the content stored in a content repository such as Oracle Content DB.
- A document is an Oracle business object (entity).
- A document's metadata includes basic attributes, such as document name and number, and user-defined attributes.
- A document's content can include multiple associated files (unstructured data).
- Classify documents using categories and subcategories.
- Control the modification of documents using a check-in/check-out system with version history.

- Use a lifecycle phase workflow to drive a document review and approval process.

Files

- A file contains unstructured content in various formats (PDF, DOC, GIF, HTML, XML and so on)
- Files reside in a file management system such as Oracle Content DB, although they can reside in other file management systems, too.

Note: You must define the file management system as a repository in order for DOM to access the files. See: *Setting Up a Content Management Repository, Oracle Product Lifecycle Management Implementation Guide* or *Oracle Product Information Management Implementation Guide*

- A document can contain one or more files or a file can reside in the document repository on its own, uncontained within a document.

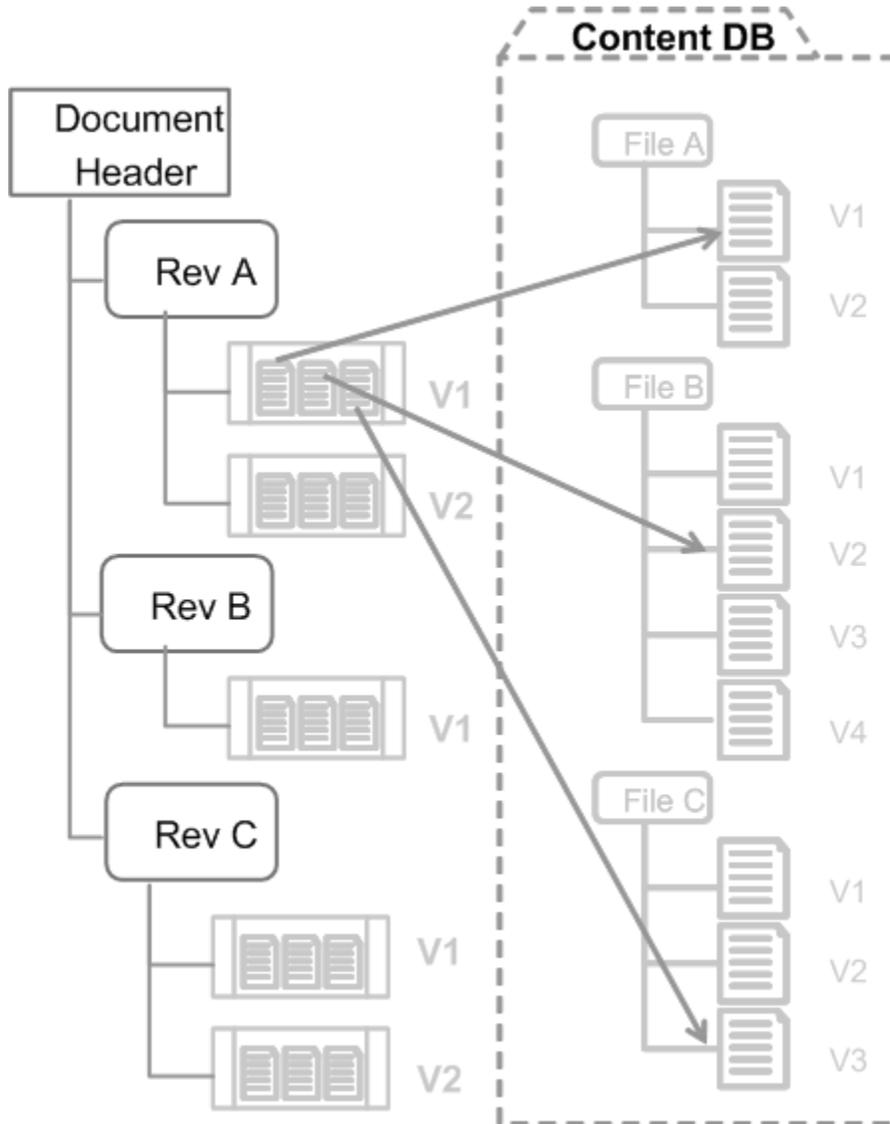
Revisions and Versions

Using revisions and versions, optionally, you can designate a minor change to a document as a new version and a major update as a new revision. How you determine the need for a revision versus a version is up to you.

DOM tracks all changes to documents by versioning every document when it is created and each time it is checked in. You can track the history of changes using the document's version history.

DOM treats each document revision as an entity, separate from other revisions of the document. Although all document revisions are associated to the same document, each revision independently goes through the various phases of the document's lifecycle and each revision can have its own set of users. Revising a document provides an audit trail of all changes to a document by tracking who created each revision, the revision creation date, and any revision comments. You can store and view a revision list in reverse chronological order (for example, if there are three revisions, view the third (latest) revision first). Optionally, specify a revision policy to disable revisions for a document in a specific lifecycle phase. You must specify a lifecycle for a document category. A new revision is created in the initial lifecycle phase of a document within that category.

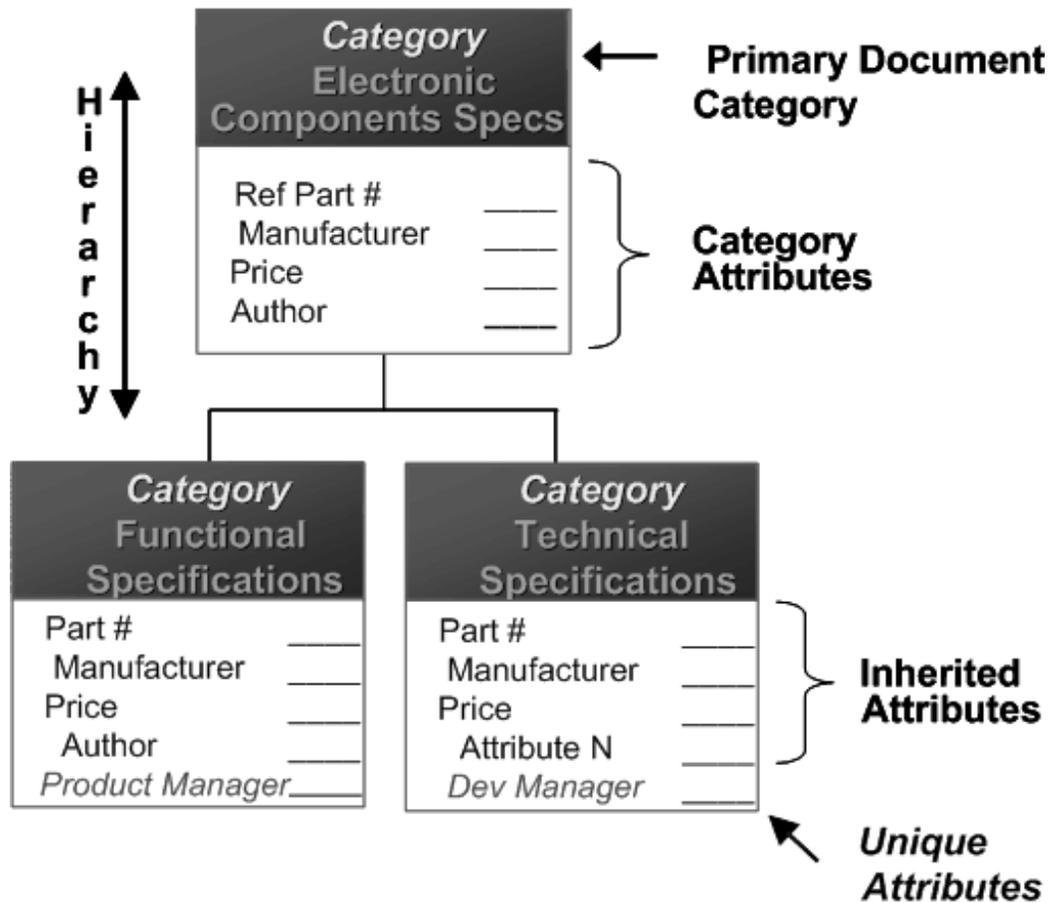
Document Revisions and Versions



Hierarchical Classification of Documents

You can classify documents using a hierarchy of primary categories, subcategories and alternate categories. For example, classify documents by subject according to their use, under document categories for specifications, data sheets, marketing collateral, and so on. You can assign each category its own characteristics, including validation rules, lifecycles, change policies, access policies, workflows, and approval processes. The subcategories can inherit these characteristics from their parent category. Document primary categories behave similarly to item catalog categories.

Hierarchical Classification of Documents



The document primary category is the main classification structure for classifying documents. However, users can also create alternate category catalogs for organizing documents. Documents can belong to more than one alternate category.

Primary Attributes for Documents

Documents can include both primary and user-defined attributes. The three primary attributes controlled by users include:

- Document number - You can choose to manually assign or to automatically generate and assign a document number to a document. The document numbering method for any particular document is governed by the method assigned to the primary document category of the document. The numbering schema can include a prefix, a sequential number, and a suffix or, alternatively, can derive from user-defined functions and parameters. You can overwrite the document numbering method inherited from the primary document category within the subcategories.

- Document name - Document naming functions similarly to item description generation. You can choose to automatically name documents, based on a naming scheme defined within the primary document category.
- Revision number - You can choose to generate revision numbers automatically or enter them manually. For automatic generation, you can select one of the provided sequences or specify your own sequence.

User-Defined Attributes for Documents

You can create user-defined attribute groups within document categories. User-defined attributes for documents have functionality and features similar to user-defined attributes for items:

- You can define attributes of various types, including text, translated text, number, date, check-box, radio button, drop-down list, URL, or any type of file.
- They support multiple languages and date attributes display in the local time format.
- Define attribute groups at any level of the document classification hierarchy. Once you associate an attribute group with a document category, the child categories inherit the attributes of the parent category.
- You can specify an attribute as a required attribute within an attribute group. The system then performs the necessary validations to enforce the requirement whenever anyone updates the attribute group.

Unstructured Content Stored Within Files

Examples of unstructured content stored within files include:

- Complex files - data sheets, technical specifications, process instructions, warranty files, training manuals, and test reports
- Images and audio - drawings, marketing literature, symbols, and sound clips
- Data from a wide variety of CAD/CAM systems - drawings, models, and schematics
- Links to other files - URLs and references to other document management systems

You can associate any file to one or more documents. You can also associate different files with the same name, but different content, located in different areas within the repository, to one document. While many documents contain both metadata (attributes) and files, certain documents can contain only attributes without any associated content files. For example, a Meeting Minutes attribute group could contain the following

attributes populated by users:

- Date
- Time
- Place
- Attendees
- Agenda
- Minutes

Checking Out Documents

In order to update a document revision or a document revision's associated file versions, you must check out the document revision or the associated file version. Once you check out a document revision:

- no other user can update that document revision.
- other users can check out the associated files in a different context and modify them. To prevent others from updating the associated files, you must check out the files as well.
- the system tracks who checked out the document revision and only the user who checked out the document revision can check out one or more of its associated file versions.
- you can update the document revision's attributes and associated file versions.

Before checking in the document revision, you must check in all of the associated file versions.

Locking Documents

When you lock a document, you lock all revisions and others cannot update the document metadata or file associations. The person who locks the document can still check document revisions in and out and make changes.

Document Lifecycles

Each document has a lifecycle. Each lifecycle consists of one or more lifecycle phases. Here are some examples of lifecycle phases: Draft, Under Review, Approved, Released and Obsolete. As a document progresses through a lifecycle, it can go through a series of review, approval, and other workflows. You can associate a workflow to a phase. As a document enters a phase, the workflow initiates. The document cannot enter the next

phase until the workflow completes successfully. You must define the workflow used in the phase via the workflow template functionality, which is provided by the change management framework (see: *Workflows for Change and Document Management, Oracle Product Lifecycle Management Implementation Guide*). Workflows are optional for phases, except phases of type Review or Approval must be associated with an appropriate workflow. Oracle Product Lifecycle Management provides phases that you can modify to meet your business requirements.

You can associate any lifecycle to a document. A lifecycle is associated to a document category and that lifecycle is available for use with all child categories. Child categories can also optionally associate additional lifecycles not inherited from the parent category.

You can define change policies for documents by lifecycle phase. A change policy restricts changes during a particular lifecycle phase of a document.

Use access policies to control accessibility to a document based on its lifecycle phase. You can give different users different levels of access to a document within different lifecycle phases.

Document Relationships

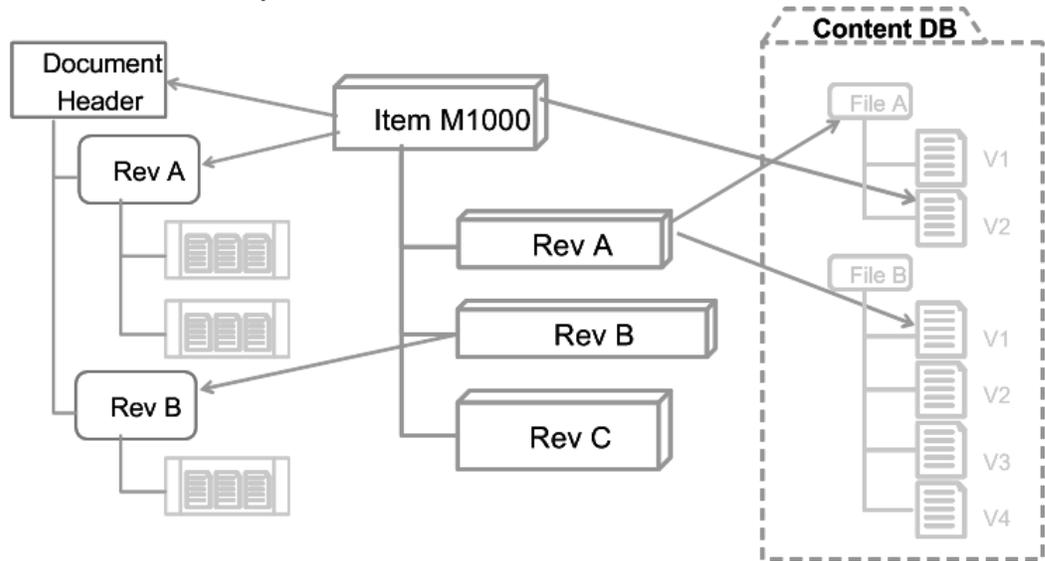
You can associate a document to an item or another document.

Associate a document to an item in the Item Workbench. You can associate an item revision to a specific document revision or, dynamically, to the latest document revision (a floating relationship). You can view the item-document relationships from either the item pages or the document pages.

Associate a document to another document during document creation or when updating the document details. You can see all related documents from any given document and can access them from the list of associated documents. Associate documents by a certain revision or reference only the most recent revisions of the associated documents.

When viewing a list of the related items or documents, the system lists only those associated items and documents that you have permission to view.

Document Relationships



Document Security

Documents use roles the same way items use roles for security. You can assign different roles to different users or groups of users. Based on the roles assigned to a user, you can determine which users can create documents in a document primary category, as well as the roles other users receive for any documents created in that category. Features of role-based security include:

- Accessing documents based on role
- Specifying roles at either the document category or document level
- Assigning roles to individuals or groups
- Granting different levels of document access to different roles
- Varying document roles by document revision

Oracle provides some seeded roles, including Document Viewer, Document Author, Document Administrator, and Document Primary Category User. The two types of document roles include:

- Primary category roles - determine a user's privileges in a primary document category. The seeded role of Document Primary Category User enables users to create documents in that category.
- Document roles - grant users roles on any document created within the document primary category.

Additional features of document security include:

- Single sign-on - Users log in to Oracle E-Business Suite (EBS) Applications and Oracle Content DB (OCD) using a single sign-on integration built using the Oracle Internet Directory, which holds user information in a common location. You can also use the same user name and password to independently log on to EBS Applications or OCD.
- Role-based security mapping to OCD - A seeded security mapping defined for the document provides the ability to map roles associated with a document to a folder within OCD. This mapping enables document users to have different levels of access to the folders.
- Access policies - Access policies enable you to further control user access to documents by lifecycle phase, even if their document role grants them more access. For example, you can choose to revoke a marketing engineer's access to a document during the draft phase, even though the role grants view access to the document in any phase.

Document Search

You can search for documents in three different ways:

- Browse by document categories - search for documents by browsing through either the primary or the alternate catalogs.
- Document simple search - search by keywords against the number, name, or description of documents, using wild card and fuzzy searches. Additionally, search by other key basic document attributes such as document status, created by, and so on.
- Document advanced search - search by selected document attributes, either basic or user-defined. In addition, search by the basic attributes of files contained within a document (such as file name, file description, and so on). Perform content-based searches of the individual files that comprise a document. Perform searches that combine both content-based and attribute-based searches.

Search results display using the display format specified by the user. Users can see only those documents to which they have access. By default, the document's latest version of the latest revision displays in the search results.

Documents use display formats the same as they are used by items and change objects. The search results page displays the document information as specified by the display format and provides access to all older revisions and versions that match the search criteria.

You can define and save search criteria, based on the selected document category. You can also specify default search criteria for the document category.

Document Review and Approval

A review and approval process initiates based on a workflow associated with a lifecycle phase of a document. Oracle Workflow sends notifications at various stages of the review and approval process, including a final notification of approval. Users can respond to notifications from within the e-mail itself.

The workflows used in the document review and approval processes are based on the change management workflows (See: Workflows for Change and Document Management, *Oracle Product Lifecycle Management Implementation Guide*). You can define a workflow as a template and use it in multiple approvals and reviews, similarly to change management. Define document approval workflow steps as either sequential or parallel. The system can derive approvers from user roles on the document or you can add approvers directly to the workflow step. No one can update a document going through an approval process. The approval status of the document depends on the lifecycle phase of the document and the status of the associated workflow process. The document's status changes to Approved only after the final approval workflow process completes successfully.

Document Publishing

Publish documents using Oracle XML Publisher. You can publish a document, then copy or move it to a less secure repository location or outside the private domain. This enables users without a document role to access the document information. With Oracle XML Publisher, you have access to templates, output formats, multiple layouts for reports, and so on.

You can publish document metadata in addition to the associated files. When using a PDF output format, you can merge files with the document metadata based on a user-defined sequence. Upload the published document (metadata + files) to a destination in the OCD repository.

Related Topics

Setting Up Document Management, page 14-11

Searching for Documents, page 14-39

Using Document Management and Collaboration, page 14-38

Setting Up Document Management

In order to use Document Management and Collaboration, you must complete the setup steps listed below:

1. Set up the document repository.

See: Setting Up a Content Management Repository, *Oracle Product Lifecycle*

2. Create user-defined attribute groups.
Create user-defined attribute groups and attributes so that you can associate them to document primary categories. Documents assigned to a particular document primary category automatically inherit the user-defined attribute groups assigned to the category. See: *Creating User-Defined Attribute Groups*, page 14-13.
3. Set up workflow templates.
Lifecycle phases such as Review and Approval depend on workflows to route documents through the review and approval process. Create the workflows used in lifecycle phases with workflow templates, similarly to how you create workflows in Change Management. See: *Setting Up Workflow Templates*, page 14-14.
4. Define lifecycle phases.
A document lifecycle consists of one or more phases. Before you can define a lifecycle, you must define the lifecycle phases. See: *Defining Lifecycle Phases*, page 14-15
5. Create lifecycles.
When creating a lifecycle, you can set up lifecycle phase properties, such as alternate workflows and promotion and demotion rules, just as you do in Change Management. See: *Creating Lifecycles*, page 14-16
6. Create primary categories and category hierarchies.
You can classify your documents by defining a hierarchy of primary categories. Document primary categories behave similarly to item catalog categories. See: *Creating Primary Categories*, page 14-17
7. Define alternate categories.
In addition to classifying your documents by primary categories, you have the option to classify them by alternate categories, too. This enables the user to find documents using different logic, although the documents are physically stored in only one location. See: *Defining Alternate Categories*, page 14-18
8. Add user-defined attribute groups to document primary categories. See: *Associating Attribute Groups To Primary Categories*, page 14-19
9. Assign primary category people and document people roles to users.
To enable users to create documents in a primary category, assign users to a primary category people role. Once documents are created, users with a document people role receive that role's access for the document. See: *Assigning People to a Document Primary Category*, page 14-22

10. Associate lifecycles to document primary categories.
Documents have lifecycles, similarly to items and change objects. Lifecycles associated to a document primary category default to the documents created within the primary category. See: *Associating Lifecycles with a Document Primary Category*, page 14-25
11. Assign change policies to the lifecycle phases of each lifecycle assigned to a primary category.
Change policies control what changes users can make to the document during various lifecycle phases. See: *Managing Document Change Policies*, page 14-27
12. Assign access policies to the lifecycle phases of each lifecycle assigned to a primary category.
Access policies enable you to further restrict a user's access to a document by lifecycle phase. See: *Assigning Access Policies to a Lifecycle Phase*, page 14-29
13. Define the default numbering, naming, revision generation, and default folders for each primary category.
See: *Defining Default Primary Attributes for a Primary Category*, page 14-30
14. Assign Oracle XML Publisher templates for each primary category.
Oracle XML Publisher enables you to publish document metadata and files in a printable format, such as PDF or TXT. See: *Assigning Oracle XML Publisher Templates to a Document Primary Category*, page 14-35
15. Create display formats for each primary category.
Display formats enable the search results page to display the document information in a certain format. See: *Specifying Display Formats for a Document Primary Category*, page 14-37
16. Specify search criteria for each primary category.
By specifying search criteria, you can quickly find the attributes you want to search on. See: *Creating Search Criteria for a Document Primary Category*, page 14-38

Creating User-Defined Attribute Groups

Create user-defined attribute groups and attributes similarly to how you create them for items or change objects. You associate attribute groups to document primary categories later in the setup process.

To create user-defined attribute groups:

1. Navigate to the Setup Workbench, Documents tab.

2. On the **Primary Categories** page, click the Attribute Groups link.
3. From the **Attribute Groups** page, follow the instructions for creating attribute groups at User-Defined Attributes, page 6-1, starting with the step that begins at the **Search: Attribute Groups** page.

The screenshot shows the Oracle Item Catalog Administration web interface. The page title is 'ORACLE Item Catalog Administration'. The navigation menu includes 'Items', 'Documents', 'Structures', 'Change Management', 'Security', 'Functions', 'Catalogs', and 'Value Sets'. The breadcrumb trail is 'Primary Categories > Attribute Groups > Lifecycle Templates > Workflow Templates'. The current page is 'Documents: Attribute Groups >'. The main content area is titled 'Attribute Group Details' and contains the following information:

Internal Name	UV_Engine_Spec
Display Name	Engine Specification
Description	UV Engine Specification
Multi-Row	No

Below this is the 'Data Security' section with 'View Privilege' and 'Edit Privilege' options. The 'Attributes' section includes a 'Select Object:' dropdown with a 'Delete' button and an 'Add Attribute' button. Below this is a table of attributes:

Select Sequence	Internal Name	Display Name	Data Type	Display As	Value Set Name	Enabled	Required	Indexed	Column	Edit
<input type="checkbox"/> 1	UV_EngineType	Engine Type	Char	Text Field	Eng_Type	Yes	No	No	C_EXT_ATTR1	
<input type="checkbox"/> 2	UV_EngineModel	Engine Model	Char	Text Field	Eng_Model	Yes	No	No	C_EXT_ATTR2	

Related Topics

Associating Attribute Groups To Primary Categories, page 14-19

Defining Item Attributes and Attribute Groups, *Oracle Product Lifecycle Management Implementation Guide*

Setting Up Document Management, page 14-11

Setting Up Workflow Templates

Create workflow templates similarly to how you create them for change objects. You associate workflows to lifecycle phases later in the setup process.

To create workflow templates:

1. Navigate to the Setup Workbench, Documents tab.
2. On the **Primary Categories** page, click the Workflow Templates link.
3. From the **Workflow Templates** page, follow the instructions for creating workflow templates at Creating Workflow Templates, page 3-23, starting at the step that begins on the **Workflow Templates** page.

Related Topics

Defining Workflow Templates, *Oracle Product Lifecycle Management Implementation Guide*

Attaching Workflow Templates, *Oracle Product Lifecycle Management Implementation Guide*

Customizing Change Management Workflows, *Oracle Product Lifecycle Management Implementation Guide*

Reviewing and Approving Documents, page 14-59

Setting Up Document Management, page 14-11

Defining Lifecycle Phases

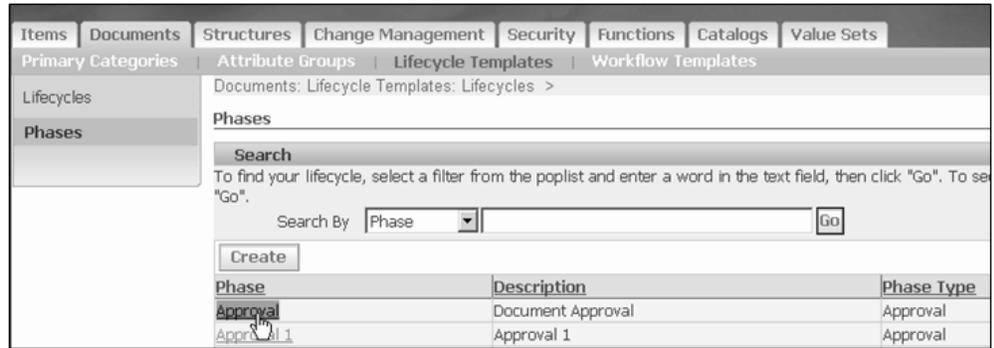
Document lifecycles consist of one or more lifecycle phases. A lifecycle phase can have one or more workflows associated with it, although phases of type Review or Approval require an associated workflow. If the lifecycle phase has an associated workflow, the workflow initiates once the document enters the lifecycle phase. You cannot promote a document to the next lifecycle phase until the workflow associated with the phase completes successfully.

Note: Although each lifecycle phase can have one or more workflows associated with it, each document can only go through one workflow during each lifecycle phase. You must select one of the workflows for a document in the phase.

The phase type determines the order in which the phases appear in the lifecycle. Available phase types, in the order in which they appear in a lifecycle, include: Create, Review, Approval, Release, and Archive. Depending on your business process, you can define different phases using some or all of the above phase types.

To define a document lifecycle phase:

1. Navigate to the Setup Workbench, Documents tab.
2. On the **Primary Categories** page, click the Lifecycle Templates link.
3. From the **Lifecycles** page, click the Phases link.
4. From the **Phases** page, click Create to create a lifecycle phase.



Related Topics

Creating Lifecycles, page 14-16

Reviewing and Approving Documents, page 14-59

Setting Up Document Management, page 14-11

Creating Lifecycles

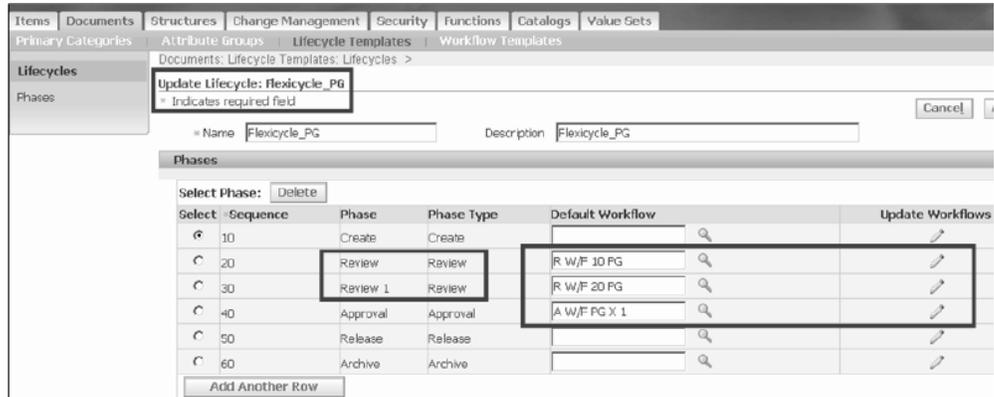
After creating the lifecycle phases, you can create the lifecycle using those phases. As you add a phase to a lifecycle, you can associate a workflow to the phase.

Important: The system requires you to associate a workflow to phases of Review or Approval phase type.

Lifecycles can include multiple phases of the same phase type. You can also include one or more workflows for a phase, defining one of them as the default workflow for the phase. Define promotion and demotion rules for each phase while updating the workflows within the lifecycle, too.

To create a document lifecycle:

1. Navigate to the Setup Workbench, Documents tab.
2. On the **Primary Categories** page, click the Lifecycle Templates link.
3. From the **Lifecycles** page, click Create to create a lifecycle.



Related Topics

Defining Lifecycle Phases, page 14-15

Reviewing and Approving Documents, page 14-59

Setting Up Document Management, page 14-11

Creating Primary Categories

You can classify your documents by defining a hierarchy of primary categories. Document primary categories behave similarly to item catalog categories. See: Creating Item Catalog Categories, page 1-2. You can specify an inactive date for a primary category, which prevents users from creating a document within that category after the inactive date passes. When you create a category, specify whether or not document creation is allowed. Use the categories that do not allow document creation for the organization of sub-categories. Use the Browse Categories button to graphically view the parent-child relationships between the categories.

To create a document category:

1. Navigate to the Setup Workbench, Documents tab.
2. On the **Primary Categories** or **Browse Categories** page, click Create to create a document category.
3. Name the category. Required.
4. Enter a description of the category. Optional.
5. Enter the parent category, if applicable.

Select an existing category as the parent of this category. Child categories inherit characteristics, such as attributes and lifecycles, from their parent category.

6. Enter the inactive date, if applicable.
Once the inactive date passes, users cannot create documents in this category.
7. Check Document Creation Allowed to enable the creation of documents within this category.
If you leave this box unchecked, you cannot store documents in this category, but you can use it to organize child categories, which can store documents.
8. Click Apply.

ORACLE Item Catalog Administration
Home Logout Preferences

Items Documents Structures Change Management Security Functions
Primary Categories | Attribute Groups | Lifecycle Templates | Workflow Templates
Documents: Primary Categories >

Create Primary Category

* Indicates required field

* Name

Description

Parent Category 🔍

Inactive Date 📅

Document Creation Allowed

Related Topics

- Setting Up Document Management, page 14-11
- Defining Alternate Categories, page 14-18
- Changing Primary and Alternate Categories, page 14-50

Defining Alternate Categories

In addition to primary categories, you can also optionally set up alternate categories for documents. Alternate categories enable you to organize the same documents differently, giving you different views of those documents for different purposes.

Alternate Category Example

Your company produces laser jet printers and other computer accessories. Create a product specification document for a new laser jet printer and assign it to the primary category Functional Specification. Create another category named Laser Jet Printer and

assign your product specification document to this as an alternate category. Now, a user browsing for your product specification document can locate it in both the Functional Specification and Laser Jet Printer categories.

Documents use the same categories as items for alternate categories. For information on defining alternate categories, see *Creating Categories*, page 2-1.

Related Topics

Setting Up Document Management, page 14-11

Creating Primary Categories, page 14-17

Changing Primary and Alternate Categories, page 14-50

Associating Attribute Groups To Primary Categories

Assign user-defined attribute groups to document categories. When you create a document within a primary category, the document inherits the user-defined attribute groups assigned to the primary category. All child categories also inherit the attribute groups, displaying them as read-only.

To assign user-defined attribute groups to a primary category:

1. Navigate to the Setup Workbench, Documents tab.
2. On the **Primary Categories** page, click a category name link.
3. On the **Basic Information** page, click Category Attributes.
4. On the **Category Attributes** page, click Add Attribute Groups.

ORACLE Item Catalog Administration

Home Logout Preferences Help Personalize Page Diagnostics

Items Documents Structures Change Management Security Functions Catalogs Value Sets

Primary Categories | Attribute Groups | Lifecycle Templates | Workflow Templates

Documents: Primary Categories >

Category Attributes

Document Primary Category: PGDPC1

Groups Pages

Add Attribute Groups

Select Attribute Groups: Delete

Select All | Select None

Select Display Name	Description	Classification	Pages	Update Actions
<input type="checkbox"/> pgAG2	pgAG2	PGDPC1	pgAG1 & pgAG2	
<input type="checkbox"/> pgAG1	pgAG1	PGDPC1	pgAG1 & pgAG2	

5. On the **Add Attribute Groups** page, search for the attribute groups that you want to add.

ORACLE Item Catalog Administration Home Logout Preferences Help Personalize Page Diagnostics

Items Documents Structures Change Management Security Functions Catalogs Value Sets

Primary Categories | Attribute Groups | Lifecycle Templates | Workflow Templates

Documents: Primary Categories > Document Attribute Groups >

Add Attribute Groups

Document Primary Category: PGDPC1

Search

Search Display Name

Results

[Select All](#) | [Select None](#)

Select	Display Name	Internal Name	Description
<input checked="" type="checkbox"/>	Design Attributes	Design_Attributes	
<input type="checkbox"/>	MSS_DOC_ATTR	MSS_DOC_ATTR	MSS_DOC_ATTR
<input type="checkbox"/>	MSS_DOC_NAME_GEN_2	MSS_DOC_NAME_GEN_2	MSS_DOC_NAME_GEN_2
<input type="checkbox"/>	MSS_DOC_NAME_GEN_ATTR	MSS_DOC_NAME_GEN_ATTR	MSS_DOC_NAME_GEN_ATTR
<input type="checkbox"/>	MSS_DOC_NUM_GEN_ATTR	MSS_DOC_NUM_GEN_ATTR	MSS_DOC_NUM_GEN_ATTR
<input type="checkbox"/>	MSS_DOC_REV_GEN_2	MSS_DOC_REV_GEN_2	MSS_DOC_REV_GEN_2
<input type="checkbox"/>	MSS_DOC_REV_GEN_ATTR	MSS_DOC_REV_GEN_ATTR	MSS_DOC_REV_GEN_ATTR
<input type="checkbox"/>	Manual_doc_ATG	SH_DOC_ATG	Manual_doc_ATG

6. Select the attribute groups to add to the primary category, then click Apply.

To define pages to display attribute groups

You can define pages to display certain attribute groups together in a specific order. Pages defined at the parent category level are inherited by child categories, displaying as read-only. Document attribute group pages behave similarly to item attribute group pages. See: Creating Pages for an Item Catalog Category, page 1-20

7. On the **Category Attributes** page, click the Pages tab.
8. Click Create Page.

ORACLE Item Catalog Administration
 Home Logout Preferences Help Personalize Page Diagnostics

Items Documents Structures Change Management Security Functions Catalogs Value Sets

Primary Categories | Attribute Groups | Lifecycle Templates | Workflow Templates

Documents: Primary Categories > Document Attribute Groups >

Edit Page
 Document Primary Category: PGDPC1

* Indicates required field

Basic Information

* Display Name * Internal Name
 Description * Sequence

Attribute Groups

Select Object:

Select All | Select None

Select	*Sequence	*Display Name	Description
<input type="checkbox"/>	<input type="text" value="1"/>	<input type="text" value="pgAG1"/>	pgAG1
<input type="checkbox"/>	<input type="text" value="2"/>	<input type="text" value="pgAG2"/>	pgAG2

Related Topics

Setting Up Document Management, page 14-11

Creating User-Defined Attribute Groups, page 14-13

Assigning People to a Document Primary Category

A user must have a primary category people role in order to create documents within a primary category. The system contains a pre-seeded role named Primary Category User, which you can assign to a person or a group. The creator of the document primary category is assigned as a Primary Category User.

To assign primary category people to a document primary category:

1. Navigate to the Setup Workbench, Documents tab.
2. On the **Primary Categories** page, click a category name link.
3. On the **Basic Information** page, click People.
4. On the **People** page, click Update underneath the Primary Category People heading.

ORACLE Item Catalog Administration Home Logout Preferences Help Personalize Page Diagnostics

Items Documents Structures Change Management Security Functions Catalogs Value Sets

Primary Categories | Attribute Groups | Lifecycle Templates | Workflow Templates

Documents: Primary Categories >

Document Primary Category:

Primary Category People

TIP These roles apply at the Document catalog category level (for example, the ability to create a Document for this Document catalog Category)

Role	Type	Name	Company	People List	Start Date	End Date
Primary Category User	Person	Steve Williams	Vision Enterprise		30-Apr-2007	

Document People

TIP The following are default User role assignments for all documents in this Document Primary Category

Role	Type	Name	Company	Start Date	End Date
No results found.					

5. On the **Update Document Primary Category People** page, click Add Another Row.
6. Select a role.

The Primary Category User role comes pre-seeded. To define additional roles, see: *Defining Role Based Security, Oracle Product Lifecycle Management Implementation Guide*
7. Choose whether to assign the role to a person or a group.
8. Search for and select the name of a person or group.
9. Enter the start and ending date for which this role is valid for the person or group.

The start date defaults to today's date. The role remains valid if the end date is left blank.

ORACLE Item Catalog Administration
 Home Logout Preferences Personalize Page Diagnostics

Items Documents Structures Change Management Security Functions Catalogs Value Sets

Primary Categories | Attribute Groups | Lifecycle Templates | Workflow Templates

Documents: Primary Categories > People >

Update Document Primary Category People

* Indicates required field

Cancel Apply

Select People: Remove

Select All | Select None

Select	*Role	Type	*Name	Company	*Start Date	End Date
<input type="checkbox"/>	Primary Category User	Person	Steve Williams	Vision Enterprise	30-Apr-2007	
<input type="checkbox"/>	Primary Category User	Person	Sally Martin	Vision Enterprise	30-Apr-2007	

Add Another Row

Cancel Apply

- Click Apply.

To assign document people roles to a document primary category

Administrators use document people roles to specify the roles assigned to users for all documents created in the document primary category. Seeded roles include Document Viewer, Document Author, and Document Administrator. Users can create other document roles, too. See: *Implementing Catalog Role Based Security, Oracle Product Lifecycle Management Implementation Guide*. The System Administrator can assign these roles for a specific document primary category to a user or a group of users.

- On the **People** page, click Update underneath the Document People heading.
- On the Update Document People Page, click Add Another Row.
- Select a role
 Seeded roles include Document Viewer, Document Author, and Document Administrator.
- Choose whether to assign the role to a person or a group.
- Search for and select the name of a person or group.
- Enter the start and ending date for which this role is valid for the person or group.
 The start date defaults to today's date. The role remains valid if the end date is left blank.

ORACLE Item Catalog Administration
 Home Logout Preferences Help Personalize Page Diagnostics

Items Documents Structures Change Management Security Functions Catalogs Value Sets

Primary Categories | Attribute Groups | Lifecycle Templates | Workflow Templates

Documents: Primary Categories > People >

Update Document People Page

* Indicates required field

Cancel Apply

Select People: Remove

Select All | Select None

Select	*Role	Type	*Name	Company	*Start Date	End Date
<input type="checkbox"/>	Document Creator	Person	Steve Williams	Vision Enterprise	30-Apr-2007	

Add

- Document Administrator
- Document Creator
- Document Viewer

Cancel Apply

17. Click Apply.

Related Topics

Defining Roles, *Oracle Product Lifecycle Management Implementation Guide*

Setting Up Document Management, page 14-11

Associating Lifecycles with a Document Primary Category

Document primary categories are assigned lifecycles, similarly to how items and change objects are assigned lifecycles. See: *Associating Lifecycles with an Item Catalog Category*, page 1-22. You can associate one or more lifecycles with a document primary category. A document primary category must have at least one valid lifecycle, which contains at least one phase, before users can create documents using that document primary category. Child categories inherit lifecycles associated with their parent primary category.

To associate lifecycles with a document primary category:

1. Navigate to the Setup Workbench, Documents tab.
2. On the **Primary Categories** page, click a category name link.
3. On the **Basic Information** page, click Lifecycles.
4. On the **Lifecycles** page, click Update.

ORACLE® Item Catalog Administration

Home Logout Preferences Help Personalize Page Diagnostics

Items Documents Structures Change Management Security Functions Catalogs Value Sets

Primary Categories | Attribute Groups | Lifecycle Templates | Workflow Templates

Documents: Primary Categories >

Lifecycles

Document Primary Category: **Primary LAD**

Lifecycles Results

Update

Select	Name	Description	Document Primary Category	Inactive Date
<input type="radio"/>	product	Product	Primary LAD	

Lifecycle: product

Change Policy Access Policy

Update Create Go

Change Policy For	Create	Release	Archive
Document Revision	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Document Publish	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Attributes and Content	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Promote to Next Phase	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Demote to Previous Phase	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Show Key Notation

5. On the Update Lifecycles page, click Add Another Row.
6. Search for a lifecycle.

ORACLE® Item Catalog Administration

Home Logout Preferences Help Personalize Page Diagnostics

Items Documents Structures Change Management Security Functions Catalogs Value Sets

Primary Categories | Attribute Groups | Lifecycle Templates | Workflow Templates

Update Lifecycles

Document Primary Category: **Primary LAD**

Cancel Apply

Name	Description	Document Primary Category	Inactive Date	Delete
product	Product	Primary LAD	<input type="text"/>	<input type="checkbox"/>
Product2	Product 2	Primary LAD	<input type="text"/>	<input type="checkbox"/>

Add Another Row

Cancel Apply

Items Documents Structures Change Management Security Functions Catalogs Value Sets Home Logout Preferences Help Personalize Page Diagnostics

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7. Click Apply.

Related Topics

Setting Up Document Management, page 14-11

Workflows for Change and Document Management, *Oracle Product Lifecycle Management Implementation Guide*

Defining Lifecycle Phases, page 14-15

Managing Document Change Policies

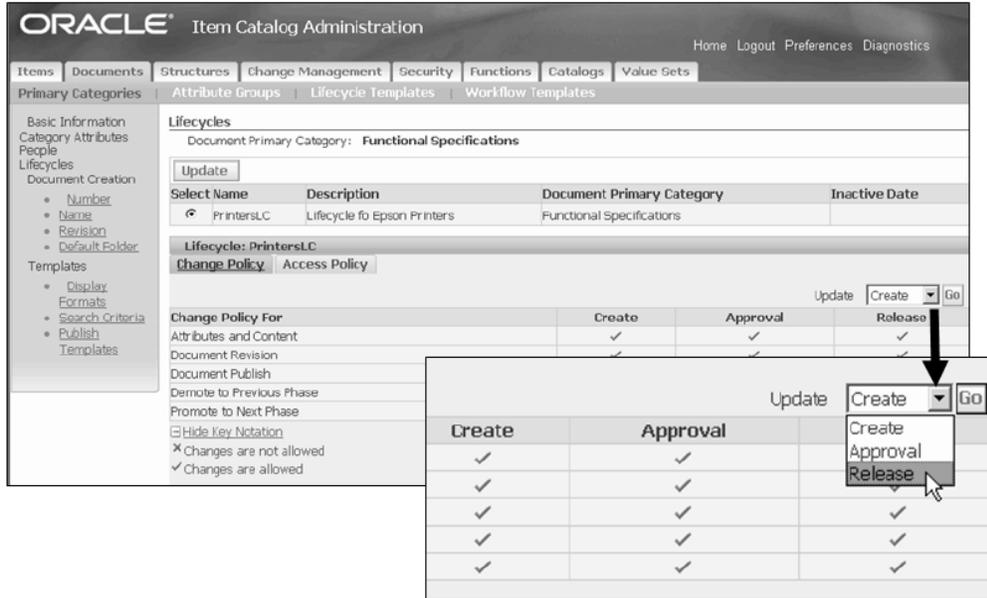
Document change policies determine the rules for how and when a document's attributes, files, and associations are changed. Define change policies for each Lifecycle phase and for each lifecycle associated with a document primary category. Choose whether or not the following changes are allowed:

- Promote to Next Phase
- Document Revision
- Document Publish
- Demote to Previous Phase
- Attributes and Content

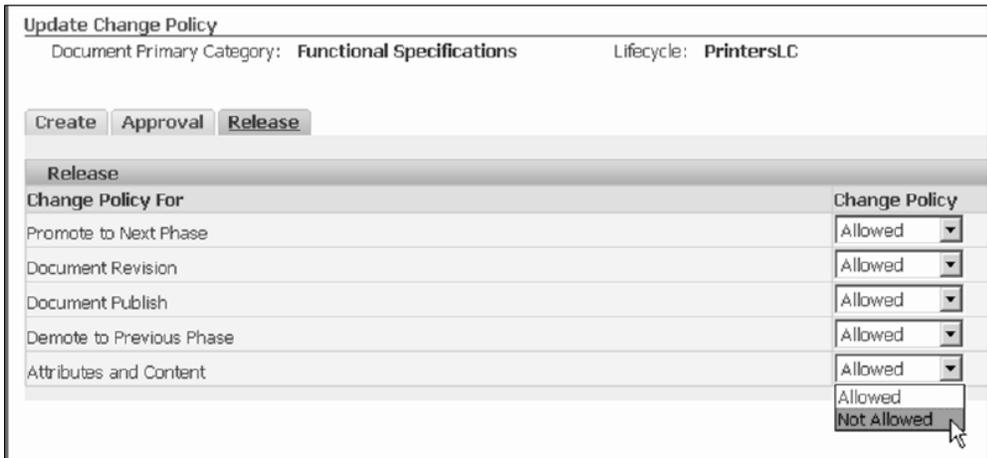
Child categories inherit the change policies defined for their parent category. You cannot modify change policies at the child category level.

To define or update a document change policy:

1. Navigate to the Setup Workbench, Documents tab.
2. On the **Primary Categories** page, click a category name link.
3. On the **Basic Information** page, click Lifecycles.
4. On the **Lifecycles** page, click the Change Policy tab.
5. Select the lifecycle for which you want to define or update change policies.
6. In the Update field, select which lifecycle phase for which you want to define or update change policies, then click Go.



- In the **Update Change Policy** page, select the change policy (Allowed or Not Allowed) for each lifecycle phase action.



- Click **Apply**.

Related Topics

Defining Lifecycle Phases, page 14-15

Setting Up Document Management, page 14-11

Assigning Access Policies to a Lifecycle Phase

Access policies enable you to further restrict a user's access to a document by lifecycle phase. Define access policies for each lifecycle phase within each lifecycle associated with a document primary category. Access policy options include:

- No Access - no access to the document allowed, even if the user's role is entitled to more access
- Access Based On Role - same access as the role
- View Only - enables view-only access to the document for the phase, even if the user's role is entitled to more access

To define or update a document access policy:

1. Navigate to the Setup Workbench, Documents tab.
2. On the **Primary Categories** page, click a category name link.
3. On the **Basic Information** page, click Lifecycles.
4. On the **Lifecycles** page, click the Access Policy tab.
5. Select the lifecycle for which you want to define or update access policies.

The screenshot shows the Oracle Item Catalog Administration interface. The main content area displays the 'Lifecycles' page for the 'Functional Specifications' document primary category. A table lists lifecycle phases, with 'PrintersLC' selected. Below the table, the 'Access Policy' tab is active, showing a table for document roles and their access policies. The 'Access Policy' table has columns for 'Document Role', 'Create', 'Approval', and 'Release'. The 'Document Role' column lists 'Dom Document Author', 'MCDocRole', and 'Document Administrator'. The 'Access Policy' table has a dropdown menu for selecting the access policy for each role. The dropdown menu is open, showing options: 'Hide Key Notation', 'No Access', 'Access Based On Role', and 'View Only Access'. The 'Access Based On Role' option is selected.

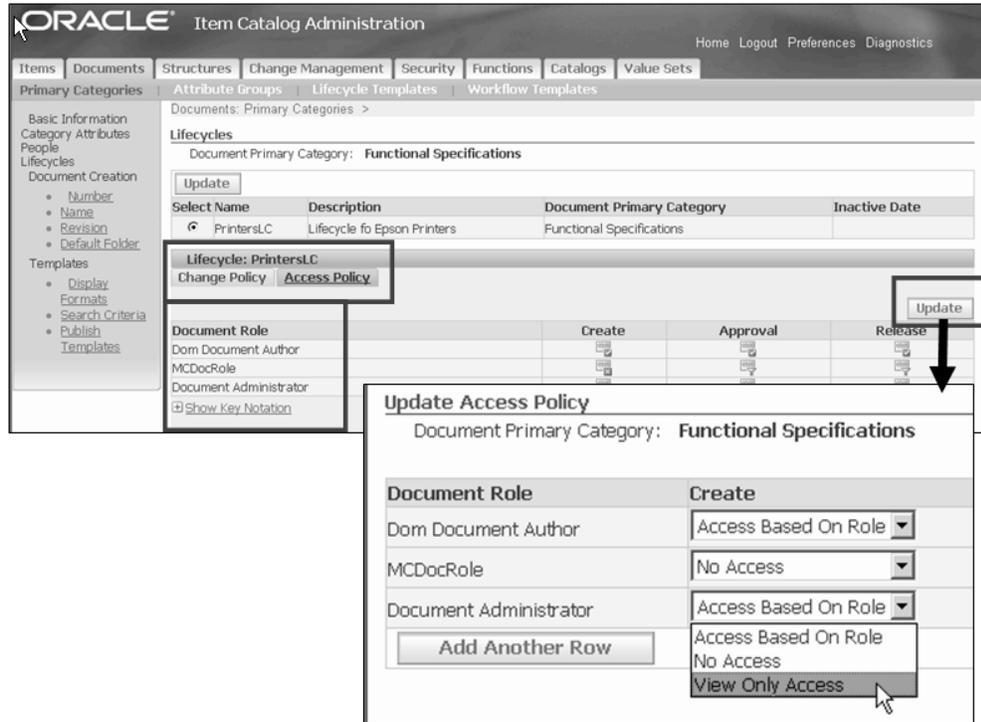
Select Name	Description	Document Primary Category	Inactive Date
PrintersLC	Lifecycle for Epson Printers	Functional Specifications	

Document Role	Create	Approval	Release
Dom Document Author	<input type="text"/>	<input type="text"/>	<input type="text"/>
MCDocRole	<input type="text"/>	<input type="text"/>	<input type="text"/>
Document Administrator	<input type="text"/>	<input type="text"/>	<input type="text"/>

Access Policy options:

- Hide Key Notation
- No Access
- Access Based On Role
- View Only Access

6. Click Update.
7. In the **Update Access Policy** page, select the access policy for each document role and lifecycle phase combination.



8. Click Apply.

Related Topics

Assigning People to a Document Primary Category, page 14-22

Setting Up Document Management, page 14-11

Defining Primary Attributes for a Primary Category

Set up the following primary attributes:

- Document number
- Document name
- Document revision
- Default folder

To set up document primary attributes:

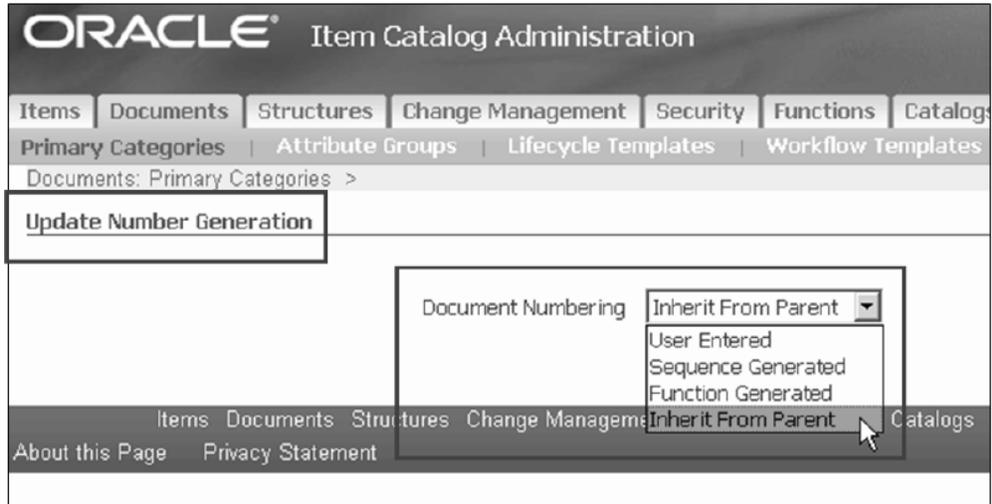
1. Navigate to the Setup Workbench, Documents tab.

2. On the **Primary Categories** page, click a category name link.
3. On the **Basic Information** page, click one of the following under the Document Creation heading:
 - Number
 - Name
 - Revision
 - Default Folder

To define document numbering

4. On the **Number Generation** page, click Update.
5. Select one of the following document numbering options:
 - User Entered - the user manually enters a document number.
 - Sequence Generated - the system generates a number based on the sequence format specified.
 - Function Generated - the system generates a number based on the function's logic and input values. See: *Creating User-Defined Functions*, page 6-6
 - Inherit From Parent - inherits the document numbering option selected at the parent category level.

Note: The default document numbering option for document primary categories is User Entered. If the category is a child category, then the default document numbering option is Inherit From Parent.



6. Click Apply.

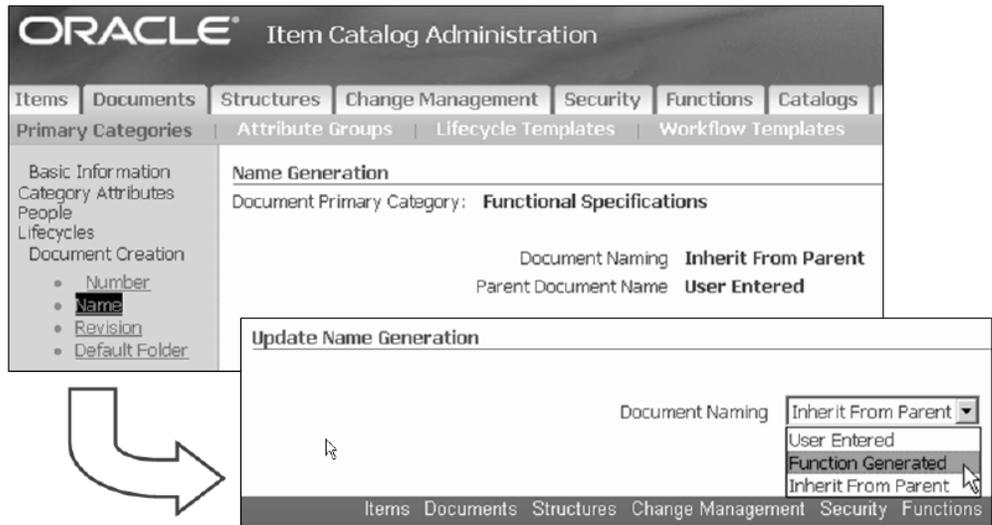
To define document naming

7. On the **Document Naming** page, click Update.

8. Select one of the following document naming options:

- User Entered - the user manually enters a document name.
- Function Generated - the system generates a name based on the function's logic and input values. See: Creating User-Defined Functions, page 6-6
- Inherit From Parent - the document inherits the document naming option selected at the parent category level.

Note: The default document naming option for document primary categories is User Entered. If the category is a child category, then the default document naming option is Inherit From Parent.



9. Click Apply.

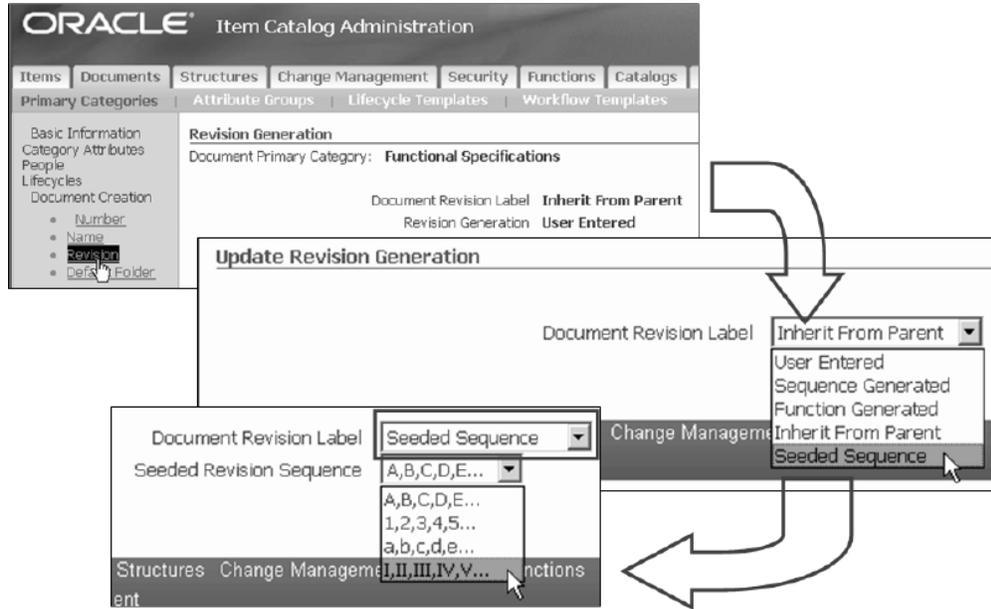
To define document revision generation

10. On the **Revision Generation** page, click Update.

11. Select one of the following revision generation options:

- User Entered - the user manually creates a document revision.
- Sequence Generated - the system generates a document revision based on the sequence format specified.
- Function Generated - the system generates a revision based on the function's logic and input values. See: *Creating User-Defined Functions*, page 6-6
- Inherit From Parent - the document inherits the document revision generation option selected at the parent category level.
- Seeded Sequence - the system generates a document revision based on one of the four provided seeded sequences.

Note: The default document revision generation option for document primary categories is User Entered. If the category is a child category, then the default revision generation option is Inherit From Parent.



12. Click Apply.

To define a default folder

Default folders enable companies to set up a folder structure hierarchy within their repository so that users can create or upload files only into specified folders.

13. On the **Default Folder** page, click Update.

14. Select one of the following default folder options:

- User Specified - the user can choose to specify a default folder of their choice or choose not to select any default folder. Users can only choose a folder for which they have administrative privileges.
- Create New - creates a new folder for every document created within a document primary category.

The user must specify a repository and select a folder location. The user creating the document receives administrative privileges for the default folder created. This user must have edit privileges for the parent folder. To name the folder, choose between naming the folder the same as the document name or creating your own name (user entered).

- Use Existing - enables the administrator to specify a Repository and a folder, for use as the default folder for all documents created within this document primary category. This implies that all files uploaded to the default folder for all documents within this category reside in the same folder.

Note: For the Create New and Use Existing options, the user setting up must have Administrative privileges on the folder used as the parent folder for new folders as well as privileges to use the existing folder as the default folder.

The image contains two screenshots of a web-based configuration interface titled "Update Default Folder".

The top screenshot shows the "Default Folder Option" dropdown menu open. The menu items are "User Specified", "Create New", "Use Existing", and "User Specified". A mouse cursor is pointing at the "Use Existing" option.

The bottom screenshot shows the "Default Folder Option" dropdown menu closed and set to "Use Existing". Below it, the "Repository" dropdown menu is set to "OCS1012WS Workaround". At the bottom, there is a text input field labeled "* Select New Folder Location" with a magnifying glass icon to its right.

15. Click Apply.

Related Topics

Creating User-Defined Attribute Groups, page 14-13

Associating Attribute Groups to Primary Categories, page 14-19

Setting Up Document Management, page 14-11

Assigning Oracle XML Publisher Templates to a Document Primary Category

You can assign previously defined Oracle XML Publisher templates to use with a document primary category. For information on defining templates, see: *Creating the Template, Oracle XML Publisher User's Guide*.

To associate templates with a document primary category:

1. Navigate to the Setup Workbench, Documents tab.
2. On the **Primary Categories** page, click a category name link.
3. On the **Basic Information** page, click Publish Templates.
4. On the **Publish Templates** page, click Add Templates.

ORACLE Item Catalog Administration
 Home Logout Preferences Help Personalize Page Diagnostics

Items Documents Structures Change Management Security Functions Catalogs Value Sets

Primary Categories | Attribute Groups | Lifecycle Templates | Workflow Templates

Documents: Primary Categories > Add Templates >

Publish Templates

Document Primary Category: **doccatys**
 Personalize "Publish Templates"

Select Publish Templates: Remove | Add Templates

Select All | Select None

Select	Name	Description	Start Date	End Date	Document Category Name
<input type="checkbox"/>	Document Detail Report	Document Detail Report	10-May-2006		

5. On the **Add Templates** page, search for and select templates.

Items Documents Structures Change Management Security Functions Catalogs Value Sets

Primary Categories | Attribute Groups | Lifecycle Templates | Workflow Templates

Documents: Primary Categories >

Add Templates

Cancel Apply

Document Primary Category: **doccatys**
 Personalize Query: (region3)

Search

Note that the search is case insensitive

Name

Description

Go Clear

Personalize "Add Publish Templates"

Add Publish Templates

Select All | Select None

Select	Name	Description	Start Date	End Date
<input type="checkbox"/>	XML XSL Simple Instruction Template	XSL XML Instruction template with onle TOC and page numbering	10-May-2006	
<input type="checkbox"/>	XML XSL Instruction Template	XSL->XML instruction template with chapter cover, page numbering, page header etc	10-May-2006	
<input checked="" type="checkbox"/>	Document Coversheet Template	Coversheet Template containing Document User-Defined Attributes	10-May-2006	
<input checked="" type="checkbox"/>	Document Summary Report	Document Summary Report	09-May-2006	

Cancel Apply

6. Click **Apply**.

Related Topics

Creating the Template, *Oracle XML Publisher User's Guide*

Creating Display Formats for a Document Primary Category

You can create display formats for document primary categories similarly to how you create them for items and change objects. Child categories inherit display formats from their parent categories.

To create display formats for a document primary category:

1. Navigate to the Setup Workbench, Documents tab.
2. On the **Primary Categories** page, click a category name link.
3. On the **Basic Information** page, click Display Formats.
4. From the Display Formats page, create a display format as explained in Managing Display Formats, page 7-5.

The screenshot shows the Oracle Item Catalog Administration interface. The top navigation bar includes 'ORACLE Item Catalog Administration' and links for 'Home', 'Logout', 'Preferences', 'Help', and 'Diagnostic'. Below this is a menu with 'Items', 'Documents', 'Structures', 'Change Management', 'Security', 'Functions', 'Catalogs', and 'Validation'. The 'Documents' menu is expanded to show 'Primary Categories', 'Attribute Groups', 'Lifecycle Templates', and 'Workflow Templates'. The left sidebar contains a tree view with categories like 'Basic Information', 'Category Attributes', 'People', 'Lifecycles', 'Document Creation', and 'Templates'. The main content area is titled 'Documents: Primary Categories >' and 'Display Formats'. It shows 'Document Primary Category: Specifications'. There are 'Delete' and 'Create' buttons. Below are 'Select All' and 'Select None' options. A table lists display formats:

Select	Name	Description	Document Primary Category	Default	Rows per Page	Copy	Update
<input type="checkbox"/>	System	System Result Format	Primary Category Root	Yes	25		

Related Topics

Setting Up Document Management, page 14-11

Managing Display Formats, page 7-5

Creating Primary Categories, page 14-17

Creating Search Criteria for a Document Primary Category

You can create search criteria for document primary categories similarly to how you create them for items and change objects. Child categories inherit search criteria from their parent categories.

To create search criteria for a document primary category:

1. Navigate to the Setup Workbench, Documents tab.
2. On the **Primary Categories** page, click a category name link.
3. On the **Basic Information** page, click Search Criteria.
4. From the Search Criteria page, create search criteria as explained in Managing Search Criteria, page 7-1.

The screenshot shows the Oracle Item Catalog Administration interface. The top navigation bar includes 'ORACLE Item Catalog Administration' and links for 'Home', 'Logout', 'Preferences', 'Help', and 'Diagnostic'. Below this is a secondary navigation bar with tabs for 'Items', 'Documents', 'Structures', 'Change Management', 'Security', 'Functions', 'Catalogs', and 'Validation'. Under the 'Documents' tab, there are sub-tabs for 'Primary Categories', 'Attribute Groups', 'Lifecycle Templates', and 'Workflow Templates'. The left sidebar contains a tree view with categories like 'Basic Information', 'Category Attributes', 'People', 'Lifecycles', 'Document Creation', and 'Templates'. The main content area is titled 'Documents: Primary Categories >' and 'Search Criteria'. It shows 'Document Primary Category: Specifications'. Below this, there are 'Delete' and 'Create' buttons. A table lists search criteria with columns for 'Select', 'Name', 'Description', 'Document Primary Category', 'Default Copy', and 'Update'. One entry is visible: 'System Criteria Template' under the 'System' name, with 'Primary Category Root' as the document primary category.

Select	Name	Description	Document Primary Category	Default Copy	Update
<input type="checkbox"/>	System	System Criteria Template	Primary Category Root	Yes	

Related Topics

Setting Up Document Management, page 14-11

Managing Search Criteria, page 7-1

Using Document Management and Collaboration

After setting up Document Management and Collaboration (DOM), you can perform the following tasks:

- Searching for Documents, page 14-39
- Creating Documents, page 14-42
- Managing Document Lifecycles, page 14-48
- Changing Primary and Alternate Categories, page 14-50
- Using Document Versions and Revisions, page 14-52
- Locking Document Revisions, page 14-58
- Reviewing and Approving Documents, page 14-59
- Associating Documents with Items and Other Documents, page 14-63
- Publishing Documents, page 14-65

Searching for Documents

You can search for documents similarly to how you search for items, using a simple or advanced search. Searching for Items, page 8-5 explains how to use wildcard characters, perform stemming searches, perform fuzzy searches and more.

The Results page returns complete details about the documents retrieved as a result of your search.

To perform a simple document search:

Tip: Simple search only returns the latest version of each document revision. To search the version history, use the advanced search.

1. On the **Document Management Simple Search** page, enter as many keywords as possible in the Include Keywords or Exclude Keywords fields. For example, entering "CRT Color Monitor" would return more relevant results than simply entering "Monitor." To specify that the search uses all the keywords entered, select Match all word(s) (AND). To specify that the search use any of the keywords entered, select Match any word(s) (OR).
2. Optionally, enter some of the document's primary attributes.
 - Document Status - select the status of the document
 - Created By - select the person who created the document
 - Created Date Within - Enter the time period within which the document was

created

- Last Modified Date Within - Enter the time period within which the document was last modified

3. Click Search.

Document Primary Category	Number	Name	Description	Revision	Version	Lifecycle Phase	Document Status	Created By	Created Date	Last Modified
Functional Specifications	ESPC-1001	XL100 Printers Functional Spec	XL100 Printers Functional Spec	A	1	PrintersLC Create	Created	Internal User1	09-11-2006 01:56:05	09-11-2006

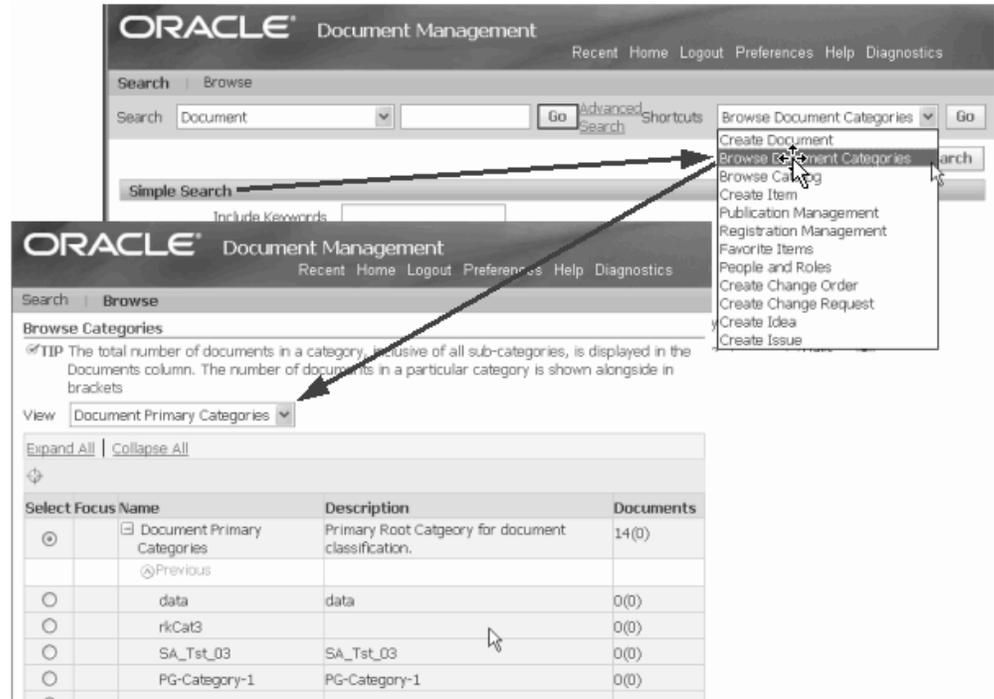
To browse document categories:

You can browse either the primary document categories or any of the alternate catalogs, similar to how you can browse item catalog categories. See: Searching for Item Catalog Categories, page 1-2

1. From the document **Simple Search** page, click the Browse link or select Browse Categories from the Shortcuts field.

The Browse Categories page lists all document primary categories and alternate catalogs. The Documents column lists the total number of documents in that category.

2. You can view the results in a certain way by selecting the display format you want to use. To define a display format, see: Managing Display Formats, page 7-5.
3. From the Browse Categories page, you can expand the category hierarchy or drill down into a specific category, among many options.



To perform an advanced document search:

1. Optionally, in the Document Management **Advanced Search** page, select a Document Category. This determines the search criteria that is available to use for this particular search.

Note: You are not required to search by or select a document category. If you do not, by default the system primary attributes appear.

2. Optionally, check the Search Version History box.

Checking this box directs the system to search older versions of a document revision in addition to the latest versions. If you leave this box unchecked, only the latest versions of the document revisions are searched. The latest revision of the document to which the user has access is displayed in the search results. The system also provides a link to the other revisions and versions that match the search criteria.

3. Click Go.

To select document metadata search criteria

4. Select search criteria, add or delete attributes and enter values to define your

parametric search. You must include at least one indexed attribute in your search. You can select and preview a display format for the search results.

Note: For details about how to define search criteria to assist in your advanced search, see *Creating Search Criteria for a Document Primary Category*, page 14-38.

5. Click Go.

To select document content search criteria

6. In the Repository field, select the document repository.
7. Optionally, select the folder in which to perform the search.
8. Check Search Sub-Folders to search in the selected folder and in its sub-folders. If left unchecked, the system only searches in the one folder specified above.
9. Optionally, in the File Contains field, enter text to search for in files attached to documents.

To select the display format

10. Select the format in which to display the search results in the Display Format field. Optionally, click Personalize to define a display format to use for this search only. See: *Creating Display Formats for a Document Primary Category*, page 14-37
11. Click Go.

To execute the advanced search

12. Click Search.

Related Topics

Creating Display Formats for a Document Primary Category, page 14-37

Creating Search Criteria for a Document Primary Category, page 14-38

Creating Documents

You can create a document by following a variety of pathways, including copying an existing document. When creating an original document, you must specify a document primary category. The document automatically inherits the characteristics of the document primary category, but you specify the document metadata and content.

While copying a document, you can choose whether or not to copy all attributes,

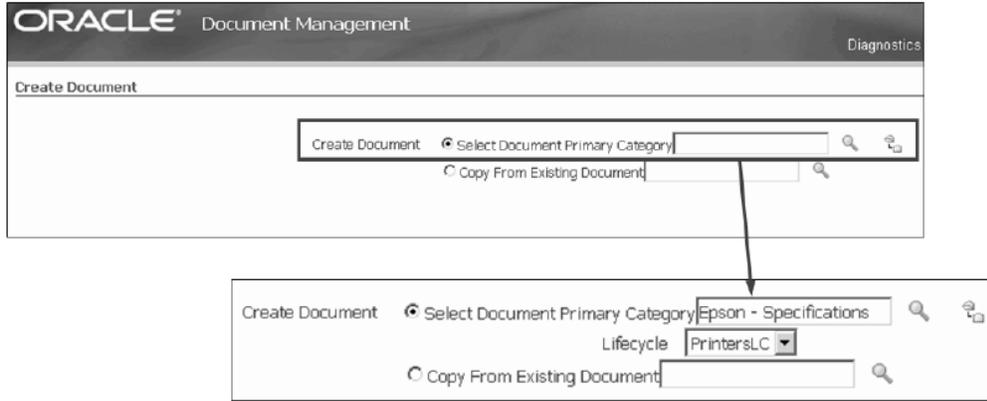
attached files, document associations, and people who have roles assigned to the document. The newly copied document has the same document category affiliation as the original document. When copying a document, users can either create new references to the files contained in the original document or create a new copy of the files in a new location within the file management system.

To create a document:

1. Navigate to the **Create Document** page. Choose the Select Document Primary Category option.
2. Find and enter the document primary category in which you want the new document to reside.

Available document primary categories depend on the following:

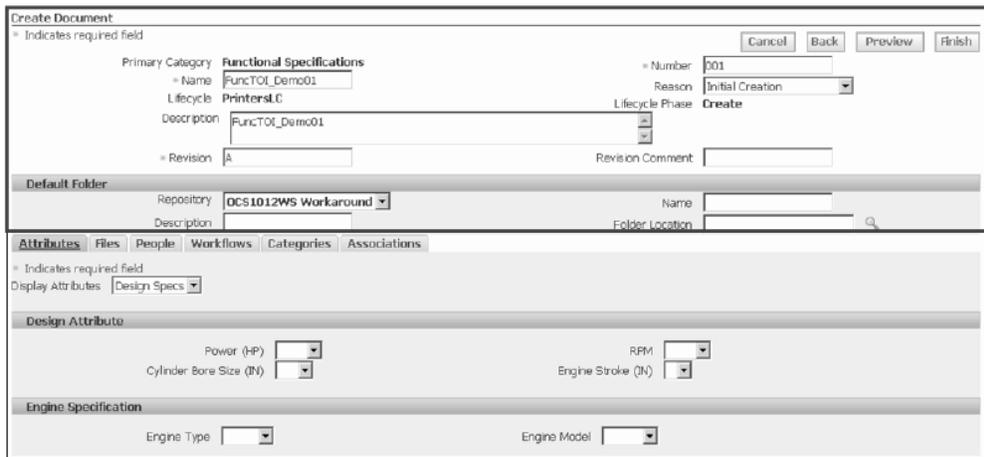
- You have the necessary privileges to create a document within the selected document primary category. See: *Assigning People to a Document Primary Category*, page 14-22
 - The document primary category selected is a valid, effective category. See: *Creating Primary Categories*, page 14-17
 - Document creation is allowed in the document primary category (the Document Creation Allowed box is checked). See: *Creating Primary Categories*, page 14-17
 - The document primary category is associated with at least one valid lifecycle. See: *Associating Lifecycles with a Document Primary Category*, page 14-25
3. In the Lifecycle field, choose one of the lifecycles available for the document primary category. Click Continue.



4. Enter information in the following required fields unless the values are automatically entered by the system::
 - Name
 - Number
 - Revision

Optionally, specify a default folder for the document.

Tip: You can set up the system so it automatically generates Name, Number, and Revision values.. See: *Defining Primary Attributes for a Primary Category*, page 14-30



5. In the Attributes tab, enter the user-defined attribute values for the document.

Attributes | Files | People | Workflows | Categories | Associations

* Indicates required field
 Display Attributes: Design Specs

Design Attribute

Power (HP) 200 RPM 1000
 Cylinder Bore Size (IN) 6.5 Engine Stroke (IN) 6

Engine Specification

Engine Type [Dropdown: Diesel, Gas] Engine Model N-495

6. In the Files tab, attach files to the document.

You can either upload local desktop files or associate files already present in the repository. When selecting files from a repository, specify the version of the file.

Attributes | **Files** | People | Workflows | Categories | Associations

Files

Add File: Desktop Files [Dropdown] Go

Select	Name	Description	Attached Version	Latest Version
No	Desktop Files			
	Repository Files			

7. In the People tab, provide certain users with access to the document.

Users can receive access to a document in two ways:

- Direct document roles - A user or a group receives access to a document if they are given a role directly on the document in the People tab.
- Indirect document roles - This happens when:
 - a user or a group is given a role on the document primary category to which the document is assigned.
 - users have been given a role on a change, review or approval process involving the document.

Tip: You can also grant a direct document role to a user on an existing document by navigating to the **Document Overview** page, clicking the People tab, and adding users or groups using the Update option.



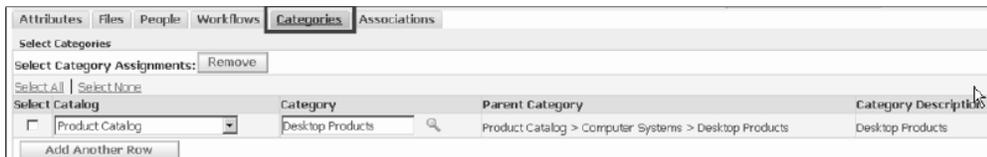
- In the Workflow tab, view the workflows associated with each phase of the lifecycle.

You can choose to add steps or to add assignees to steps.

Tip: The workflows for documents are managed using the same framework as workflows for change management. The information at Managing Workflows, page 10-40 applies to documents, too.



- In the Alternate Categories tab, associate the document with alternate categories. See: Defining Alternate Categories, page 14-18



- In the Associations tab, specify any relationships with existing documents. Choose from relationship options such as:

- this document references another document
- this document requires another document
- this document affects another document



- Optionally, preview the document before creating the document by clicking Preview.

The system creates an XML Publisher document for you to preview.

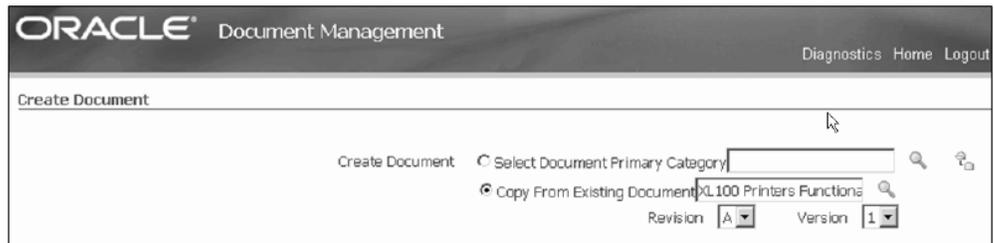
- Click Apply.

Once the system creates the document, the **Document Overview** page appears.

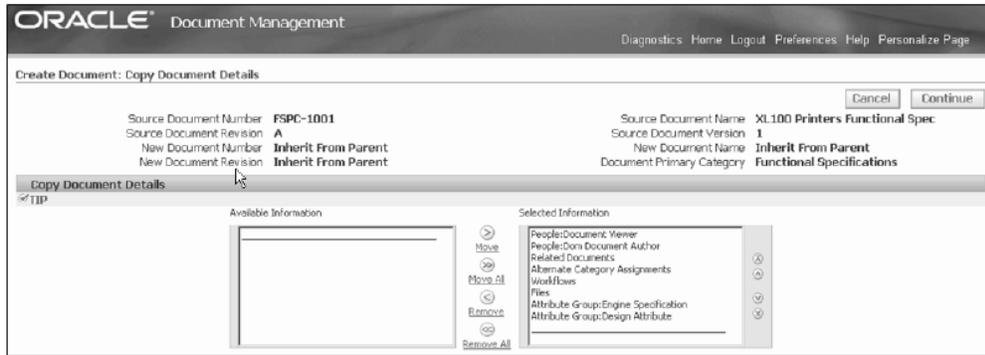
To copy a document:

In order to copy a document, you must have the privileges necessary to view all contents of the document.

- Navigate to the **Create Document** page. Choose the Copy from Existing Document option.
- Search for and select the document that you want to copy.
- Specify the revision and version of the document to copy. Click Continue.

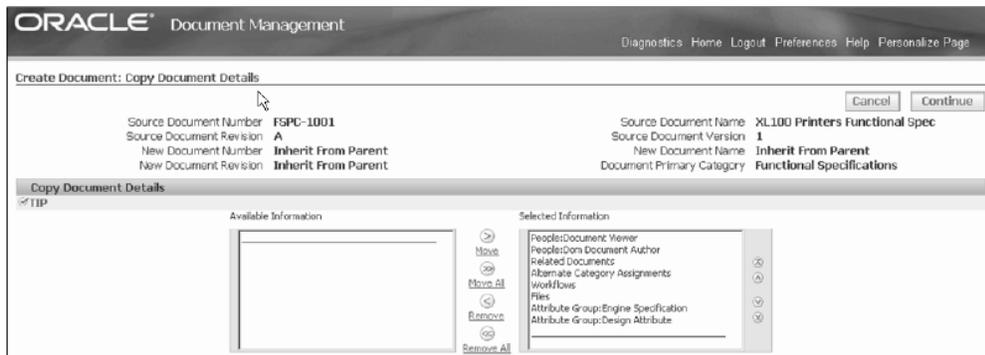


- In the **Create Document: Copy Document Details** page, select the information you want to copy to the new document. Click Continue.



- From this point on, the process of copying a document is the same as creating an original document. Enter the primary attributes, default folder information, and so on as described in To create a document, page 14-43.

Important: In the Files tab, if you chose to copy files from the original document, a list of files from the original document appear. You have the option to create references to the same files or you can create a new physical copy of the file in a different location. If you create a new physical copy, then the content of the two documents could differ in the future.



Related Topics

Setting Up Document Management, page 14-11

Managing Document Lifecycles

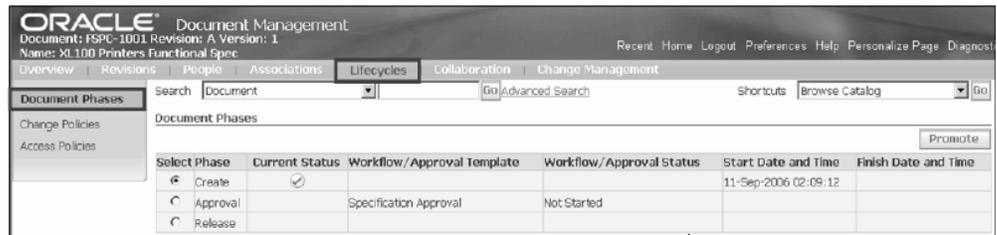
After you create a document, you can make some changes to the document lifecycle, assuming you have the appropriate level of authority on the document. You can change workflows within the document lifecycle, as well as view change policies and access policies.

To make changes to a document lifecycle workflow:

You can make changes to workflows in each phase of the document's lifecycle. You can add one-time steps or assignees for a particular workflow step or, if alternate workflows are available for a particular lifecycle phase, choose an alternate workflow.

Caution: If a workflow is already running, you must abort it before choosing an alternate workflow. Also, similarly to change management, you cannot modify previously processed workflow steps unless you abort the workflow.

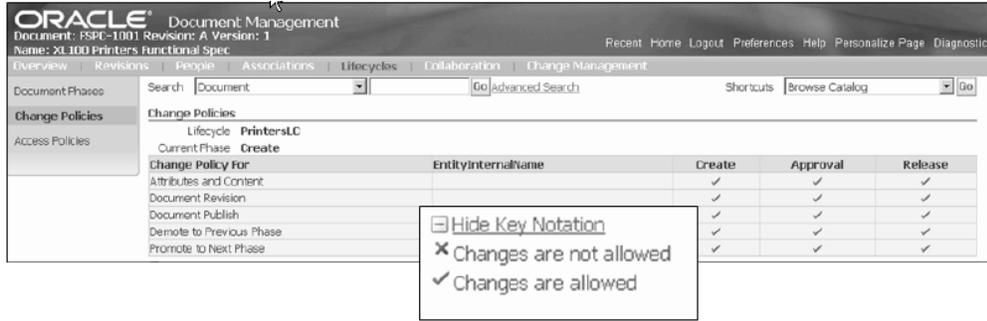
1. Find a document, then click on the document name link. See: Searching for Documents, page 14-39
2. From the Document Overview page, click Lifecycles, then Document Phases.
3. Select a phase and make changes.



To view document change policies:

Only administrators can define change policies. Users cannot modify them. See: Managing Document Change Policies, page 14-27

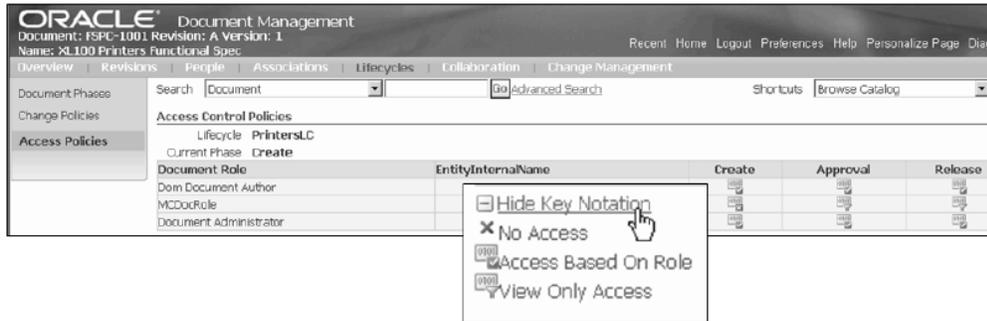
1. Find a document, then click on the document name link. See: Searching for Documents, page 14-39
2. From the Document Overview page, click Lifecycles, then Change Policies.
3. Select a change policy to view it.



To view document access policies:

Only administrators can define access policies. Users cannot modify them. See: *Assigning Access Policies to a Lifecycle Phase*, page 14-29

1. Find a document, then click on the document name link. See: *Searching for Documents*, page 14-39
2. From the Document Overview page, click Lifecycles, then Access Policies.
3. Select an access policy and view the access level by document role.



Changing Primary and Alternate Categories

You can assign alternate categories to existing documents as well as change an existing document's primary category. Consider assigning your documents to multiple alternate categories to enable users to browse the documents using an alternate category hierarchy.

If you choose to change a document's primary category, you can enter or update some of the primary attributes and the default folder if the new primary category's policies allow this. If the user-defined attributes differ between the old and new primary categories, the user-defined attribute values of the old primary category, not present in the new primary category, are lost.

To update the primary and alternate categories of existing documents:

1. Find a document, then click on the document name link. See: Searching for Documents, page 14-39
2. From the Document Overview page, click the Categories link.

The Document Categories page shows the primary category and the alternate categories. Update both types of categories from this page.



To update the primary category

3. To change the primary category, click Change Primary Category.
4. In the Change Category page, enter the new primary category, then click Go or click the search icon to search for and select a new valid primary category.
5. Click Apply.

To update the alternate category

6. To update the alternate categories, click Update.
7. Optionally, to add a new alternate category, click Add Another Row in the Document Categories page.

ORACLE® Document Management
Recent Home Logout Preferences Help Personalize Page Diagnostics

Overview | Revisions | People | Associations | Lifecycles | Collaboration | Change Management

Update Alternate Categories
* Indicates required field

Cancel Apply

Select Category Assignments: Remove

Select All | Select None

Select Catalog	Category	Category Description	Parent Category
<input type="checkbox"/> Product	150000	Merchandise	1000000

Add Another Row

Cancel Apply

8. In the Catalog field, select a catalog from the drop down list.
9. In the Category field, enter a valid category for the catalog selected.
You can click on the field's search icon to search for and select a valid category.
10. Optionally, to delete an alternate category, select the alternate category that you want to delete, then click Remove.
11. Click Apply.

Related Topics

Creating Primary Categories, page 14-17

Defining Alternate Categories, page 14-18

Using Document Versions and Revisions

To change existing document metadata or content, you must use a controlled check-out and check-in process. Metadata includes the document's primary attributes and user-defined attributes and the content includes associated files. The system tracks all changes to documents by versioning every document whenever a new document is created or when an existing document is checked in. Document revisions provide another level of detail about the changes made to a document. When you choose to revise a document, the system provides an audit trail of all changes to a document by tracking:

- who created each revision
- the revision creation date and time
- revision comments

You can view a list of revisions. Revisions are stored in reverse chronological order.

Revision options include:

- Generating revision numbers - You can choose to generate revision numbers automatically or enter them manually. For automatic generation, you can select one of the seeded sequences or specify your own numbering scheme.
- Specify a revision policy - You can specify a revision policy to enable the revision of a document in a specific lifecycle phase or not. Regardless of the revision policy, the system creates a new revision during the initial lifecycle phase of the document category.

You can change or update the following without creating a new document version or revision:

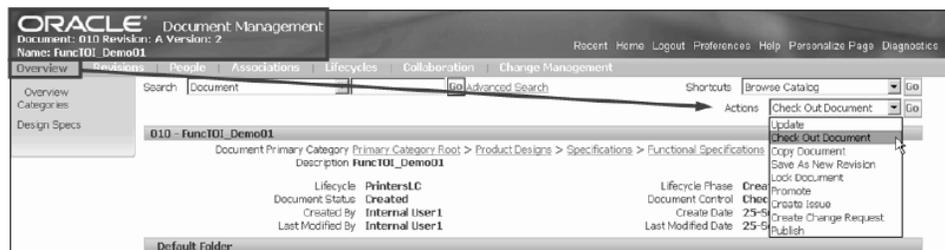
- Document name and description - Check in or check out is not required since this information is common to all versions and revisions.
- Document peripheral information and associations - This includes actions that do not change the metadata or content of a document, such as document copying, locking, promoting, publishing, and associating to another document or item.

To check out a document:

You must check out a document to make any changes to the document metadata or content.

1. Select one of the following methods to check out a document:

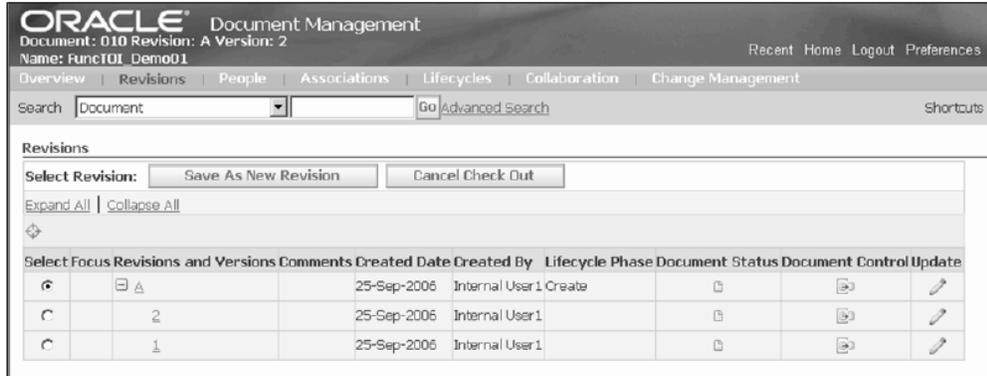
- In the **Document Overview** page, select the Check Out Document option from the Actions drop-down menu.



- In the **Document Overview** page, click the Revisions tab. The **Revisions** page lists all revisions and versions. Click the check out icon for a particular revision or version, provided it is enabled.

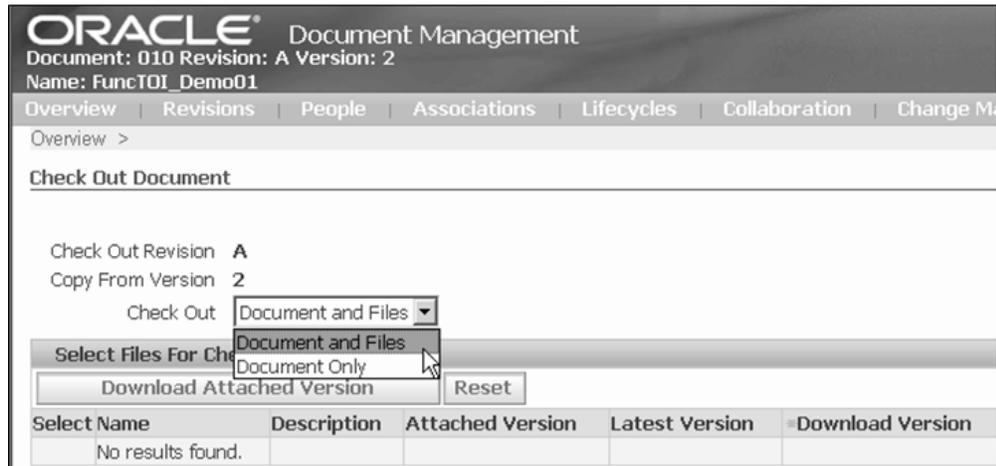
Note: A system profile option named Document Revision Multiple Checkout Enabled determines if users are enabled to check out only the latest revision of the document or if users can check out multiple revisions. The check out icon appears enabled or disabled

for the various document revisions based on the setting of this profile option. The default system setting enables the check out of only the latest revision.



- In the **Check Out Document** page, Check Out field, select whether to check out the document and files or document only.

When checking out the document and files, choose one or more of the files from the list of associated files.



- Specify the version of the file to download. Choose from:
 - the attached version of the file
 - the latest version of the file
 - any other version

The default option is to download the latest version of the file.

Tip: Click Download Attached Version to quickly change the download version to the Attached Version for all files.

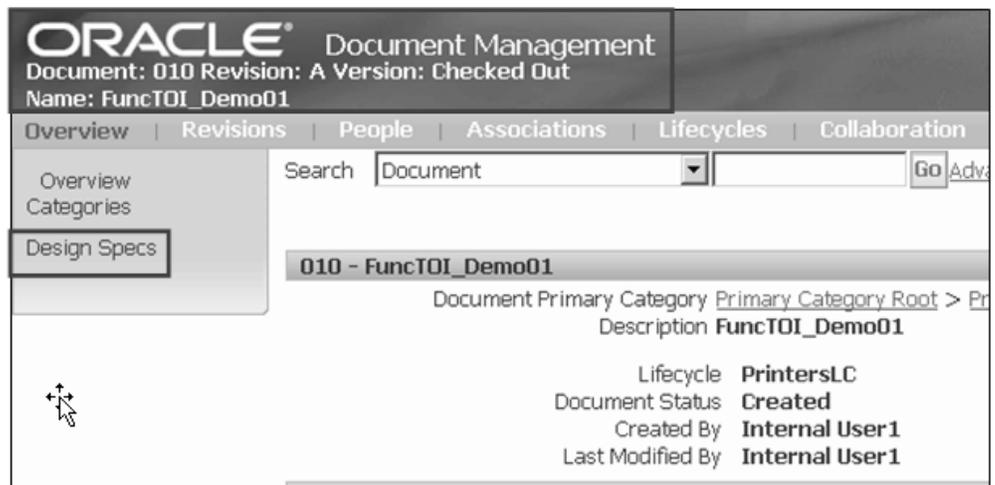
4. Click Apply.

You can now download the checked out files as a single compressed file.

To update document metadata

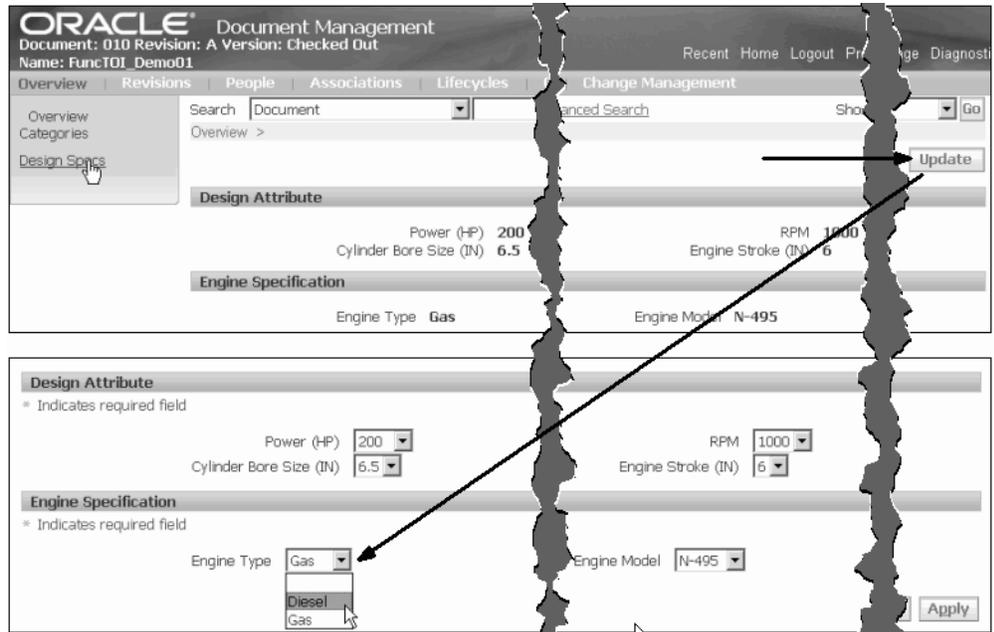
Once you check out the document, you can update the document metadata as well as the content. Update the metadata in the attribute group pages.

5. In the Document Overview page, click a user defined attribute page link in the side navigation bar.



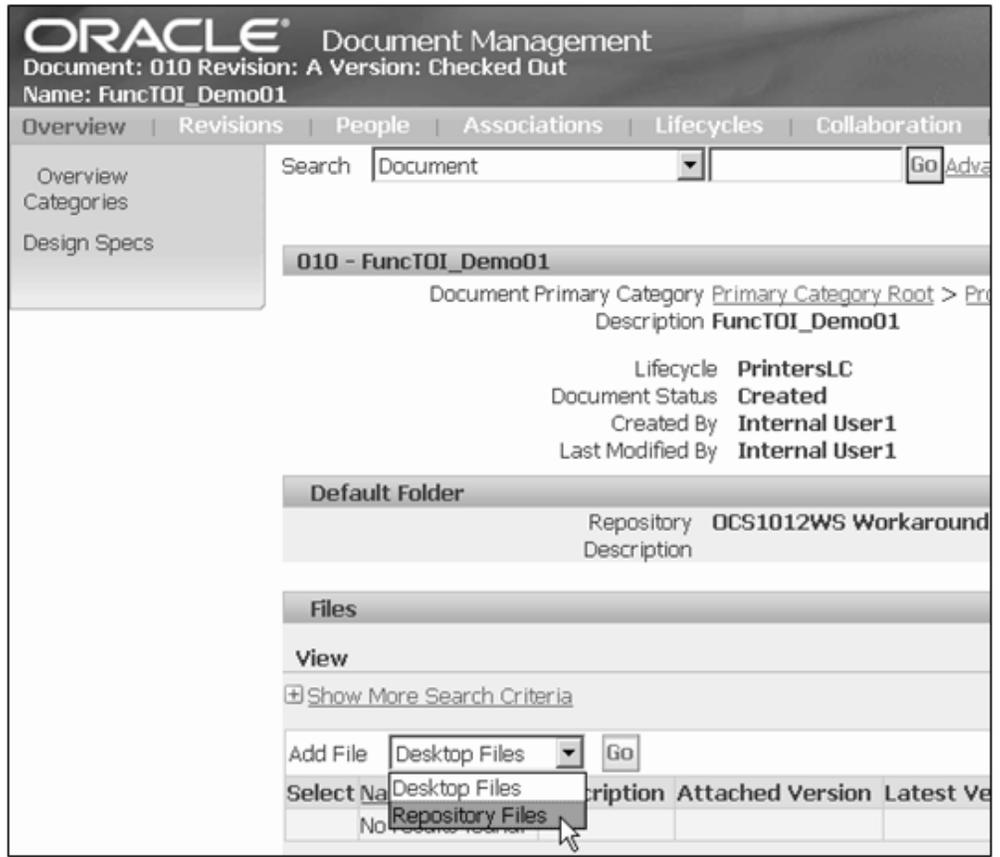
6. In the user defined attribute page, update the attribute values, click Update, then click Apply.

Important: You can only update the attribute values if you have the appropriate privileges for the document and the attributes are not under change control.



To update document content

7. In the **Document Overview** page, choose from one of the following options to update document content:
 - Add a new file by uploading a file from the desktop into the repository and associating it with the document at the same time.
 - Associate files from the repository.
 - Remove some of the associated files.
 - Change the attached version of an associated file.
 - Update the contents of any associated file by checking out the file, then checking in the new content.



To check in a new revision or version

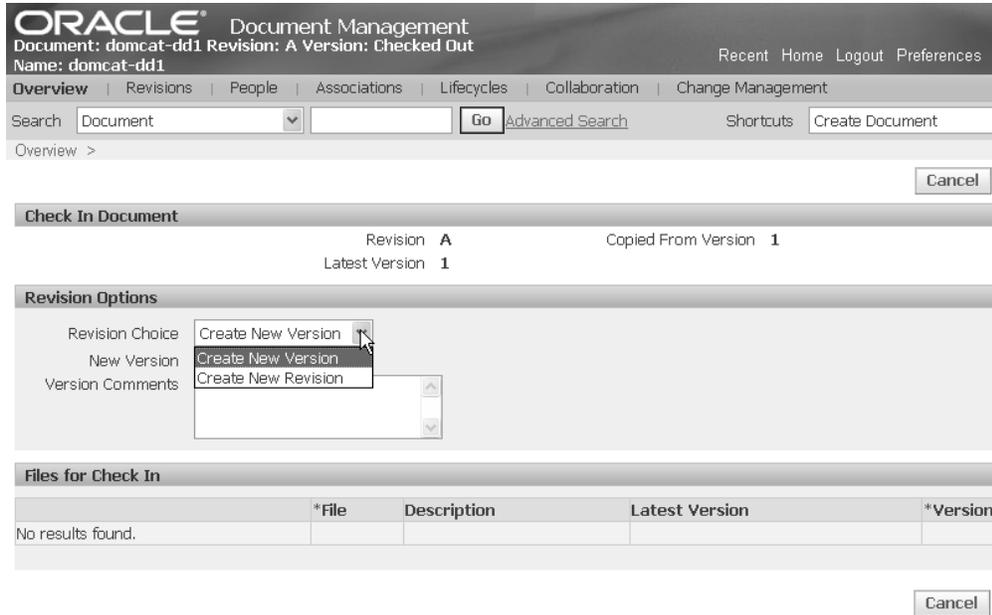
Once you complete all updates to the document metadata and content, check in the document. You choose whether to create a new revision or a new version of the document during the check in process.

8. Select one of the following methods to check in the document:

- In the **Document Overview** page, select Check In Document from the Actions field drop-down list.
- In the **Revisions** page, click the check in icon for any of the versions of the checked out revision.

9. In the **Check In** page, Revision Choice field, select whether to create a new version or a new revision upon check in.

If you create a new version, the system automatically generates the next version for the document revision. If you create a new revision, the system creates a new document revision upon check in. The modified metadata and content checks in as the new document revision.



10. Click Apply.

Related Topics

Managing Document Change Policies, page 14-27

Assigning Access Policies to a Lifecycle, page 14-29

Locking Document Revisions, page 14-58

Locking and Unlocking Documents

You can prevent all other users from updating any information for all document revisions by locking the document. Locking the document prevents any updates to either the metadata or file associations for any revision of that document. You can unlock the document at any time. The user who locks the document can still check the document in and out and make changes.

To lock and unlock a document:

1. In the **Document Overview** page, select the Lock Document option from the Actions drop-down menu.

If the document is already locked, the Unlock Document option appears in the Actions drop-down menu.

The screenshot displays the Oracle Document Management interface for a document named 'domcat-dd1'. The top navigation bar includes 'Overview', 'Revisions', 'Permissions', 'Associations', 'Lifecycles', 'Collaboration', and 'Change Management'. A search bar is present with a 'Go' button and an 'Advanced Search' link. The document details section shows the following information:

Document Primary Category	Primary Category Root > domcat_ys
Description	
Lifecycle	DomLC_YS
Document Status	Created
Created By	Jonathan Smith
Last Modified By	Jonathan Smith
Lifecycle Phase	Create
Document Control	Locked By ?
	Checked In
Create Date	18-Dec-2011
Last Modified Date	06-Feb-2012

Below the details is a 'Default Folder' section with columns for 'Repository', 'Description', 'Name', and 'Folder Location'. A 'Files' section is also visible. At the bottom, there is a 'View' section with a link to 'Show More Search Criteria' and a table with columns: Name, Description, Attached, Latest, Last Modified, Last Modified, and Version.

Related Topics

Using Document Versions and Revisions, page 14-52

Reviewing and Approving Documents

As a document goes through its lifecycle, it typically undergoes a formal review and approval process. Depending on the lifecycle phase of the document, a review or approval process automatically initiates. After creating a document, a user circulates it among others to get feedback and gain acceptance from other users in a review process. After the review process, the document is submitted to a formal approval process. Once all of the approvers have approved the document, the user can share the document with a wider audience, usually by placing the document in a public location, accessible by all company users or to the general public.

The document review and approval processes apply to both components of a document, the metadata and files (content). When you approve a document, this constitutes a full approval of both components. Separate approval of the files contained in the document is not required.

Documents use Oracle Workflow to process reviews and approvals similarly to how Change Management uses Oracle Workflow to process reviews and approvals for issues, change requests, and change orders, including sending out notifications. You can define workflows as templates, then use the templates in multiple approvals and reviews. For more information about using workflows, see:

Setting Up Workflow Templates, page 14-14

Managing Workflows, page 10-40

Defining Workflow Templates, *Oracle Product Lifecycle Management Implementation Guide*

Attaching Workflow Templates, *Oracle Product Lifecycle Management Implementation Guide*

Customizing Change Management Workflows, *Oracle Product Lifecycle Management Implementation Guide*

The workflow processes used for documents include:

- **FYI:** The system sends FYI notifications to the reviewers on the workflow informing them about the document. Reviewers can choose to review the document and provide their feedback or not.
- **Request Comment:** Initiate a Request Comment process to require a response from the reviewers. You can set up the response policy to require a response from some users, but not from others. The process completes once all of the required reviewers respond.
- **Approval:** The system sends a request for document approval to the approvers on the workflow. You can set up the response policy to require an approval from some users, but not from others. The process completes once all of the required approvers respond.

The differences between review and approval processes for documents versus change objects are discussed in the following sections.

Document Review

A document can undergo multiple review processes during its initial lifecycle phases, usually to solicit feedback and opinions about the document. A review process typically uses one of the following workflow processes:

- FYI
- Request Comment

To set up a review process, associate one of the above workflow processes with a review lifecycle phase. The review process initiates when the document enters the lifecycle phase. Once all of the review processes for a phase have been successfully completed, you can promote the document to the next phase type.

- You can only associate generic workflows with a lifecycle phase of the type of Review.
- Once a document has a status of Reviewed, authorized users can check the document in and out (possibly changing the document)

and the document's status remains Reviewed. You can manually restart the workflow process to submit the document for review again.

Document Status During the Review Process

Once the document enters a review lifecycle phase, the document's status changes to Submitted for Review. If the document completes one review process, but must go through another, the document's status remains at Submitted for Review. Once all review processes within the lifecycle phase have completed, the document's status changes to Review.

The approval status of the file version included in the document revision is not changed during the review process. Review of a document implies that the user reviews both the metadata and content, so there is no need to separately require the review of files included in the document.

Document Approval

Once a document has been reviewed and changes from the review process are incorporated, the document can go through one or more approval processes, resulting in the formal approval of the document. An approval lifecycle phase can only include workflows of the type Approval, although it can contain multiple workflows. Each associated workflow of the type Approval must contain at least one approval process, but the workflow can also include one or more review processes. An approval workflow typically uses one or more of the following workflow processes:

- Approval (mandatory)
- FYI
- Request Comment

Once the document gains approval from all of the workflows in the lifecycle phase, you can promote the document to the next lifecycle phase. Or, if the setup permits skipping the approval phase, you can promote the document without approval. You cannot update an approved document unless you reset the lifecycle phase or demote the document to the previous phase.

Once you approve a document, you cannot update it or create a new version unless you use one of the following methods:

- Without Change Control: Demote the document, then create a new version and promote the new version to the approval phase. Alternatively, perform a Reset Phase action, make changes, and resubmit the document for approval.
- With Change Control: Create a new version of the document using a change order.

Document Status During the Approval Process

Once a document successfully completes all approval processes, then the document's status changes from Submitted for Approval to Approved. If one approval process is complete, but another is incomplete, the document's status remains at Submitted for Approval. If an approval request is rejected, then the status changes to Rejected.

If the lifecycle permits the skipping of phases, you can skip the approval phase and promote the document to the next phase type. The status of the document remains as Submitted for Approval.

You can resubmit a rejected document for approval. To resubmit the document, restart the approval workflow associated with the lifecycle phase.

Once a document has been approved or promoted to an approval phase type, you cannot initiate a review process unless you demote the document back to the review phase.

Although it is possible to separately review and approve files (see: Managing Item Attachments, page 8-62) included in the document, it is not necessary. Approval of the document implies approval of both the document's metadata and content (files). The status of the file version included in the document revision is not changed in any way due to the document approval process.

Document Status

As a document progresses through the various phases of a lifecycle, its status changes as it travels through different phases. Once you approve a document, its status remains as Approved for all subsequent lifecycle phases. The document status only changes if you demote the document back to a Review or Create phase. The following table shows the various document statuses valid for different lifecycle phase types:

Phase Type	Document Status	Valid Period in the Phase
Create	Created	Throughout the phase
Review	Submitted for Review	Upon entering the first review phase
Review	Reviewed	Upon completion of the last review phase workflow
Approval	Submitted for Approval	Upon entering the first approval phase

Phase Type	Document Status	Valid Period in the Phase
Approval	Approved / Rejected	Upon completion of the workflow in the last approval phase
Release	Document status at the exit of the last phase	Throughout the phase
Archive	Document status at the exit of the last phase	Throughout the phase

Related Topics

Defining Lifecycle Phases , page 14-15

Creating Lifecycles, page 14-16

Setting Up Workflow Templates, page 14-14

Managing Workflows, page 10-40

Defining Workflow Templates, *Oracle Product Lifecycle Management Implementation Guide*

Attaching Workflow Templates, *Oracle Product Lifecycle Management Implementation Guide*

Customizing Change Management Workflows, *Oracle Product Lifecycle Management Implementation Guide*

Associating Documents with Items and Other Documents

You can associate a document with an item or with another document. When making the association, you can choose from several types of associations:

- References
- Affects
- Is Referenced By
- Is Affected By
- Is Supported By
- Is Described By

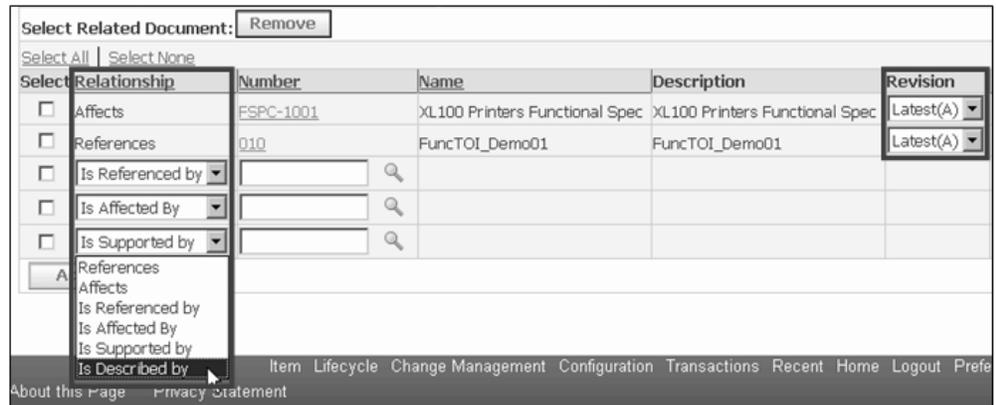
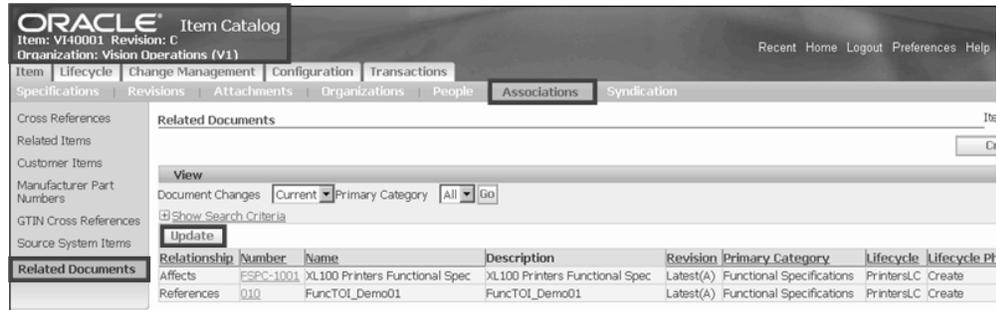
Associate an item or document revision to a specific document revision or always to the

latest document revision. Always associating to the latest document revision is commonly referred to as a floating relationship because the association always points to the most recent revision of the document. If you make an association between specific revisions, then the association does not change, even if the associated document is revised. When viewing associated items or documents, only those associated items and documents for which a user has view permission are presented to the user. The exact privileges depend on the user's role for that document or item.

To associate documents with items:

1. In the item's **Overview** page, click the Associations link, then the Related Documents link. This brings you to a page with a list of related documents.
2. Optionally, search for certain related documents to filter the list.
3. Click Update. This enables you to modify or delete current related documents and add new related documents.

You can specify the type of relationship the document has with the item as well as the revision level of the document.



To view items associated with a document:

You can view the documents associated with an item from the item catalog **Related**

Documents page and the objects, including items, associated with a document from the document management **Associations** page.

1. In the **Document Overview** page, click the Associations link.

The **Associations** page Where Associated region displays all items associated with the document.

To associate a document with other documents:

1. In the **Document Overview** page, click the Associations link.
2. Optionally, search for certain related documents.
3. Click Update. This enables you to modify or delete current related documents and add new related documents.

You can specify the type of relationship between the documents as well as the revision of the document.

Related Topics

To change the association between an item and a document, *Oracle Product Lifecycle Management Implementation Guide*

Publishing Documents

Users with a publish privilege on a document can publish revision and version-specific document metadata and associated files using Oracle XML Publisher. Publishing is permitted when the change policy enables publishing for the document revision's lifecycle phase.

To publish a document:

1. In the **Document Overview** page, select the Publish option from the Actions drop-down menu.
2. Select the document revision and version to publish.
3. In the **Publish** page, enter the following field information:
 - Destination - select the repository where you want to place the published document

Note: You must select a Web Services-based repository.

- Select Folder - select an existing folder or create a new folder

Tip: To create a new folder, you must have participant or administrator privileges.

Caution: The publishing process will not overwrite an existing file with the same publish file name .If a file with the same publish file name exists in the destination location, then the publish process fails.

- Folder Location - enter the destination folder location
- Publish File - the name of the published file
You cannot change the publish file name here. The default name of the published file is the document name plus a suffix containing the document revision, published version, date of publishing and time of publishing. For example, if revision B version 3 of document Doc100 is published on 30-Sep-2005 at 06:32:00 hrs, then the default name of the published file is Doc100_B_3_30Sep2005_06320.
- Publish Template - select the template to use from the drop-down list. You can only select the publish templates associated with the document's primary category (or any of its parent catalog categories). See: Assigning Oracle XML Publisher Templates to a Document Primary Category, page 14-35
- Description - enter the description of the published file
The publish file name defaults into this field, but you can change it.
- Output Format - select the output format from the list of choices. The default value is Adobe Acrobat (*.pdf). Choose from:
 - Adobe Acrobat (*.pdf)
 - XML File (*.xml)
 - Rich Text Format (*.rtf)
 - Web page (*.html)
 - Microsoft Excel Workbook (*.xls)

Note: If you select a PDF book binder template, then you cannot change the value from Adobe Acrobat(*.pdf).
- PDF Book Binder Template - optionally, select a book binder template. Only select a book binder template if you want to make a composite book. All files

selected for the composite book must be in PDF format.

Oracle XML Publisher uses the book binder functionality to create one composite PDF file that can include the document metadata (which appears on a coversheet) as well as files. To use a book binder template, specify the template, select the files to include, and specify the sequence order for publishing. If you select any non-PDF files, these files are copied to the publish folder selected. The composite PDF file contains links to these non-PDF files. For more information about book binder templates, see: PDF Book Binder Processor, *Oracle XML Publisher Administration and Developer's Guide*.

ORACLE Document Management
Document: FSPC-1001 Revision: A Version: 1
Name: XL100 Printers Functional Spec

Overview Revisions People Associations Lifecycles Collaboration Change Management

Search Document Go Advanced Search Shortcuts Br

Overview > Cancel

Publish
Publish Version 1
Latest Version 1
Publish Revision A

Publish Destination
Destination OCS1012WS Workaround
Select Folder Existing Folder
Folder Location

Details
Publish File XL100 Printers Functional Spec_A_
Description XL100 Printers Functional Spec_A_
Publish Template Document Management Detail Report - User Defined
Output Format Adobe Acrobat (*.pdf)

PDF Book Binder
Template
Description

Select Files to Publish
TIP If output format is 'Adobe Acrobat (.pdf)', then files in 'rtf','txt','xls', 'xml' formats can be converted to pdf format and merged with the published file.

Select All | Select None

Select	Name	Description	Attached Version	Sequence
<input type="checkbox"/>				
<input type="checkbox"/>				

To view the publish history of a document:

If you have a view privilege for a document, you can view the publish history of a version of a document revision. If the document was successfully published, you can view the resulting file (*.pdf).

For each document published, the Publish History page displays:

- the list of attached files selected for publishing
- other file information, such as the attached version and file size
- whether each attached file merged with the coversheet or was inserted as a link
- the published file name in the Files Selected table, with a link to view the published file

1. In the **Document Overview** page, click the Collaboration tab.

2. In the **Create Attachment Review** page, click the Publish History link.

The **Publish** page opens.

3. In the Publish History table, select a published file (document).

The Files Selected table below shows all of the files associated with the selected published file (document).

Document: DOC1001 Revision: B Version: 3 NEWER OLDER
 Name: Wireless LAN Specifications

Overview | Revisions | People | Associations | Lifecycles | **Collaboration** | Change Management

~Review
 ~Approval
 Change Notification
Publish History

Search Documents [Advanced Search](#) Shortcuts -----Item----

Publish History

Previous

Select	Published File	Publish Date	Published By	Destination	Location	Re
<input checked="" type="radio"/>	DOC1001_B_3_12Sept...	09-12-2005 9:45AM	Jonathan Smith	Oracle Files NA	/Public/DOC1001...	280
<input type="radio"/>	DOC1001_B_3_12Sept...	09-12-2005 10:45AM	Jonathan Smith	Oracle Files NA	/Public/DOC1001...	280
<input type="radio"/>	DOC1001_B_3_05Sept...	09-05-2005 11:45AM	Terri Miller	Oracle Files Europe	/Public/DOC1001...	280
<input type="radio"/>	DOC1001_B_3_04Sept...	09-04-2005 11:45AM	Terri Miller	~Desktop		280
<input type="radio"/>	DOC1001_B_3_05Sept...	09-05-2005 10:00AM	Blair Palmer	Oracle Files Asia	/Public/DOC1001...	280

Published File: DOC1001_B_3_12Sept2005_063200

Details

Description	Coversheet for DOC1001 Revision B	Publish Template	Document Detail
Output Format	Adobe Acrobat (*.pdf)		
PDF Book Binder			
Template	Document Publish		
Description	XSL-XML template having watermark as 'Draft', page numbering in Roman n page header as 'Oracle' and page footer as 'Confidential'		

Files Selected

To export document search results:

You can export both simple and advanced document search results using the following report formats:

- Adobe Acrobat (*.pdf)
- XML File (*.xml)
- Rich Text Format (*.rtf)
- Web page (*.html)
- Microsoft Excel Workbook (*.xls)

1. From the **Simple Search** or **Advanced Search** page, click Export All Results.

Search | Browse

Search [Advanced Search](#) [Shortcuts](#)

Simple Search

Include Keywords

Match all word(s) (AND)
 Match any word(s) (OR)

Exclude Keywords

Document Status

Created Date Within Days Last Modified Date Within Days

TIP For an explanation of the icons used in the following table, see the [Icon Key](#).

Display Format

|

Select	Document Primary Category	Number	Name	Description	Revision	Version	Lifecycle	Lifecycle Phase	Document Status	Created By
<input type="radio"/>	Design Documents	DD-1	V150000 Motherboard HLD	V150000 Motherboard High Level Design Document	A	1	Document Lifecycle	Review	Not Submitted for Approval	Mary Robins
<input type="radio"/>	Technical Specifications	TS-1	DX2000 Desktop Technical Specs	DX2000 Desktop Technical Specifications	A	1	Document Lifecycle	Create	Created	Mary Robins

- In the **Export** page, select the publish template to use and the output format from the lists of values.

ORACLE Document Management

[Recent](#) [Home](#) [Logout](#) [Preferences](#) [Help](#) [Diagnostics](#)

Search | Browse

Search > Simple Search >

Export

Publish Template

Output Format

- Adobe Acrobat (*.pdf)
- Microsoft Rich Text (*.rtf)
- Microsoft Excel (*.xls)
- *.html
- *.txt
- *.xml

[About this Page](#) [Privacy](#) [Logout](#) [Preferences](#) [Help](#) [Diagnostics](#)

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- Click **Export**.



Document Summary	
Number	DD-1
Name	VI50000 Motherboard HLD
Description Primary Category	Design Documents
Description	VI50000 Motherboard High Level Design Document
Revision	A
Revision Creation Reason	Initial Creation
Revision Comments	
Version	1
Version Comments	
Lifecycle	Document Lifecycle
Lifecycle Phase	Review
Document Status	Not Submitted for Approval
Created By	Mary Robinson
Created Date	2007-01-29
Last Modified By	Mary Robinson
Last Modified Date	2007-01-29

Symbols

xml publisher template, 14-35

A

access policies, 14-29
action log, 10-25
add attachments, 13-3
 desktop file, 13-4
 new folder, 13-7
 repository file/folder, 13-5
 text, 13-9
 url, 13-8
adding people, 8-69
 people to item, 8-69
 update access, 8-70
advanced search, 11-
alternate categories, 14-18
approval routing, 10-40
 delete step, 10-43
 digital sharing, 10-48
 edit step, 10-41
 insert step, 10-42
 set vacation rules, 10-48
 start/stop approval, 10-43
 switch template, 10-44
 transfer notifications, 10-46
 view approval, 10-45
 view progress, 10-43
Approved Manufacturers List (AML), 8-61
assigning people, 2-9
assign people
 document primary category, 14-22

attribute group
 adding actions, 1-12
attribute groups
 associating to primary categories, 14-19
 user-defined, 14-13

C

catalog
 assigning category, 2-5
 assigning people, 2-8
 assign item to category, 8-4
 browsing catalog, 8-2
 copying items, 8-5
category hierarchy
 create, 2-6
 delete, 2-8
 update, 2-7
category mapping, 2-6
change
 item attachment, 8-62
change categories
 primary and alternate, 14-50
change category
 create, 3-1
change headers
 organization policies, 3-10
change header types, 3-4
 associate attribute groups, 3-7
 associate codes, 3-7
 associate pages, 3-7
 associate workflows, 3-8
 configure, 3-8

- create, 3-5
- change line types, 3-12
 - associate attribute groups, 3-13
 - associate pages, 3-13
 - create, 3-12
- change management, 10-2
- change management business event, 3-20
- change management text index, 3-18
- change order revised item, 10-32
- change orders, 10-20
- change order structures, 12-75
- change priorities, 3-14
- change reasons, 3-17
- change requests, 10-11
- change revisions, 10-26
- change tasks, 10-39
- create document, 14-42
- create lifecycle, 14-16
- creating catalogs, 2-3
- creating categories, 2-1
- creating change orders, 12-85
- creating classifications , 3-17
- creating ideas, 10-7
- creating issues, 10-4
- creating items, 12-20
- creating parameter mappings, 1-19
- creating relationships, 10-39
- creating reports, 3-19
- creating statuses, 3-15
- creating structures, 12-52
- customer items
 - import, 8-19
- customer subscription, 9-25
- custom privileges, 6-15

D

- defined structure, 12-74
- defining item numbers, 1-18
- display formats, 7-5
 - administrator level, 7-6
 - document primary category, 14-37
 - user level, 7-7
- document change policies, 14-27
- documentlifecycles, 14-48
- document management, 14-2
 - check out documents, 14-7

- document lifecycle, 14-7
- document publish, 14-11
- document relationships, 14-8
- documents and files, 14-2
- document search, 14-10
- document security, 14-9
- hierarchical classification, 14-4
- lock documents, 14-7
 - primary attributes, 14-5
 - review/approval, 14-11
 - revisions and versions, 14-3
 - setup overview, 14-11
 - unstructured content, 14-6
 - use, 14-38
 - user-defined attributes, 14-6
- document revision
 - lock, 14-58
- document search, 14-39
- document versions/revisions, 14-52

E

- e-business suite
 - attachments, 13-1
 - attachments page, 13-2
 - managing attachments, 13-2
 - terms, 13-1
- eco open interface table, 10-55
- EGO_ITEM_PEOPLE_INTF, 8-24
 - column details, 8-26
- EGO_ITM_USR_ATTR_INTRFC
 - column details, 8-21
- EGO_ITM_USR_ATTR_INTRFC , 8-19
- ENG_CHANGE_LINES_INTERFACE
 - table, 10-64
- ENG_CHANGE_LINES_INTERFACE
 - column details, 10-66
- ENG_CHANGE_PEOPLE_INTF
 - column details, 10-62
 - table, 10-60
- exclusion rules, 12-49
- existing item update, 8-40
 - mass assign/unassign items, 8-47
 - reassign categories, 8-49
 - using excel spreadsheet, 8-41

F

- favorite items, 8-9
 - add item, 8-9
 - manage items, 8-9

G

- gdsn administration, 1-28
 - associating gdsn to item catalog, 1-30
 - default gdsn catalog, 1-28
 - gdsn attribute groups, 1-29
 - gtin number setup, 1-30
- gdsn syndication, 9-1
 - associate gtins, 9-3
 - create an item, 9-1
 - enable existing item, 9-2
- generating reports, 8-79

I

- import change, 10-52
- import changes
 - change lines, 10-54
 - change people, 10-54
 - eco open interface, 10-52
 - issues, 10-52
 - user attributes, 10-53
- import formats, 1-6
 - copy, 1-8
 - create, 1-6
 - delete, 1-9
 - update, 1-8
- importing item category, 8-35
- importing item organization, 8-37
- importing item revisions, 8-31
- importing items, 8-28
- importing people assignment, 8-38
- import product structure, 12-27
 - create, 12-29
 - import, 12-30
 - item open interface, 12-30
 - sync, 12-28
 - update, 12-30
 - use spreadsheets, 12-27
- independent values, 6-14
- issue and change request lines, 10-30
- item attachments, 8-62
- item business events, 8-67
- item catalog category

- adding attachment categories, 1-22
- assigning people, 1-10
- associating attribute groups, 1-11
- associating lifecycles, 1-22
- associating new item requests, 1-16
- associating report templates, 1-27
- browsing, 1-10
- create, 1-2
- creating pages, 1-20
- deleting attachment categories, 1-24
- search, 1-2
- update, 1-4
- item catalog text index
 - optimize, 1-26
- item change policy, 1-24
- item creation
 - multiple item, 8-15
 - new item, 8-10
- item imports, 8-17
 - import customer items, 8-19
 - import items, 8-17
 - import people, 8-18
 - import user attributes, 8-18
- item inquiries, 11-5
 - locate assembly items, 11-6
 - view items, 11-6
- item management, 12-3
 - favorites list, 12-3
 - item information, 12-11
 - item search, 12-7
- item phases, 8-58
 - change item status, 8-60
 - demote item, 8-60
 - implement item change, 8-60
 - item change policy, 8-60
 - lifecycle tracking project, 8-59
 - promote item, 8-59
- item request
 - define new item request, 1-14
- item request
 - setting up, 1-14
- item revision, 8-61
 - create, 8-62
 - update, 8-62
- item search, 8-5
 - advanced search, 8-8
 - items in structure, 11-1

- simple search, 8-6
- item search
 - simple search, 11-1
- item searchadvanced search, 11-2
- item specification, 8-51
 - update operational attributes, 8-55
 - update primary attributes, 8-52
- item status, 1-9
 - create, 1-9
 - edit, 1-10
- item templates, 1-17
 - define, 1-17
- item transaction information, 8-77

L

- lifecycle phases, 1-21, 14-15
 - edit, 1-21
- lifecycles
 - associating with document, 14-25
- logon to repository, 13-23

M

- manage attachments, 13-10
 - attachment review/approval, 8-63
 - change file version, 13-14
 - check files, 13-15
 - detach attachments, 13-16
 - grant access, 13-21
 - search attachment, 13-13
 - update attributes, 13-17
 - version history, 13-18
 - view contents, 13-13
 - view objects, 13-20
- manage item structure, 11-4
 - See* update structure
 - add attachment categories, 11-4
 - display attachments, 11-4
- manage projects, 8-72
 - associate item to project, 8-73
 - associate project, 8-72
 - create tasks, 8-75
 - navigate to project, 8-73
 - view projects, 8-72
- manage reports, 10-68
 - browse, 10-69
 - create, 10-69

- create list, 10-71
- delete, 10-71
- delete list, 10-72
- export, 10-71
- print, 10-71
- send, 10-70
- update, 10-70
- update list, 10-72
- managing attachments, 10-27
- managing roles
 - add or remove members, 5-8
 - create group, 5-8
 - find group, 5-9
 - search company, 5-9
 - search group, 5-9
 - search people, 5-7
- managing roles , 5-6
- managing structures, 12-41
- mark up structures, 12-81
- multilevel structures, 12-31
 - use compare, 12-39
 - use copy, 12-31
- multi-row attribute
 - update in spreadsheet, 8-49

O

- organization assignments, 8-68

P

- package hierarchy, 9-17
- people and roles, 10-29
- people and roles administration
 - creating roles, 5-3
 - deleting roles, 5-4
 - organization level roles, 5-5
 - role mapping, 5-4
 - updating roles, 5-4
 - view roles, 5-1
- performing actions, 10-23
- primary attributes, 14-30
- primary categories, 14-17
- product structure, 12-21
 - find components, 12-21
 - setting preferences, 12-22
- product workbench, 12-1
- publish document, 14-65

publishing items, 9-27

R

recently visited, 8-10
register items, 9-21
review/approve document, 14-59
revision phases, 8-70
 demote item, 8-71
 implement phase changes, 8-71
 lifecycle tracking project, 8-71
 promote item, 8-70

S

search criteria
 document primary category, 14-38
search criteria templates, 7-1
 administrator level, 7-1
 user level, 7-3
searching issues, 10-2
 advanced search, 10-3
 simple search, 10-2
structure information
 edit, 12-65
 view, 12-59
structure names
 create, 4-5
 search, 4-4
structure types
 associating component attribute groups, 4-5
 associating other information, 4-6
 associating structure names, 4-4
 create, 4-2
 search, 4-1

T

table value sets, 6-12
 identify, 6-13
task templates
 create, 3-11
troubleshoot attachments, 13-23

U

user-defined attributes, 6-1
 create, 6-2
user-defined functions, 6-6

create, 6-7
create parameter mapping, 6-8

V

valid component, 12-89
value sets
 create, 6-10
view item structure
 indented structures, 11-2
 locate components, 11-3
 reclassify structures, 11-4
 structure details, 11-2
 structure list, 11-3
view item structure , 11-2

W

workflow templates, 3-23
 setup overview, 14-14

