

Oracle® Product Information Management

User's Guide

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Send Us Your Comments

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- Did you understand the context of the procedures?
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- 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?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

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Preface

Intended Audience

Welcome to Release 12.1 of the *Oracle Product Information Management User's Guide*.

See Related Information Sources on page x for more Oracle E-Business Suite product information.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

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Structure

- 1 Using the Item Catalog
- 2 Using Style and SKU Items
- 3 Synchronizing Product Data and Managing Data Quality
- 4 Using Change Management
- 5 Using Configuration Management
- 6 Using the Product Workbench
- 7 E-Business Suite Attachments
- 8 Publishing Items and Structures to Multiple Systems

Related Information Sources

- Oracle E-Business Suite User's Guide
- Oracle E-Business Suite Developer's Guide
- Oracle Application Framework Personalization Guide
- Oracle E-Business Suite System Administrator's Guide 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 Information Management Implementation 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.

Users who are granted the Integration Analyst role can navigate to the Oracle Integration Repository through the Integration Repository responsibility. Users who have the Integration Developer role or the Integration Administrator role can access the Oracle Integration Repository through the Integrated SOA Gateway responsibility.

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle **STRONGLY RECOMMENDS** that you never use SQL*Plus, Oracle Data

Browser, database triggers, or any other tool to modify Oracle E-Business Suite 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 E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, 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 E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite 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.

Using the Item Catalog

This chapter covers the following topics:

- Browsing the Item Catalog and Alternate Catalogs
- Updating Item Catalog Categories
- Assigning an Item to a Category
- Changing an Existing Item's Item Catalog Category
- Copying Items with Category Assignments
- Assigning Suppliers to Items
- Searching for Items
- Managing Favorite Items
- Using Recently Visited
- Creating New Items
- Creating New Item Requests
- 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
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- Updating Existing Items

- Updating Existing Items Using a Spreadsheet
- Mass Updating Items, Categories and Associations
- Deleting Items
- Updating Multi-Row Attributes in a Spreadsheet
- Managing Item Specifications
- Managing Item Phases
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- Managing Item Attachments
- Using Item Business Events
- Enabling Organization Assignments
- Managing Revision Phases
- Viewing Item Transaction Information
- Generating Reports

Browsing the Item Catalog and Alternate Catalogs

You can browse the hierarchically structured item and alternate catalogs from the application tree menu "Browse Catalog" link. You can also browse the item catalog, but not alternate catalogs, from the Setup Workbench. Expand and collapse levels in the hierarchy to view the current structure of the catalog. You can only browse catalogs for which you have the Catalog Viewer role.

To browse a catalog:

1. In the Items section of the Application tree menu, click the "Browse Catalog" link.
2. In the **Browse Catalog** page Catalog field, select either the Item Catalog or another catalog.
3. In the Categories field, choose to view all categories for the catalog or only the active categories.
4. Click the Show/Hide link to search for item catalog categories by Name or Description. After entering the search criteria, click Go.
5. To view the items associated with the item catalog category, select the item catalog category.

All items associated with the item catalog category and its child categories are listed below.

6. Click the focus icon next to the desired item catalog category to display it at the top level.

To perform actions on an item within a catalog category:

The actions you can perform on items vary depending on whether you select a category within the Item Catalog or another catalog.

From an Item Catalog category, you can select items and perform the following actions:

- create a new item request
- add items to a new catalog category
- add items to an existing catalog category
- generate a report
- create a change order, change request, or issue
- change the lifecycle
- change the item catalog category
- compare items
- add to the Favorites list
- export all items in the category to a spreadsheet
- remove items from the catalog category

From any other catalog, you can select items and perform the following actions:

- create a new item request
- create a change order, change request, or issue
- generate a report
- compare items
- add to the Favorites list

1. Complete the steps in *To browse a catalog* above, then select one or more items.

To export all items to a spreadsheet

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

To perform all other actions

3. In the Select Items field, select one of the following actions, then click Go.
 - Create New Item Request. See: *Creating New Item Requests*, page 1-28

Note: You can only create new item requests for items with an Approval Status of "Not Submitted For Approval" or "Rejected".
 - Add to Existing Catalog Category. See: *Assigning an Item to a Category*, page 1-7
 - Add to New Catalog Category. See: *Assigning an Item to a Category*, page 1-7
 - Generate Report. See: *Generating Reports*, page 1-109
 - Create Change Order. See: *Creating Change Orders*, page 4-21
 - Create Change Request. See: *Creating Change Requests*, page 4-12
 - Create Issue. See: *Creating Issues*, page 4-5
 - Change Lifecycle. See: *Defining Change Policies, Oracle Product Information Management Implementation Guide*
 - Change Item Catalog Category. See: *Changing an Existing Item's Item Catalog Category*, page 1-10
 - Compare

You can compare attributes of two or more 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. Select each attribute group individually.
 - Add to Favorites. See: *Managing Favorite Items*, page 1-23

To search or browse the item catalog from the Setup Workbench:

1. In the Applications tree menu, click the "Setup Workbench" link.

On the **Search: Item Catalog Categories** page, click the Catalog Hierarchy link or the Catalog Hierarchy icon.

Note: You can only browse the item catalog using this method.

Tip: In the **Search: Item Catalog Categories** page, you can also search for item catalog categories by entering search criteria for a category name, description, or parent category.

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.

Related Topics

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

Overview of Catalogs, *Oracle Product Information Management Implementation Guide*

Assigning an Item to a Category, page 1-7

Copying Items with Category Assignments, page 1-12

Updating Item Catalog Categories

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

To update an item catalog category:

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

Catalog (required)

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

Description

Optionally enter a brief description of the item catalog category.

Parent Item Category

If at any time a parent item 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 item catalog category. Also, if a parent item catalog category has already been defined, then you can only choose the item catalog category's siblings, its sibling's children, or the current parent item catalog category, as a parent item catalog category.

Note: For item catalog categories with versions, once the item catalog category is released, you cannot change the parent item catalog category.

Item Creation Allowed

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

Inactivate

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. Thus, all children of a parent item catalog category with an inactive date should be made inactive at the same time or earlier. Making an item catalog 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 item catalog category upon creation of an item catalog category.

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

4. Click Apply.

Related Topics

Defining Item Catalog Categories, *Oracle Product Information Management Implementation Guide*

Assigning an Item to a Category

When you create an item, it is automatically assigned to the default mandatory item 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 an existing category from the item's Classifications and Categories page:

This explains how you can change an item catalog category as well as assign an item to one or more existing catalog categories.

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 item's link in the search results.
3. On the **Overview** page, select the Classification and Categories link.
4. On the **Classification and Categories** page, click Update. After the page refreshes, click Add Assignment.
5. Select a catalog and then a category within that catalog.

If *Enforce List of Valid Categories* is enabled in the catalog definition (See: Defining Catalogs, *Oracle Product Information Management Implementation Guide*), 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 (See: Defining Catalogs, *Oracle Product Information Management Implementation Guide*), 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.

Tip: If you want to add the selected items to more than one catalog category, click Add Another Row to search for and select another catalog/category combination.

6. Click Apply.

To add items to an existing catalog category from the Browse Catalog or Search Results page:

Using this method, you can select one or more items and assign them to existing catalog categories from the **Browse Catalog** or **Search Results** page.

1. Browse the item catalog or another catalog. Select the items within a catalog category that you want to add to an existing catalog category. See: *Browsing the Item Catalog and Alternate Catalogs*, page 1-2

Alternatively, search for one or more items. In the Search Results page, select the items that you want to add to an existing catalog category. See: *Searching for Items*, page 1-17
2. In the Select Items field, select the Add to Existing Catalog Category action, then click Go.
3. The **Add to Existing Category** page appears. In the Catalog field, search for and select a catalog.
4. In the Category field, search for and select a category.
5. If you want to add the selected items to more than one existing catalog category, then click Add Another Row.
6. If you decide not to add the items to a catalog category, you can either remove the items or remove the catalog category by selecting it, then clicking either Remove for the selected categories or Remove for the selected items.
7. Click Apply.

To add items to a new catalog category from the Browse Catalog or Search Results page:

In addition to creating new catalog categories in the Setup Workbench (see: *Defining Catalog Categories, Oracle Product Information Management Implementation Guide*), you can create a new catalog category from the **Browse Catalog** and **Search Results** pages and add items to it in one flow of steps.

1. Browse the item catalog or another catalog. Select the items within a catalog category that you want to add to a new catalog category. See: *Browsing the Item Catalog and Alternate Catalogs*, page 1-2

Alternatively, search for one or more items. In the Search Results page, select the items that you want to add to a new catalog category. See: *Searching for Items*, page 1-17
2. In the Select Items field, select the Add to New Catalog Category action, then click Go.
3. In the **Add to New Category** page, Catalog field, search for and select the catalog to which you want to add a new category.

Caution: You can only select those catalogs for which you have the Manage Catalog privilege.

4. The Catalog Category field appears. Enter a unique name for the new catalog category.

Caution: If the search/list of values icon appears next to the Catalog Category field, this means that a value set is assigned to the flex structure associated with the catalog. Any new catalog category name must be a value from this value set that has not been previously used to create a catalog category.

When you use the list of values icon to search for a value within the value set, you are able to search on all values, including the values already used to create categories. If you select a value that is already assigned to a category, an error appears only after you try to create the new category.

To avoid this problem, select a catalog that uses free form category creation rather than one based on a value set.

5. Optionally, enter a description for the catalog category.

6. Optionally, enter a parent category for the new category.

The Parent Category field only appears if the catalog's Enable Hierarchy for Categories field is set to No (see: *Defining Catalogs, Oracle Product Information Management Implementation Guide*).

7. Optionally, in the Inactive On field, enter the date when you can no longer assign this catalog 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

8. Optionally, you can select any items and click Remove if you no longer want to include them in the new catalog category.

9. Click Apply.

Related Topics

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

Overview of Catalogs, *Oracle Product Information Management Implementation Guide*

Browsing the Item Catalog and Alternate Catalogs, page 1-2

Searching for Items, page 1-17

Copying Items with Category Assignments, page 1-12

Changing an Existing Item's Item Catalog Category

Warning: Before changing an item's ICC, consider the potential loss of user defined attribute data. If attribute groups associated with the existing ICC are not associated with the new ICC, then the item's attribute data for these attribute groups will be lost once the ICC changes.

See: Associating Attribute Groups with an Item Catalog Category, *Oracle Product Information Management Implementation Guide*

You can change an item's item catalog category (ICC) with the following exceptions:

- You cannot change the ICC for style items that have SKU items.
 - For style items, the new ICC must have variant attribute groups.
 - You can only change the ICC of items for which you have the Edit Item and the Change Item Status privileges.
1. In one of the following pages, select the item(s) for which you want to change the item catalog category.
 - **Browse Catalog** page. See: Browsing the Item Catalog and Alternate Catalogs, page 1-2
 - **Search Results** page. See: Searching for Items, page 1-17

Alternatively, you can change the ICC from the item's **Overview** page.

Warning: If ICC versions are enabled, use one of the HTML interface options as described above to change an item's item catalog category rather than the Forms interface to avoid data corruption. Forms behavior has not been enhanced to support ICC versions.

2. Select Change Item Catalog Category from either:
 - the Select Items field in the **Browse Catalog** or **Search Results** page.
 - the Actions field in the item's **Overview** page.

Click Go.

3. In the **Change Item Catalog Category** page, search for and select a new ICC, then click Go.

Note: Items you selected for an ICC change do not appear in the **Change Item Catalog Category** page when the following conditions apply:

- The items selected are style items with SKU items.
- The items selected are style items and the new ICC has no variant attribute groups.
- You do not have the Edit Item and the Change Item Status privileges for the item(s).

4. Optionally, you can select new values for the following fields:

- New Lifecycle
- New Lifecycle Phase
- New Item Status

Any new values selected apply to all items in the list.

5. Optionally, select any items to remove from the list of items for which you plan to change the ICC. Click Remove.
6. Click Continue.
7. In the **Change Item Catalog Category: Review Details** page, for each item in the list, enter the following field values if you did not enter these field values for all items previously.
 - New Lifecycle. Optional.
 - New Lifecycle Phase. Optional.
 - New Item Status. Required.

8. Click Finish.

Related Topics

Browsing the Item Catalog and Alternate Catalogs, page 1-2

Searching for Items, page 1-17

Assigning an Item to a Category, page 1-7

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.

Assigning Suppliers to Items

Assigning suppliers to items enables you to assign attributes, perform actions, and make rules that only apply to that item/supplier combination. For example, if you choose not to assign suppliers to items, you can assign attributes at:

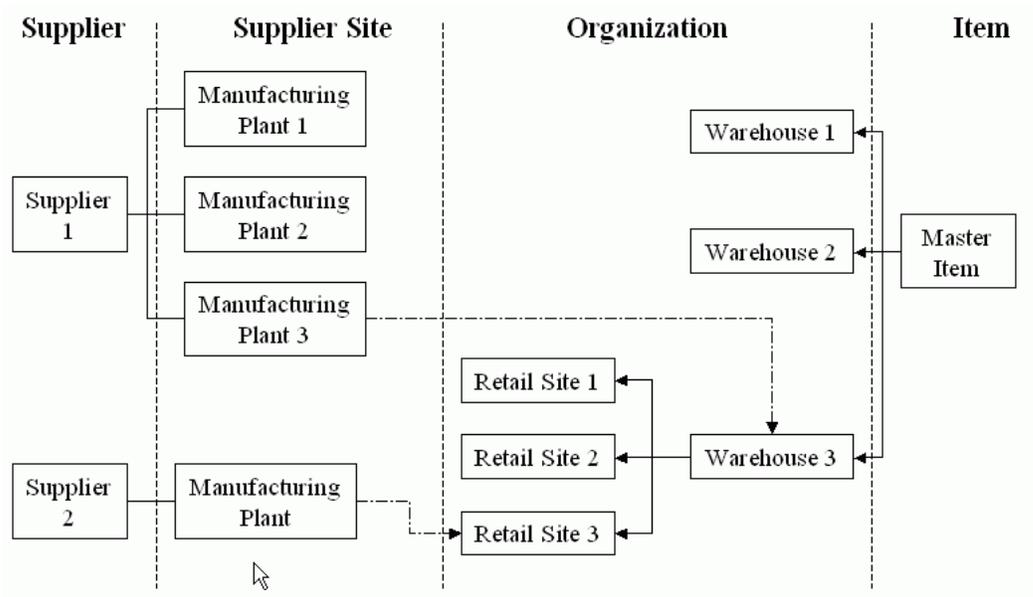
- the master item level - all attributes defined at this level apply to the item across all organizations and all suppliers.
- the item organization level - all attributes defined at this level apply to the item only in this particular organization.

If you choose to assign suppliers to items, you can also assign supplier sites to items.

For example, a supplier manufactures an item in two locations, San Francisco and Denver (the supplier sites). The characteristics of the item differ slightly depending on which supplier site ships to your retail store (organization). In this example, you can assign attributes at the following levels, in addition to the item and item organization levels described above:

- item supplier - all attributes defined at this level apply to this item and supplier combination.
- item supplier site - all attributes defined at this level apply to this item and supplier site combination.
- item supplier site organization - all attributes defined at this level apply to this item, supplier site, and your organization combination.

The following graphic depicts an item supplied to a company's retail stores, either directly to the store or through a warehouse. The suppliers can ship the item from more than one manufacturing plant (supplier site). In this scenario, a store either receives the item from its warehouse or directly from a supplier. Supplier 1 ships to the warehouse, which then ships the item to the store, while supplier 2 ships the item directly to the store. The item attributes differ slightly, depending on which supplier, and even which supplier site, ships the item.



Note: Some users question how item supplier associations relate to the Approved Supplier List (ASL). The item supplier associations serve a different purpose than the Approved Supplier List. The item supplier associations can tell you which supplier and/or supplier location supply an item, but not whether the supplier is approved.

To assign a supplier and supplier site to an item:

1. In the Item **Overview** page, select the Associations subtab. Select Supplier and Supplier Site Assignment from the left side of the page.
2. From the **Supplier and Supplier Site Assignments** page, click Assign.
3. In the **Assign Items to Suppliers: Select Suppliers** page, enter at least one of the following to identify the supplier, then click Next.
 - Supplier Name
 - Supplier Number
 - DUNS Number
 - Tax Payer ID
 - Tax Registration Number

Tip: Check the Show Supplier Sites box to narrow your search for specific suppliers and supplier sites. Checking this box enables you to enter supplier site information.

4. In the **Assign Items to Suppliers: Review Supplier Results** page, select the supplier and/or the supplier sites listed. Click Next.

This page lists the supplier and all supplier sites for the supplier.

5. In the Assign Items : Review Results page, review supplier and supplier sites selected. Click Finish.

If the supplier and supplier sites selected are incorrect, click Back to correct the error.

To assign a supplier site and organization to an item:

The process of assigning a supplier site and organization to an item is similar to the process described above of assigning a supplier and supplier site to an item, but with one more step - assigning an organization to the item supplier site.

1. In the Item **Overview** page, select the Associations subtab. Select Supplier Site Organization Assignment from the left side of the page.
2. Assign a supplier site as described above in "To assign a supplier and supplier site to an item:".
3. In the **Assign Items to SupplierSites-Org: Select Organizations** page, enter an

organization code, name or hierarchy. Click Next.

4. Review the organization selected and click Next again.
Click Back if you want to change the organization.
5. In the **Assign Items: Review Results** page, you can review the supplier, supplier site, and organization assigned to the item. Click Finish.
Click Back if you want to change the supplier, supplier site, or organization.

To view and update item supplier, item supplier site, or item supplier site organization attributes:

You can view or update a single item supplier association from both the **Supplier and Supplier Site Assignments** page and the **Supplier Site Organization Assignment** page. To update all item supplier associations at once, you must import the changes using a spreadsheet.

To view and update attributes for a single item/supplier/supplier site/organization association

1. Navigate to either the **Supplier and Supplier Site Assignments** page or the **Supplier Site Organization Assignment** page.
2. In the Advanced Search region, search for and select an item/supplier/supplier site/organization intersection.
3. In the Supplier Assignment detail region, select the Attributes tab, then click Update.
4. Enter any changes to the item/supplier/supplier site/organization intersection attributes, then click Apply.

To view and update attributes for all suppliers, supplier sites, or supplier site organizations at once

1. Navigate to either the **Supplier and Supplier Site Assignments** page or the **Supplier Site Organization Assignment** page.
2. Click the appropriate button:
 - Update Supplier Attributes
 - Update Supplier Site Attributes
 - Update All Attributes (on the **Supplier Site Organization Assignment** page)
3. Select a display format to download, then click Export.

Note: The display format you select must contain attributes controlled at the appropriate level. For example, if you want to update supplier site attributes, the display format must contain attributes controlled at the supplier site level.

See Updating Existing Items Using a Spreadsheet, page 1-70 for a detailed description of how to export, make changes, and import those changes.

To view and mass update item supplier, item supplier site, or item supplier site organization attributes:

1. For item supplier and item supplier site attributes, navigate to the **Supplier and Supplier Site Assignments** page. For item supplier site organization attributes, navigate to the **Supplier Site Organization Assignment** page. Select the supplier, supplier site, and/or organization intersection for which to view or update attributes.
2. Click one of the following:
 - Update Supplier Attributes
 - Update Supplier Site Attributes
 - Update All Attributes - use for updating the item supplier site organization intersection attributes.

Tip: You can update the item supplier and item supplier site attributes from the **Supplier Site Organization Assignment** page. For the selected item supplier site organization, click the Supplier and Supplier Site Assignment tab. All item supplier and item supplier site intersections are listed. Click the Additional Attributes icon for a particular row, then click Update.

3. Select a display format that contains attributes controlled at the intersection level selected. Click Export.
4. Select the application on your desktop to use for viewing the exported document. Click Next.
5. Choose whether to open or save the exported spreadsheet document.
6. Update the attributes, then save the spreadsheet to import later.

See: Managing Item Imports, page 1-38

To view and update item-supplier formal packs:

1. Navigate to the **Supplier and Supplier Site Assignments** page, then select the Formal Packs tab.
2. To update the pack type, select the Pack Type to use with the selected supplier or supplier site, then click Create Change Order.

See: *Managing the Packaging Hierarchy*, page 5-8 and *Creating a SKU Packaging Hierarchy*, page 2-9.

To view, create, and update item-supplier change orders:

You can create a change order for:

- adding or removing a supplier or specific supplier site to or from an item
 - updating item supplier, item supplier site, or item supplier site organization attributes
1. For item supplier and item supplier site assignments and attributes, navigate to the **Supplier and Supplier Site Assignments** page. For item supplier site organization assignments and attributes, navigate to the **Supplier Site Organization Assignment** page. Select the supplier, supplier site, and/or organization intersection for which to view or update attributes.
 2. Click Create Change Order. See: *Creating Change Orders*, page 4-21

To inactivate an item supplier, item supplier site, or item supplier site organization association:

Once you assign an item to a supplier, supplier site, or supplier site organization, you cannot delete this relationship. You can inactivate the relationship, though. In the **(item/supplier/supplier site/organization) Assignment: Update Attributes** page, change the Status attribute to Inactive.

Related Topics

Approved Supplier List, Oracle Purchasing User's Guide

Entering Suppliers Manually, Oracle Payables User's Guide

Adjusting Suppliers (Adding a New Supplier Site), Oracle Payables User's Guide

Finding Suppliers, Oracle Payables User's Guide

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 "telephone."

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 template is used, you must add your own criteria to be used for the search.
 - If no display format template 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 templates that are available to use for this particular search.

Note: You are not required to search by or select a catalog category.

If you do not, the default system search criteria template appears.

You can also optionally search by Organization and Revision. To search by item revision specific attributes, 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.
2. 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, Oracle Product Information Management Implementation Guide* and *Managing Display Formats, Oracle Product Information Management Implementation Guide*.

3. 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.

To perform actions on items in the Search Results page:

You can select items and perform the following actions:

- create a new item request
- add items to a new catalog category
- add items to an existing catalog category
- generate a report
- create a change order, change request, or issue

- change the lifecycle
 - change the item catalog category
 - compare items
 - add to the Favorites list
 - export all items in the category to a spreadsheet
1. Complete the steps in *To perform a simple item search* or *To perform an advanced search* above, then select one or more items.

To export all items to a spreadsheet

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

To perform all other actions

3. In the Select Items field, select one of the following actions, then click Go.
 - Create New Item Request. See: *Creating New Item Requests*, page 1-28

Note: You can only create new item requests for items with an Approval Status of "Not Submitted For Approval" or "Rejected".
 - Add to Existing Catalog Category. See: *Assigning an Item to a Category*, page 1-7
 - Add to New Catalog Category. See: *Assigning an Item to a Category*, page 1-7
 - Generate Report. See: *Generating Reports*, page 1-109
 - Create Change Order. See: *Creating Change Orders*, page 4-21
 - Create Change Request. See: *Creating Change Requests*, page 4-12
 - Create Issue. See: *Creating Issues*, page 4-5
 - Change Lifecycle. See: *Defining Change Policies, Oracle Product Information Management Implementation Guide*
 - Change Item Catalog Category. See: *Changing an Existing Item's Item Catalog Category*, page 1-10
 - Compare

You can compare attributes of two or more 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. Select each attribute group individually.

- Add to Favorites. See: Managing Favorite Items, page 1-23

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 and 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 1-38)
- Microsoft Office Excel spreadsheet (see: Importing Items Using a Spreadsheet, page 1-54)
- Import Workbench (see: Overview of Inbound Product Data Synchronization and Data Quality Management, page 3-1).
- Product Workbench (see: Creating Items, page 6-21)

If the item catalog category specified when creating the item requires an item request

approval, proceed to Creating New Item Requests, page 1-28 after you create the item.

To create a new item:

1. From the menu, select either Create Engineering Items or Create Production Items.

Note: The only difference between these two menu choices is whether or not the Engineering Item box is pre-selected.

2. On the **Create Item** page, enter values in the following fields:

- Create - select New Items.

Tip: Alternatively, you can select Copies of an Existing Item in the Create field. See: To create copies of an existing item, page 1-28. If you have multiple similar items to create, consider creating the first item by selecting New Items in the Create field. After this item is thoroughly defined, created, and approved (if necessary), create the remaining items by creating multiple copies of the first item.

- Item Catalog Category - find and select an item catalog category in which to create the new 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.

Warning: If ICC versions are enabled, use any of the item creation options described above to create an item rather than the Forms interface to avoid data corruption. Forms behavior has not been enhanced to support ICC versions.

- Number of Items - enter the number of items you want to create.
- Style Item - select Style Item if you want to create a style item with related SKUs. For more information about style items, see: Overview of Style and SKU Items, page 2-1.

Note: You can only create a style item if the selected item catalog category includes at least one attribute group with variant attributes. You can only create SKUs from a style item

within the style item's **Overview** page. See: To create SKU items from a style item:, page 2-5

- GDSN Syndicated - select this box to permit synchronization with a GDSN datapool such as 1SYNC. See: Overview of the Global Data Synchronization Network, *Oracle Product Information Management Implementation Guide*

Important: You cannot send data directly from Oracle Product Information Management (PIM) to GDSN since PIM only maintains the master data, but does not validate the data for GDSN. To send data to GDSN, you must build a validation or use a third party software application to perform this function.

- Engineering Item - if a new item request is not required for the item catalog category, you have the option to check the Engineering Item checkbox. If a new item request is required, the Engineering Item check box is automatically selected and displayed as read-only. See: Creating New Item Requests, page 1-28
- Select Templates - optionally, select templates to set the operational and user-defined attributes for the item. The selected templates are applied to all of the items created in the order specified. See: Defining Item Templates, *Oracle Product Information Management Implementation Guide*

3. On the **Create Item: Enter Number/Description** page, enter the required information. Optionally, you can update the primary attribute values (for multiple items, click the Show link to view the primary attributes).

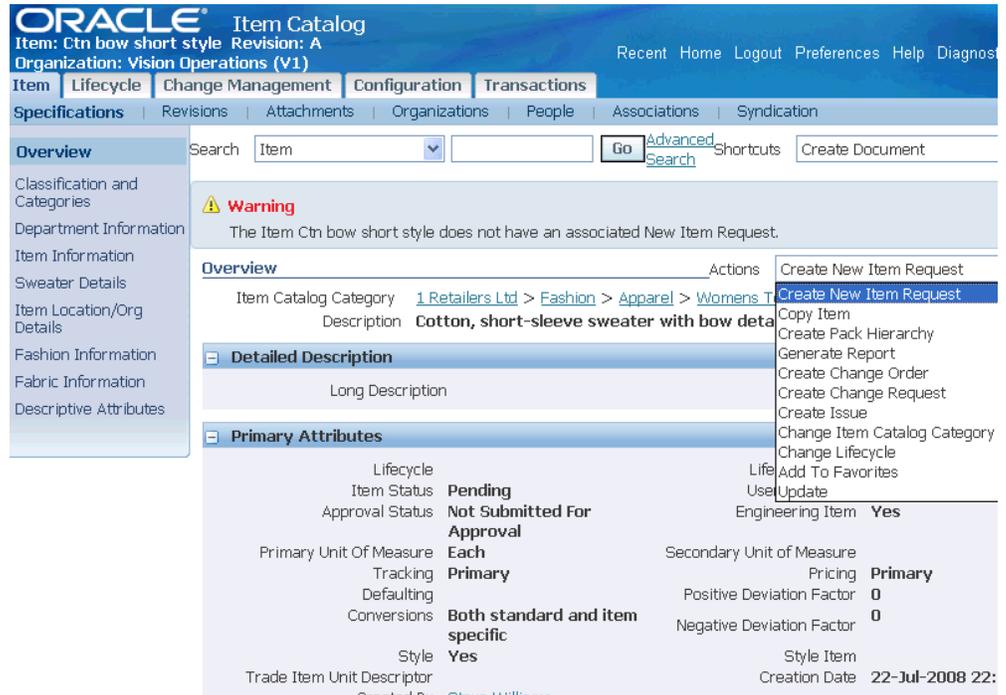
The item catalog category definition determines the new item's generation method. The item number already appears when the item catalog category specifies that it is Sequence-generated. If the category specifies that the item number or item description is User Entered, then enter an item number or item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

4. Click Finish.

If you created one item, the system creates the item and returns you to the item **Overview** page (the item workbench) where you can further define the item or change attribute values. If you created more than one item, the system notifies you that the items have been submitted for creation and provides the Concurrent Request ID.

If the item's catalog category requires approval, a warning message appears in the item workbench stating that this item does not have an associated new item request.

The item's status remains as Pending with an approval status of Not Submitted for Approval until a new item request is created and approved. See: *Creating New Item Requests*, page 1-28.



Optionally, you can now update item characteristics using the item workbench subtabs:

- Specifications

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 1-86). You cannot add new attributes. Attribute associations with item catalog categories are performed at the administration level. For more information, see *Defining Item Catalog Categories, Oracle Product Information Management Implementation Guide*.

- Revisions

See: *Creating Item Revisions*, page 1-95

- Attachments

See: *Managing Item Attachments*, page 1-96

- Organizations

See: *Enabling Organization Assignments*, page 1-102

- People
See: Adding People, *Oracle Product Information Management Implementation Guide*
- Associations
See: Assigning Suppliers to Items, page 1-12 and Managing AMLs, page 1-94.

Caution: GTIN cross references are no longer supported for use with GDSN.
- Syndication
Oracle Product Information Management no longer supports outbound product data synchronization with customers.

To create copies of an existing item:

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.

1. Follow the same steps as described above in "To create a new item:", except in the Create field, select Copies of an Existing Item. You can then enter the item and revision to copy.
2. In the Copy Item Details region, select the sequence in which to copy the template item details and the copied item details. Select which specific item details (such as item attribute groups, attachment categories, and people) to copy.

Creating New Item Requests

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 either Not Submitted for Approval, Submitted for Approval, or Approved, depending upon the approval status of the corresponding new item request. The default approval status of the new item request (NIR) 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 Oracle Product Information Management 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.

Item Creation Process Steps	Item Status	Approval Status (for the item)	Approval Status (for the NIR)
1. Create item.	Pending	Not Submitted for Approval	-
2. Create and save NIR.	Pending	Not Submitted for Approval	Not Submitted for Approval
3. Submit NIR for approval.	Pending	Submitted for Approval	Not Submitted for Approval
4. NIR in approval workflow.	Pending	Submitted for Approval	Approval Requested
5. NIR is approved.	Pending	Submitted for Approval	Approved
NIR is implemented.	Pending	Approved	Approved

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 Information Management Implementation Guide* and *Managing Business Events, Oracle Workflow Developer's Guide*.

New item requests are change objects. See the *Using Change Management* chapter in the *Oracle Product Information Management User's Guide* for more information about managing change objects in general.

Prerequisites

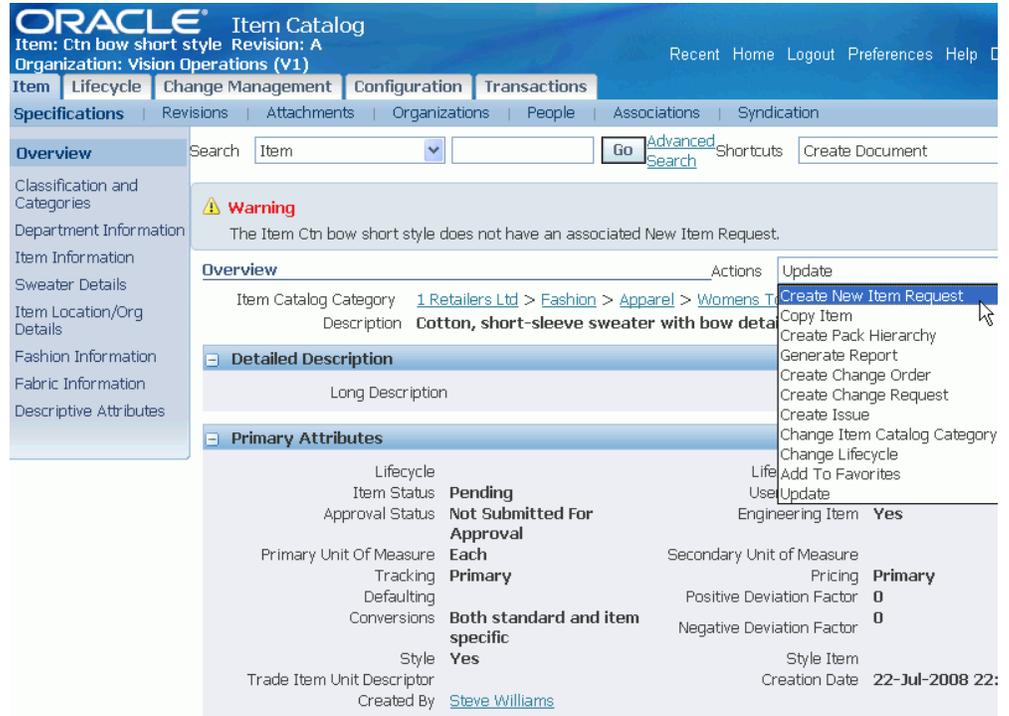
- Associating New Item Requests with an Item Catalog Category, Oracle Product Information Management Implementation Guide*

To create a new item request:

1. Create a new item request from either the item **Search Results** page or the item **Overview** page.

In the **Search Results** page, select the item(s) that you want to add to a new item request. In the Select Items field, select Create New Item Request, then click Go. Using this method, you can create a new item request that contains one or many items.

In the **Overview** page, select Create New Item Request in the Actions field, then click Go. Using this method, you create a new item request for only one item, the item displayed, or you can add this item to an existing new item request in the next step.



- In the **Create New Item Request: Select New Item Request Type** page, choose whether to create a new item request or to add the selected item(s) to an existing new item request.

Click Continue.

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

The following list provides additional information for some fields on this page.

- New Item Request Name - required. Enter a descriptive name for the new item request.
- Assigned To - the assignee is defaulted based on the item catalog category role specified in the assignment rule for new item requests.
- Priority and Reason - use these fields to track the degree of urgency and the reason for requesting the new item.
- Source Type and Name - use these fields to document who requested the new items.

You can also update information in the following tabs:

- New Items (Lines) - lists all of the items included in the new item request. You

can select items and remove them from the new item request or add additional items to the request.

Note: You can only add items that have a status of Not Submitted for Approval, Cancelled, or Rejected.

- Dependencies and References - add change object dependencies and item reference information in these two tabs. See: *Creating Relationships*, page 4-40.
- Workflow Approval - 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. See: *Defining New Item Request Workflows, Oracle Product Information Management Implementation Guide*.

If the new item request type has more than one workflow attached to a phase, the Switch Template button appears. Click Switch Template to choose a different workflow. To view workflows associated with a different phase, use the Phase pull down list.

- Attachments - attach any supporting files, URLs, or text. See: *Adding Attachments*, page 7-3.

Item | Lifecycle | Change Management | Configuration | Transactions

Specifications | Revisions | Attachments | Organizations | People | Associations | Syndication

Item: Specifications > Create New Item Request: Select New Item Request Type >

Create New Item Request

* Indicates required field

[Cancel](#)

New Item Request Type: **1 Step NIR** New Item Request Number: NIR

* New Item Request Name: NIRT6

Description:

Source Type: Internal Source Name: Linda Dave

Priority: High Need By Date:

Reason: Cost (example: 23-)

* Assigned To: Steve Williams Requestor: Steve Willi

[New Items](#) | [Dependencies](#) | [References](#) | [Workflow Approval](#) | [Attachments](#)

Select Items: [Remove](#)

[Select All](#) | [Select None](#)

Select	Catalog	Item	Revision	Description	Long Description	Approval St
<input type="checkbox"/>	Sweaters	Ctn bow short style	A	Cotton, short-sleeve sweater with bow detail		Not Submitted Approval
<input type="checkbox"/>	Sweaters	Ctn bow 3/4 style	A	Cotton, 3/4-sleeve sweater with bow detail		Not Submitted Approval

4. You can submit the new item request or save it if you wish to enter additional information later.

Submitting the NIR starts the workflow listed for the Open status. Once you submit it, you cannot add more items to it. If you save it for later, the new item request is saved with a Draft status. Upon submission, if set up, an assignment notification is sent via e-mail.

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

To add SKUs to a new item request:

First, create the SKUs as described in *Creating Style and SKU Items*, page 2-5. You can then add each SKU to a new item request individually as described above in "To create a new item request:" or you can add multiple SKUs all at once to the same new item request as described below.

1. In the **Overview** page for the style item, select the associated SKUs that you want to add to a new item request. Click Add to New Item Request.

Item: Ctn bow short style Revision: A
 Item Number Request: NIRT6
 Organization: Vision Operations (V1) Recent Home Logout Preferences Help Diagn

Item Lifecycle Change Management Configuration Transactions

Specifications | Revisions | Attachments | Organizations | People | Associations | Syndication

Search: Item [Advanced Search](#)

Information
 New Item Request associated with this Item is in Open status
[NIRT6](#)

Overview
 Item Catalog Category: [1 Retailers Ltd > Fashion > Apparel > Womens Tops > Sweaters](#)
 Description: **Cotton, short-sleeve sweater with bow detail**

Detailed Description
Primary Attributes
Variant Attributes

SKUs
 Color: All

Select Items: |

[Select All](#) | [Select None](#)

Select Item:	Item	Item: Color	Item: Top Size	Item: Item Status	Item: Approval Statu
<input checked="" type="checkbox"/>	SWTR3900	Navy	XS	Pending	Not Submitted For Appr
<input checked="" type="checkbox"/>	SWTR3910	Royal Blue	XS	Pending	Not Submitted For Appr
<input checked="" type="checkbox"/>	SWTR3920	Turquoise	XS	Pending	Not Submitted For Appr
<input checked="" type="checkbox"/>	SWTR3930	Coastal Blue	XS	Pending	Not Submitted For Appr

From this point on, refer to the steps in "To create a new item request:" above.

To update a new item request:

Within a new item request, you can perform the following updates on each individual line item or on all line items, depending on their status and your role:

- Remove - you can remove an item from a new item request (NIR) as long as the NIR has not been submitted for approval (the NIR status is Draft).
- Add Items - you can add new items to a NIR when the NIR status is Draft and the item you want to add meets one of the following criteria:
 - the item is not assigned to another NIR and the item's catalog category requires a NIR.
 - if the item is assigned to another NIR, the item's status is Cancelled or Rejected.

This action effectively copies the item from the original NIR into the NIR currently in view.

- Update Item Attributes - you can export the item to a spreadsheet, update the attributes, and import the item. See: Mass Updating Items, Item Categories and Item Associations, page 1-73.

- Add to Category - you can add approved items only to existing catalog categories.
- Assign Items to Suppliers
See: Assigning Suppliers to Items, page 1-12
- Assign Items to SupplierSites
See: Assigning Suppliers to Items, page 1-12
- Approve - this action enables you to approve only certain lines in a NIR, while other lines may have a status of Cancelled or Rejected.
- Reject or Cancel - you can add a rejected or cancelled line to another NIR at a later time, enabling other, approved lines to continue with the current NIR towards final approval.
- Add to New Item Request - only available for rejected or cancelled items.
Adding a cancelled or rejected item from one NIR to another effectively copies the cancelled or rejected item to a new NIR.

To manage a new item request from Open to Approved status:

A new item request can have many workflows to complete before reaching Approved status. After each workflow is complete, you must promote the NIR to the next workflow.

1. Navigate to the new item request's **Overview** page. Select the Workflow tab.
2. If a Workflow/Approval Status is Completed and the Workflow/Approval Status of the next workflow is Not Started, then click Promote.

New Item Request: NIRT6 Recent Home Logout Preferences
 Organization: Vision Operations (V1)

New Item Request | Lines | Relationships | Workflow

Statures

Statures

[Promote](#)

Select	Status	Current Status	Workflow/Approval Template	Workflow/Approval Status	Start Date and Time	Finish Date and Time
<input checked="" type="radio"/>	Open	<input checked="" type="checkbox"/>	Retail Item Review FYI	Completed	23-Jul-2008 22:45:51	
<input type="radio"/>	Approval		Simple Workflow for NIR	Not Started		
<input type="radio"/>	Completed					

Status: Open

[Current](#) | [History](#)

[Reset Workflow](#)

Workflow Template: Retail Item Review FYI
 Workflow Type: Definition
 Workflow Status: Completed [Restart Workflow](#)
 Submitted By: Steve Williams
 Submitted Date and Time: 23-Jul-2008 22:46:00
 Completed Date and Time: 23-Jul-2008 22:46:13
 Description: This is an preliminary item request.

3. In the **Promote Status: (NIR number)** page, select the next status, then click Apply.
4. The approver can approve, reject, or transfer the new item request from the **Notifications** page to complete the workflow or perform these actions on each NIR line item individually from the **New Items** page.

Notifications Page

Notifications >

New Item Request NIRT6 requires approval

Approve Reject Transfer

From **Williams, Steve** Priority **High**
 To **Robinson, Mary** Status **Approval**
 Sent **23-Jul-2008 18:01:20** Assigned To **Steve Williams**
 Due **24-Jul-2008 18:01:20** Reason **Cost**
 ID **3517138**

New Items						
Catalog Category	Item	Revision	Description	Long Description	Status	Approval Status
Sweaters	Ctn bow short style	A	Cotton, short-sleeve sweater with bow detail		✗	Not Submitted For Approval
Sweaters	Ctn bow 3/4 style	A	Cotton, 3/4-sleeve sweater with bow detail			Submitted For Approval

To navigate to the **New Items** page, click the New Item Request Details link in the **Notifications** page, then select the Lines tab.

You can now select each new item individually and perform the actions described above in "To update a new item request:", depending on your role.

New Items Page

New Item Request: NIRT6 Organization: Vision Operations (V1) Recent Home Logout Preferences

New Item Request Lines Relationships Workflow

Lines

New Items

Select Items:	Approve	Go				
Select All Select	<ul style="list-style-type: none"> Update Item Attributes Assign Items to Categories Assign Items to Suppliers Assign Items to SupplierSites Approve Reject Add to New Item Request Cancel 					
<input type="checkbox"/>	Sweater		description	Long Description	Comments	Status
			ton, short-sleeve sweater n bow detail		Add to NIRT7	✗
<input checked="" type="checkbox"/>	Sweater		ton, 3/4-sleeve sweater n bow detail			

- Once you (the approver) are satisfied that each line item in the NIR is at the correct status (Approved, Rejected, or Cancelled), you must approve, reject, or cancel the entire NIR to complete the workflow.

From the new item request's **Overview** page, click on the Approve/Reject link, then approve or reject the NIR.

ORACLE Change Management
 New Item Request: NIRT7
 Organization: Vision Operations (V1)

Navigation: [New Item Request](#) | [Lines](#) | [Relationships](#) | [Workflow](#)

Overview | [Action Log](#) | [Attachments](#) | [Revisions](#) | [People](#)

Search: [Advanced Search](#) Shortcut

Information
 This New Item Request requires your approval. Click on the link below to respond.
[Approve/Reject](#)

Overview

New Item Request Type	1 Step NIR		
New Item Request Name	NIRT7		
Description			
Assigned To	Steve Williams	Source Type	
Requestor	Steve Williams	Source Name	
Priority	High	Need By Date	
Status	Approval	Creation Date	23-Jun
Approval Status	Approval requested	Reason	Cost
Current Revision			

- In the item **Overview** page, the approval status should now reflect the status of the new item request, but the item status remains at Pending. If the approval status is Approved, you can now update the item status to Active.

Related Topics

Creating New Items, page 1-24

Associating New Item Requests with an Item Catalog Category, *Oracle Product Information Management Implementation Guide*

Performing Actions, page 4-24

Managing People and Roles, page 4-30

Creating Relationships, page 4-40

Managing Workflows, page 4-41

Defining Workflow Templates, *Oracle Product Information Management Implementation Guide*

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 1-54)

- Import Workbench (see: Overview of Inbound Product Data Synchronization and Data Quality Management, page 3-1)

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. The Open Interface program validates all data before importing it into the production tables. You can also import the following item-related data:

- Item people.
- User attributes.
- Customer items.
- Customer item cross references.

This topic discusses importing items and their associated data using interface tables. You can import and update items and their associated data from any source into Oracle Product Information Management using interface tables. When you import items through the item interface tables, you create new items in your Item Master organization or assign existing items to additional organizations. Validation of imported items is done using the same rules as the item definition pages, so you are insured of valid items.

Before you use the interface tables, you must write and run a custom program that extracts item and/or associated data from your source system and inserts it into the appropriate interface tables. After you load the interface tables, run the appropriate concurrent request(s) to import the data into the production tables. The concurrent request programs assign defaults, validates data you include, and then imports the new data.

You can use the following concurrent request programs to import data:

- Import Items - imports items and item revisions.
- Import Catalog Items - imports items, item revisions, and their related user defined attributes, item associations (the relationship between items and suppliers, supplier sites, and/or supplier site organizations), manufacturer part numbers, and item people.
- Import Item/Item Revision User Attributes - imports user defined attributes for items and item revisions.

- Import Item People - imports people associated to items.
- Import Customer Items
- Import Customer Item Cross References
- Import Item Cross References - imports item cross references and GTIN cross references.
- Import Related Items

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.
- My Oracle Support (<http://metalink.oracle.com>) Document ID 730164.1 for instructions on how to use the Oracle Product Information Management public APIs and sample code examples.

To import items and associated data:

You can import items and their associated data from any source into Oracle Product Information Management using interface tables and the Import Catalog Item concurrent request program. Before you use the Import Catalog Item concurrent request program, you must write and run a custom program that extracts item information from your source system and inserts it into the following interface tables:

- MTL_SYSTEM_ITEMS_INTERFACE - for items.
- MTL_ITEM_REVISIONS_INTERFACE - for item revisions.
- EGO_ITM_USR_ATTR_INTRFC - for user defined attribute values associated to items.
- EGO_ITEM_ASSOCIATIONS_INTF - for suppliers, supplier sites, and supplier site organizations associated to items.
- EGO_AML_INTF - for manufacturer part numbers associated to items.
- EGO_ITEM_PEOPLE_INTF - for people associated to items.

The set_process_id and data_set_id values must be consistent across these tables to identify data related to a single batch.

After you load the data into the interface tables, run the Import Catalog Item concurrent request to import the data into the production tables. This program assigns defaults, validates data you include, and then imports the new data.

Tip: Alternatively, use the Catalog Item Maintenance API package to load most of the above information into the production tables. For more information on using the Catalog Item Maintenance API package, navigate to the Integrated SOA Gateway responsibility > Integration Repository > Product Lifecycle Management > Advanced Product Catalog > Catalog Item > Catalog Item Maintenance (Internal Name: EGO_ITEM_PUB). See: My Oracle Support (<http://support.oracle.com>) Document ID 730164.1 for instructions on how to use the Oracle Product Information Management public APIs and sample code examples.

1. Navigate to the Development Manager responsibility > Batch Import > Import Items > Import Catalog Items. This opens the Run this Request... window.

The Name field is automatically filled in with the name of the concurrent program, Import Catalog Items, and the Parameters window opens.

2. In the All Organizations field, indicate whether to run the interface for all organizations in the item interface table (MTL_SYSTEM_ITEMS_INTERFACE). If you choose No, the interface runs only for the current organization and interface table rows for other organizations are ignored.
3. In the Validate Items field, indicate whether to validate all items and their data residing in the interface table that have not yet been validated. If items are not validated, they are not processed into Oracle Inventory. You would choose No if you had previously run the item interface and responded Yes for Validate Items and No for Process Items, and now want to process your items.
4. In the Process Items field, indicate whether to process items. If you choose Yes, all qualifying items in the interface table are inserted into Oracle Inventory. You would choose No, along with Yes for Delete Processed Rows, to remove successfully processed rows from the interface table without performing any other processing.
5. In the Delete Processed Rows field, indicate whether to delete successfully processed items from the item interface tables. Choose No to leave all rows in the item interface tables for successfully processed items.
6. In the Process Set (Null for All) field, you can optionally enter a batch ID.
Use this field to process a particular batch. To process all records in the interface table, leave this field blank.
7. In the Create or Update Items field, select whether to:

- Create New Items - only create new items. Do not update existing items.
 - Update Existing Items - only update existing items. Do not create new items.
 - Sync Items - Create new items and update existing items.
8. Choose OK to close the Parameters window, then choose Submit.

To import user attributes for items:

1. Load the Item User-defined Attributes Open Interface table (EGO_ITM_USR_ATTR_INTRFC, page 1-45) with the data you want to import. For detailed help on loading the Open Interface tables, refer to:
 - My Oracle Support (<http://metalink.oracle.com>) Document ID 730164.1.
 - the Integration Repository. See: *Oracle Integration Repository User's Guide*.
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 1-50) 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*

To import item cross references:

You can import item cross references from any source into Oracle Product Information Management using the Item Cross Reference Interface. Before you use the Item Cross Reference Interface, you must write and run a custom program that extracts item cross reference information from your source system and inserts it into the MTL_CROSS_REFERENCES_INTERFACE table. After you load the item cross references into the interface table, run the Import Item Cross References concurrent request to import the data into the production table. This program assigns defaults, validates data you include, and then imports the new item cross references.

Note: : This program enables importing both seeded (for example, Customer, Vendor, and Substitute) and user defined cross reference types.

Tip: Alternatively, use the Import Item Cross References API to load the cross reference information into the production table. For more information on how to use the Import Item Cross References API, navigate to the Integrated SOA Gateway responsibility > Integration Repository > Product Lifecycle Management > Advanced Product Catalog > Catalog Item > Import Item Cross References (Internal Name: MTL_CROSS_REFERENCES_PUB).

1. Navigate to the Development Manager responsibility > Batch Import > Import Items > Import Item Cross References. This opens the Run this Request... window.

The Name field is automatically filled in with the name of the concurrent program, Import Item Cross References, and the Parameters window opens.

2. Optionally, in the Parameters window, enter the following values:
 - In the Process Set (Null for All) field, enter a batch ID to process a particular batch. To process all records in the interface table, leave this field blank.
 - In the Delete Processed Records field, enter No to retain all processed records. This field defaults to Yes, which deletes all processed records from the MTL_CROSS_REFERENCES_INTERFACE table.
3. Choose OK to close the Parameters window, then choose Submit.

To import related items:

You can import related items from any source into Oracle Product Information Management using the Related Items Interface. Before you use the Related Items Interface, you must write and run a custom program that extracts related item information from your source system and inserts it into the MTL_RELATED_ITEMS_INTERFACE table. After you load the related items into the interface table, run the Import Related Items concurrent request to import the data into the production table. This program assigns defaults, validates data you include, and then imports the new related items.

Note: This program does not support uploading planning details information.

Tip: Alternatively, use the Import Related Items API to load the related items information into the production table. For more information on how to use the Import Related Items API, navigate to the Integrated SOA Gateway responsibility > Integration Repository > Product Lifecycle Management > Advanced Product Catalog > Catalog Item > Import Related Items (Internal Name: MTL_RELATED_ITEMS_PUB).

1. Navigate to the Development Manager responsibility > Batch Import > Import Items > Import Related Items. This opens the Run this Request... window.
2. Optionally, in the Parameters window, enter the following values:
 - In the Process Set (Null for All) field, enter a batch ID to process a particular batch. To process all records in the interface table, leave this field blank.

- In the Delete Processed Records field, enter No to retain all processed records. This field defaults to Yes, which deletes all processed records from the MTL_RELATED_ITEMS_INTERFACE table.
3. Choose OK to close the Parameters window, then choose Submit.

Related Topics

- Creating New Items, page 1-24
- EGO_ITM_USR_ATTR_INTRFC, page 1-45
- EGO_ITM_USR_ATTR_INTRFC Column Details, page 1-47
- EGO_ITEM_PEOPLE_INTF, page 1-50
- EGO_ITEM_PEOPLE_INTF Column Details, page 1-52
- Importing Items Using a Spreadsheet, page 1-54
- Importing Item Revisions Using a Spreadsheet, page 1-59
- Importing Item Categories Using a Spreadsheet, page 1-63
- Importing Item Organization Assignment Using a Spreadsheet, page 1-65
- Importing Item People Assignment Using a Spreadsheet, page 1-66
- Updating Existing Items Using a Spreadsheet, page 1-69
- Updating Multi-Row Attributes in a Spreadsheet, page 1-84
- Overview of Inbound Product Data Synchronization and Data Quality Management, page 3-1

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 1-47.

EGO_ITM_USR_ATTR_INTRFC table

Column Name	Data Type	Required?
EGO_ITM_USR_ATTR_INTRFC		
TRANSACTION_ID	NUMBER	Yes

Column Name	Data Type	Required?
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)	
ATTR_UOM_DISP_VALUE	VARCHAR2(25)	
ATTR_VALUE_UOM	VARCHAR2(3)	
TRANSACTION_TYPE	VARCHAR2	Yes
ORGANIZATION_ID	NUMBER	
INVENTORY_ITEM_ID	NUMBER	
ITEM_CATALOG_GROUP_ID	NUMBER	
REVISION_ID	NUMBER	
ATTR_GROUP_ID	NUMBER	

Column Name	Data Type	Required?
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.

ATTR_UOM_DISP_VALUE

The description of the unit of measure associated with the attribute.

ATTR_VALUE_UOM

The internal value of the unit of measure associated with the attribute.

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 1-52.

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. When importing sequence generated item numbers with multi-row attribute groups, use dummy strings for the item numbers, such as \$\$SG\$\$1, \$\$SG\$\$2, and so on, in the WebADI Excel field for the item number. The import program uses this dummy string to determine which row belongs to which item.

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.

Note: You can import items with multi-row attributes for multiple organizations during a single concurrent request.

Important: You cannot update transaction attributes using the Item Open Interface, the Microsoft® Office Excel spreadsheet, or the Import Workbench. You must update them directly. See: *Defining Transaction Attributes, Oracle Product Information Management Implementation Guide.*

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 primary 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.

Prerequisites

- ❑ Optionally, define an import format for the item catalog category you plan to use when importing items. See: *Defining Item Catalog Import Formats, Oracle Product Information Management Implementation Guide*

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 Items object 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. Predefined formats matching the interface tables are used for item people, item organization assignment, and manufacturing part number imports, too.

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 Viewer** 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, primary 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 primary 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. If the description is function-generated, the system generates the description during the item creation process.

Some attribute columns also utilize poplists and LOVs, depending on the attribute definition. You can also make updates to multi-row attributes, page 1-84.

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.

- If the import format contains attributes from attribute groups that are associated with the supplier business entity, then you must enter a value in the key column Supplier Name. If the import format contains attributes from attribute groups that are associated with the supplier site or supplier site organization business entities, then you must enter a value in the key column Supplier Site as well as Supplier Name. If you need to enter a retail site, enter the retail site organization code in the existing Organization Code column.
- When importing style and SKU item information:
 - Use the Style column to indicate if the item is a style item (Yes or No).
 - Use the Style Item column to identify the style item for an SKU item row.
 - You must define a style item before you define its child SKU items. You can define the style and SKU items within the same spreadsheet, but the new style item must be in a row above the new SKU items.
 - Variant attribute columns do not have a list of values in the spreadsheet to choose from. For style items, enter the child

value set name in the variant attribute column. For SKU items, enter the variant attribute value in this column.

For example, assign the variant attribute group Color to a style item. Color has multiple value sets: fall, winter, and spring colors. Assign the value set Fall to the style item in the variant attribute column. For an associated SKU, enter a fall color attribute value, such as brown or orange, in the same column.

Tip: You can rename columns, wrap the column name text, or widen the columns so the column names are easier to read and understand. You must unprotect the spreadsheet before reformatting the columns.

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 1-24

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 (see: Defining Item Catalog Import Formats , *Oracle Product Information Management Implementation Guide*) 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 primary 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 Item Revisions 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 Revision 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 Revision Import Format is available for use. Neither users nor the system administrator can modify the System Item Revision 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 Viewer** page, select the version of Excel that you are using and click Next. You cannot enable or disable Reporting.
6. A Download window presents processing messages. Click Close when the transfer is complete. The Excel spreadsheet also opens.
7. In the spreadsheet, primary 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
- Revision Label
- Effective Date

Note: Description is a primary 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

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

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 1-84.

8. After data entry is complete, select Upload from the Oracle menu in the toolbar.
9. In the **Upload Parameters** window, enter the following and then click Upload.
 - Batch Name
 - Import:
 - Immediately on data load - automatically updates the Oracle Item Master

table with matched data.

- Schedule Data and Time - select the date and time to import the confirmed items or structures in the batch.
 - None - leaves the data in the Import Workbench. You can manually import the data at a later time.
- Select whether to create a new change order, add to an existing change order, or to not create a change order.
 - Select whether to create a new item request:
 - None
 - One per Item
 - One per Item Catalog Category
10. 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.

Note: If you created a new revision containing user defined attributes defined at the item revision level and enabling the change order option, then the new revision contains the item revision user defined attributes copied from the current revision. Any changed item revision user defined attributes appear in the new revision's change order attribute change section.

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 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 displays 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.

Tip: You can rename columns, wrap the column name text, or widen the columns so the column names are easier to read and understand. You must unprotect the spreadsheet before reformatting the columns.

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 finished. 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.

Important: Users can only assign items to those organizations to which they have permission. See: *Overview of Roles and Role Based Security, Oracle Product Information Management Implementation Guide*

Tip: You can rename columns, wrap the column name text, or widen the columns so the column names are easier to read and understand. You must unprotect the spreadsheet before reformatting the columns.

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.

- You can update the End Date only in an existing item people assignment.
- For style and SKU items only:

People assignments default from style to SKU items. If you make an item people assignment for a style item, this assignment automatically defaults to the style item's SKUs. However, if you change the end date of the style item, the end date of the associated SKUs does not change. You must change the end date of each SKU.

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 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 primary 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". 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 needed 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 **Search Results** page, click Export All Items.
3. On the **Select Viewer** page, select the version of Excel that you are using and click Next. You cannot enable or disable Reporting.
4. An Information page and Download window present processing messages. Follow the instructions in these 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, primary 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 primary 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 following and then click Upload.
 - Batch Name
 - Import:
 - Immediately on data load - automatically updates the Oracle Item Master table with matched data.
 - Schedule Data and Time - select the date and time to import the confirmed items or structures in the batch.
 - None - leaves the data in the Import Workbench. You can manually import the data at a later time.
 - Select whether to create a new change order, add to an existing change order, or to not create a change order.
 - Select whether to create a new item request:
 - None
 - One per Item
 - One per Item Catalog Category
8. 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, Categories and Associations

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 1-70).

Choose from the following mass update functions:

- Update Master Item Attributes
- Update Organization Item Attributes
- Update Supplier Assignment Attributes
- Update SupplierSite Assignment Attributes
- Update SupplierSite-Org Assignment Attributes
- Assign Items to Organizations
- Assign Items to Categories
- Unassign Items from Categories
- Reassign Categories
- Assign Items to Suppliers
- Assign Items to SupplierSites
- Assign Items to SupplierSite-Organizations

All mass update functions are located in the Mass Change folder/section in the navigation menu.

To mass update master item attributes:

- 1.

From the navigation menu, in the Mass Change section, select Update Master Item Attributes.

2. In the **Update Master Item Attributes: Select Items** page, use either Simple Search or Advanced Search to find the items you want to update. See: Searching for Items, page 1-17. The **Update Master Item Attributes: Review Results** page appears.
3. Review the search results. If the search results returned the expected items, click Export. If you need to refine the search criteria, click Back.
4. After clicking Export, 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 Updating Existing Items Using a Spreadsheet, page 1-70.

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 1-17. 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 **Update Organization Item Attributes: Review Organizations** page lists all organizations matching your search criteria.

5. Select the organizations you want to update, then click Next and the **Update Organization Attributes: Review Results** page appears. If you want to refine the Organization search, click Back. Otherwise, click Export.
6. 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 1-70 with the following exceptions in the Upload Parameters window:

- Enter the Batch Name
- Select an import option:
 - Immediately on data load - automatically updates the Oracle Item Master table with matched data.
 - Schedule Data and Time - select the date and time to import the confirmed items or structures in the batch.
 - None - leaves the data in the Import Workbench. You can manually import the data at a later time.
- Select whether to create a new change order, add to an existing change order, or to not create a change order.

To mass update supplier, supplier site, and supplier site organization assignment attributes:

The process for mass updating supplier, supplier site, and supplier site organization assignment attributes is almost the same. The only difference between mass updating assignment attributes for the three different supplier business objects is the page name. For example, when mass updating supplier assignment attributes, the first page name is **Update Supplier Assignment Attributes: Supplier Assignment Search**. When mass updating supplier site organization assignment attributes, the first page name is **Update SupplierSite-Organization Assignment Attributes: SupplierSite-Organization Assignment Search**. The following steps assume that you are mass updating supplier assignment attributes.

1. Navigate to the **Update Supplier Assignment Attributes: Supplier Assignment Search** page.
2. Use either Simple Search or Advanced Search to find the items you want to update. See: Searching for Items, page 1-17. The **Update Supplier Assignment Attributes: Review Supplier Assignment** page appears.
3. Review the search results. If the search results returned the expected items, click Export and the **Select Viewer** page appears. If you need to refine the search criteria, click Back.
4. 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 1-70 .

To mass assign items to organizations:

1. Navigate to the **Assign Items to Organizations: Select Items** page.
2. Enter search criteria, then click Next. See: Searching for Items, page 1-17. 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 **Assign Items to Organizations: Select Organizations** 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 **Assign Items to Organizations: Review Results** page appears.
If you want refine the Organization search, click Back. Otherwise, click Finish.
6. Review the Item Organization Assignments.

If the items selected have associated packs or structures, the Select Options region appears. Select one of the following options:

- Assign Packs
Enables the selected items to share their associated (common) packs across the selected organizations. See: Referencing Common Bills and Routings, *Oracle Bills of Material User's Guide* and Managing the Packaging Hierarchy, page 5-8
- Assign Structures
Copies or uses a common structure associated with each of the selected items across the selected organizations. See: Referencing Common Bills and Routings, *Oracle Bills of Material User's Guide*

Click Back if you need to change your selected organization(s) 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 Submit.

If you selected Apply changes to Database

8. The **Schedule Request: Schedule** page appears. Choose when you would like your request to run. You can choose the following:

- Start Date - choose as soon as possible or a specific date and time.
- Recurrence - select Never Repeat or Repeat on a certain interval, ending at a certain date and time.
- Apply the Interval - apply the interval based on the start or completion date and time.
- Schedule Name - optionally select a predefined schedule from the list. Select Increment Date Parameters to set the next date.
- Save Schedule - define and save a new schedule by entering a new Schedule Name, Description, and selecting Save Schedule.

9. Click Next. The **Schedule Request: Review** page appears.

Review the schedule parameters. Click Back if you need to change any of the parameters.

10. Click Submit.

A message appears, saying your request for EGO Spreadsheet Java Concurrent Program has been scheduled and giving you the Request ID.

11. Click OK.

The **Requests** page appears. From here, you can find out the details and status of your request.

If you selected Export to Excel

12. 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 1-70.

To mass assign items to suppliers, supplier sites, and supplier site organizations:

The process for mass assigning items to suppliers, supplier sites, and supplier site organizations is almost the same, and very similar to mass assigning items to organizations. The only difference between assigning items to the three different supplier business objects is the page name. For example, when assigning items to suppliers, the first page name is **Assign Items to Suppliers: Select Items**. When assigning items to supplier site organizations, the first page name is **Assign Items to SupplierSite Organizations: Select Items**. The following steps assume that you are assigning items to suppliers.

1. Navigate to the **Assign Items to Suppliers: Select Items** page.
2. Enter search criteria, then click Next. See: Searching for Items, page 1-17. The **Assign Items to Suppliers: 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 **Assign Items to Suppliers: Select Suppliers** page appears. If you need to refine the search criteria, click Back.
4. Search for a supplier using one of the following fields:
 - Supplier
 - Supplier Number
 - DUNS Number
This field only appears when assigning items to suppliers.
 - Tax Payer ID
This field only appears when assigning items to suppliers.
 - Tax Registration Number
This field only appears when assigning items to suppliers.

You can also search for supplier sites. Select Show Supplier Sites, then search for supplier sites using the following fields:

Note: These fields automatically appear when assigning items to supplier sites or supplier site organizations.

- Supplier Site
- City

- State
- Country

Click Next and the **Assign Items to Suppliers: Review Supplier Results** page lists all suppliers matching your search criteria.

5. Select the supplier(s) you want to assign to the item(s), then click Next. The **Assign Items to Suppliers: Review Results** page appears.
6. Review the item supplier assignments.
Select a display format for export, then click Go.
Click Back if you need to change your selected supplier(s) or Finish to proceed with assigning the items to suppliers.
7. After clicking Finish, the **Assign Items to Suppliers: 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 Submit.

If you selected Apply changes to Database

8. The **Schedule Request: Schedule** page appears. Choose when you would like your request to run. You can choose the following:
 - Start Date - choose as soon as possible or a specific date and time.
 - Recurrence - select Never Repeat or Repeat on a certain interval, ending at a certain date and time.
 - Apply the Interval - apply the interval based on the start or completion date and time.
 - Schedule Name - optionally select a predefined schedule from the list. Select Increment Date Parameters to set the next date.
 - Save Schedule - define and save a new schedule by entering a new Schedule Name, Description, and selecting Save Schedule.
9. Click Next. The **Schedule Request: Review** page appears.
Review the schedule parameters. Click Back if you need to change any of the parameters.

10. Click Submit.

A message appears, saying your request for EGO Spreadsheet Java Concurrent Program has been scheduled and giving you the Request ID.

11. Click OK.

The **Requests** page appears. From here, you can find out the details and status of your request.

If you selected Export to Excel

12. 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 1-70.

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.

Caution: Only users with create/edit category privileges can create or edit category information in a catalog. A user can assign items to categories only if the user has item assignment privileges for the catalog side as well as the item. For example, a user can assign item A to category B in catalog C only if the user has item assignment privileges for the item as well as managing catalog item assignment privileges for the catalog.

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 1-17

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): Select Organizations** page appears.

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. 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.

6. 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.

7. 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 1-70.

8. If you chose to Apply changes to Database, then the Schedule Request: Review page appears. Submit the concurrent program.

To reassign categories:

Caution: Only users with create/edit category privileges can create or edit category information in a catalog. A user can assign items to categories only if the user has item assignment privileges for the catalog side as well as the item. For example, a user can assign item A to category B in catalog C only if the user has item assignment privileges for the item as well as managing catalog item assignment privileges for the catalog.

1. Select Reassign Categories from the menu.

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: Select Organizations** page appears.

Enter an organization code, name, or hierarchy. Click Next.

4. The **Reassign Categories: Review Organizations** page lists all organizations matching your search criteria.

Select only those organizations for which you want to reassign categories. If you need to refine the search criteria, click Back.

5. 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.

6. After clicking Finish, the **Reassign Categories: Choose Action** page appears. Choose Apply changes to Database.

Click Submit.

7. The **Schedule Request: Review** page appears. Submit the concurrent program.

Deleting Items

You can delete or purge items from Oracle Product Information Management using deletion groups, deletion constraints, and deletion statements. Use deletion groups to specify the items that you want to delete. Deletion statements define what records to delete, for a particular deletion group, from a particular database table. Deletion constraints define the conditions when you can not delete a record from a database table. Oracle provides many predefined item deletion statements and deletion constraints, but you can also create custom deletion statements and deletion constraints. Other Oracle applications use deletion groups, statements, and constraints to delete other entities, too. For details on how to use deletion groups, statements, and constraints, see the Related Topics listed below.

The predefined item deletion statements specify that the following records are deleted, along with the master item record:

- Item organizations
- Item suppliers
- Item supplier sites
- Item organization supplier sites
- Packaging hierarchy
- Item associations, such as:
 - MPNs (manufacturing part numbers)
 - Related items
 - Customer item cross references
 - Source system cross references
 - Related documents
 - Cross references

- GTIN cross references
- Item operational and user-defined attributes, including style item variant attribute group value sets when deleting a style item.

Note: When you delete a SKU, that particular variant attribute combination becomes available again for the style item.

Predefined item deletion constraints created specifically for Oracle Product Information Management include:

- Delete a style item only if the style item has no associated SKUs.
- No deletion of unapproved items allowed.
- No deletion of a Global Trade Item Number (GTIN) registered to 1SYNC allowed.

Related Topics

Deleting Items, Bills, Routings, Components, and Operations, *Oracle Bills of Material User's Guide*

Deletion Constraints and Statements, *Oracle Bills of Material User's Guide*

Creating Custom Deletion Statements and Constraints, *Oracle Bills of Material User's Guide*

Item Deletion, *Oracle Inventory User's Guide*

Delete Items Report, *Oracle Bills of Material User's Guide*

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 primary or single-row 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 1-54 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 primary/single row attributes in the new row. You must delete the values of the primary/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 primary/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					EGO - 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 primary and operational attributes that are enabled at the master item or item organization level and

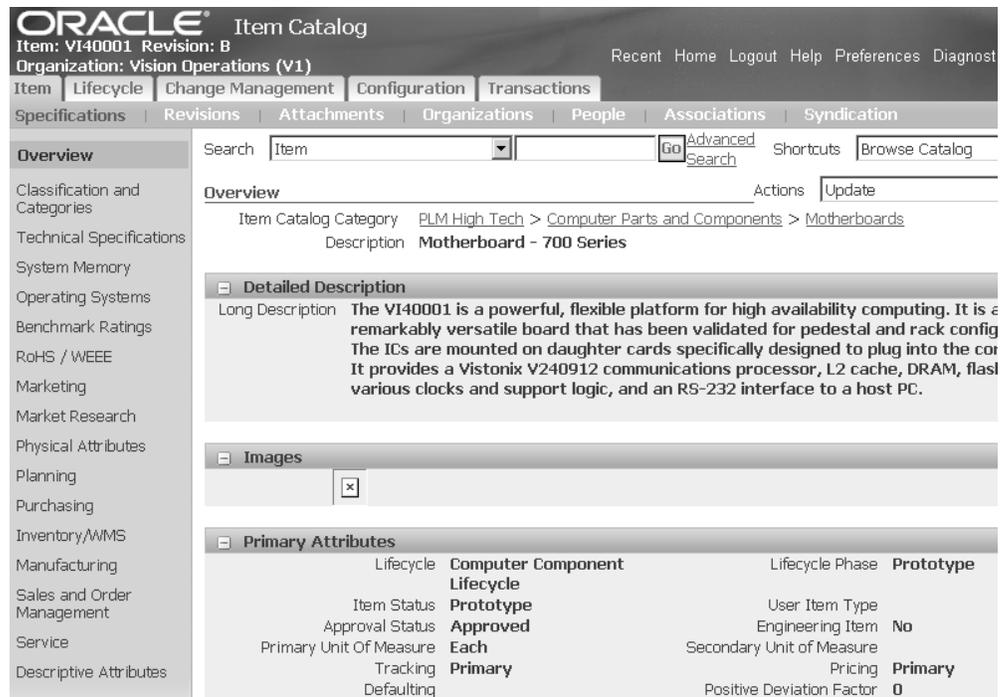
in the form of user defined and transaction attributes that are inherited from the catalog category of the item. You can also add an unlimited number of descriptions and images about an item to enrich its specification. All unstructured item information can be added as an attachment to the item.

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 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.



2. 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:

When you define or update an item's operational and user-defined attributes, you update them at the item's organization and revision level, not at the master item level. If you want to update an operational or user-defined attribute across all organizations, then see: Mass Updating Items, Categories and Associations, page 1-73.

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 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	No
	<input checked="" type="checkbox"/> OM Indivisible

4. Click Apply.

To update attributes using a change order

5. Click Create Change Order.

To update an item's transaction attributes:

When you update an item's transaction attributes, you update them at the item's organization and revision level, not at the master item level.

1. Locate the item whose transaction attributes you want to update.
2. From the item's **Overview** page, click Transaction Attributes.
3. For further instructions on how to update an item's transaction attributes, see: "To update a transaction attribute:" in *Defining Transaction Attributes, Oracle Product Information Management Implementation Guide*.

Related Topics

Creating Change Orders, page 4-21

Performing Actions, page 4-24

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.

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.

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.

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 *Defining Change Policies*, *Oracle Product Information Management Implementation Guide*.

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 7-1.

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.

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 4-41.

When you send a file version stored in a Oracle Universal Content Management (UCM) or Content DB 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.

ORACLE Item Catalog
 Item: VI40001 Revision: B
 Organization: Vision Operations (V1)
 Item | Lifecycle | Change Management | Configuration
 Specifications | Revisions | **Attachments** | Organizations | People | Associations | Syndication
 Shortcuts Create Document

Item Revision

Attachments Create

View At

Attachments: Current Category: All Go
 Show More Search Criteria

Select Attachments: Request Approval Go | Add Attachment Desktop Files 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"/>	Data sheet	Motherboard product data sheet		Datasheet	Steve Williams	25-Jan-2007 20:36:04			EBS
<input checked="" type="checkbox"/>	r12 ebs attachments tol 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

Cancel Submit

File Approval Type **Datasheet Approval** File Approval Number **DSA101**

* File Approval Name Motherboard datasheets

Description

Priority High

Need By Date

Select to access date picker

(example: 25-Jan-2007 19:45:00)

Reason Cost

Subject

Item Number **VI40001**

Revision **B**

Item Description **Motherboard - 700 Series**

Requestor Steve Williams

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

Cancel Submit

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 4-41
 - Defining Workflow Templates, *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**

[Show All Details](#) | [Hide All Details](#)

Details	Step	Workflow Process	Response Required	Type	Name	Assigned To	Action Required	Date	Update	Delete
<input type="checkbox"/> Show	10	Request Approval	Optional	Item Role	Product Manager	Steve Williams				
<input type="checkbox"/> 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 links: Recent, Home, Logout, Preferences, Help, Diagnostics. Below that, the breadcrumb trail is: Item | Lifecycle | Change Management | Configuration. The main navigation bar includes: Specifications | Revisions | Attachments | Organizations | People | Associations | Syndication. A search bar is present with a dropdown menu set to 'Item' and a 'Go' button. Below the search bar, there are links for 'Item Attachments' and a 'Create Change Order' button. The 'Attachments' section has a 'View' section with a dropdown menu set to 'AC11' and a 'Go' button. Below this, there are links for 'Show More' and 'Current' items. A table of attachment changes is displayed with the following data:

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	ask_repository_documents.gif		Miscellaneous	Jonathan Smith	19-Apr-2005	Unapproved	EBS	link

At the bottom of the page, there are navigation links: Item | Lifecycle | Change Management | Configuration | Recent | Home | Logout | Preferences | Help | Diagnostics. Copyright information: Copyright 2000-2004 Oracle Corporation. All rights reserved. About this Page. 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: *Defining Item Attributes and Attribute Groups*, *Oracle Product Information Management Implementation Guide*). 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.

Note: When integrating a retail system such as Oracle Retail with Oracle eBusiness Suite, you must set up the retail sites as organizations. Refer to the retail site hierarchy and create a matching organization hierarchy. Model retail site clusters as single level organization hierarchies, with one of the sites defined as a parent (a dummy role). Once the organizations are defined, you can synchronize retail site data with the organizations.

See: *Setting Up Organizations, Oracle HRMS Enterprise and Workforce Management Guide*

Choose from the following methods of assigning organizations to items:

- Manually. You can manually assign organizations to items from:
 - the Item Workbench, Organizations tab. See: "To enable an item in an organization:", listed below.
 - the Mass Update menu. See: "To mass assign items to organizations:" in *Mass Updating Items, Item Categories and Item Associations*, page 1-73.
 - the Item Workbench, Configuration tab, Packs subtab. See: "To assign a pack to an organization:", listed below.
- Automated. Use API calls initiated by a retail system such as Oracle Retail to create and maintain item organizations synchronized with retail sites. See the *Oracle Integration Repository* for a list of organization APIs available for use. Separate organization APIs can assign organizations to items as well as keep the organizations synchronized with retail sites if you use a retail system such as Oracle Retail.
- Manual and automated. You can choose to automate the synchronization of some portion of the organization hierarchy and maintain the rest manually. For example, Oracle Retail has a six level site hierarchy, the top levels of which usually remain static. The majority of the changes occur at the last level, the retail sites/organizations. You could set up the initial organization hierarchy from Oracle Retail manually in eBS. Automate the creation of the site and site clusters in eBS using APIs.

Important: Only those users with access to an organization can assign items to it.

To enable an item in an organization:

1. Locate the item you wish to enable.
2. On the item's **Overview** page, click the Organizations tab.
3. On the **Organization Assignments** page, click Assign to Organization.

Note: When you are viewing an item within the master organization context, you can also click Mass Assign to Organization. This button is not available within child organizations. See: "To mass assign items to organizations:" in Mass Updating Items, Item Categories and Item Associations, page 1-73.

The Assign to Organization button enables you to copy the following item attribute values from the master organization context to the new organizations:

- Status
- Primary Unit of Measure
- Tracking
- Pricing
- Secondary Unit of Measure
- Defaulting
- Negative Deviation Factor
- Positive Deviation Factor

If you want to copy more attribute values, then use the Mass Assign to Organization button.

4. On the **Update Organization Assignments** page, select the Assigned checkbox 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.

A message appears, listing the concurrent request ID.

To assign a pack to an organization:

You can assign any level in a packaging hierarchy to one or more organizations. All

items below the pack item selected are assigned to the same organization(s) as the pack item.

1. Navigate to the **Packs** page of an item.

From the item's **Overview** page, click the Configuration tab, then the Packs subtab. The Packs page displays a list of each pack item of which this item is a member.

2. In the bottom table that displays the pack hierarchy, select the pack item that you want to assign to one or more organizations.

3. Click Assign Pack to Organization.

4. In the **Assign Items to Organizations: Select Organizations** page, search for the organizations to select using one or more of the following fields:

- Organization Code
- Organization Name
- Hierarchy

Click Next.

5. In the **Assign Items to Organizations: Review Organizations** page, select one or more organizations, then click Next.

6. In the **Assign Items to Organizations: Review Results** page, review the items and the organization assignments. Click Back to change them or Finish to complete the organization assignment.

7. In the **Assign Items to Organization: Choose Action** page, choose to either apply the changes to the database or to export the changes to Excel.

Click Submit.

8. If you chose the apply to database option, follow the next steps that appear to schedule the concurrent request, choose a report layout, and review the options you have chosen. Click Submit to schedule the concurrent request.

If you chose the export to Excel option, follow the next steps that appear to download the changes into an Excel spreadsheet. Update the spreadsheet if necessary, then upload it as described in Updating Existing Items Using a Spreadsheet, page 1-70.

To change the organization context:

You can change the organization context to look at item information in a different organization either from the main menu or from within the item workbench.

To change organizations from the main menu

1. From the menu, find and select Change Organization.

To change organizations from the item workbench

1. Navigate to the item's **Overview** page or to any page within the item workbench.
2. From the Shortcuts drop down list, select Organization, then click Go.
3. In the **Choose Organization** page, click the Quick Select icon next to the organization you want to select.

Alternatively, from the item's **Overview** page, select the Organizations tab. In the Change Organization drop down list, select an organization.

To view item organization assignments:

Important: You can only view those organizations to which you have access.

1. Navigate to the item's **Overview** page.
2. Select the Organizations subtab.

The **Organization Assignments** page lists all of the organizations assigned to the item.

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.

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.

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, Retail, 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 My Oracle Support (<http://metalink.oracle.com>, Doc ID: 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 1-17.
2. On the item's **Overview** page, click the Transactions tab.

You can view transaction information under the following sections of the **Transactions** page.

- Open Orders
- Onhand Quantities
- Open Returns
- Open Service Requests
- Installed Units Information
- Open Purchasing Orders

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: TEE9000 Revision: A
 Organization: Vision Operations (V1) Recent Home Logout Preferences Help Diagnostics

Item Lifecycle Change Management Configuration Transactions

Transactions

Transactions: Item

You may select a particular transaction type to view a specific transaction history or click on List View button to see a complete list of business transactions.

Select

* Transaction Type

Open Orders

Customer Name	Account Number	Order Type	Order Number	Backlog Quantity	List UOM Price	Selling Price	Backlog Amount	Currency	Booked Date	Request Date	Shipping Warehouse
No results found.											

Onhand Quantities

Organization	Item Revision	Quantity	UOM	Lot Number	Lot Expiry Date
No results found.					

Open Returns

Customer	Account	Order	Return	Resolving
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

Prerequisites

- Defining Report Templates Using XML Publisher, *Oracle Product Information*

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. If you want to include images in the report, select 'Include Item Overview Images'. This option includes any images attached to an item's description.
5. Upon export, the report will be generated in the required format.

Note: You can also generate report from the Browse Catalog Category and Item detail pages.

Using Style and SKU Items

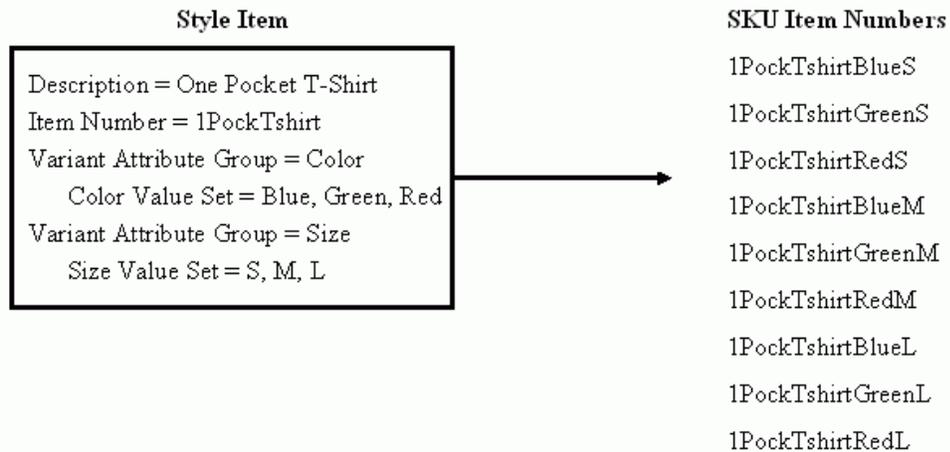
This chapter covers the following topics:

- Overview of Style and SKU Items
- Creating Style and SKU Items
- Creating a SKU Packaging Hierarchy

Overview of Style and SKU Items

You can use style items to group similar items (called SKUs or Stock Keeping Units) together. The items grouped under the style item (the SKUs) have variant attributes. For example, a retail clothing business sells a particular shirt style in multiple colors and sizes. The multiple colors represent one variant attribute group while the various sizes represent another variant attribute group. Variant attribute groups contain attributes that differentiate the item. Each unique variant combination represents a possible SKU item. A simple example that explains the use of style items with SKUs follows.

Style/SKU Example



The style item behaves as a model item while the SKUs behave as standard items. All business transactions occur at the SKU item level.

The SKUs can either inherit or default certain item characteristics from the style item. When a SKU inherits a characteristic from its style item, the characteristic is always controlled at the style item level. For example, you can only change an inherited item level user defined attribute such as price at the style item level. Once the price is changed, all SKUs reflect the new price. When a characteristic defaults from a style item to a SKU during SKU creation, you can change the characteristic at the SKU level later without affecting the style item. Conversely, if you change a defaulted characteristic at the style item level after SKU creation, the change does not automatically appear at the SKU level. You must manually make the change at the SKU level or use a mass update function to change the SKUs. See: *Mass Updating Items, Item Categories and Item Associations*, page 1-73. The following table lists the characteristics available to style and SKU items, as well as whether the inherit or default behavior is available for the characteristic.

Characteristics Availability and Inheritance/Defaulting Behavior

Characteristics	Style Item	SKU	Defaulting from Style to SKU	Inheritance from Style to SKU
Item level - User Defined Attributes	Yes	Yes	Yes	Yes

Characteristics	Style Item	SKU	Defaulting from Style to SKU	Inheritance from Style to SKU
Item level - Retail Library defined attributes	Yes	Yes	Yes	Yes
Item level - Operational attributes	Yes	Yes	Yes	No
Variant Attribute Group	Yes	Yes	No	No
Revisions	Yes	Yes	No	No
Revision level User-defined attributes	Yes	Yes	No	No
Status	Yes	Yes	Yes	No
People/Security	Yes	Yes	Yes	No
Lifecycle	Yes	Yes	Yes	No
Retailer Sites	Yes	Yes	Yes	No
Item - Retailer Sites association attributes	Yes	Yes	Yes	Yes
Informal Pack Hierarchy	Yes	Yes	Yes*	Yes*
Formal Pack Hierarchy	Yes	Yes	No	not applicable
Structure/Bill of Material	Yes	Yes	No	No

Characteristics	Style Item	SKU	Defaulting from Style to SKU	Inheritance from Style to SKU
Attachment - Item level	Yes	Yes	Yes	No
Attachment - Revision level	Yes	Yes	No	No
GTIN	Yes	Yes	No	No
Item Supplier associations	Yes	Yes	Yes	No
Change Management	Yes	Yes	not applicable	not applicable
External Transactions	not applicable	Yes	not applicable	not applicable
Related Items	Yes	Yes	No	No
Customer Item cross-reference	Yes	Yes	No	No
Manufacturer Part Number	Yes	Yes	No	No
Cross-Reference	Yes	Yes	No	No
Source System Cross-Reference	Yes	Yes	No	No
GDSN Syndicated Flag	No	Yes	not applicable	not applicable

* for user defined attributes only

The style item and it's related SKUs must have the same item catalog category (ICC). You can only change a style items' ICC if there are no related SKUs or if you change the ICC using a mass update function to change the style and related SKUs ICC at the same time. See: Mass Updating Items, Item Categories and Item Associations, page 1-73.

Related Topics

Creating Style and SKU Items, page 2-5

Creating a SKU Packaging Hierarchy, page 2-9

Creating Style and SKU Items

You can use the same process to create style items as you do to create standard items. Once you create the style item, you have the option to immediately begin the SKU item creation flow from the style item's **Overview** page. In addition, you can create style and SKU items using the following methods:

- Microsoft Office Excel spreadsheet (see: Importing Items Using a Spreadsheet, page 1-54)
- Item Open Interface table (see: Managing Item Imports, page 1-38)
- Import Workbench (see: Overview of Inbound Product Data Synchronization and Data Quality Management, page 3-1)

To create a style item:

1. Create an item as described in Creating New Items, page 1-24 with the following exceptions.
2. Select Style.

Caution: Once you create a style item, you cannot deselect Style. You also cannot change another type of item to a style item later. You can only create style items during the item creation process.

Note: You cannot create a GDSN Syndicated style item. The GDSN Syndicated box displays as read-only.

3. Optionally, select one or more templates that set the operational and user-defined attributes for the item.

Note: Each template selected is applied in the order listed. Templates applied latest override the attribute values of templates applied earlier.

4. In the **Create Item: Enter Number/Description** page, enter the item and item

description.

Note: The system ignores the item number and description generation instructions specified by the item catalog category. Style item numbers and descriptions are user defined even if the item catalog category specifies 'Function Generated' or 'Inherited From Parent'.

Enter the following attributes, keeping in mind how the values entered effect the SKU items based on this style item.

- Variant Attributes

The variant attribute groups listed default from the item catalog category selected. Variant attribute groups can have multiple value sets assigned to each group. For each group, select the value set to use when creating SKUs based on this style item.

- You cannot select variant data types for Date, Date and Time, and Translatable Text.
- You cannot enforce dependencies between value sets by using \$ATTRIBUTEGROUP\$ in the value set where clause for variant attribute groups, since they are static in nature.

- Primary Attributes

Select the primary attribute values that you want the SKUs to either inherit or receive the default values.

Important: Verify that the following operational (transaction) attributes are set to No since style items are not transactable or stockable.:

- Inventory Item
- BOM Allowed
- Build in WIP
- Customer Orders Enabled
- Internal Orders Enabled
- Invoice Enabled

- Transactable
- Purchasable
- Stockable
- GDSN

The default value for these attributes is No, unless a template applied in the previous step sets their value to Yes.

5. Click Finish. The item **Overview** page displays.

To create SKU items from a style item:

1. Navigate to the **Overview** page for a style item.
2. In the SKUs region, for each variant attribute, select the attribute value that you want to assign to the new SKU.

Tip: If you want to create a SKU for more than one variant attribute value, then select All for one or more attributes.

3. Click Create. The **Create SKUs: Select Variants** page appears.
4. For each variant attribute, select the values for which you want to create SKUs.

Note: You must select at least one value for each variant attribute.

5. Click Add Selected Variants to create the list of SKUs based on the variant attributes selected.
6. Select Outbound GDSN to GDSN-enable each SKU.

Caution: Oracle Product Information Management no longer supports outbound product data synchronization.

You cannot send data directly from Oracle Product Information Management (PIM) to the Global Data Synchronization Network (GDSN) since PIM only maintains the master data, but does not validate the data for GDSN. To send data to GDSN, you must build a validation or use a third party software application to perform this function.

7. Select Engineering Item if you want to create each SKU as an engineering item.
Leave this box blank to create the SKUs as production items.
8. Enter an item number and description for each SKU.
These fields already contain values if the item catalog category specifies function generated item numbers and descriptions. See: Defining Item Numbers and Descriptions, *Oracle Product Information Management Implementation Guide*.
9. Optionally, click Show in the Details column to change the primary attribute values for each SKU if these values defaulted from the style item.

If the SKU inherits the primary attribute values, then you cannot modify them.

Caution: The system only considers SKUs with a Trade Item Unit Descriptor (TIUD) = Each or Base Unit for pack creation. See: Creating a SKU Packaging Hierarchy, page 2-9

10. Click Apply.

You receive a message saying that a batch has been submitted for SKU Creation. the message includes a link to the concurrent request ID.

To create SKU items after a new variant attribute value is added to the value set:

Using the example of a shirt style in a retail clothing business, suppose the retailer plans to introduce a new shirt color, magenta, for spring. After the new color is added to the value set, you can create new SKUs for the magenta color.

Follow the steps to create SKU items from a style item as described above. The **Create SKUs: Select Variants** page, SKU Combinations region has a column titled "SKU Exists". If no checkmark exists in this column for the new SKU combination, you can create the new SKU. Enter the new SKU description and item number (unless the item number is sequence generated), then click Apply.

What's Next

Update all SKU item operational attributes as necessary to make them stockable and transactable. You can manually update these attributes after SKU item creation from the SKU item's **Overview** page or you can perform a mass update. See:

- Updating Existing Items, page 1-69
- Updating Existing Items Using a Spreadsheet, page 1-70
- Mass Updating Items, Categories and Associations, page 1-73

Creating a SKU Packaging Hierarchy

You can package SKUs into multiple units of individual items. For example, a packaging hierarchy for different sizes and colors of v-neck t-shirts might contain the following pack types:

- Pallet: Item = V-MultiColorSizePallet
 - Case: Item = V-MultiColorSizeCase, Quantity = 6
 - Multipack: Item = V-MultiColorSizePack, Quantity = 2
 - Pack or Inner Pack: Item = V-WhiteMixedSizePack, Quantity = 1
 - Base Unit or Each: Item = V-WhiteSmall, Quantity = 25
 - Base Unit or Each: Item = V-WhiteMedium, Quantity = 25
 - Base Unit or Each: Item = V-WhiteLarge, Quantity = 40
 - Pack or Inner Pack: Item = V-BlueMixedSizePack, Quantity = 1
 - Base Unit or Each: Item = V-BlueSmall, Quantity = 30
 - Base Unit or Each: Item = V-BlueMedium, Quantity = 15
 - Base Unit or Each: Item = V-BlueLarge, Quantity = 25

Use the following procedure to create a packaging hierarchy containing the SKUs. In the example above, this procedure creates the pack or inner pack item that contains either the white or blue v-neck t-shirt mixture of sizes. See: *Managing the Packaging Hierarchy*, page 5-8 for instructions on how to create other levels of the packaging hierarchy.

Packaging Hierarchy Example

Item: TEE9000 Revision: A
 Organization: Vision Operations (V1) Recent Home Lo

Item Lifecycle Change Management Configuration Transactions

Structures Where Used Packs

Search Item [Advanced Search](#) Shortcuts Cr

Packs

Display Format: GTIN Details

Select Pack Type	Item Name	Brand Name
<input checked="" type="radio"/> Pallet	V-MultiColorSizePallet	

[Expand All](#) | [Collapse All](#)

Select Focus Pack Type	Item Name	Quantity
<input checked="" type="radio"/> <input type="checkbox"/> Pallet	V-MultiColorSizePallet	1
<input type="radio"/> <input type="checkbox"/> Case	V-MultiColorSizeCase	6
<input type="radio"/> <input type="checkbox"/> Multipack	V-MultiColorSizePack	2
<input type="radio"/> <input type="checkbox"/> Pack Or Inner Pack	V-WhiteMixedSizePack	1
<input type="radio"/> Base Unit Or Each	TEE9000	25
<input type="radio"/> Base Unit Or Each	TEE9001	25
<input type="radio"/> Base Unit Or Each	TEE9002	40
<input type="radio"/> <input type="checkbox"/> Pack Or Inner Pack	V-BlueMixedSizePack	1
<input type="radio"/> Base Unit Or Each	TEE9014	30
<input type="radio"/> Base Unit Or Each	TEE9015	15
<input type="radio"/> Base Unit Or Each	TEE9013	25

To create a SKU packaging hierarchy:

1. Search for and select a style item.
2. In the Item Catalog, Item tab, Specifications subtab, **Overview** page, select Create Pack Hierarchy from the Actions menu. Click Go.
3. In the Create Pack Hierarchy page, select the SKUs that you want to include in a packaging hierarchy.

Tip: Use the variant attribute group pulldown lists to filter your list of SKU item choices.

4. Select the item catalog category for the new pack items.
All new items created are assigned to this item catalog category.
5. Select the lowest level pack type.
The lowest level (pack type) of a packaging hierarchy is the base unit (in most cases,

Each).

Note: An item's pack type and Trade Item Unit Descriptor (TIUD) are synonymous with each other.

6. Select Create Above under the Define Pack Hierarchy region, then click Go.
7. For the new package level, specify the pack type, quantity, unit of measure, item attribute template, and whether the package level is an engineering item and outbound GDSN-enabled.

The quantity and unit of measure for a package level refer to the package level just below. For example, a pack or inner pack contains 25 each.

Create Pack Hierarchy

Select Style Item

Item: Tee_V_Style

Select SKUs for Pack Creation

SKUs

Color: Pink Top Size: All

Select Items:

[Select All](#) | [Select None](#)

Select Item:	Item	Item: Color	Item: Top Size	Item: Item Status	Item: Approval Status	Item Location/Org De
<input checked="" type="checkbox"/>	TEE9008	Pink	L	Active	Approved	
<input checked="" type="checkbox"/>	TEE9009	Pink	M	Active	Approved	
<input checked="" type="checkbox"/>	TEE9010	Pink	S	Active	Approved	
<input type="checkbox"/>	TEE9011	Pink	XL	Active	Approved	
<input type="checkbox"/>	TEE9012	Pink	XS	Active	Approved	

Select Item Catalog Category for Pack Items

Item Catalog Category: Tees

Define Pack Hierarchy

Select and:

Select	PackType	Quantity	Unit of Measure	Item Attribute Template	Outbound GDSN	Engir
<input type="radio"/>	Pack or Inner Pack		Each	Packaging	<input type="checkbox"/>	
<input checked="" type="radio"/>	Each	25			<input type="checkbox"/>	

8. Once you have finished building the packaging hierarchy, click Continue.
9. In the **Create Pack Items: Item Attribute Selection** page, select the item details (such as attributes) to apply to the new pack item.

If you selected an item attribute template for the new pack type, you can choose whether to apply the template attribute values first or the attribute values common to both the SKU and pack item catalog categories first.

Click Continue.

Create Pack Items: Item Attribute Selection

Cancel Continue

Create Selection

Create **Copies of Existing Item**
Copy Item **SKU Item**
Copy Item Revision **Current Effective**

Copy Item Details

TIP Only attributes common between SKU Item and Pack Item categories will be available for selection.

Sequence Apply template first, then copy
 Copy first, then apply template

Available Information Selected Information

	> Move	Item Attribute:Top Details
	>> Move All	Item Attribute:Theme
	< Remove	Item Attribute:Tee Details
	<< Remove All	Item Supplier Attribute:Supplier Site Primary Attributes
		Item Supplier Site Attribute:Supplier Site Primary Attrib
		Item Supplier Site Organization Attribute:Supplier Loca
		Item Attribute:Seasons/Phases
		Item Supplier Site Organization Attribute:Order Inform
		Item Supplier Site Attribute:Order Information
		Item Attribute:Order Information

Cancel Continue

- In the **Create Items: Enter Item/Description** page, enter the item number and description for the new pack item, unless it is sequence or function generated. Click Finish.

Note: You only need to enter the item number and description for the new pack item in the first row of SKU items. The system ignores any item numbers and descriptions entered in later SKU item rows..

A concurrent request program launches to create the new pack item. You receive a concurrent request ID. After the concurrent request processes successfully, you can search for the new pack item and view it as you would view any other item.

Create Items: Enter Item/Description

* Indicates required field

Item Catalog Category **Tees**
 Copy From Item **SKU Item**
 Revision **Current Effective**

Select Rows:

[Select All](#) | [Select None](#) | [Show All Details](#) | [Hide All Details](#)

Select	Details	Trade Item Unit Descriptor	SKU Item	*Item Number	*Item Description
<input type="checkbox"/>	+ Show	Pack Or Inner Pack	TEE9010	V-PinkMixedSizePack <input type="button" value="Info"/>	Pack: Pink V-Neck Size Run
<input type="checkbox"/>	+ Show	Pack Or Inner Pack	TEE9009	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	+ Show	Pack Or Inner Pack	TEE9008	<input type="text"/>	<input type="text"/>

Information
 The following Items have been submitted for creation. Concurrent Request ID is [5215697](#)

Created Items : Results

Catalog Category	Item Number	Description	Long Description	Primary Unit of Measure	Lifecycle
Tees	V-PinkMixedSizePack	Pack: Pink V-Neck Size Run		Each	

Related Topics

Managing the Packaging Hierarchy, page 5-8

Synchronizing Product Data and Managing Data Quality

This chapter covers the following topics:

- Overview of Inbound Product Data Synchronization and Data Quality Management
- Creating Batches
- Reviewing and Importing Batches
- Reviewing and Importing PIMDH Batches
- Reviewing and Importing GDSN Batches
- Performing Actions on Batches
- Managing 1SYNC Messages
- Managing Subscriptions

Overview of Inbound Product Data Synchronization and Data Quality Management

Oracle Product Information Management uses the Import Workbench to bring product data from disparate systems into a master product information repository, known as the Product Information Management Data Hub (PIMDH). Examples of disparate systems and data include:

- third party applications
- legacy applications
- data from mergers and acquisitions
- duplicate data in global locations
- vendor or supplier item data

- data from a GDSN datapool such as 1SYNC. See: *Overview of the Global Data Synchronization Network, Oracle Product Information Management Implementation Guide*
- item definition information from external CAD systems

While importing data into a centralized data model, the Import Workbench identifies and resolves duplicates and errors while at the same time enriching existing data with external information. This process creates a blended record, known as the single source of truth. You can then create business reports and other documents related to the updates. The following steps describe the Import Workbench process:

1. Extract and Load. Use one of the following options to extract and load:
 - Upload data to the interface tables using Microsoft® Office Excel.
 - Upload data directly to the interface tables using APIs.

Important: If you choose to upload data directly to the interface tables, then you must call the data load complete public API as the last step when uploading data.

2. Match
 - Identify and resolve duplicates
 - Exclude unwanted data
3. Import
 - Import and create a single source of truth blended record in the product information repository
 - Optionally, enforce the product change approval process when importing data

You can import the following types of data using Import Workbench:

- items
- routings
- structures

Important: You cannot update transaction attributes using the Item Open Interface, the Microsoft® Office Excel spreadsheet, or the Import Workbench. You must update them directly. See: *Defining Transaction*

In order to import data from an external source system, you must define a source system for each data source and create match rules to help match imported data to existing data in the product information repository.

Importing Product Information Management Data Hub Data

You can use the PIMDH as its own source system when importing new or updated data. The advantage of using the Import Workbench instead of the Item Open Interface or importing data using a spreadsheet comes from the Import Workbench's extensive error management capabilities.

The process of importing PIMDH data is much simpler than importing data from a source system for the following reasons:

- No setup steps - There is no reason to define a source system or match rules since the PIMDH is the source system.
- No matching process
- No unconfirmed (unmatched) data or data excluded from import

Process for Importing PIMDH Data

1. Create a batch using the Product Information Management Data Hub as the source system. See: *Creating Batches*, page 3-4
2. Review and import the batch. See: *Reviewing and Importing PIMDH Batches*, page 3-22
3. Perform actions on the batch as necessary. See: *Performing Actions on Batches*, page 3-37

Importing GDSN Data

The process of importing GDSN data differs slightly from the process of importing data from other sources. To trigger this process, specify that the source is a GDSN data pool when defining the source system by selecting the **Enable for Data Pool** check box. See: *Defining Source Systems, Oracle Product Information Management Implementation Guide*

GDSN batches differ from other batches in the following ways:

- All items in a batch within a pack hierarchy receive the same Group ID.
- All of the items in a given pack hierarchy receive the same timestamp. This timestamp validates when you import data into the PIM Data Hub. This timestamp appears in the Received Date field.

- No merge on data upload
- Once an item/Group ID combination exists in a batch, you cannot add more data to the batch.
- The system sends Catalog Item Subscription (CIS) messages to 1SYNC.
- The Import Ready icon appears only if the entire group is confirmed and ready for import.
- You can use the Ignore match action to temporarily exclude an item and all of its associated items with the same Group ID from import.

Related Topics

Creating Match Rules, *Oracle Product Information Management Implementation Guide*

Defining Source Systems, *Oracle Product Information Management Implementation Guide*

Defining Units of Measure for GDSN Attributes, *Oracle Product Information Management Implementation Guide*

Creating Batches, page 3-4

Reviewing and Importing Batches, page 3-9

Reviewing and Importing PIMDH Batches, page 3-22

Reviewing and Importing GDSN Batches, page 3-26

Performing Actions on Batches, page 3-37

Creating New Items, page 1-24

Creating Batches

A batch consists of the data that you want to import into the master product information repository. You can use two methods to create batches:

- Import Workbench, Import tab, Create Batch button
- Public API

Prerequisites

- Set the EGO: Enable Product Information Management Data Librarian site level profile option to Yes.

See: Profile Options, *Oracle Product Information Management Implementation Guide*

- ❑ Create rules to match the imported data with existing data in the Oracle Item Master. See: *Creating Match Rules, Oracle Product Information Management Implementation Guide*
- ❑ Define the source of the imported data. See: *Defining Source Systems, Oracle Product Information Management Implementation Guide*

To create a batch online:

1. Navigate to the **Import Workbench**.

In the **Import** tab, click **Create Batch**.

2. Complete the following fields:

- **Batch Name**
- **Source System**
- **Batch Type** - Specify the type of data contained in the batch, either items or structures.
- **Assigned To** - Enter the name of the person responsible for reviewing and completing the batch.

Users can only assign items to those organizations to which they have permission.

3. Review the selections on the **Data Load Options** and **Import Options** tabs and make changes as necessary.

The selections default from the source system selected. For detailed information about each selection, see: *Defining Source Systems, Oracle Product Information Management Implementation Guide*.

Note: You cannot change Import Options after you create the batch.

4. Click **Apply**.

To create a batch using an API:

1. Use `oracle.apps.ego.item.itemimport.server.EgoImportBatchHeaderAMImpl` to create batches.

Caution: Consider the following points when loading data directly into the open interface tables:

- Before deleting data rows from interface tables, ensure that you do not need the batch information for any batch history purpose. No batch delete or purge function exists.
- When using the Import Catalog Items or Bill and Routing Interface concurrent programs, ensure the Delete Processed Rows field equals No. For Import Workbench to function properly, rows must be deleted by Batch ID, not by process

status.

- Verify that adequate file system space and table space exists before loading data. For example, inadequate file system space for FND_FILE logging can result in incomplete import processes or partial imports.

To add records to an existing batch:

After creating a batch, load data into a batch. Use one of the following two methods to load data into a batch:

- Microsoft® Office Excel spreadsheet - Enter data into an Oracle WebADI-generated Excel import document. The data is then loaded into the item or structure interface tables.
- Load data directly into the Item Open Interface or the Bills of Material Open Interface.

Using the Add to Batch button enables you to add records to a batch after the batch has been created.

Note: You can also add records to an existing batch by loading the item or structure interface tables directly using the same batch ID again. See: To create a batch using an API, page 3-6

1. Navigate to the **Import Workbench**. Use the search fields to find a particular batch. For detailed information about each search field, see: To find a batch, page 3-9.
2. Select the batch on which to perform the action.
3. Click **Add to Batch**.
4. In the **Add to Batch: Select Object** page, select the type of object to which to add the data:
 - Items
 - Item Revisions
 - Item People
 - Item Categories
 - Item Organization Assignment

- Manufacturer Part Numbers
 - Structures (only if the type of batch is Structure)
5. Perform one of the following, depending on the batch type of the batch you want to add:
- For an Item object, in the **Add to Batch: Download Import Format** page, find the item catalog category you want to use for the object selected (for example, select the Items object). A list of valid import formats for that item catalog category appears. See: *Defining Item Catalog Import Formats*, *Oracle Product Information Management Implementation Guide*. Select one, then click **Go**.
 - For a Structure, in the **Add to Batch: Import Structure** page, select the import format you want to use, then click **Go**.

The import format determines the column names on the spreadsheet. For example, an item import format may have different columns than a manufacturing part number import format spreadsheet.

6. Click one of the following:
- **Import** - Creates a Microsoft® Office Excel spreadsheet containing the batch data that matches the item catalog category and object type selected (or just the object type for structures). You can use this spreadsheet to import the data later. See: *Importing Items Using a Spreadsheet*, page 1-54
 - **Add More** - Enables you to select more records based on a different object, item catalog category, and import format criteria. Click Add More until you have selected all of the records you want to add to the batch.
 - **Back** - Returns you to the **Add to Batch: Select Object** page.
 - **Cancel** - Returns you to your search results.
 - **Finish** - Returns you to your search results.
7. The **Select Viewer** page appears after you click **Import**. Select the version of Microsoft® Office Excel that you want to use to view the document.
8. Check **Reporting** if you only want to use the document for reporting purposes. If you check Reporting, you cannot upload records from the document.

Related Topics

Overview of Inbound Product Data Synchronization and Data Quality Management, page 3-1

Creating Match Rules, *Oracle Product Information Management Implementation Guide*

Defining Source Systems, *Oracle Product Information Management Implementation Guide*

Reviewing and Importing Batches, page 3-9

Performing Actions on Batches, page 3-37

Reviewing and Importing Batches

Reviewing batches while the data is in the open interface tables consists of the following actions:

- Confirm all unconfirmed items by running match rules or manually matching the items.
- Exclude unwanted items.

Once you have reviewed a batch, initiate the import process to import the data into PIM Data Hub.

Only the batch assignee can access a batch to perform matching, import and other functions for a batch's records. This ensures that only one person can work on a batch at a time. However, anyone with access to the Import Workbench can change the assignee.

To find a batch:

1. Search for a batch using one or more of the following fields:
 - **Batch Status** - Select one of the following statuses:
 - All
 - Active
 - Pending
 - Completed
 - Rejected
 - **Batch ID** - Enter a full or partial batch ID number, using % as a wildcard character.
 - **Batch Type** - Select either Item or Structure. If you select Structure, then the Structure Details column in the search results shows a detail icon.
 - **Assigned To** - Select the person who created the batch from the list.
 - **Created On** - Select the date the batch was created.

- **Batch Name** - Enter a full or partial batch name, using % as a wildcard character.
 - **Source System** - Select either All or a particular source system from the list.
 - **Created By** - Select either the blank option or a particular person from the list.
2. Click **Go** to retrieve the search results or click **Clear** to clear all of the search fields.
 3. Review the search results under the following columns:
 - **Batch Id** - Batch ID is a system-generated unique batch identification number. Click on the title to sort the batch IDs in ascending or descending order.
 - **Batch Name** - The batch name is created manually with the batch. Click on the title to sort the batch names in ascending or descending order.
 - **Batch Type** - The batch type can be either Item or Structure. If it is a structure, then the Structure Details column shows a detail icon.
 - **Batch Status:**
 - Active - A batch consisting of one or more records currently being worked on by the assignee.
 - Pending - A batch with a matching or import concurrent request in process. The system automatically derives this status.
 - Rejected - A batch rejected by the user. The user can choose to reject a batch. For example, a user might reject a batch containing many errors.
 - Completed - A batch containing records that have all been successfully imported or manually marked as complete.
 - **Last Import Request Phase** - Lists the phase of the last import concurrent request. Clicking on the phase link takes you to a concurrent request page listing all of the concurrent requests for this batch. If the phase is Scheduled, then the concurrent request page lists the date and time for import.

Tip: You can change the import schedule date and time for the batch in the Batch Summary page, if necessary (see: To update the batch header, page 3-15). The system cancels the old scheduled date and time request and submits a new one. To cancel the import, change the Import option to None.
 - **Last Match Request Phase** - Lists the phase of the last matching concurrent

request. Clicking on the phase link takes you to a concurrent request page listing all of the concurrent requests for this batch.

- **Total Items**
- **Total Items Successfully Imported**

Caution: This field can show that a master item imported successfully even when one or more of the child entities, such as category assignments and child organization attributes, had errors. You can view the errors in the Update Batch page, Import tab, Import Status column. The Import Status shows as Partial.

- **Batch Summary** - Use the batch summary icon to navigate to the Batch Summary page when the batch is active, completed, or rejected. A user who is not the batch assignee can access the Batch Summary page using this icon and review the batch contents.
- **Update** - Use the update icon to navigate to the Update Batch page. This icon is enabled only for active batches and is available only to the assignee.
- **Delete** - Use the delete icon to delete a batch record, including all data and headers. Only the batch assignee can delete a batch.

To review batch records:

Review batch records to determine possible further actions, such as:

- matching records
 - excluding records
 - creating new items
 - importing and reimporting a batch
 - rejecting a batch
 - reassigning a batch
 - completing a batch
1. Navigate to the **Import Workbench**. Use the search fields to find a particular batch. For detailed information about each search field, see: To find a batch, page 3-9.

2. Click the Batch Summary column icon (eyeglasses) for a particular batch.
3. Review the **Batch Summary** page:
 - Import Details tab
 - Before Import - displays the entities you plan to import with the batch. Types of entities you can import include items, item revisions, item organization/store, item supplier, item supplier site, item organization supplier site, components, people, organization assignments, category assignments, approved manufacturers lists, and structures. Structure and component entities only appear for a batch type of structure.

Note: Users can only assign items to organizations to which they have permission to do so.

- After Import - displays the types of entities that were imported with the batch, but breaks them down into:
 - Updated - The number of existing entities that will be updated with new information once the batch is imported.
 - New - The number of entities that will be created once the batch is imported.
- Change Order - displays the change orders that will be created after the batch is imported.
- New Item Request - displays the new item requests that will be created after the batch is imported.

Note: When importing style items with SKUs, the style item is processed first, then the associated SKUs, resulting in two new item requests. If you want to include the style item and SKUs in the same NIR, then you must move the SKU line items from their draft NIR to the style item draft NIR. See: *Creating New Item Requests*, page 1-28 for more information on working with NIRs.

ORACLE Item Import Management
 Organization: Vision Operations (V1) Home Logout Preferences Help Diagnostics

Import | Source System Setup
 Import >

Batch Summary: 26OCT-2

Actions: Update

Batch Id: 10006828 Source System: X13
 Batch Name: 26OCT-2 Batch Type: Item
 Batch Status: Active Assigned To: Steve Williams
 Created By: Steve Williams Created Date: 25-Oct-2006

Import Details | Unimported Items | Data Load Options | Import Options

TIP Totals include both master and child organization records.

Before Import		After Import		
Entities	Total Entities	Updated	New	Total
Items	2 Items	2	0	2
Total	2	Total	2	0

Change Order

Details Number	Organization	Name	Type	Assigned To	Priority	Status	Approval Status	Need By Date	Effort
No results found.									

New Item Request

Details Number	Name	Type	Assigned To	Priority	Status	Approval Status
No results found.						

- Unimported Items tab
 - Confirmed Items - includes items matched and confirmed using match rules or new items (see: *Creating Match Rules, Oracle Product Information Management Implementation Guide*). Confirmed items include three types:
 - Cross-Referenced - Source system records with an existing cross-reference to an Oracle PIMDH item.
 - Matched - The user confirmed a single match for these source system records.
 - New Item - The user confirmed that these source system records must create new items.

The above three types cannot exist for unconfirmed items. To change any confirmed item information, click the **Update** icon in a particular confirmed item type row. Update takes you to the **Update Batch** page.

- Unconfirmed Items - includes the following three types:
 - Single Match - displays source system records with a single match found by running match rules. The user needs to review and confirm the match.
 - Multiple Matches - displays source system records with many matches found by match rules. The user needs to review and confirm a single

match.

- No Match - displays source system records unmatched by match rules.

These three types cannot exist for confirmed items. To change any unconfirmed item information, click the **Update** icon in a particular unconfirmed item type row. Update takes you to the **Update Batch** page.

- Excluded Items - displays the items excluded by the user from import. The system tracks excluded items by source system. If previously excluded items are reimported, the system automatically identifies them and tracks them in the Excluded Items region.
- Data Load Options and Import Options tabs - displays the same information set up for the source system (see: *Defining Source Systems, Oracle Product Information Management Implementation Guide*).

4. If you are importing structures, review the structure details.

Navigate to the **Compare Structure** page. From the Import Workbench search results, Structure Details column, click the structure details icon for a batch.

- Structure region - provides summary information about the batch.
- Components region - shows a single-level view of the components to import.
 - View by Confirmation Status - select how you want to view the components: All, Confirmed, or Unconfirmed.
 - Component Actions - reported as Add, Modify, or Delete.
 - Match Status and Match Actions - the same statuses and actions are used for both items and structures.
 - PIMDH Component and Op Seq - These columns are only populated if structure information in the source system contains the effectivity data and operating sequence on that component. If that exists, the matching PIMDH effectivity data and operating sequence displays.
 - Next Level - If multiple levels exist, you can use the Next Level number link to click down to the same information for components at each level of the structure.

All other columns are self-explanatory.

- Details region - shows the attributes for the components or items, depending on what you have chosen to view in the Attributes field. Compare the source

system item attributes with the PIMDH item attributes.

- Actions - optionally, select one of the following, then click **Go**:
 - Batch Summary - return to the Batch Summary page.
 - Concurrent Requests - view the status of concurrent requests ran previously.
 - Import - creates a concurrent request to import the structure.
- Revert - Click **Revert** to undo any changes made to the structure.

Click **Save** to save any changes made to the structure.

To update the batch header:

If you need to change the Data Load Options, Import Options, or Batch Name of a batch, select Update from the Actions field in the **Batch Summary** page, then click Go. For information about the Data Load Options and Import Options tab fields, see: *Defining Source Systems, Oracle Product Information Management Implementation Guide.*

To update batch records:

1. If, after reviewing batch records, you need to take action, you can navigate to the **Update Batch** page in one of two ways:

- From the **Import Batches** page, search for a batch. Click the Update icon in the row for the batch.
 - From the **Batch Summary** page, Unimported Items tab, click the Update icon for a particular type row.
2. Review each batch record in the **Update Batch** page tabs. Some key fields in the tabs are described below.
- Unconfirmed tab - enables you to look at all unmatched items and find appropriate matching items.
 - Match Status - displays an icon representing the match status of the item. Match statuses include:

Tip: Use the Match Status selection field to view unconfirmed items by match status.

 - Single Match
 - Multiple Matches
 - No Match
 - New Item

Tip: Select **Show Key Notation** to view the key to the Match Status icons.
 - Match Action - Select the action you want to take for this source system item.
 - Confirm - The user confirms the match with an existing PIMDH item.
 - Exclude - The user excludes this item from import.
 - Ignore - Temporarily excluded this item from import. The next time the same item data is uploaded within a batch, it appears in the Excluded tab for that batch.
 - New Item - The user confirms that a new item must be created during import for this source system item.
 - Unconfirmed (default value) -The user must confirm the match status in order to import the item.

- **PIMDH: Item** - The Product Information Management Data Hub (PIMDH) item indicates the item that is within your single source repository. For example, PIMDH is a single source repository. The PIMDH: Item column indicates the item that you intend to match to or update with external source system item information. This column only names an item in the case of a single match.
- **Source System Item** - The name of the source system item.
- **Source System Description** - The description of the source system item.
- **Revision Label** - Item revision planned for import.
- **Item Catalog Category** - Item catalog category planned for import.

Note: Additional columns can appear in your display depending on the display format chosen. The columns described above always appear.

Update Batch: KD-Aug28 (SSIMBX7)

[Show Key Notation](#) Revert

Unconfirmed Confirmed Imported Excluded

Match Status: All Display Format: System Details: Manufacturer Part Nu

Search Batch Items Show All Run Match

Show All Details Hide All Details

Select	Details	Match Status	Match Actions	PIMDH: Item	Source System Item	Source System Description	Revision Label	Description	Long Description
<input checked="" type="radio"/>	Show		Unconfirmed	VI40670	KD125	Motherboard super smart			
<input type="radio"/>	Show		Unconfirmed		KD127	786			

Single Match 1 Multiple Matches 0 No Match 1

Click **Search Batch Items** to search the batch items by item, item description, and item catalog category. Click **Show All** to reset the table and show all of the unconfirmed items in the batch. Click **Run Match** to go to the Run Match page where you can select and run certain match rules.

If you select an item, detailed information regarding that item appears below in the Matching Items region. For example, if the item selected has multiple matches, then they appear in this region and you can select the appropriate matching item. viewing and comparing item information and to find an appropriate match. To confirm the match, select the item, then the Confirm match action for the corresponding row in the table above. Click Find Match to search and find another match.

Single Match 1 Multiple Matches 0 No Match 1

Matching Items: KD125

View

Select	Details	Source System	Item Catalog Category	Item	Revision Label	Description	Long Description
<input type="radio"/>	<input type="button" value="Show"/>	SSIMBX7	Motherboards	KD125		Motherboard super smart	
<input type="radio"/>	<input type="button" value="Show"/>	Product Information Management Data Hub	Motherboards	VI40670.B		Motherboard - 670 Series	The VI40670 is a powerful availability computing. It is validated for pedestal and mounted on daughter card the connectors.

Use the View field to change the display format between:

- List View - lists the source system items in rows.
- Compare View - enables you to compare source system items and PIMDH items vertically. Item information is listed in columns, with the attributes to import listed in rows. All attributes to import are listed, independent of the display format.

This tab does not appear when the source system is PIMDH.

- Confirmed tab
 - Details - Click **Show** in the Details column to open a table below the row. The information in the table depends on the option selected in the tab header Details field. Details field options include:
 - None - removes the Details column from the page
 - Manufacturer Part Numbers
 - Category Assignments
 - Match Status - displays an icon representing the match status, just as in the Unconfirmed tab. Match statuses include:
 - Single Match
 - Cross-Referenced
 - New Item
 - Multiple Matches

- No Matches
- Match Actions - select the action you want to take for this match, just as in the Unconfirmed tab. Valid actions include Confirmed, Ignore, Unconfirm, and Exclude. Before you import a batch item record, you can unconfirm or exclude the record from import.

Note: You can also unconfirm a cross-reference. Once you do this, the item moves to the unconfirmed tab with no match. When you find a new match for the unconfirmed item, the status for that matched item becomes a single match. Upon import, the existing cross-reference is end-dated and the new cross-reference is created with a start effective date equal to the import date.

- PIMDH: Item - displays the Oracle Product Information Management Data Hub (PIMDH) item to which the imported item will be matched. This column only appears for source systems other than PIMDH.
- Source System Item and Source System Description - display the item name and description as they appear in the source system.
- Revision Label - displays the item revision planned for import. This column is only shown if included in the display format.

Note: All of the columns up to the Revision label are fixed and always present. The columns between the Revision Label and Item Catalog Category are determined by the display format.

- Item Catalog Category - displays the item catalog category planned for import.
- Import Ready - indicates, generally, whether or not the item information is ready for import. In the case of a new revision creation, the system verifies that a revision label, code, and effective date exist. In the case of a new item, the system verifies that an item number and description exist. The nonexistence of these values indicates an error and the column is blank (no icon). If these values exist and no other data is required, the system flags the item as available for import by placing an icon in the column.

Update Batch: KD-Aug28 (SSIMBX7)

Show Key Notation Revert

Unconfirmed **Confirmed** Imported Excluded

Match Status: All Display Format: System Details: Manufacturer Part Number

Search Batch Items Show All Import

Show All Details Hide All Details

Select	Details	Match Status	Match Actions	PIMDH: Item	Source System Item	Source System Description	Revision Label	Description	Long Description	Lifecycle
<input checked="" type="radio"/>	Show		Confirmed		KD123	Motherboard super				

Cross-Referenced 0 Matched 0 New Item 1

The **Search Batch Items** and **Show All** buttons function the same as in the Unconfirmed tab. Click **Import** to initiate the import process, during which you can review and modify change management options. See: To import a batch, page 3-21, for more information about the import process.

The View field options of List View and Compare View function the same as in the Unconfirmed tab, but the Compare View option includes an additional column for change policy. This column indicates whether attributes are under change control in the given item phase.

- Imported tab
 - Details - Click **Show** in the Details column to open a table below the row. The information in the table depends on the option selected in the tab header Details field. Details field options include:
 - Import Errors
 - None - removes the Details column from the page
 - Manufacturer Part Numbers
 - Category Assignments
 - New Item Request - displays the name of the new item request that the system creates during import. Click on the new item request name to go to the New Item Request summary page. A return link brings you back to the Update Batch page.
 - Change Order - displays the name for the change order associated with the item as part of the last import request. The change order can either be system generated or entered by the user, depending on the change type. If the last import request for an item did not create a change order, then the value for that item row is blank. Click on the change order name to go to the Change Order summary page. A return link brings you back to the Update Batch page.

You can select items and click **Re-Import** to initiate the re-import process. The process takes you to the change order page. You can review and modify the change order if necessary and click Apply. A concurrent request initiates the re-import process.

- Excluded tab - shows all of the source system records excluded from import into PIMDH. The only field requiring explanation is **Match Actions**. To move an item back to the Unconfirmed tab, select **Unexclude** in the Match Actions field. To temporarily exclude an item, select **Ignore**. The next time the same item data is uploaded within a batch, the item appears in the Excluded tab for that batch.

The Excluded tab does not appear if the source system is PIMDH since the item already exists in the PIMDH.

To import a batch:

The import concurrent request imports item and structure information and updates the matching PIMDH item and structure. The import process updates a specifically requested item revision, latest item revision or creates a new item revision, depending on the matching item. The import process performs security checks in the following order:

- Checks the user's update/edit source system item cross-reference privilege for the matched item. The import fails if the user does not have privileges. See: *Overview of Roles and Role Based Security, Oracle Product Information Management Implementation Guide*
- If the user's update/edit source system item cross-reference privilege for the matched item is valid, the system creates or updates the cross-reference, then imports the data. Depending on the attributes' privileges, the system can import some attributes and fail others.
- Checks the user's catalog author privileges to verify the authority to create a new item in a item catalog category.

The system behaves as follows when importing attributes:

- Checks the user's data security privilege for the matched item that the user intends to update.
- Imports some attributes, but not others if security or validation violations occur.
- Updates PIMDH primary attributes with source system import data. The import process honors the current validation rules. For example, it does not update the primary UOM, but enters data in the PIMDH description column in the Excel spreadsheet, then the system updates the PIMDH description during import.

- During the item import process, the system also imports any child information existing in the same batch for the same item. When you import a confirmed item, the item's attributes and structures, as well as other item information like item people, item category assignments, and organizations, which are not visible in the Import Workbench, are also imported.

The source system item number and description updates the cross-reference table source system item and description fields.

1. From the **Update Batch** page, select **Import Batch** from the Actions field, then click **Go**.

The system submits your import concurrent request, gives you a concurrent request number, then returns to the Import Batches page.

To view your import concurrent requests:

1. From the **Update Batch** page, select **Concurrent Requests** from the Actions field, then click **Go**.

The Request Summary Table displays details about every import concurrent request of the batch.

Related Topics

Overview of Inbound Product Data Synchronization and Data Quality Management, page 3-1

Creating Match Rules, *Oracle Product Information Management Implementation Guide*

Defining Source Systems, *Oracle Product Information Management Implementation Guide*

Creating Batches, page 3-4

Performing Actions on Batches, page 3-37

Reviewing and Importing PIMDH Batches

After creating a batch using PIMDH as the source system (see: Creating Batches, page 3-4, you can review the batch records, make changes as necessary, and import the batch.

To review the batch:

1. Navigate to the **Import Workbench**. Use the search fields to find a particular batch. For detailed information about each search field, see: To find a batch, page 3-9.
2. Click the Batch Summary column icon (eyeglasses) for a particular batch.
3. Review the **Batch Summary** page.

See: To review batch records, page 3-11 for a detailed explanation of this page.

4. If, after reviewing batch records, you need to take action, you can navigate to the **Update Batch** page in one of two ways:
 - From the **Import Batches** page, search for a batch. Click the Update icon in the row for the batch.
 - From the **Batch Summary** page, Unimported Items tab, click the Update icon for a particular type row.
5. Review each batch item in the **Update Batch** page tabs. Some key fields in the tabs are described below.
 - Confirmed tab
 - Match Status - displays an icon representing the match status. Match statuses include:
 - Single Match
 - Cross-Referenced
 - New Item
 - Item, Description, and Long Description - display the item name and descriptions as they appear in PIMDH.
 - Revision Label - displays the item revision planned for import. This column is only shown if included in the display format.

Note: All of the columns up to the Revision label are fixed and always present. The columns between the Revision Label and Import Ready are determined by the display format.

Click **Search Batch Items** to search the batch items by item, item description, and item catalog category. Click **Show All** to reset the table and show all of the confirmed items in the batch. Click **Import** to initiate the import process, during which you can review and modify change management options. See To import a batch, page 3-21 for more information about the import process.

Use the View field to change the display format between:

- List View - lists some key item information, similar to the item information in the **Batch Summary** page.

- Compare View - Item information is listed in columns, with the attributes to import listed in rows. All attributes to import are listed, independent of the display format.
- Imported tab
 - Details - Click **Show** in the Details column to open a table at the bottom of the page that indicates the errors per item. The table displays:
 - Entity - the entity (such as a user-defined attribute) where the error occurred.
 - Message Text - explains the details of the error.
 - Message Date
 - Message Type - an error or a warning.
 - Last Import ID - the concurrent request ID of the last import.
 - Last Import Date
 - Last Import Status - displays the concurrent request import statuses:
 - Success - indicates the importing of all attributes.
 - Partial - indicates the importing of only some attributes due to validation errors, change order policies, or security restrictions.
 - Error - no item attributes were imported.
 - New Item Request - displays the name of the new item request that the system creates during import. Click on the new item request name to go to the New Item Request summary page. A return link brings you back to the Update Batch page.

Note: When importing style items with SKUs, the style item is processed first, then the associated SKUs, resulting in two new item requests. If you want to include the style item and SKUs in the same NIR, then you must move the SKU line items from their draft NIR to the style item draft NIR. See: *Creating New Item Requests*, page 1-28 for more information on working with NIRs.
 - Change Order - displays the name for the change order associated with the

item as part of the last import request. The change order can either be system generated or entered by the user, depending on the change type. If the last import request for an item did not create a change order, then the value for that item row is blank. Click on the change order name to go to the Change Order summary page. A return link brings you back to the Update Batch page.

The columns between Last Import Status and New Item Request are self-explanatory.

You can select items and click **Re-Import** to initiate the re-import process. The process takes you to the change order page. You can review and modify the change order if necessary and click Apply. A concurrent request initiates the re-import process.

6. If you are importing structures, review the structure details.

Navigate to the Compare Structure page. From the Import Workbench search results, Structure Details column, click the structure details icon for a batch.

- Structure region - provides summary information about the batch.
- Components region - shows a single-level view of the components to import.
- Component Actions - reported as Add, Modify, or Delete.
- PIMDH Component and Op Seq – Columns are self-explanatory
- Next Level - If multiple levels exist, you can use the Next Level number link to click down to the same information for components at each level of the structure.
- Details region - shows the attributes for the components or items, depending on what you have chosen to view in the Attributes field.
- Actions - optionally, select one of the following, then click Go:
 - Batch Summary - return to the Batch Summary page.
 - Concurrent Requests - view the status of concurrent requests ran previously.
 - Import - creates a concurrent request to import the structure.

To import a PIMDH batch:

The process of importing a PIMDH batch is the same as the non-PIMDH process. See: To import a batch, page 3-21.

Reviewing and Importing GDSN Batches

The system automatically preprocesses and creates a batch for inbound items received from 1SYNC. Review the batch records, make changes as necessary, and import the batch. You can send the following messages to 1SYNC to inform the data pool of the items' status.

- **Catalog Item Confirmation (CIC) - Accept**
Once you receive an item or pack in a batch, the system automatically sends this message to 1SYNC,
- **Catalog Item Confirmation (CIC) - Synchronize**
Once an item or pack is imported, all the items with the same Group ID are imported and a packaging BOM is created. The system sends a CIC-Synchronize message to 1SYNC automatically or you can send this message manually.
- **Catalog Item Confirmation (CIC) - Reject**
When the top item in a pack is rejected, the system automatically sends a CIC-Reject message to 1SYNC or you can send this message manually. All items with the same Group ID move to the Excluded tab of the batch, with a Last Synchronization Status of Rejected.
- **Request for Correction**
You can manually send a Request for Correction message for an item. Once you send this message, the Last Synchronization Status for all items with the same Group ID changes to Requested for Correction.
- **Request for Customer Item Notification (RFCIN) message**
You can manually send a RFCIN message is sent to the supplier via 1SYNC when you want to reload the catalog items.

To manually send messages, see *Managing 1SYNC Messages*, page 3-39.

Prerequisites

- Create a 1SYNC target system and GLN
See: *Creating a 1SYNC Target System and Global Location Number, Oracle Product Information Management Implementation Guide*
- Create suppliers and supplier sites, both with an appropriate GLN
Define the suppliers and supplier sites from whom you intend to receive data through 1SYNC, as well as the Global Location Numbers (GLNs) of the supplier sites. 1SYNC uses the GLN to identify the supplier.

See: Suppliers, *Oracle Payables User's Guide*.

Create match rules

See: Creating Match Rules, *Oracle Product Information Management Implementation Guide*

Define source systems

See: Defining Source Systems, *Oracle Product Information Management Implementation Guide*

Create structure batches to receive GDSN item data

Create structure batches within a source system. The source system must have the Enable for Data Pool flag set to Yes. View the data sent by the supplier via 1SYNC in the Unconfirmed tab of the batch if no match rules ran automatically.

See: Creating Batches, page 3-4.

Apply the 1SYNC library to seed the attributes required to receive item data

See: Applying the 1SYNC Library, *Oracle Product Information Management Implementation Guide*

Define units of measure classes and units of measure for GDSN attributes

See: Defining Units of Measure for GDSN Attributes, *Oracle Product Information Management Implementation Guide*.

Create an XSL mapping from 1SYNC UOM classes to the GDSN attribute UOM classes

See: Creating XSL Mappings from 1SYNC UOM classes to GDSN Attribute UOM Classes, *Oracle Product Information Management Implementation Guide*

Create an Item Catalog Category and associate attribute groups to the category for items received by way of 1SYNC

Create an item catalog category (ICC) for the items received through 1SYNC and map the attribute groups created using the ldt file egogdsnag.ldt. This enables you to see the data sent by 1SYNC in the item pages.

See: Defining Item Catalog Categories, *Oracle Product Information Management Implementation Guide* and Associating Attribute Groups with an Item Catalog Category, *Oracle Product Information Management Implementation Guide*

Create alternate catalog categories with GPC codes

Create alternate catalog categories (ACCs) with the same names as the GPC codes. This enables you to identify the items received from 1SYNC and to map them to appropriate ICCs.

See: *Defining Catalog Categories, Oracle Product Information Management Implementation Guide.*

- ❑ Map categories between the GPC alternate catalog and the item catalog

See: *Mapping Categories Between GPC Alternate Catalogs and Item Catalogs, Oracle Product Information Management Implementation Guide*

To review a GDSN batch:

Review batch records to determine possible further actions, such as:

- matching records
 - excluding records
 - creating new items
 - importing and reimporting a batch
 - rejecting a batch
 - reassigning a batch
 - completing a batch
1. Navigate to the **Import Workbench**. Use the search fields to find a particular batch. For detailed information about each search field, see: *To find a batch, page 3-9.*
 2. Click the Batch Summary column icon (eyeglasses) for a particular batch.
 3. Review the **Batch Summary** page.
See: *To review batch records, page 3-11* for a detailed explanation of this page.
 4. If, after reviewing batch records, you need to take action, you can navigate to the **Update Batch** page in one of two ways:
 - From the **Import Batches** page, search for a batch. Click the Update icon in the row for the batch.
 - From the **Batch Summary** page, Unimported Items tab, click the Update icon for a particular type row.
 5. Review each batch item in the **Update Batch** page tabs. Some key fields in the tabs are described below.
 - Unconfirmed tab - enables you to look at all unmatched items and find appropriate matching items.

- Match Status - displays an icon representing the match status of the item. Match statuses include:

Tip: Use the Match Status selection field to view unconfirmed items by match status.

- Single Match
- Multiple Matches
- No Match
- New Item

Tip: Select **Show Key Notation** to view the key to the Match Status icons.

- Match Action - Select the action you want to take for this source system item.
 - Confirm - The user confirms the match with an existing PIMDH item.
 - Exclude - The user excludes this item from import.

All records containing the same item (even in different Group IDs) move to the Excluded tab. The Match Action for the excluded item is Excluded. All other items, regardless of Group ID, associated with the excluded item are also moved to the Excluded tab, and assigned a Match Action of Ignored.
 - Ignore - Temporarily excludes this item from import. Only that record of the item moves to the Exclude tab and the Match Action appears as Ignored. All other items with the same Group ID as the ignored item also move to the Excluded tab and the Match Action appears as Ignored. The next time the same item is uploaded with a different batch/Group ID, it appears in the Unconfirmed tab for that batch.
 - New Item - The user confirms that a new item must be created during import for this source system item.
 - Unconfirmed (default value) -The user must confirm the match status in order to import the item.
- PIMDH: Item - The Product Information Management Data Hub (PIMDH) item indicates the item that is within your single source repository. For

example, PIMDH is a single source repository. The PIMDH: Item column indicates the item that you intend to match to or update with external source system item information. This column only names an item in the case of a single match.

- Source System Item - The name of the source system item.
- Source System Description - The description of the source system item.
- Revision Label - Item revision planned for import.
- Item Catalog Category - Item catalog category planned for import.

Note: Additional columns can appear in your display depending on the display format chosen. The columns described above always appear.

Update Batch: KD-Aug28 (SSIMBX7)

Show Key Notation Revert

Unconfirmed Confirmed Imported Excluded

Match Status: All Display Format: System Details Manufacturer Part Nu

Search Batch Items Show All Run Match

Show All Details Hide All Details

Select	Details	Match Status	Match Actions	PIMDH: Item	Source System Item	Source System Description	Revision Label	Description	Long Description
<input type="radio"/>	Show		Unconfirmed	VI40670	KD125	Motherboard super smart			
<input type="radio"/>	Show		Unconfirmed		KD127	786			

Single Match 1 Multiple Matches 0 No Match 1

Click **Search Batch Items** to search the batch items by item, item description, and item catalog category. Click **Show All** to reset the table and show all of the unconfirmed items in the batch. Click **Run Match** to go to the Run Match page where you can select and run certain match rules.

If you select an item, detailed information regarding that item appears below in the Matching Items region. For example, if the item selected has multiple matches, then they appear in this region and you can select the appropriate matching item. viewing and comparing item information and to find an appropriate match. To confirm the match, select the item, then the Confirm match action for the corresponding row in the table above. Click Find Match to search and find another match.

Single Match 1 Multiple Matches 0 No Match 1

Matching Items: KD125

View

Select	Details	Source System	Item Catalog Category	Item	Revision Label	Description	Long Description
<input type="radio"/>	<input type="button" value="Show"/>	SSIMBX7	Motherboards	KD125		Motherboard super smart	
<input type="radio"/>	<input type="button" value="Show"/>	Product Information Management Data Hub	Motherboards	VI40670B		Motherboard - 670 Series	The VI40670 is a powerful availability computing. It is validated for pedestal and mounted on daughter card connectors.

Use the View field to change the display format between:

- List View - lists the source system items in rows.
- Compare View - enables you to compare source system items and PIMDH items vertically. Item information is listed in columns, with the attributes to import listed in rows. All attributes to import are listed, independent of the display format.

This tab does not appear when the source system is PIMDH.

- Confirmed tab
 - Match Status - displays an icon representing the match status, just as in the Unconfirmed tab. Match statuses include:
 - Single Match
 - Cross-Referenced
 - New Item
 - Multiple Matches
 - No Matches
 - Match Actions - select the action you want to take for this match, just as in the Unconfirmed tab. Valid actions include Confirmed, Ignore, Unconfirm, and Exclude. Before you import a batch item record, you can unconfirm, ignore or exclude the record from import.

Note: You can also unconfirm a cross-reference. Once you do this, the item moves to the unconfirmed tab with no

match. When you find a new match for the unconfirmed item, the status for that matched item becomes a single match. Upon import, the existing cross-reference is end-dated and the new cross-reference is created with a start effective date equal to the import date.

- PIMDH: Item - displays the Oracle Product Information Management Data Hub (PIMDH) item to which the imported item will be matched. This column only appears for source systems other than PIMDH.
- Source System Item and Source System Description - display the item name and description as they appear in the source system.
- Revision Label - displays the item revision planned for import. This column is only shown if included in the display format.

Note: All of the columns up to the Revision label are fixed and always present. The columns between the Revision Label and Item Catalog Category are determined by the display format.

- Item Catalog Category - displays the item catalog category planned for import.
- Import Ready - indicates, generally, whether or not the item information is ready for import. In the case of a new revision creation, the system verifies that a revision label, code, and effective date exist. In the case of a new item, the system verifies that an item number and description exist. The nonexistence of these values indicates an error and the column is blank (no icon). If these values exist and no other data is required, the system flags the item as available for import by placing an icon in the column.

Update Batch: KD-Aug28 (SSIMBX7)

Show Key Notation

Match Status: Display Format: Details:

Select	Details	Match Status	Match Actions	PIMDH: Item	Source System Item	Source System Description	Revision Label	Description	Long Description	Lifecycle
<input checked="" type="radio"/>	<input type="button" value="Show"/>	<input checked="" type="radio"/>	<input type="text" value="Confirmed"/>		KD123	Motherboard super				

Cross-Referenced 0 Matched 0 New Item 1

The **Search Batch Items** and **Show All** buttons function the same as in the Unconfirmed tab. Click **Import** to initiate the import process, during which you can review and modify change management options. See: To import a batch, page 3-21, for more information about the import process.

The View field options of List View and Compare View function the same as in the Unconfirmed tab, but the Compare View option includes an additional column for change policy. This column indicates whether attributes are under change control in the given item phase.

- Imported tab
 - Details - Click **Show** in the Details column to open a table at the bottom of the page that indicates the errors per item. The table displays:
 - Entity - the entity (such as a user-defined attribute) where the error occurred.
 - Message Text - explains the details of the error.
 - Message Date
 - Message Type - an error or a warning.
 - Last Import ID - the concurrent request ID of the last import.
 - Last Import Date
 - Last Import Status - displays the concurrent request import statuses:
 - Success - indicates the creation of the source system cross-reference and the importing of all attributes.
 - Partial - indicates the creation of the source system cross-reference and the importing of only some attributes due to validation errors, change order policies, or security restrictions.

- Error - no creation of the source system cross-reference and no item attributes were imported.
- New Item Request - displays the name of the new item request that the system creates during import. Click on the new item request name to go to the New Item Request summary page. A return link brings you back to the Update Batch page.
- Change Order - displays the name for the change order associated with the item as part of the last import request. The change order can either be system generated or entered by the user, depending on the change type. If the last import request for an item did not create a change order, then the value for that item row is blank. Click on the change order name to go to the Change Order summary page. A return link brings you back to the Update Batch page.

You can select items and click **Re-Import** to initiate the re-import process. The process takes you to the change order page. You can review and modify the change order if necessary and click **Apply**. A concurrent request initiates the re-import process.

- Excluded tab - shows all of the source system records excluded from import into PIMDH. The only field requiring explanation is **Match Actions**. To move an item back to the Unconfirmed tab, select **Unexclude** in the Match Actions field. To temporarily exclude an item, select **Ignore**. Only that record of the item moves to the Exclude tab and the Match Action appears as Ignored. All other items with the same Group ID as the ignored item also move to the Excluded tab and the Match Action appears as Ignored. The next time the same item is uploaded with a different batch/Group ID, it appears in the Unconfirmed tab for that batch.
 - The Ignore Match Action is available only for batches with Enable for Data Pool set to Yes.
 - The Excluded tab does not appear if the source system is PIMDH since the item already exists in the PIMDH.

6. If you are importing structures, review the structure details.

Navigate to the **Compare Structure** page. From the Import Workbench search results, Structure Details column, click the structure details icon for a batch.

- Structure region - provides summary information about the batch.
- Components region - shows a single-level view of the components to import.

- View by Confirmation Status - select how you want to view the components: All, Confirmed, or Unconfirmed.
- Component Actions - reported as Add, Modify, or Delete.
- Match Status and Match Actions - the same statuses and actions are used for both items and structures.
- PIMDH Component and Op Seq - These columns are only populated if structure information in the source system contains the effectivity data and operating sequence on that component. If that exists, the matching PIMDH effectivity data and operating sequence displays.
- Next Level - If multiple levels exist, you can use the Next Level number link to click down to the same information for components at each level of the structure.

All other columns are self-explanatory.

- Details region - shows the attributes for the components or items, depending on what you have chosen to view in the Attributes field. Compare the source system item attributes with the PIMDH item attributes.
- Actions - optionally, select one of the following, then click **Go**:
 - Batch Summary - return to the Batch Summary page.
 - Concurrent Requests - view the status of concurrent requests ran previously.
 - Import - creates a concurrent request to import the structure.
- Revert - Click **Revert** to undo any changes made to the structure.

Click **Save** to save any changes made to the structure.

ORACLE® Batch Import Home Logout Preferences Help Diagnostics

Import | Source System Setup
 Import >

Compare Structure: CONFIGURATION: Default

Show Key Notation Revert Actions Batch Summary Save

Structure

Source Item: CONFIGURATION: Default
 Structure Name: ProtoBOM
 Effectivity Control: Date

PIMDH Item: Revision
 Effectivity

Components

View by Confirmation Status:

Select	Component	Match	Match	PIMDH	PIMDH	PIMDH	Component		Op	Next		
	Actions	Status	Action	Item	Revision	Item	Component	Revision	Description	Quantity	Seq	Level
<input type="button" value="Add"/>		X	Unconfirmed			GyroscopeII.SLDASM				1	1	3
Total Components		1	Matched Components	0	Unmatched Components	1						

Details: GyroscopeII.SLDASM

Attributes:

Previous 1-10 of 29 Next 10

Attribute Group	Attributes	PIMDH Component	GyroscopeII.SLDASM
Date Effectivity	Effective Date		
Date Effectivity	Disable Date		
Component Comment	Component Remarks		

To import a batch:

The import concurrent request imports item and structure information and updates the matching PIMDH item and structure. The import process updates a specifically requested item revision, latest item revision or creates a new item revision, depending on the matching item. The import process performs security checks in the following order:

- Checks the user's update/edit source system item cross-reference privilege for the matched item. The import fails if the user does not have privileges. See: *Overview of Roles and Role Based Security, Oracle Product Information Management Implementation Guide*
- If the user's update/edit source system item cross-reference privilege for the matched item is valid, the system creates or updates the cross-reference, then imports the data. Depending on the attributes' privileges, the system can import some attributes and fail others.
- Checks the user's catalog author privileges to verify the authority to create a new item in a item catalog category.

The system behaves as follows when importing attributes:

- Checks the user's data security privilege for the matched item that the user intends to update.
- Imports some attributes, but not others if security or validation violations occur.

- Updates PIMDH primary attributes with source system import data. The import process honors the current validation rules. For example, it does not update the primary UOM, but enters data in the PIMDH description column in the Excel spreadsheet, then the system updates the PIMDH description during import.
- During the item import process, the system also imports any child information existing in the same batch for the same item. When you import a confirmed item, the item's attributes and structures, as well as other item information like item people, item category assignments, and organizations, which are not visible in the Import Workbench, are also imported.

The source system item number and description updates the cross-reference table source system item and description fields.

1. From the **Update Batch** page, select **Import Batch** from the Actions field, then click **Go**.

The system submits your import concurrent request, gives you a concurrent request number, then returns to the Import Batches page.

Performing Actions on Batches

Once you have found a batch (see: To find a batch, page 3-9), you can perform the following actions.

- add records from one batch to another batch
- complete a batch
- reject a batch
- reassign a batch to another user
- create a new batch
- purge a batch

Prerequisites

- Find a batch. See: To find a batch, page 3-9
- Using the Select column, select the batch on which to perform the action.

Note: You can also perform many of these actions from the **Batch Summary** page using the Actions field. You cannot create a batch from this page, but you can import the batch.

To add to a batch:

You can add all types of item and structure information, such as item attributes, people, category assignments, component attributes and various other data to a batch, at the same time. See: To add records to an existing batch, page 3-7.

Note: You can only add to a batch when the batch header Enabled for Data Pool field value equals No.

To complete a batch:

You can complete a batch once all the required records are either imported or excluded. To complete a batch, you can confirm or leave the records unconfirmed if you do not want to import them.

1. Select a batch, then click **Complete**. The Batch Status column now displays Completed for the batch.

Once a batch has a status of complete, you cannot perform any actions on the batch. You can delete the batch or re-activate it.

To reject a batch:

1. Select a batch, then click **Reject**. The Batch Status column now displays Rejected for the batch.

You can no longer perform any actions on a batch once it has a status of Rejected, but you can delete the batch. You can also re-activate the batch.

To reassign the batch:

1. Select a batch, then click **Reassign**. The **Reassign Batch** page appears. Find and select another user to assign to the batch.

When a batch is assigned to another user, you cannot make any changes to the batch. If you need to make changes to the batch, reassign it to yourself.

To create a new batch:

See: Creating Batches, page 3-4

To purge a batch:

1. Select a batch, then select Purge from the Actions field.
2. In the **Purge Batch** page, select one of the following options in the Import Status field:

- Success - Purges the data of all successfully processed entities within the batch.
 - Fail - Purges the data of all failed entities within the batch.
 - Partial - Purges the data of all partially processed entities within the batch.
 - All - Purges the data of all entities within the batch, but leaves the batch itself intact.
3. Click Apply.

The Purge concurrent program initiates and you receive a concurrent program confirmation message along with the concurrent request ID. Verify that the concurrent request executed properly and the data was purged.

Related Topics

Overview of Inbound Product Data Synchronization and Data Quality Management, page 3-1

Creating Match Rules, *Oracle Product Information Management Implementation Guide*

Defining Source Systems, *Oracle Product Information Management Implementation Guide*

Creating Batches, page 3-4

Reviewing and Importing Batches, page 3-9

Managing 1SYNC Messages

You have the option to manually send the following messages to 1SYNC:

- CIC-Synchronize
- CIC-Reject
- CIC-Review
- Request for Customer Item Notification (RFCIN)

To manually send a CIC message:

When an item is imported successfully, all of the items with the same Group ID are imported and a packaging BOM is created. A CIC-Synchronize message is sent to 1SYNC automatically. You can also send this message manually for an imported item.

When the Import Workbench rejects the top item in a pack, the system automatically sends a CIC-Reject message to 1SYNC. All items with the same Group ID move to the Excluded tab of the batch, with a Last Synchronization Status of Rejected. You can also

send this message manually for a top level item.

When you need data corrections, manually send a CIC-Review message to 1SYNC for a top level item.

The steps to manually send all three types of CIC messages are similar and described below.

1. Navigate to the **Import Workbench**, then the **Update Batch** page.
2. Select Send Message, then click Go.
3. In the **Send Message** page, select one of the following Message Types:
 - Synchronized
 - Rejected
 - Request for Correction
4. For Rejected or Request for Correction messages, specify the Status using the drop-down list.
5. For a Request for Correction message, specify the Corrective Action assigned to the supplier from the drop-down list.
6. For a Rejected or Request for Correction message, enter any additional comments, if required.
7. Search for the item for which you want to send the message. You can use the following search criteria: Source System Item Description, Source System Item, and Group ID.

The search results show only the top level items, not the child items. The CIC message is sent for the entire hierarchy, not each individual item. Select the item hierarchies to synchronize.

8. Click Submit.

To send a Request for Customer Item Notification (RFCIN) message:

The Request for Catalogue Item Notification (RFCIN) message originates from a 1SYNC data recipient (retailer) and is sent to the 1SYNC datapool. Using the RFCIN message, a data recipient can request 1SYNC to resend Catalog Item Notification (CIN) messages matching specific criteria. You can receive the catalog items in two different ways based on whether the Is Reload box is checked or not:

- Is Reload box checked

This implies that you are interested in a partial catalog reload (item states equal

Synchronized, Accepted, or Reviewed). You do not receive messages of GTINs which your supplier rejected. View this information from the batch.

- Is Reload box unchecked

This implies that you are interested in a full catalog reload (item states equal Synchronized, Accepted, Reviewed, or Rejected). You receive messages of GTINs which your supplier rejected. View this information from the batch.

RFCIN Sent to 1SYNC from the Data Recipient

```
<?xml version="1.0" encoding="UTF-8"?>
<os:envelope xmlns:os="http://www.1sync.org"
xmlns:sh="http://www.gsl.org/sh"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:schemaLocation="http://www.1sync.org
http://www.preprod.1sync.org/schemas/item/1.0/RequestForCatalogueItemNot
ificationProxy.xsd">
  <header version="1.0">
    <sender>6701115112315</sender>
    <receiver>8380160030102</receiver>
    <messageId>rfcin.SK101005_1995</messageId>
    <creationDateTime>2006-09-05T17:20:00</creationDateTime>
  </header>
  <requestForCatalogueItemNotification version="1.0">
    <header>
      <userGLN>6701115112315</userGLN>
      <userId>6701115112315@XML</userId>
    </header>
    <document>
      <documentId>rfcin.SK101005_1995.0001.20060905174209</documentId>
      <dataRecipientGLN>6701115112315</dataRecipientGLN>
      <isReload>true</isReload>
      <informationProviderGLN>7701115112376</informationProviderGLN>
      <targetMarket>US</targetMarket>
      <gtin>00010108675321</gtin>
    </document>
  </requestForCatalogueItemNotification>
</os:envelope>
```

Upon receiving a RFCIN message, the 1SYNC datapool responds with a Request for Catalogue Item Notification Response message (RFCIN Response).

RFCIN Response Sent from 1SYNC to the Data Recipient

This example contains both a documentAcknowledgement and documentException.

```

<?xml version="1.0" encoding="UTF-8"?>
<os:envelope xmlns:os="http://www.1sync.org"
xmlns:sh="http://www.gsl.org/sh"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:schemaLocation="http://www.1sync.org
http://www.preprod.1sync.org/schemas/item/1.0/ResponseProxy.xsd">
  <header version="1.0">
    <sender>8380160030102</sender>
    <receiver>6701115112315</receiver>
    <messageId>rfcinr.SK101005_1998</messageId>
    <creationDateTime>2006-09-05T18:01:00</creationDateTime>
  </header>
  <requestForCatalogueItemNotificationResponse version="1.0">
    <header>
      <originatingMessageId>rfcin.SK101005_1995</originatingMessageId>
    </header>
    <documentAcknowledgement>

<originatingDocumentId>rfcin.SK101005_1995.0001.2006005174209</originati
ngDocumentId>
    </documentAcknowledgement>
    <documentException>

<originatingDocumentId>rfcin.SK101005_1995.0002.2006005174209</originati
ngDocumentId>
    <description code="002">Invalid Information Provider GLN
[7701115112261].</description>
    </documentException>
  </requestForCatalogueItemNotificationResponse >
</os:envelope>

```

1. Select the M4U: Demand Side User responsibility, then Send Request for Item Notification.
2. In the **Request for Catalogue Item Notification** page, enter values in the following fields:
 - User GLN

The retailer global location number (GLN) configured by 1SYNC for XML messaging. Use one of the values provided by 1SYNC and set up in the lookup M4U_USER_GLN.
 - Represented Party GLN

End-retailer GLN value in the GDSN network. Only use this parameter when sending RFCIN messages on behalf of other retailers. Use one of the values provided by 1SYNC and defined in the lookup M4U_REP_PARTY_GLN.
 - Datapool GLN

The GLN of the 1SYNC server. Use one of the values provided by 1SYNC and defined in the lookup M4U_DATAPOOL_GLN.
 - Item Category Type

Choose from either the UDEX or GPC item category types.

- **Item Category**

This parameter is a selection filter for the item information to request from 1SYNC. You can only request RFCIN messages for item categories set up in Oracle Product Information Management (PIM). Based on the Item Category Type chosen, the item category values are retrieved from the corresponding GPC or UDEX catalog set up in PIM.
 - **Supplier Location (GLN)**

This parameter is a selection filter for the item information to request from 1SYNC. You can only request RFCIN messages for supplier sites, which are created in Oracle Trading Community (TCA) and assigned a GLN.
 - **Global Trade Item Number (GTIN)**

This parameter is a selection filter for the item information to request from 1SYNC. It is a unique item identifier assigned by the GDSN network.
 - **Target Market**

This parameter is a selection filter for the item information to request from 1SYNC. You can only request 1SYNC target market codes defined in the lookup M4U_TARGET_MARKET_COUNTRIES.
 - **Is Reload checkbox**

Select this box to set the Reload flag in the RFCIN message.
3. Click Send Item Information Request to send the RFCIN message to the 1SYNC datapool.

Managing Subscriptions

Data recipients must create subscriptions in the 1SYNC datapool to set up item synchronization. Subscriptions in the 1SYNC datapool act as filters that specify which item's information that are synchronized in the GDSN network are of interest to the data recipient. 1SYNC supports both creation and deletion of subscriptions using the Catalogue Item Subscription (CIS) messages. Upon receipt of a CIS Add message, the 1SYNC datapool responds with a CIS Response message.

For more information about 1SYNC messaging, see [1SYNC_Data_Recipient_XML_Guide_R6.1v2.pdf](#), available for download from 1SYNC. Contact 1SYNC at <http://www.1sync.org/home.html>.

Example of a CIS Sent to 1SYNC

```
<?xml version="1.0" encoding="UTF-8"?>
  <os:envelope xmlns:os="http://www.1sync.org"
xmlns:sh="http://www.gsl.org/sh"
  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  xsi:schemaLocation="http://www.1sync.org
http://www.preprod.1sync.org/schemas/item/1.0/CatalogueItemSubscriptionP
roxy.xsd">
  <header version="1.0">
    <sender>6701115112315</sender>
    <receiver>8380160030102</receiver>
    <messageId>cis.SK101005_1446</messageId>
    <creationDateTime>2006-09-05T17:20:00</creationDateTime>
  </header>
  <catalogueItemSubscription version="1.0">
    <header>
      <userGLN>6701115112315</userGLN>
      <userId>6701115112315@XML</userId>
    </header>
    <document>
      <documentId>cis.SK101005_1446.0001.20060905174209</documentId>
      <dataRecipientGLN>6701115112315</dataRecipientGLN>
      <operation>ADD</operation>
      <informationProviderGLN>7701115112377</informationProviderGLN>
      <targetMarket>US</targetMarket>
      <gtin>00010108675321</gtin>
    </document>
  </catalogueItemSubscription>
</os:envelope>
```

Upon receipt of a CIS message, the 1SYNC datapool responds with a CIS Response message.

Example of a 1SYNC CIS Response

This example contains both a documentAcknowledgement and a documentException.

```

<?xml version="1.0" encoding="UTF-8"?>
<os:envelope xmlns:os="http://www.1sync.org"
xmlns:sh="http://www.gsl.org/sh"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:schemaLocation="http://www.1sync.org
http://www.preprod.1sync.org/schemas/item/1.0/ResponseProxy.xsd">
  <header version="1.0">
    <sender>8380160030102</sender>
    <receiver>6701115112315</receiver>
    <messageId>cisr.SK101005_1886</messageId>
    <creationDateTime>2006-09-05T18:01:00</creationDateTime>
  </header>
  <catalogueItemSubscriptionResponse version="1.0">
    <header>
      <originatingMessageId>cis.SK101005_1446</originatingMessageId>
    </header>
    <documentException>
      <originatingDocumentId>cis.SK101005_1446.0001.20060905174209
      </originatingDocumentId >
      <description code="002">Invalid Information Provider GLN
[7701115112377].</description>
    </documentException>
    <documentAcknowledgement>
      <originatingDocumentId
>cis.SK101005_1446.0002.260909</originatingDocumentId >
    </documentAcknowledgement>
  </catalogueItemSubscriptionResponse>
</os:envelope>

```

Once you add a subscription using the Subscription Management pages, you can synchronize the subscription with the 1SYNC datapool using the CIS Add message. Optionally, you can delete a subscription from the 1SYNC datapool using the CIS Delete message.

To create a subscription:

1. Navigate to the M4U Demand Side User responsibility.
2. Select Create Subscription from the responsibility menu.
3. In the **Create Subscription** page, enter values for each of the following CIS message parameters to create a CIS record.
 - **Subscription Name**
A unique name that identifies the subscription. For example, Subscription_ALL_Items. This value is not synchronized to 1SYNC in the CIS message and is only used for identifying the subscription record in the Subscription Management pages.
 - **Description**
A user entered description for the subscription.
 - **User GLN**

The retailer global location number (GLN) configured by 1SYNC for XML messaging. Use one of the values provided by 1SYNC and set up in the lookup M4U_USER_GLN.

- **Represented Party GLN**
End-retailer GLN value in the GDSN network. Only use this parameter when sending CIS messages on behalf of other retailers. Use one of the values provided by 1SYNC and defined in the lookup M4U_REP_PARTY_GLN.
- **Datapool GLN**
The GLN of the 1SYNC server. Use one of the values provided by 1SYNC and defined in the lookup M4U_DATAPOOL_GLN.
- **Item Category Type**
Choose from either the UDEX or GPC item category types.
- **Item Category**
This parameter is a selection filter for the item information to request from 1SYNC. You can only send CIS messages for item categories set up in Oracle Product Information Management (PIM). Based on the Item Category Type chosen, the item category values are retrieved from the corresponding GPC or UDEX catalog set up in PIM.
- **Supplier Location (GLN)**
This parameter is a selection filter for the item information to request from 1SYNC. You can only send CIS messages for supplier sites, which are created in Oracle Trading Community (TCA) and assigned a GLN.
- **Global Trade Item Number (GTIN)**
This parameter is a selection filter for the item information to request from 1SYNC. It is a unique item identifier assigned by the GDSN network.
- **Target Market**
This parameter is a selection filter for the item information to request from 1SYNC. You can only request 1SYNC target market codes defined in the lookup M4U_TARGET_MARKET_COUNTRIES.

4. Click Apply to save the subscription details.

To synchronize a subscription with the 1SYNC datapool:

1. Navigate to the M4U Demand Side User responsibility.

2. Select Search Subscription from the responsibility menu.
3. In the **Search Subscription** page, search for the subscription created earlier.
Enter search options, then click Go. The list of matching subscriptions displays below.
4. Select the subscription, then click Subscribe. A CIS message is sent to 1SYNC.

Note: You can only subscribe to the 1SYNC datapool when the subscription has a status of New or Add Failed.

To delete a subscription:

Follow these steps to delete a subscription that has been synchronized with the 1SYNC datapool.

1. Navigate to the M4U Demand Side User responsibility.
2. Select Search Subscription from the responsibility menu.
3. In the **Search Subscription** page, search for the subscription created earlier.
Enter search options, then click Go. The list of matching subscriptions displays below.
4. Select the subscription to delete, then click Unsubscribe.
This sends a CIS Delete message to the 1SYNC datapool.

Tip: You can only delete/unsubscribe when the status of the subscription is Subscribed.

To view the status of a subscription:

1. Navigate to the M4U Demand Side User responsibility.
2. Select Search Subscription from the responsibility menu.
3. In the **Search Subscription** page, search for a particular subscription.
Enter search options, then click Go. The list of matching subscriptions displays below.
4. The status displays in the **Search Subscription** page.
Valid subscription statuses include:

- New - A newly created subscription not yet synchronized to 1SYNC.
- Add In Progress - A CIS Add request has been sent to 1SYNC, but a response is pending.
- Subscribed - A successful CIS Response has been received from 1SYNC.
- Add Failed - The CIS Add request failed.
- Delete In Progress - A CIS Delete request has been sent to 1SYNC, but a response is pending.
- Delete Failed - The CIS Delete request failed.
- Unsubscribed - The CIS record has been successfully deleted from 1SYNC.

To edit a subscription:

You can edit subscriptions that are not yet synchronized with 1SYNC. You cannot edit subscriptions that have already been synchronized with 1SYNC. To edit a synchronized subscription, you must delete (unsubscribe) the subscription from 1SYNC before making any changes.

1. Navigate to the M4U Demand Side User responsibility.
2. Select Search Subscription from the responsibility menu.
3. In the **Search Subscription** page, search for the subscription you want to edit. Enter search options, then click Go. The list of matching subscriptions displays below.
4. Click the Update icon in a particular subscription's row.

Note: You can only edit subscriptions with a status of New, Add Failed, Delete Failed, or Unsubscribed.

Related Topics

Reviewing and Importing GDSN Batches, page 3-26

Using 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 Notifications
- 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
- Using the Import Workbench to Import Change Objects
- 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. Click on the Change Simple Search link in the Change Management section of the Applications tree menu.
2. On the **Simple Search** page, select a change category, then search using one or more of the following options:

Keyword Search

Enter a partial or whole value for the change object'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 change objects that contain all the keywords entered as search criteria. This is the default value.
- Select "Match any word(s) (OR)" to search for change objects 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."

3. 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 Display Formats, Oracle Product Information Management Implementation Guide*.

To perform an advanced search:

1. Click on the Change Advanced Search link in the Change Management section of the Applications tree menu.
2. 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.
3. Choose a search criteria template from the list to select predefined search criteria fields for your search, then click Go.

For details about how to define and personalize criteria templates, see *Managing Search Criteria, Oracle Product Information Management Implementation Guide*.

4. Optionally, you can change the search criteria for only this search by using the following buttons:
 - Clear
Clears the value fields of the selected attributes.

- **Delete**
Deletes the selected attribute from the list of search criteria.
- **Duplicate**
Duplicates the selected attributes. You can now search on different values for the same attribute. For example, if you duplicate the Status attribute, you can search for change requests with either a status of Hold or Cancelled.

To change the search criteria, select one or more attributes, then click one of the above buttons.

5. To add search criteria to only this search, click **Add Criteria**.

In the **Add Criteria** page, if you simply wish to locate a single attribute, enter its name and click **Find**. To search for attributes by attribute group, select the attribute group and click **Go**.

Move search criteria back and forth from the Available Criteria list to the Selected Criteria list using the Move, Move All, Remove, and Remove All shuttles. When finished, click **Apply**.

6. Enter values for one or more search criteria.

7. Select a display format, then click **Go**.

The display format enables you to switch between different views of the search results. The view in the Display Format region shows the columns that will appear in the **Results** page. For information about defining and personalizing display formats, see *Managing Display Formats, Oracle Product Information Management Implementation Guide*.

8. Click **Search** to perform the search.

In the **Results** page, you can switch between display formats to view different attributes.

To perform actions on changes in the Results page:

You can select changes and perform the following actions:

- add the change to a new or existing change order
- change the priority of the selected change records
- demote the selected change records to the previous status
- link to an existing change order
- link to an existing enhancement request

- generate a report
 - promote the selected change records to the next status
 - reassign to a different user
 - request a comment from certain people
 - export all change records selected to a spreadsheet
1. Complete the steps in *To perform a simple item search* or *To perform an advanced search* above, then select one or more change records.

To export all results to a spreadsheet

2. Click **Export** to export all change records in the **Results** page to a spreadsheet.
3. In the **Export** page, select an export template and an output format. Click **Export**.

For more information about export (report) templates, see *Defining Change Category Reports, Oracle Product Information Management Implementation Guide*.

To perform all other actions

4. In the **Select Change (Object):** field, select an action, then click **Go**.

For more information, see: *Performing Actions.*, page 4-24

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 primary 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, or change order. To ensure this relationship is captured in a new issue, specify what the issue is related to (for example, a change request or change order), and then specify the nature of the dependency.

- References

You can specify that the issue references an item. A 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 4-24

To create a relationship:

See: Creating Relationships, page 4-40

To add an attachment to an issue line:

See: To add an attachment to a change line:, page 4-32

To create a change order from an issue:

See: To create a change order from a change request/issue/idea, page 4-15

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 primary 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 or change order. To ensure this relationship is captured in a new idea, specify what the idea is related to (for example, a change request or change order), and then specify the nature of the dependency.

- References

You can specify whether the idea references an item. A 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 4-24

To create a relationship:

See: Creating Relationships, page 4-40

To add an attachment to an idea line:

See: To add an attachment to a change line;, page 4-32

To create a change order from an idea:

See: To create a change order from a change request/issue/idea, page 4-15

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 primary 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. To ensure this relationship is captured in a new change request, specify what the change request is related to (for example, another change object), and then specify the nature of the dependency.

- References

You can specify that the change request references an item. A 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 4-24

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

ORACLE Change Management Recent Home Logout Preferences Help Diagnostics

Change Request: ECR18 Change Request Lines Relationships Workflow

Organization: Vision Operations (V1) Overview Action Log Attachments People

[Change Request Overview](#) >

Add to Change Order Cancel Continue

Change Order Category: Change Notice

Create New

 Add to Existing

Add as dependency on current Change Request

 TIP Dependency established will be of type 'Implemented By'.

Copy Change Order Details

Available Information		Selected Information
	<input type="button" value="Move"/> <input type="button" value="Move All"/> <input type="button" value="Remove"/> <input type="button" value="Remove All"/>	Project/Task Header Attributes Header Items Line Items (as Revised Items)

Cancel Continue

- 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

- 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 Notifications

Change Notification enables users to distribute documents and files to multiple recipients and track their response. The creation steps for notifications are similar to those for change requests. The documents or files to be distributed are added to the change lines.

See: Document Change Management and Distribution, *Oracle Product Lifecycle Management Implementation Guide* for details.

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 primary 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. To ensure this relationship is captured in a new change order, specify what the change order is related to (for example, another change order or item), and then specify the nature of the dependency.

- References

You can specify that the change order references an item. A 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 4-24

To create a relationship:

See: Creating Relationships, page 4-40

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. Alternatively, you can cancel individual change lines during the Approval status if the change type definition has Allow Updates selected.

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 Universal Content Management (UCM)). 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 UCM; 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)
Recent Home Logout Preferences Help D

Change Order Lines Relationships Workflow
Overview | Action Log | **Attachments** | Revisions | People | Organizations

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 the content repository used.
 - Adding Attachments, page 7-3
 - Managing Attachments, page 7-14, 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 7-1

Managing Attachments, page 7-11

Logging On to Repositories, page 7-24

Troubleshooting Attachments, page 7-24

Setting Up E-Business Suite Attachments, *Oracle Product Information Management Implementation 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

ORACLE Change Management Recent Home Logout Preferences Help Diagnostics

Change Order: C01-10 Change Order Lines Relationships Workflow

Organization: Vision Operations (V1) Overview Action Log Attachments Revisions People Organizations

Search: [Advanced Search](#) Shortcuts:

Overview Actions:

Change Order Type CO-1 Change Order Name N2 Description Assigned To Satish Rao Requestor Satish Rao Priority High Status Open Creation Date 19-Apr-2005 17:59:24 Reason Aesthetics Organization Hierarchy Item Number Item Description Project	Source Type Source Name Need By Date Classification Code Approval Status Not submitted for approval Current Revision Department Task
--	--

Actions:

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

ORACLE Change Management Recent Home Logout Preferences Help Diagnostics

Change Order: C01-12 Change Order Lines Relationships Workflow

Organization: Vision Operations (V1) Revised Items Change Tasks

Select Revised Item: | Actions:

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

Revised Item: SMC1000

[Structure Changes](#) [Item Attribute Changes](#) [Item Attachment Changes](#) [Item AML Changes](#) [Routing Changes](#)

Item Details

Item Catalog Category Computer Parts and Components > Motherboards <input type="button" value="Show"/> Primary Unit of Measure Each User Item Type Purchased item Item Status Active	Lifecycle Lifecycle Phase Production
---	--

New Revision Details

Revision Description	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: CO142

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"/>	Indica_Sat_01	Indica_Sat_01		Concept	A-A			20-Apr-2005 15:22:22	
<input type="radio"/>	Indica_Sat_01	Indica_Sat_01		Concept	A-A			20-Apr-2005 15:22:22	
<input checked="" type="radio"/>	SVC1000	Raw Wafer	Purchase Item	Production	A-A			20-Apr-2005 11:47:45	

[Add 5 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

Plan Name

YRF Active

For detailing and managing the changes to the newly added revised item, see [Managing Change Order Revised Items](#), page 4-33.

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 that are related to an issue, change request, or change order in context. For example, a change order may implement several component item changes. In such a case, the assembly item may be listed as a reporting reference to provide convenient access to the item.

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, and click Go.
3. Enter information in the required fields.
4. Click Apply.

Managing Workflows

In the Setup Workbench you can associate multiple workflow templates with a given change type. You associate multiple workflow templates with a workflow status at the header level of a idea, issue, change request, change notification, or change order. You can also add ad-hoc step assignees to the workflow based on role, group, and person filters. This enables a user to abort the workflow within a status, and to choose a different template for that status.

Once these associations are made, when creating an individual change object within that type, you can select various workflow options. This enables you to select a specialized workflow to reach those people who need to approve specific changes different from those who would approve changes.

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 and specific people, based on role, group, and person filters. You can have multiple templates at any status.

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



ORACLE Workflow and Request Diagnostics Home Logout Preferences Help

Notifications >

Change Order CO1-14 requires approval Approve Reject Transfer

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

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.							

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

The screenshot shows the Oracle Workflow and Request interface for transferring a notification. At the top, the Oracle logo and 'Workflow and Request' are displayed. Navigation links for 'Diagnostics', 'Home', 'Logout', 'Preferences', and 'Help' are in the top right. The breadcrumb trail is 'Notifications > Request Approval >'. The main heading is 'Transfer Notification: Change Order CO1-14 requires approval'. Below this, there are 'Cancel' and 'Submit' buttons. A section labeled '* Indicates required field' contains an 'Assignee' dropdown menu currently set to 'All Employees and Users' and a 'Comments' text area. At the bottom, there is a 'Return to Worklist' link and another set of 'Cancel' and 'Submit' buttons.

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** Priority **High**
 To **Narasimhan, Nagesh** Status **Approval**
 Sent **20-Apr-2005 03:12:22** Assigned To **Satish Rao**
 Due **22-Apr-2005 03:12:22** Reason **Aesthetics**
 ID **415695** 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	Satish Rao	Transferred to: Nagesh Narasimhan	22-Apr-2005 03:12:22
▶ Show	10	Request Approval	One Assignee	Person	Nagesh Narasimhan	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

[Post Comment](#) [Request Comment](#)

View

[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	Reply
		Transferred to: Nagesh Narasimhan	Satish Rao	20-Apr-2005 03:47:26	Reply
	2	Status Promoted to: Approval	Satish Rao	20-Apr-2005 03:12:17	Reply
	3	Submitted	Satish Rao	20-Apr-2005 03:11:59	Reply

[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

ORACLE Item Catalog Administration

Home Logout Preferences Help Diagnostics

Items

Structures

Change Management

Security

Functions

Catalogs

Value Sets

Categories | Statuses | Codes | Workflow | Task Templates | Header Attributes | Line Attributes

Change Management Categories >

Status Properties

Status Number: 10

Status Name: Open

Cancel Apply

Valid Statuses for Promotion

Valid Statuses for Promotion	
Statuses Available	Statuses Selected
<div style="border: 1px solid gray; height: 80px;"></div>	<div style="border: 1px solid gray; padding: 5px;">Implemented(Implemented) Approval(Approval)</div>
	<p>> Move</p> <p>>> Move All</p> <p>< Remove</p> <p><< Remove All</p>

Status Properties

Valid Statuses for Demotion

Valid Statuses for Demotion	
Statuses Available	Statuses Selected
<div style="border: 1px solid gray; height: 80px;"></div>	<div style="border: 1px solid gray; height: 80px;"></div>
	<p>> Move</p> <p>>> Move All</p> <p>< Remove</p> <p><< Remove All</p>

Workflow

Workflow Template: CoreCMGeneric

Enable Digital Signature:

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 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

ORACLE Diagnostics Home Logout Preferences Help

[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

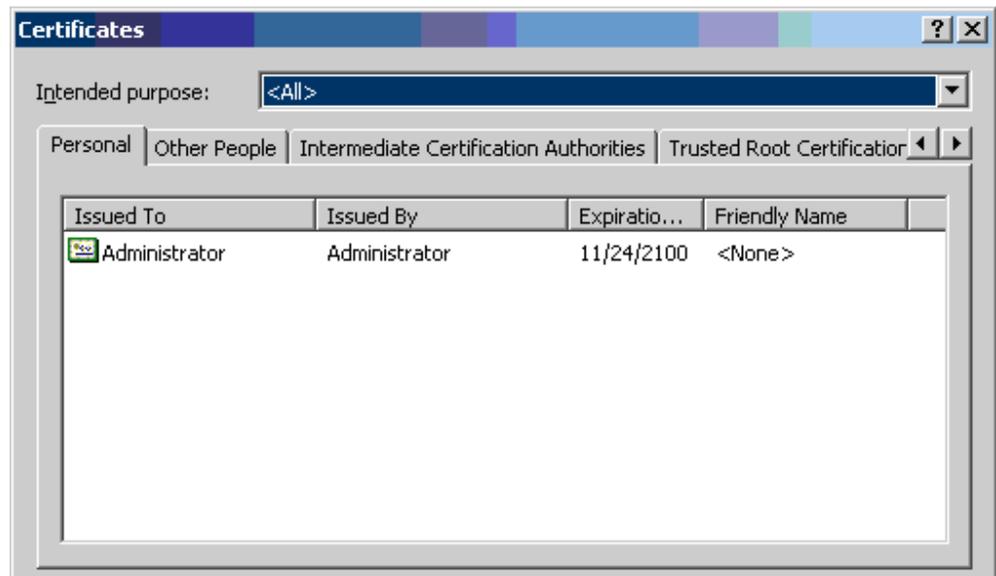
Revised Items

Item	Description	Catalog Category	Lifecycle Phase	From Revision	New Revision	Schedule Date and Time	Status
CM00037	CD Writer	Server		AA		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.

Certificates Window



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 4-58) 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 4-62) 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 4-65) 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.

Using the Import Workbench to Import Change Objects

Using the Import Workbench, you have the option to create change orders or add existing change orders when importing items or structures.

Oracle Product Information Management centralizes product data from disparate systems across an enterprise within a master repository. By combining data from numerous systems and content providers, the enterprise creates a superset of product data within its hub.

Item import management uses configurable match rules to identify equivalent products and to take the different versions of a particular product record, and blend them into a single enterprise version. Data quality tools ensure that equivalent or duplicate parts are identified, quality is verified, and source system cross-references are maintained as data enters the hub.

When a match is identified, and the source system item attribute and structure details are denoted, the item is defined as the source of truth (SST). This information is used to update the SST record to maintain a best-of-breed, blended product record. If the change policy of the SST item demands a change order, one is automatically created on import. This change order can then be routed for approval, before the changes are applied to the SST item. Similarly, if a record is identified as a new item and the catalog category requires a new item request, one is automatically created on import. The new item request can then be routed for further definition and approval, before the new item is created.

For more information about how to use the Import Workbench see: Overview of Inbound Product Data Synchronization and Data Quality Management, page 3-1

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 4-58.

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
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	

Column Name	Data Type	Required?
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)	
CHANGE_LINE_ID	NUMBER	
CHANGE_LINE_SEQUENCE_NUMBER	NUMBER (15)	

ENG_CHG_USR_ATR_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 4-63.

ENG_CHANGE_PEOPLE_INTF table

Column Name	Data Type	Required?
CHANGE_ID	NUMBER(15)	
CHANGE_NOTICE	VARCHAR2(10)	Yes
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)	

Column Name	Data Type	Required?
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
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_TYPER 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 4-67.

ENG_CHANGE_LINES_INTERFACE table

Column Name	Data Type	Required?
ECO_NAME	VARCHAR2(10)	
ORGANIZATION_CODE	VARCHAR2(3)	
CHANGE_TYPE_CODE	VARCHAR2(10)	

Column Name	Data Type	Required?
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	
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)	

Column Name	Data Type	Required?
NEED_BY_DATE	DATE	
SCHEDULED_DATE	DATE	
IMPLEMENTATION_DATE	DATE	
CANCELTATION_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.

Using Configuration Management

This chapter covers the following topics:

- Searching for Items in a Structure
- Viewing Item Structures
- Managing Item Structures
- Managing the Packaging Hierarchy
- 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 **Overview** page for the item, click the Configuration tab.
4. On the **Structure List** page, click a structure name link.
5. On the **Structure: (Structure Type)** page, click Simple Search.
6. 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 **Overview** page for the item, click the Configuration tab.
4. On the **Structure List** page, click a structure name link.
5. On the **Structure: (Structure Name)** page, click Advanced Search.
6. Choose one or more of the following options to enter search criteria:
 - In the Criteria field, select a search criteria template, then 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.
 - Click Personalize to create a new user search criteria template. See: *Defining Display Formats and Search Criteria for Structures, Oracle Product Information Management Implementation Guide*
 - Click Add Criteria to add search criteria for this search only.
In the **Add Criteria** page, you can search for a single attribute by using the Attribute Name field and clicking Find or you can search for attributes by using the Attribute Group list. Select an attribute group, then click Go.
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 Apply.
 - In the Item Catalog Category field, search for and select an item catalog category, then click Go.
In the Criteria Template list field below, valid templates for the selected item catalog category are available for selection. Select one, then click Go.
7. 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.
8. Click Search.

Related Topics

Defining Display Formats and Search Criteria for Structures, *Oracle Product Information Management Implementation Guide*

Searching for Items, page 1-17

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, Oracle Product Information Management Implementation Guide*

Managing Item Structures

Define structures in the Product Workbench (see: *Creating Structures*, page 6-65) 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 7-3

- displaying attachments
- updating a structure

Important: You can only update structure and component attribute values using the Product Workbench. See: Editing Structure Information, page 6-78.

To add attachment categories to a structure type:

Associating attachment categories with a structure type enables you to view item attachments to structure components within a BOM. Suppose you have a CAD drawing attached to each of the major subassemblies in each of your engineering BOMs. You can associate the attachment category CAD Drawing to the structure type Engineering BOM. The CAD drawings for each of the subassemblies will then appear in the EBOM structures.

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 E-Business Suite 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.

To associate an ICC structure with an item:

If an item belongs to an item catalog category with an associated structure, you can associate this ICC structure with the item in the master organization. ICC structures are useful when many of the items within an item catalog category use a similar structure.

- You can delete components from the item's defaulted ICC structure in the **Structure: (Structure Name)** page, but to add components,

you must use the Product Workbench. See: Creating Structures, page 6-65.

- To associate an ICC structure with an item in a child organization, use the Copy Structure action in the Product Workbench to copy the structure from the item in the master organization. For more information, see: Using Multilevel Structures, page 6-32.

The ICC structure version associated with an item revision depends on the item revision's and ICC structure version's effective dates.

For more information about ICC structures, see Creating an Item Catalog Category Structure, *Oracle Product Information Management Implementation Guide*.

1. Navigate to an item created within an item catalog category that has a defined ICC structure.
2. In the item's **Overview** page, select the Configuration tab. In the **Structure List** page, click Create Structures.
3. In the **Create Structure Header** page, select the following field values:
 - Structure Type
Select the same structure type as the ICC structure.
 - Engineering
Select this box. Only an Engineering item can use the ICC structure to create a structure for itself.
 - Structure Name
Select the same structure name as the ICC structure.
 - Effectivity
Select Revision Effectivity.

The ICC's structure components default to the item structure if the item's structure is a revision effective Engineering structure with the same structure type, structure name, and master organization as the ICC structure.

4. Click Apply.

The **Structure: (Structure Name)** page opens, displaying the item's new structure. From the Actions field, you can launch the Product Workbench.

Managing the Packaging Hierarchy

You can create a packaging hierarchy to define the various pack configurations in which you can package a base item. For example, you sell flash memory sticks (the base item, VI11416) in packs of 3 at retail stores, but ship 20 of the 3-packs in a case to the store. The packaging hierarchy looks like this:

- Case: Item = Case1_VI11416
 - Pack or Inner Pack: Item = Pack1_VI11416, Quantity = 20 Each
 - Base Unit or Each: Item = VI11416, Quantity = 3 Each

A packaging hierarchy can have any number of levels. The pack type defines each level in a hierarchy. The pack types used in the above example are Case, Pack or Inner Pack, and Base Unit or Each. The pack type of any item above the base unit or each level is stored as the pack item's primary attribute Trade Item Unit Descriptor (TIUD). The base item defines the lowest level in a packaging hierarchy. A base item can belong to multiple pack hierarchies.

The following pack type validations apply:

Pack Type (TIUD)	Parents	Parent Instance	Children	Child Instance
Mixed Module	None	-	Case, Pack or Inner Pack, Setpack, Multipack, Base Unit or Each	Multiple
Pallet	None	-	Display Shipper, Case, Pack or Inner Pack, Setpack, Multipack, Base Unit or Each	Single
Display Shipper	Pallet	Single	Case, Pack or Inner Pack, Setpack, Multipack, Base Unit or Each	Multiple

Pack Type (TIUD)	Parents	Parent Instance	Children	Child Instance
Case	Pallet, Mixed Module, Display Shipper	Multiple	Pack or Inner Pack, Setpack, Multipack, Base Unit or Each	Single
Setpack	Pallet, Mixed Module, Display Shipper, Case	Multiple	Pack, Base Unit or Each	Multiple
Multipack	Pallet, Mixed Module, Display Shipper, Case	Multiple	Pack, Base Unit or Each	Multiple
Pack or Inner Pack	Pallet, Mixed Module, Display Shipper, Case	Multiple	Base Unit or Each	Multiple
Base Unit or Each	Pallet, Mixed Module, Display Shipper, Case, Pack or Inner Pack, Setpack, Multipack	Multiple	-	-

To create a packaging hierarchy:

Important: You can only create and update a packaging hierarchy in the item's master organization. Once you create the packaging hierarchy in the master organization, assign it to the child organizations by following the procedure To assign packs to organizations;, page 5-11.

1. Locate the item for which you want to create a packaging hierarchy.
2. On the item's **Overview** page, click the Configuration tab, then the Packs subtab.
3. Click Create.

Alternatively, you can select Create Pack Hierarchy from the Actions drop down list in the item's **Overview** page.

4. In the **Create/Update Pack** page, Select Pack Type field, select the appropriate pack type to either add (if the pack item exists) or create above or below the selected pack

type listed below in the table. Click Go.

If you selected a pack type to create, follow the instructions at *Creating New Items*, page 1-24 to create the new pack item.

If you selected a pack type to add, find the existing pack item you want and select it.

Caution: You cannot add or create more than one pack item of the same pack type below another pack item. In other words, you cannot create a multi-level, heterogeneous pack using a top down approach. Instead, use a bottom up approach by selecting either the Create Above or Add Above option. Here is an example of a multi-level, heterogenous pack:

- Pallet
 - Case
 - Multipack 1 (Pack)
 - Base Item 1 (Each)
 - Base Item 2 (Each)
 - Multipack 2 (Pack)
 - Base Item 1 (Each)
 - Base Item 2 (Each)

Using the top down approach, you can add/create Multipack 1, but you cannot add/create Multipack 2 unless you use the bottom up approach.

5. In the **Add Next Level to Packaging Structure** page, specify the quantity of the pack item to put into the above pack item level.

For example, when adding a pack or inner pack below a multipack, specify that 3 packs or inner packs go into the multipack.

Click Apply.

6. In the **Create/Update Pack** page, you have another opportunity make changes to the packing quantities if needed. Click Apply to see if your changes generate any errors or warnings, then click Save.

To update a packaging hierarchy:

1. Locate an item contained in the packaging hierarchy which you want to update.
2. On the item's **Overview** page, click the Configuration tab, then the Packs subtab.
3. In the **Pack Hierarchy** page, in the first table, select the pack type that you want to update, then click Update.
4. In the **Create/Update Pack** page, use the expand/collapse icons or links to view certain items in the hierarchy.
5. To delete items from the packaging hierarchy, in the Remove column, click the Remove icon for the item row that you want to remove.

If you remove an upper level pack item, all lower level items contained within it are also removed.

6. To update packing quantities, change them in the quantity column.
7. To add or create a pack type level, follow the same steps as those listed in "To create a packaging hierarchy:" above.

Note: If the pack level selected is already attached to a pack level of the same type that you want to add or create, you must add the new pack items using the Add Above option, not the Add Below option.

To export a packaging hierarchy:

1. In the **Pack Hierarchy** page, select the pack that you want to export, then click Export.

You can update the packaging hierarchy similarly to how you update existing items using a spreadsheet. See: [Updating Existing Items Using A Spreadsheet](#), page 1-70

To assign packs to organizations:

You can assign a pack hierarchy to multiple organizations at once from either the item workbench Configuration tab, Packs subtab (see: "To assign a pack to an organization:" in [Enabling Organization Assignments](#), page 1-102) or from the mass change menu option "Assign Items to Organizations" (see: "To mass assign items to organizations:" in [Mass Updating Items, Item Categories and Item Associations](#), page 1-73).

Related Topics

[Creating a SKU Packaging Hierarchy](#), page 2-9

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.

Using the 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
- Excluding Transaction Attribute Value Set Values
- Overriding Component Attribute Values
- 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

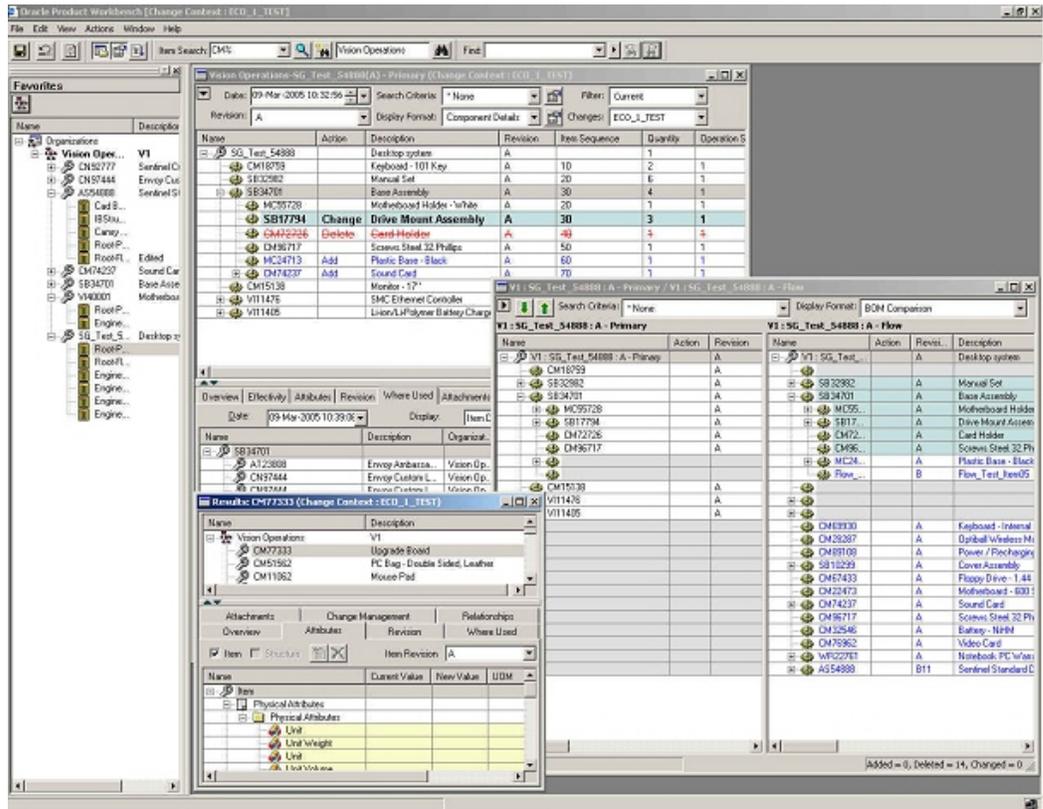
Product Workbench Overview

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.

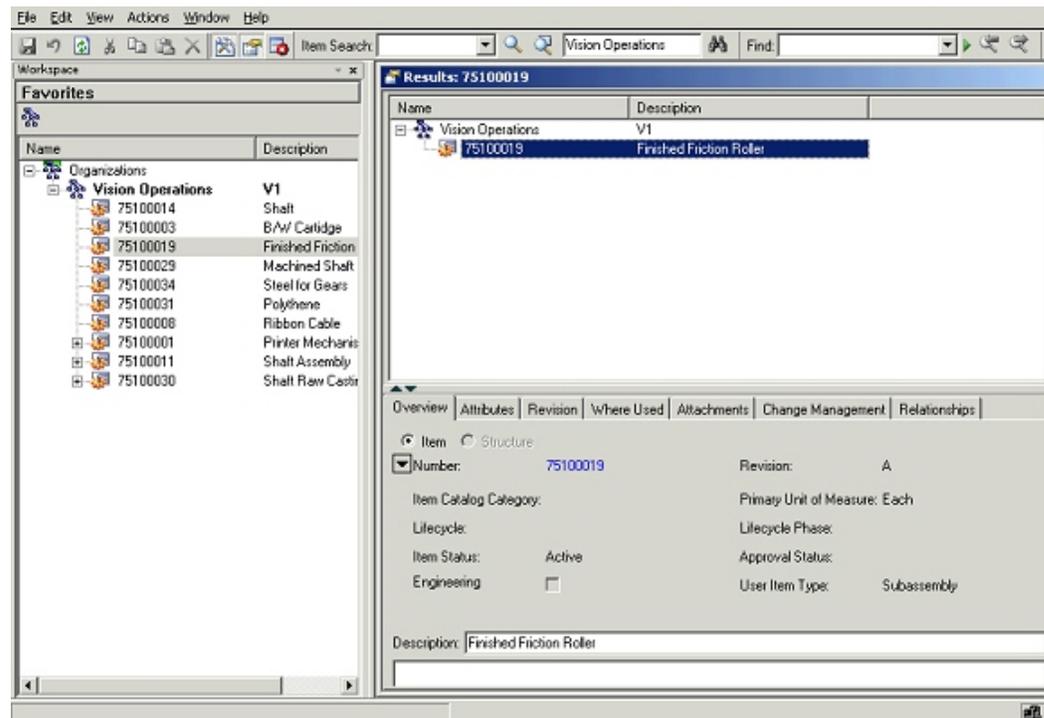
Important: You can only assign an item to only those organizations to which you have permission.

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.

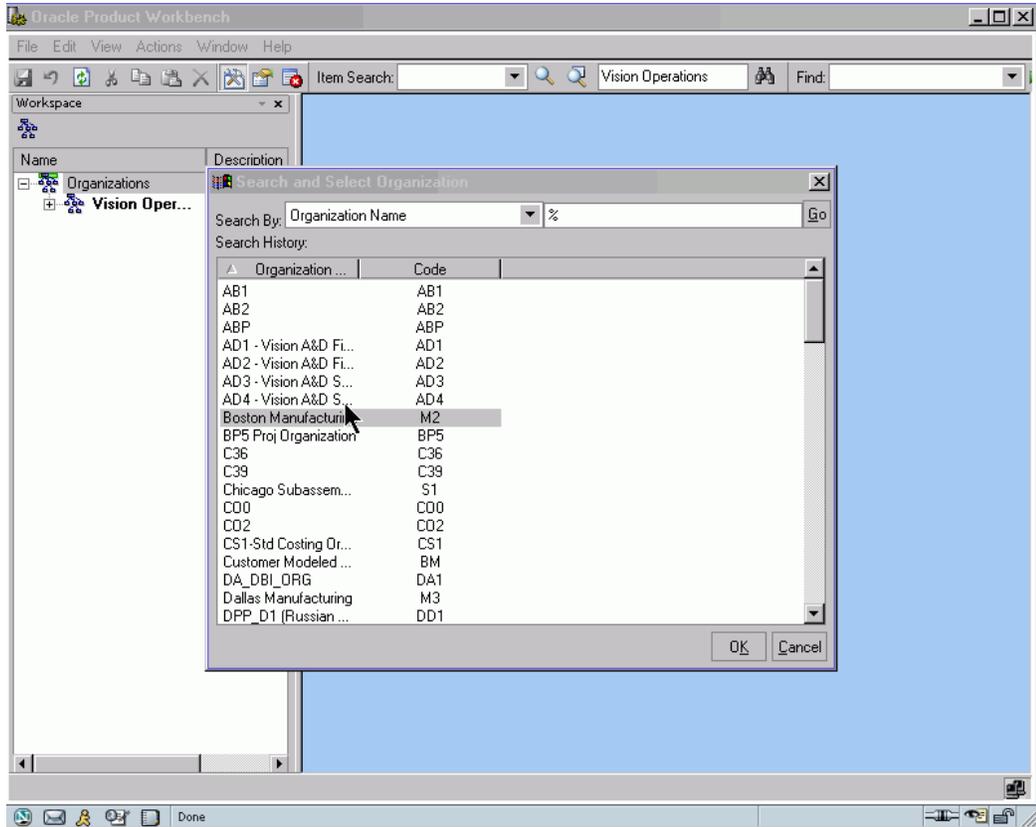
Similarly, users can select an entry from the Favorites list and remove the selected item

Item Details

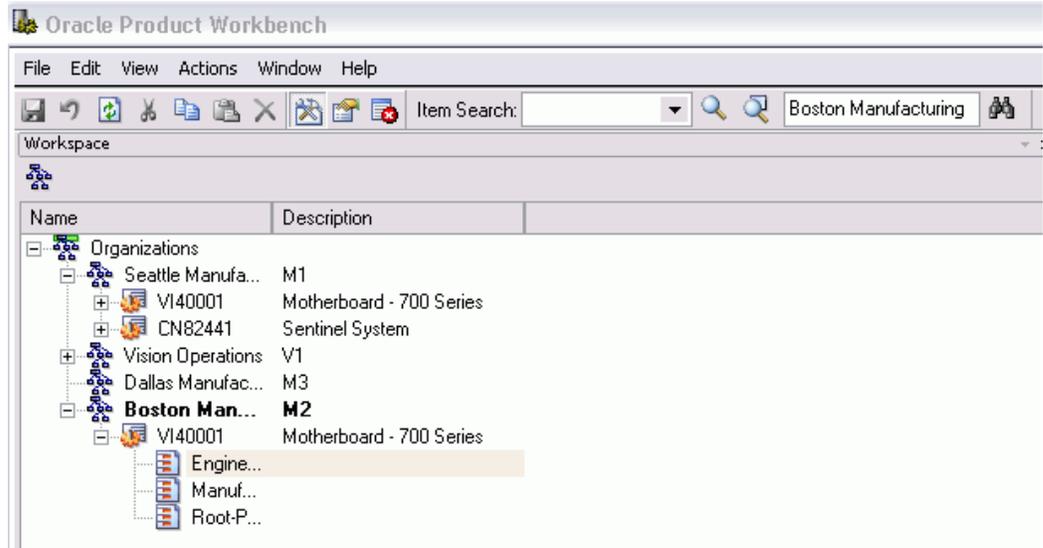


Selecting Multiple Organizations

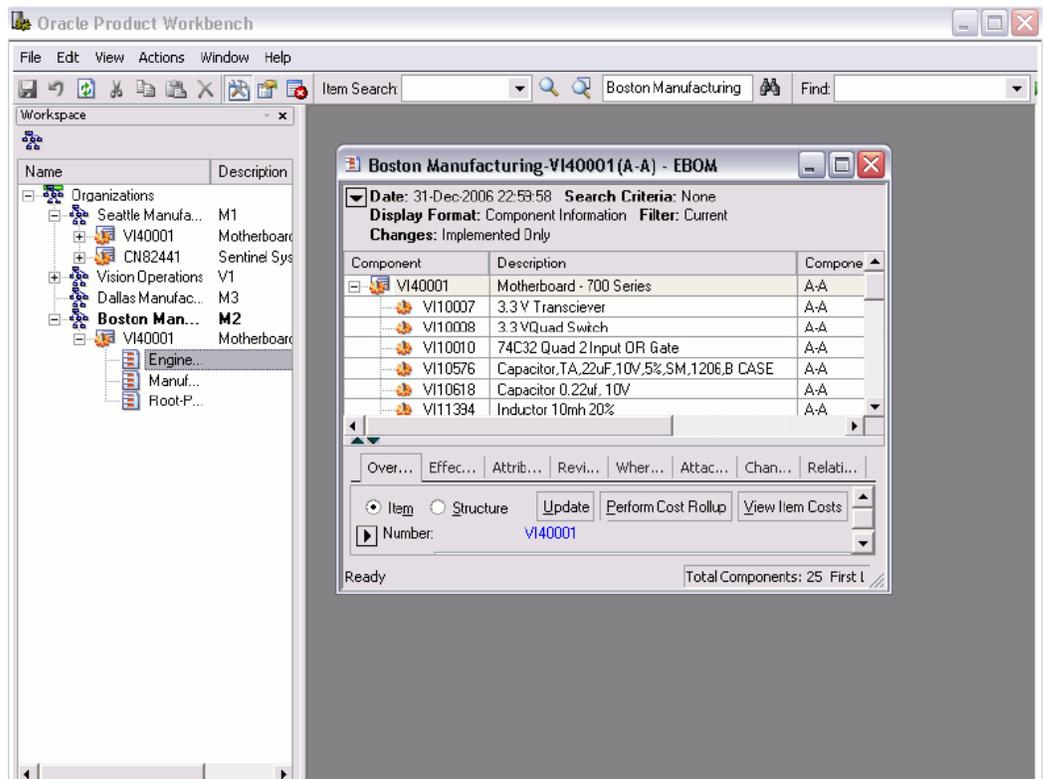
You can select and work in multiple organizations in the Product workbench. In the left pane of the Product Workbench, you can use the right click mouse function to Search and Select Organization. This will allow you to select another organization other than the default organization already displayed.



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.)

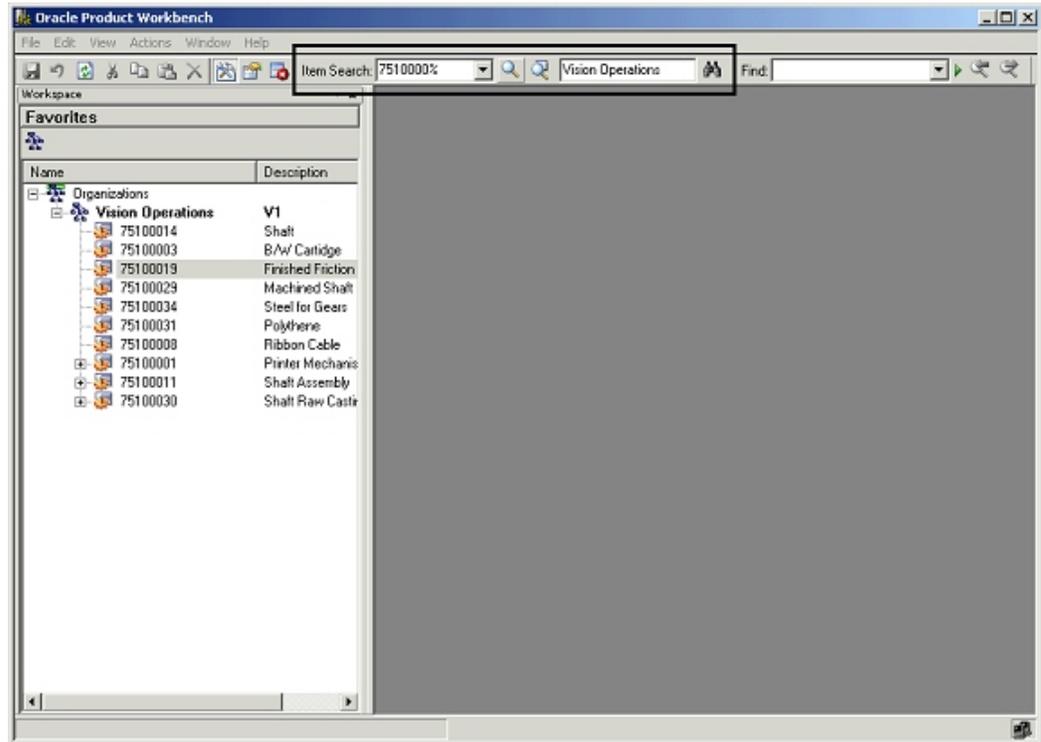
Item Search

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:

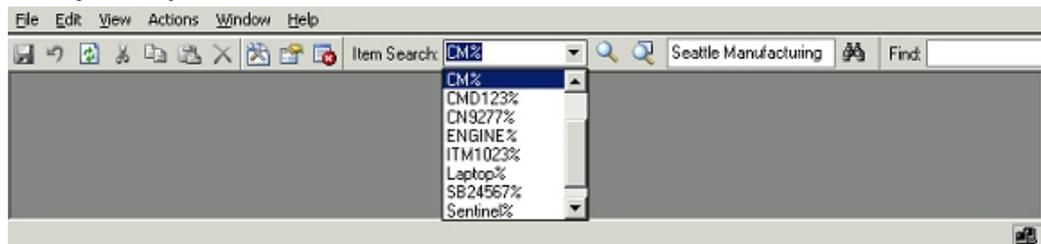
1. Select an organization and then enter a partial or complete item name you want to search for. Use "%" as the wildcard character to enter partial searches as part of the search criteria.
2. Click the simple search toolbar menu. All items matching the specified criterion are listed in the search result 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

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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.

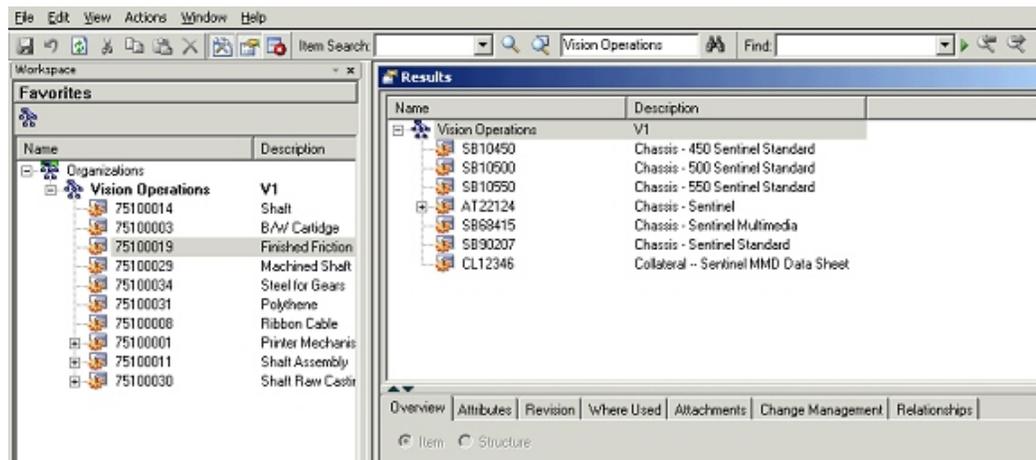
Intermediate UI for Advanced Search Results



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

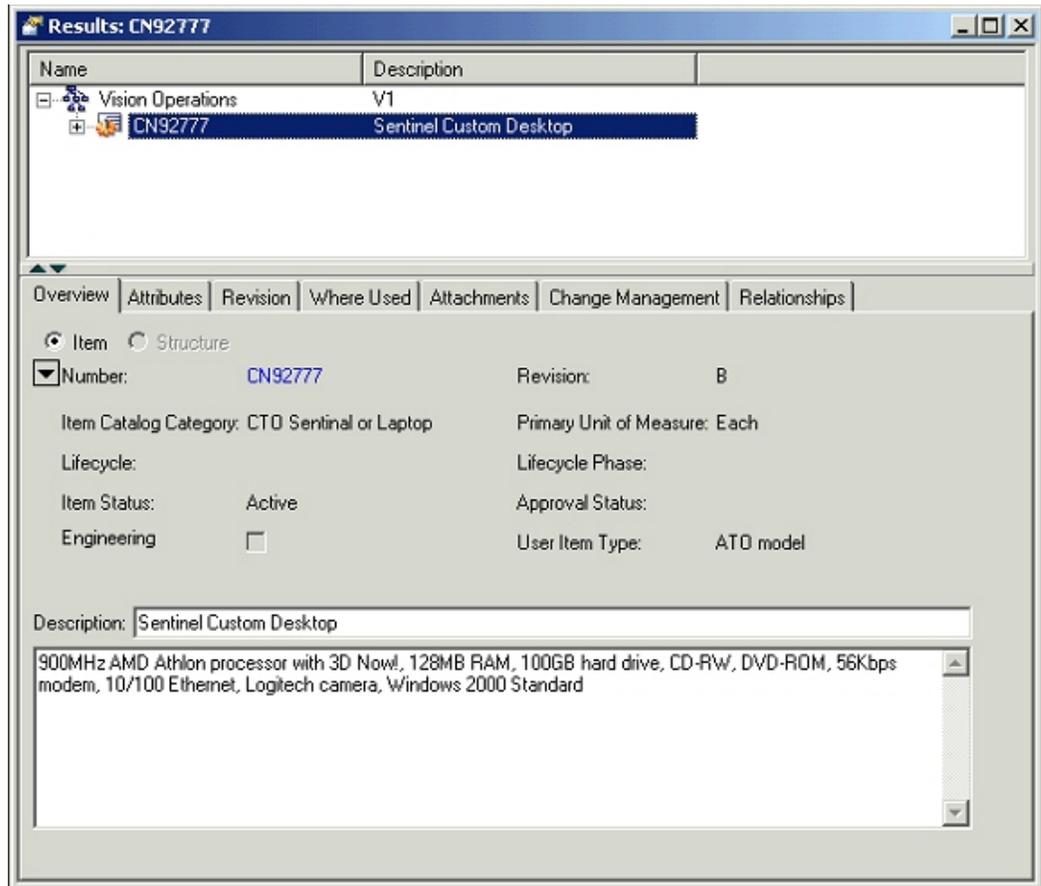
Users can view and modify item information in Oracle Product Workbench based on their privileges on this information. The item information is organized on the following tabs in the 'Details' window:

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

Component	SelvaltemAttr1	SelvaltemAttr2
VI40001		
VI11442		
VI10008		
VI10007		
VI10006		
VI11476		
VI11472		

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	sdsdifs	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	
AB11m-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.

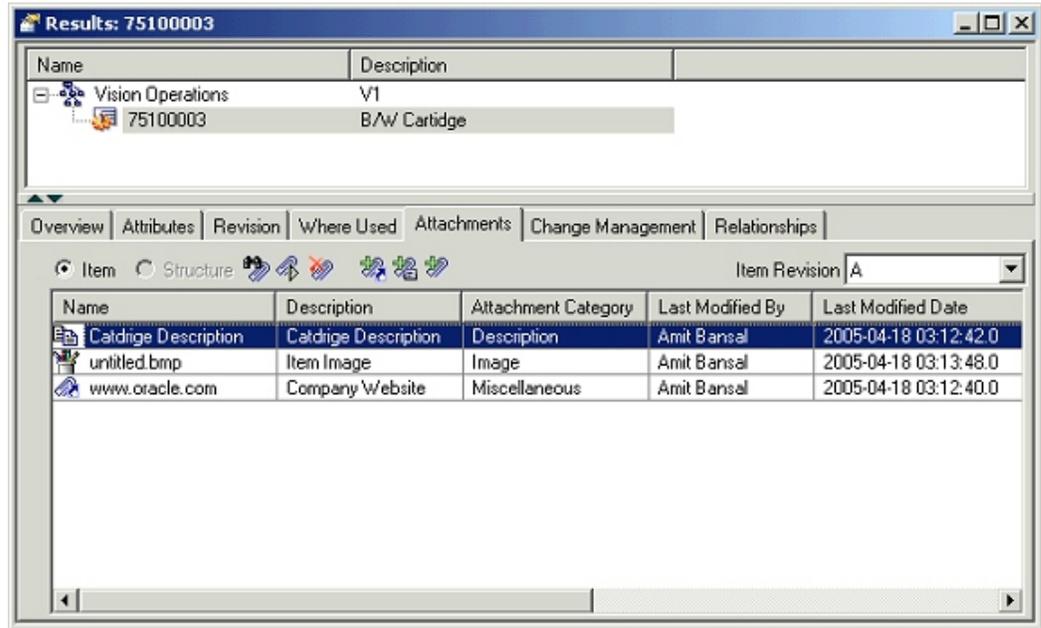
Detaching attachments

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.

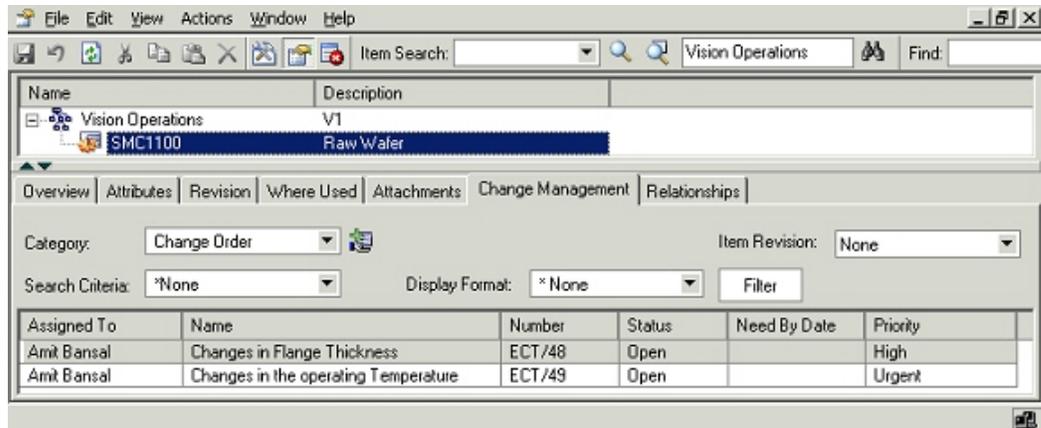
Item Attachments tab



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.

To create items:

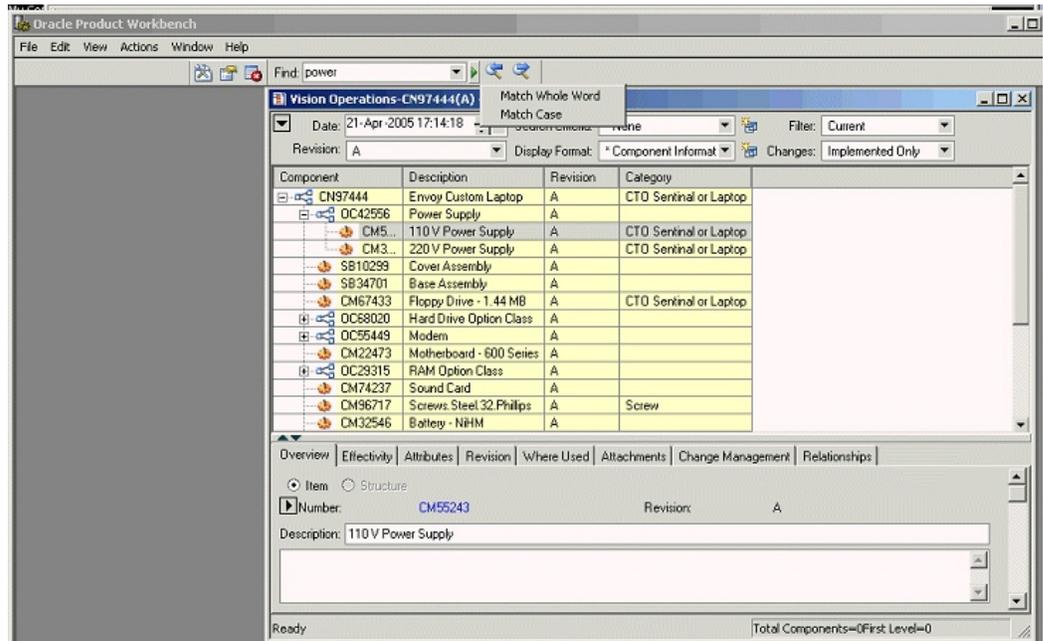
1. You can provide either an item catalog category (only those item catalog categories that have an item catalog category user role can be selected), or an existing item to create a new item from. If you select an item catalog category, different fields are defaulted as setup for the selection. Examples 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

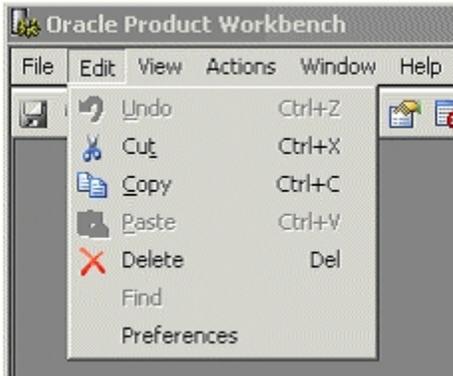


- For example if you provide the text "power" in the text field to search, all the components containing the word "power" will be highlighted one by one.
- The navigation to search result is provided by **Previous** and **Next** arrow button next to the Find text field. Using this button you view the 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

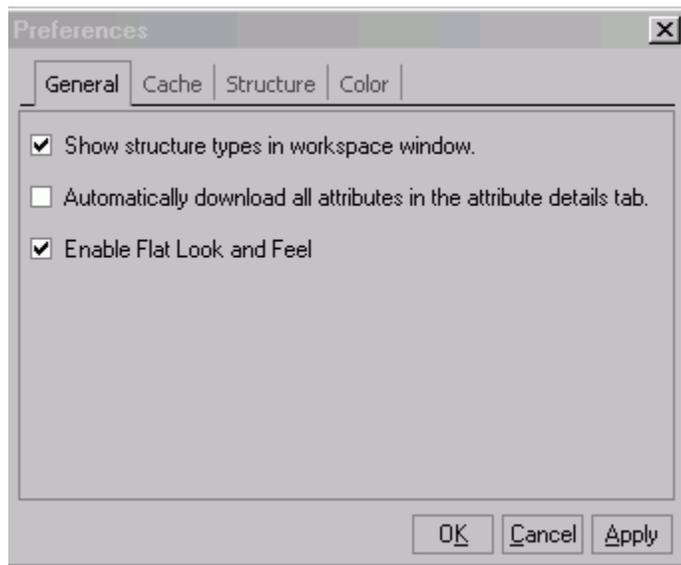


There are four section/tabs for the preference dialog.

General Preference

General Preference enables you to set the general behavior of the Product Workbench Windows client.

General Preference



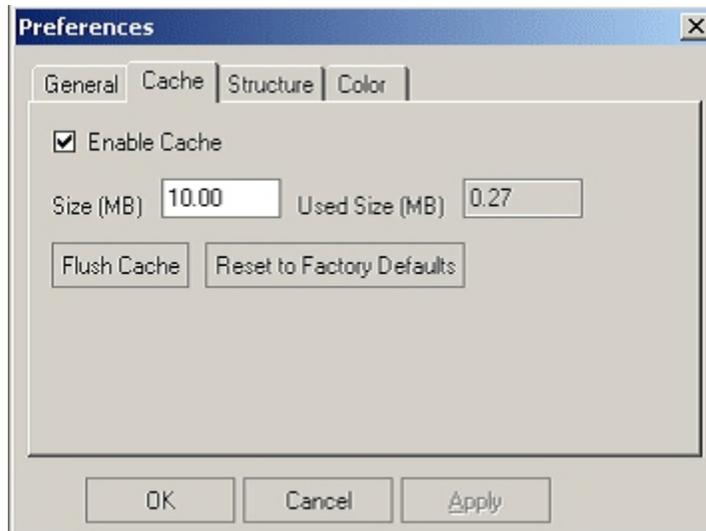
- You may or may not choose to view the splash screen on start up of the client.
- You may or may not choose to download all the attribute values in the Attribute tab in the Details section for a structure/search results window. This impacts the first time performance however subsequent view of the attribute 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

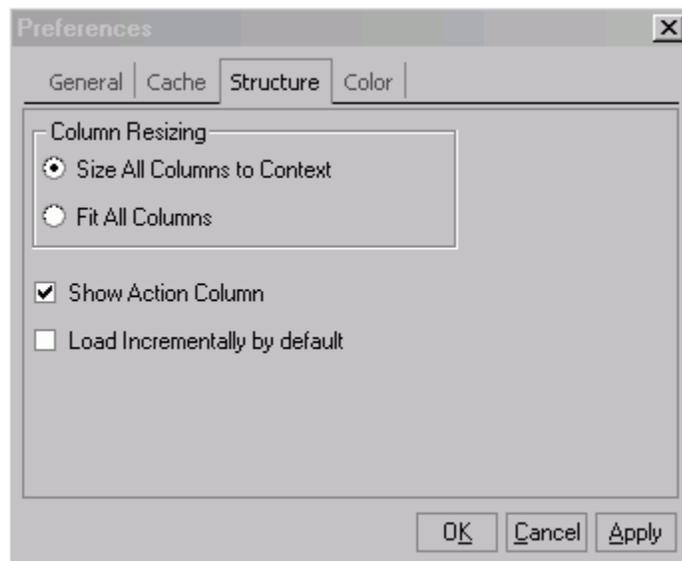


- You can set the Cache size limit. Cached data are stored in XML files in the user desktop. You can also view the current size of the cached data.
- You can periodically flush the cached data to download up-to-date information.

Structure Preference

Structure preference enables you to perform column re-sizing in the structure window and control the structure window behavior.

Structure Preference

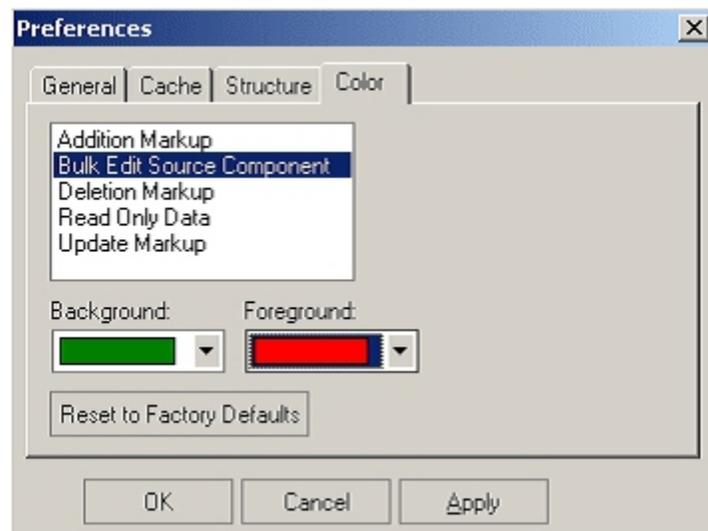


- You can set preference to size the columns according to its content value size Or Fit the all the columns in the display format to become visible within the window of current size.
- You can set to reload the structure on the event of changing the drop-downs of any field in the Structure header section 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 operational and user defined attributes, as well as Component operational 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 primary 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, primary 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 primary 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:

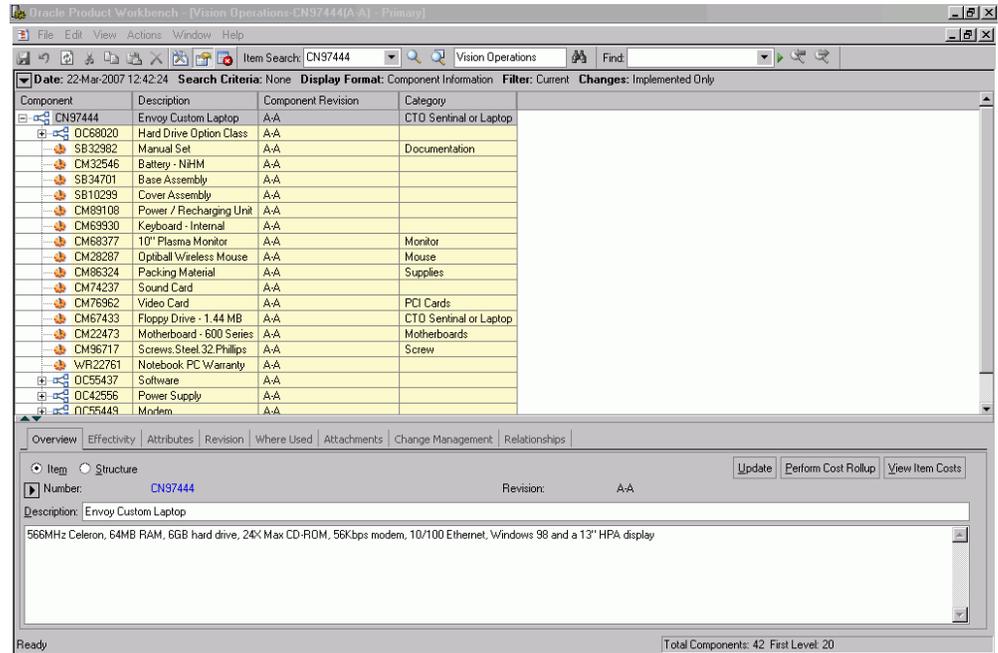
Performing a structure copy is a productive way for reusing existing structures to define new structures for an item. Copying a multilevel structure enables you to create a new structure or to copy specific subassemblies to any level of a multilevel structure within the same organization or across multiple 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.

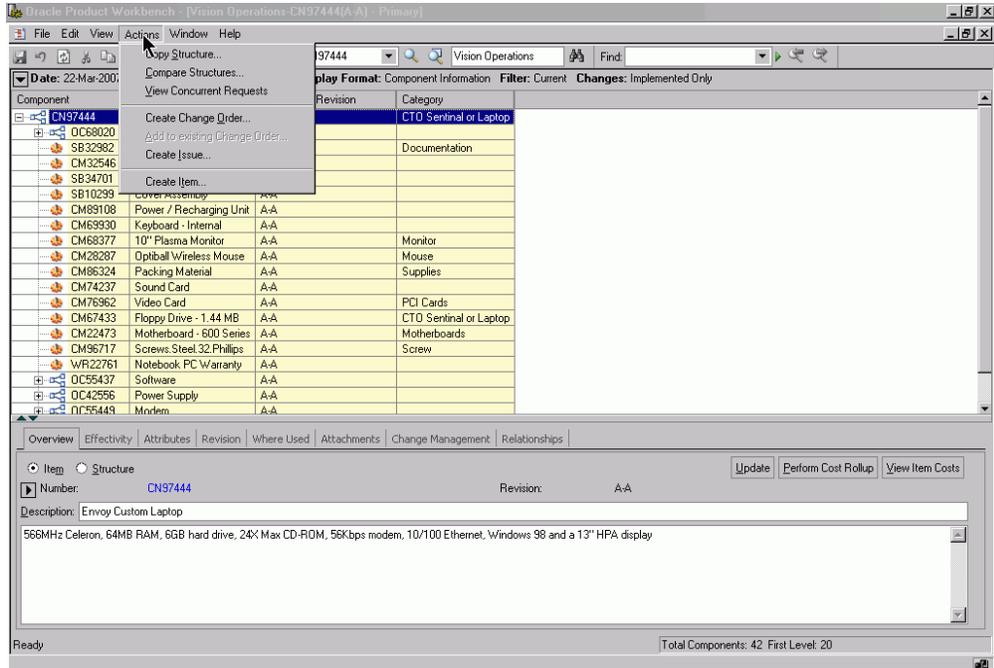
This functionality can improve your organization's efficiency by enabling the copying of

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.

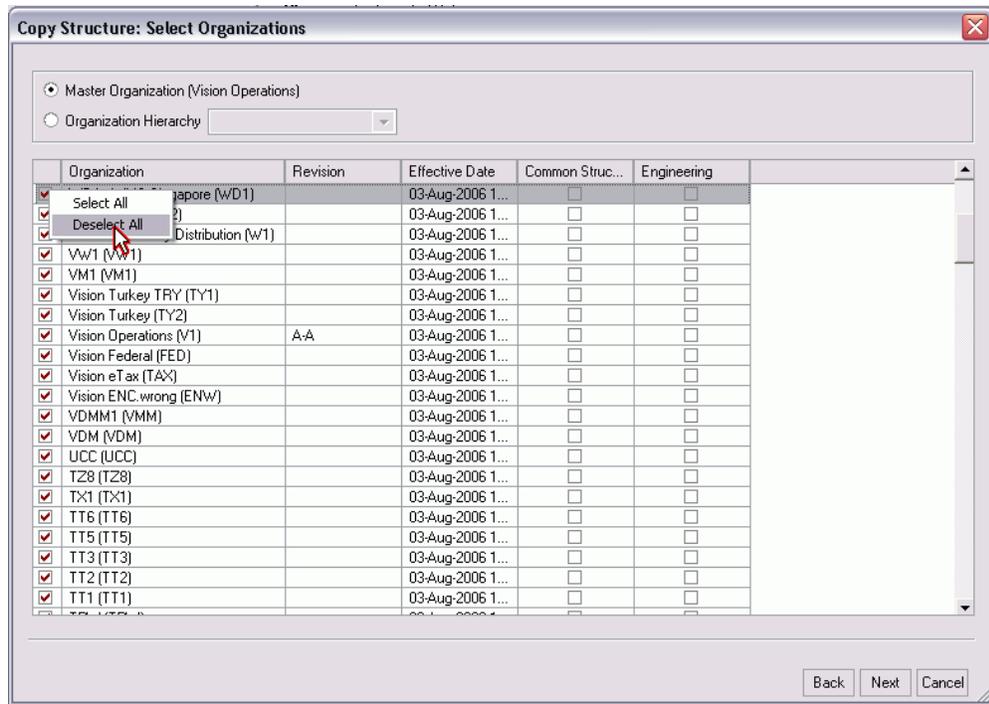


3. Enter the Copy From (source) structure information to be copied in the left pane. The selected item is defaulted. Optionally you can select any item manually. Enter the Copy to (target) structure information in the right pane which indicates the components or structure to be copied.

Structure information includes:

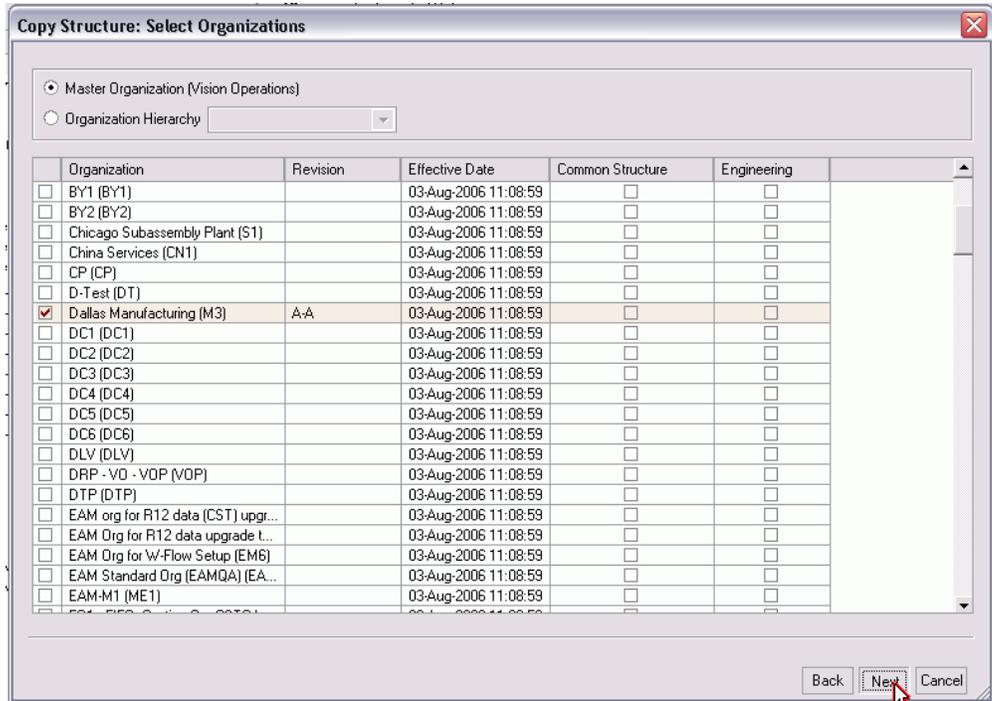
- Organization
 - Item
 - Revision
 - Structure Type
 - Structure Name
 - Engineering - engineering structure or manufacturing structure.
 - Effectivity Date (based on the type of effectivity control whether date or serial number or model/unit number), this field is appropriately rendered.
 - Filter (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.

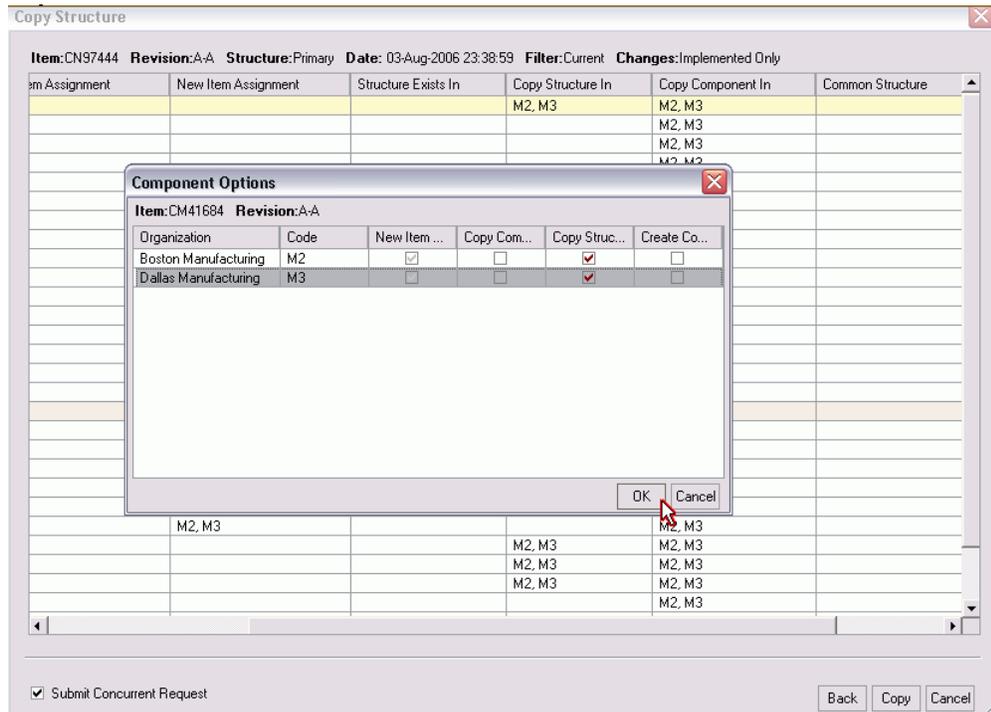
- Click the Next button, and the Copy Structure form appears. The Copy Structure form displays:

- 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

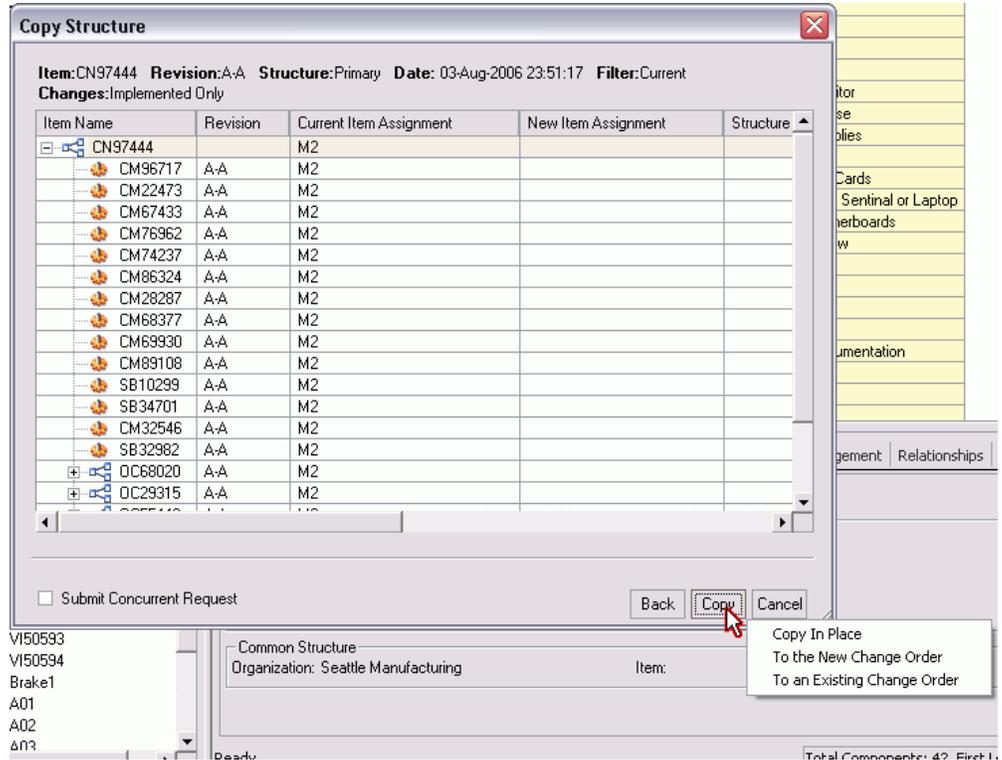
12. Complete selection of release options for end Items and sub-assemblies.

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:

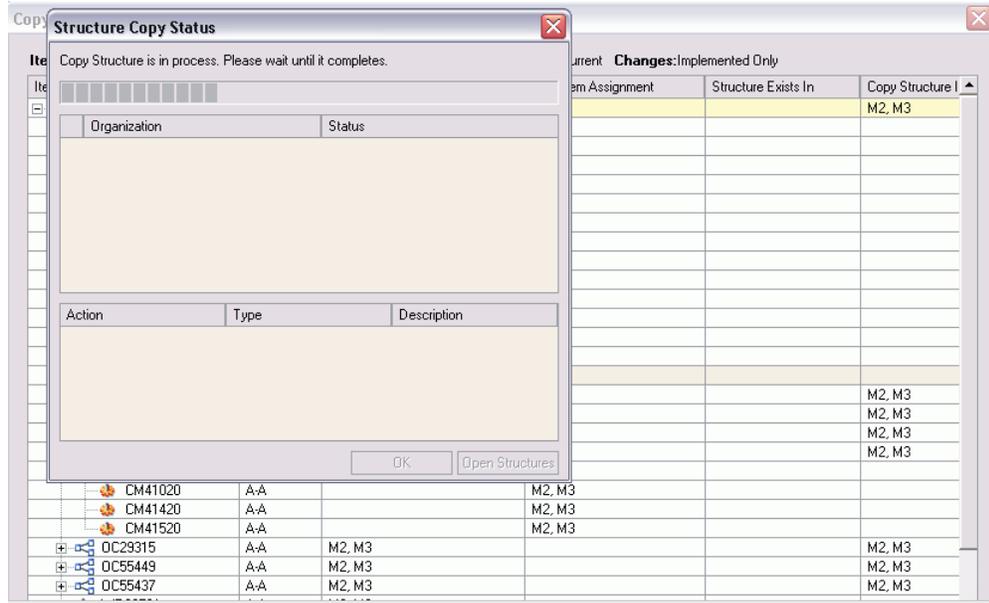
- Copy in Place
- To the New change Order
- To an Existing Change Order



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 '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

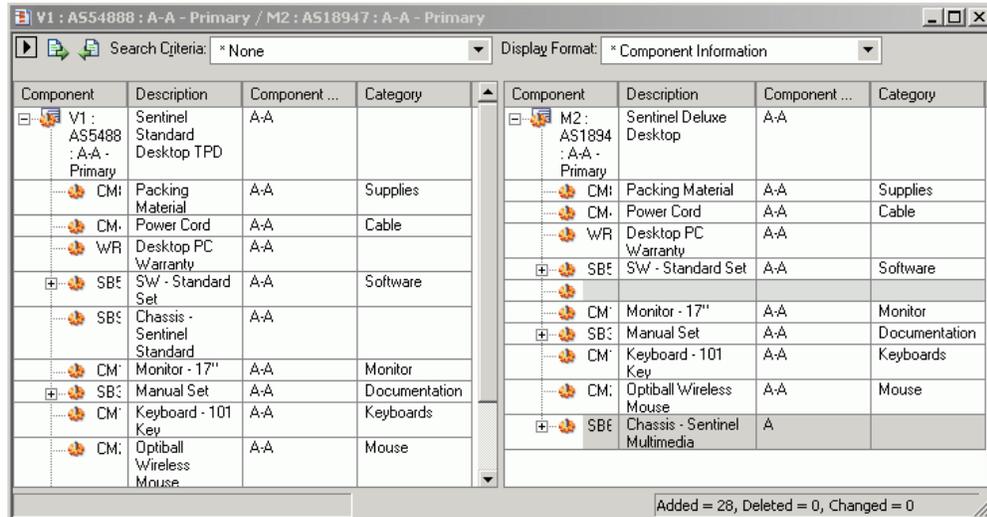
Compare Options:

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:

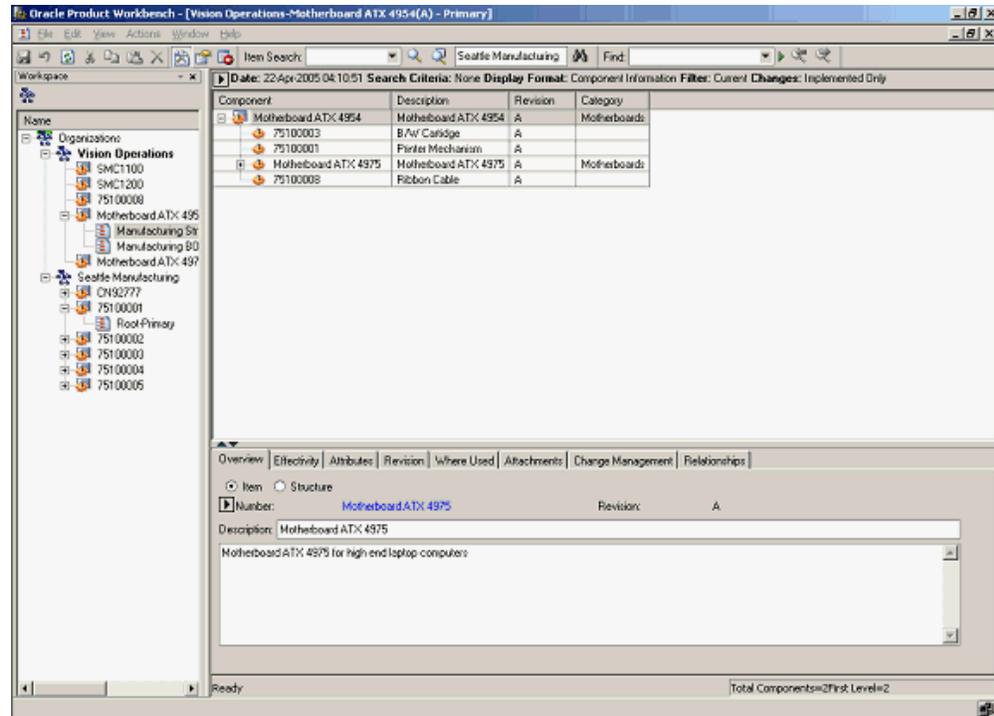
A structure contains information on the parent item, components, and optionally, attachments and descriptive elements. You can modify a structure using the Exclusion feature. You can create an engineering or manufacturing structure by manually defining all of the components for the structure, or copying 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.

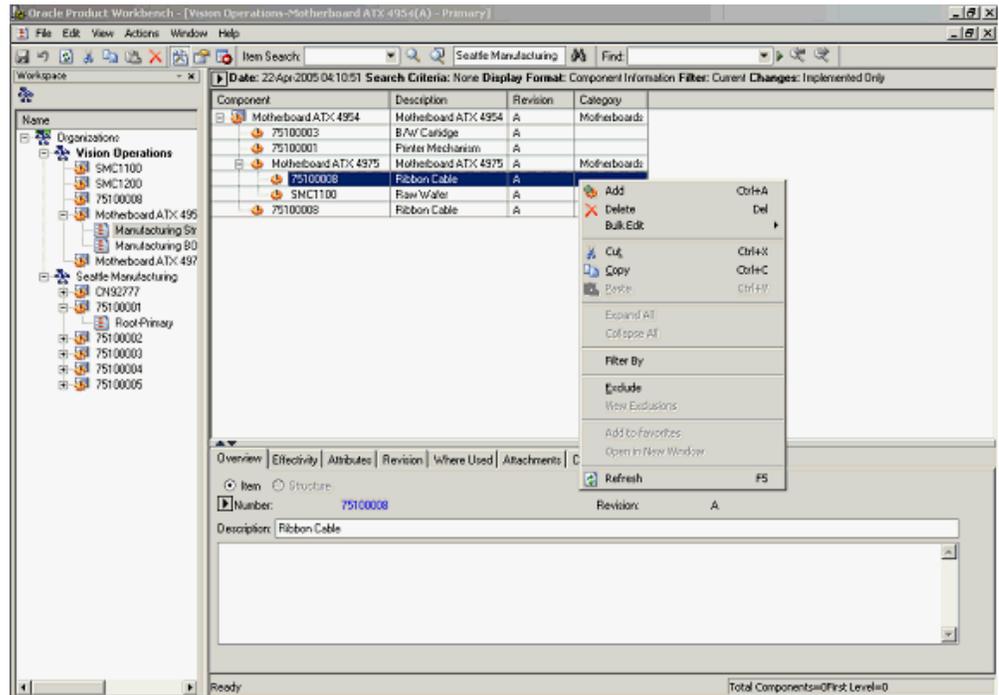
Launch Bill



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

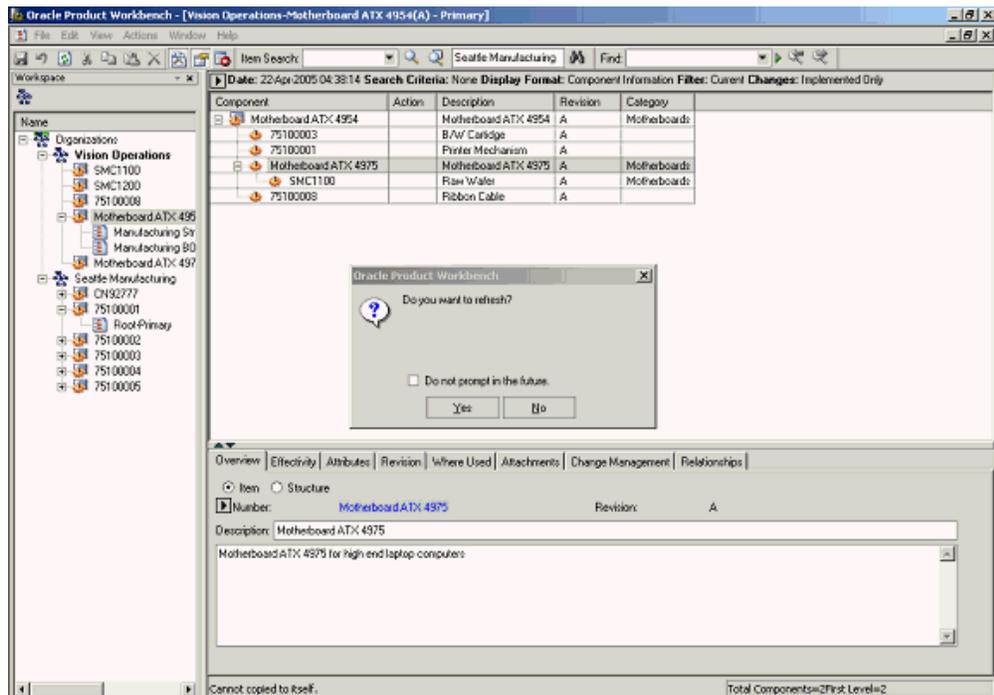


Note: You cannot exclude components in a bill that is common to another (source) bill.

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.

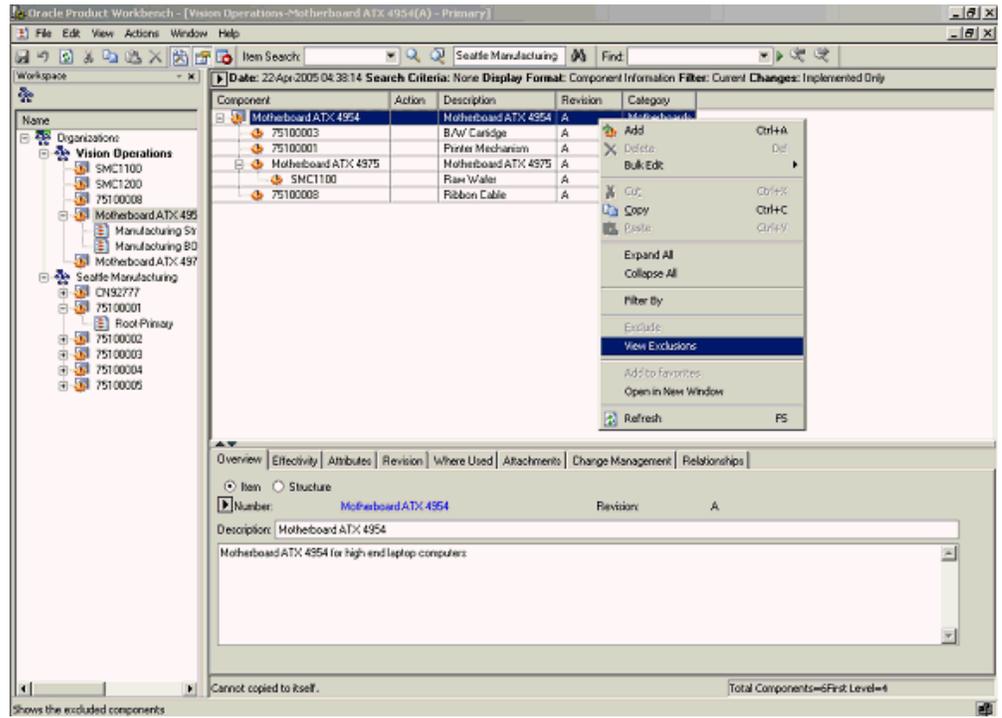
Thus in the above example, item#75100008 is excluded from the primary structure of the top item in the window (item#Motherboard ATX 4954). But, if you separately launch the structure for item(sub-assembly)#Motherboard ATX 4975, item#75100008 would continue to be shown in the structure of the sub-assembly. 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.

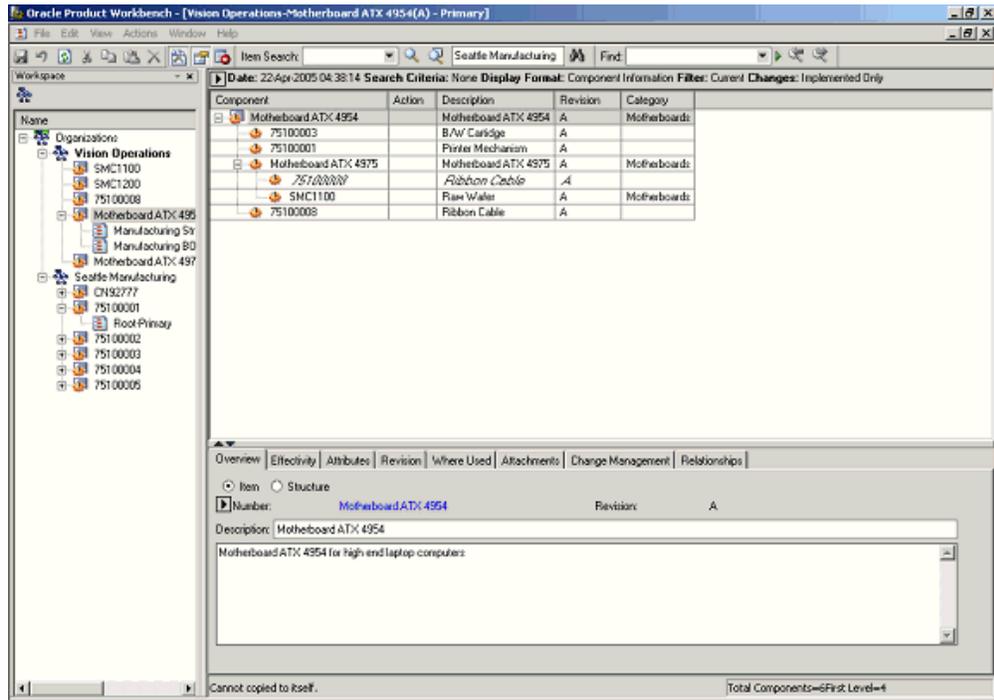
Note: You cannot use Expand all. If you have an excluded component at a lower level, explode parent subassembly by manually expanding the parent node to enable View Exclusions.

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.

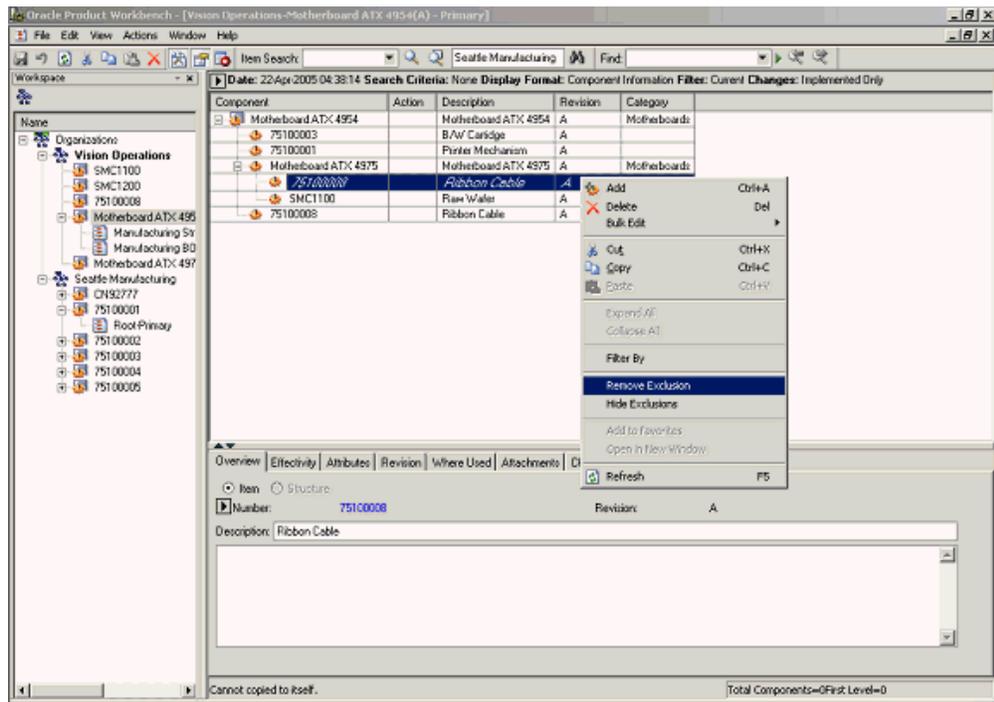
Hide Exclusions

The screenshot displays the Oracle Product Workbench interface. On the left, a tree view shows the organizational structure under 'Vision Operations', including 'Mothersboard ATX: 495'. The main workspace contains a table of components with the following data:

Component	Action	Description	Revision	Category
Mothersboard ATX: 4954		Mothersboard ATX: 4954	A	Mothersboards
75100003		RAW Cartridge	A	
75100001		Purker Mechanism	A	
Mothersboard ATX: 4975		Mothersboard ATX: 4975	A	Mo
75100007		Ribbon Caridge	A	
SMC1100		Ram Wafer	A	Mo
75100005		Ribbon Cable	A	

A context menu is open over the 'Mothersboard ATX: 4954' component, with 'Hide Exclusions' selected. The menu includes options like 'Add', 'Delete', 'Bulk Edit', 'Copy', 'Paste', 'Expand All', 'Collapse All', 'Filter By', 'Exclude', 'Add to Favorites', 'Open in New Window', and 'Refresh'. Below the table, the 'Overview' tab is active, showing details for 'Mothersboard ATX: 4954' Revision A, with a description: 'Mothersboard ATX: 4954 for high end laptop computers'. The status bar at the bottom indicates 'Total Components=6First Level=6'.

Remove Exclusion



- 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.

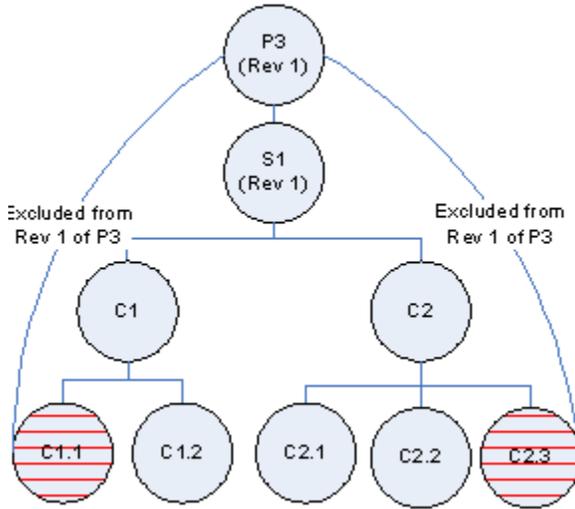
Example: Exclude Components from a Specific Revision of an End Item (Product)

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".

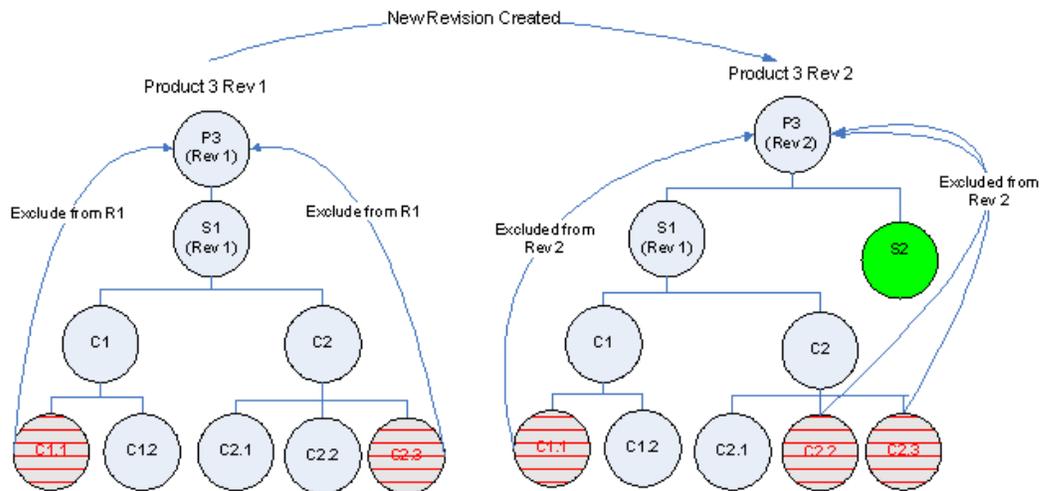
The following table and pictorial show data for the structure for revision "2" of product "P3":

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"



Excluding Transaction Attribute Value Set Values

You can use transaction attributes to assign item characteristics during an item transaction rather than at the time of item creation. However, there are times when you might want to exclude a particular attribute value from possible assignment. The following scenario provides an example of a transaction attribute value exclusion.

Bundle Product Promotion Offer

The following graphic shows two items, a cell phone package and broadband internet access, that a telecommunications company wants to sell as a bundled item to consumers. The company bundles to encourage customers to buy more items in total.

Because the price of the two items bundled together is less than if the items were sold separately, the company wants to exclude two of the more expensive options from the bundle's structure. Normally, customers could choose from the following four cell phone colors:

- Red
- Blue
- Green
- Metallic

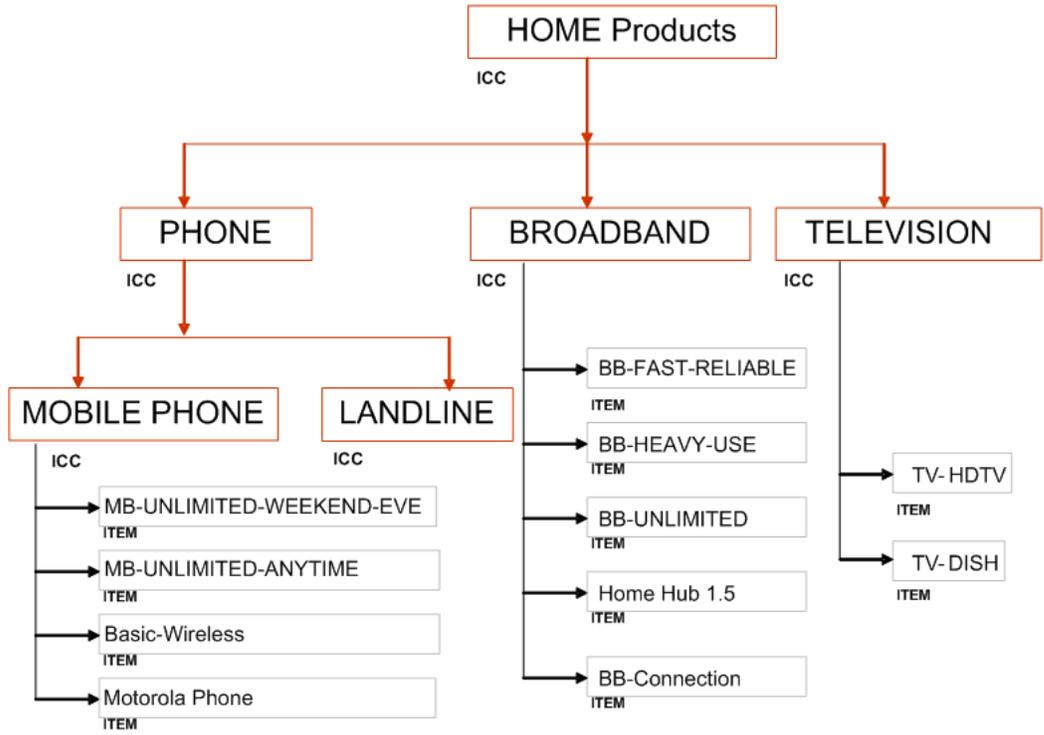
However, the metallic finish is more expensive than the others, so this attribute value, metallic, is excluded from the promotional offer bundled item only. If a customer wants a metallic phone, they can still order it, but not as part of the bundle.

One of the broadband internet access options is upload speed. Normally, the choices are:

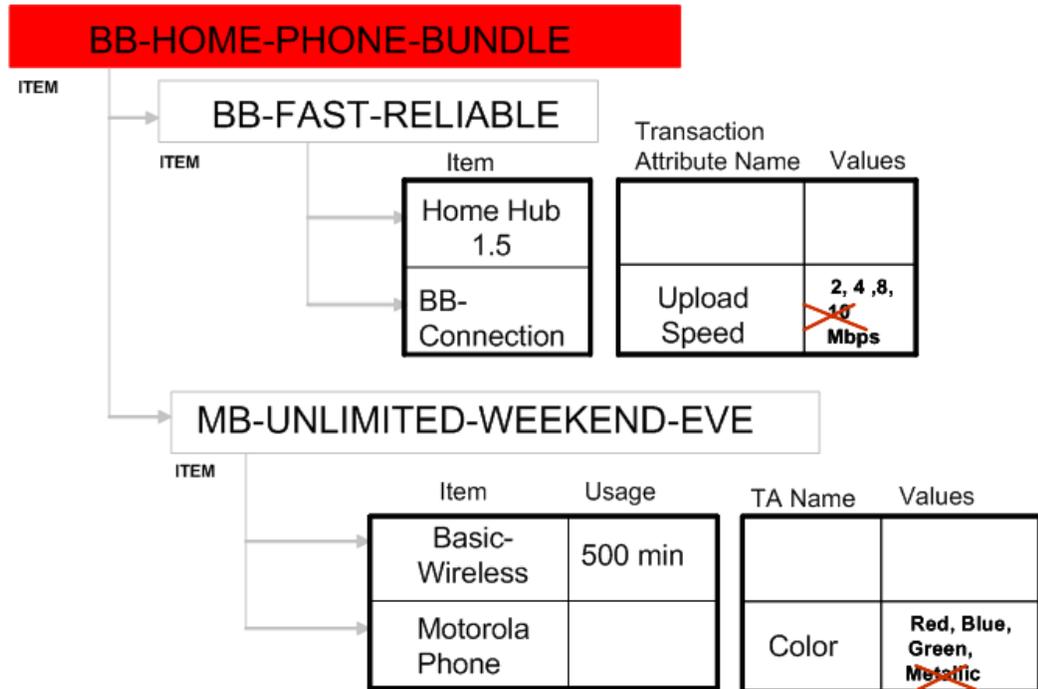
- 2 megabytes per second (Mbps)
- 4 Mbps
- 8 Mbps
- 10 Mbps

When purchasing the bundle, though, the attribute value of 10 Mbps is excluded.

Overall Product Model



Phone-Internet Bundle



The transaction attribute values excluded only apply to one specific end item structure and for one specific instance of the item's usage in the end item structure. The following examples help explain this concept.

Exclusion Behavior Examples

- You can exclude 10 Mbps from BB-CONNECTION in the structure of BB-HOME-PHONE-BUNDLE shown above. 10 Mbps still appears in the list of transaction attribute value choices if BB-CONNECTION appears as part of another end item's structure, though.
- If the same item with the excluded value is included in another structure of the same end item or in another structure of another end item, then the value is not excluded.
- Exclusions have no effect across organizations. For example, if you exclude a value from a structure in the V1 organization, then copy the structure to the M1 organization, the value is no longer excluded in the M1 organization.
- Once you delete the item with the excluded value from the structure, the exclusion is lost. For example, exclude 10 Mbps from the item BB-CONNECTION shown above. Now delete the item BB-FAST-RELIABLE from BB-HOME-PHONE-BUNDLE. Add the item BB-FAST-RELIABLE back to BB-HOME-PHONE-BUNDLE. Drill down to BB-CONNECTION; 10Mbps is no longer excluded.

Important: You can only exclude transaction attribute values from structures created in the Product Workbench with the following parameters:

- The Engineering box is selected.
- The structure name is something other than Primary.
- In the Effectivity field, Revision Effectivity is selected..
- The attribute value set's validation type is either Independent or Translatable Independent.

You cannot exclude transaction attribute values from structures created using Oracle Bills of Material, the Microsoft Excel import process, the Import Workbench, or the Open Interface tables. When you add a component to a structure, the component is in markup mode and you cannot exclude transaction attribute values. You must save the structure after adding components before you can exclude values.

Prerequisites

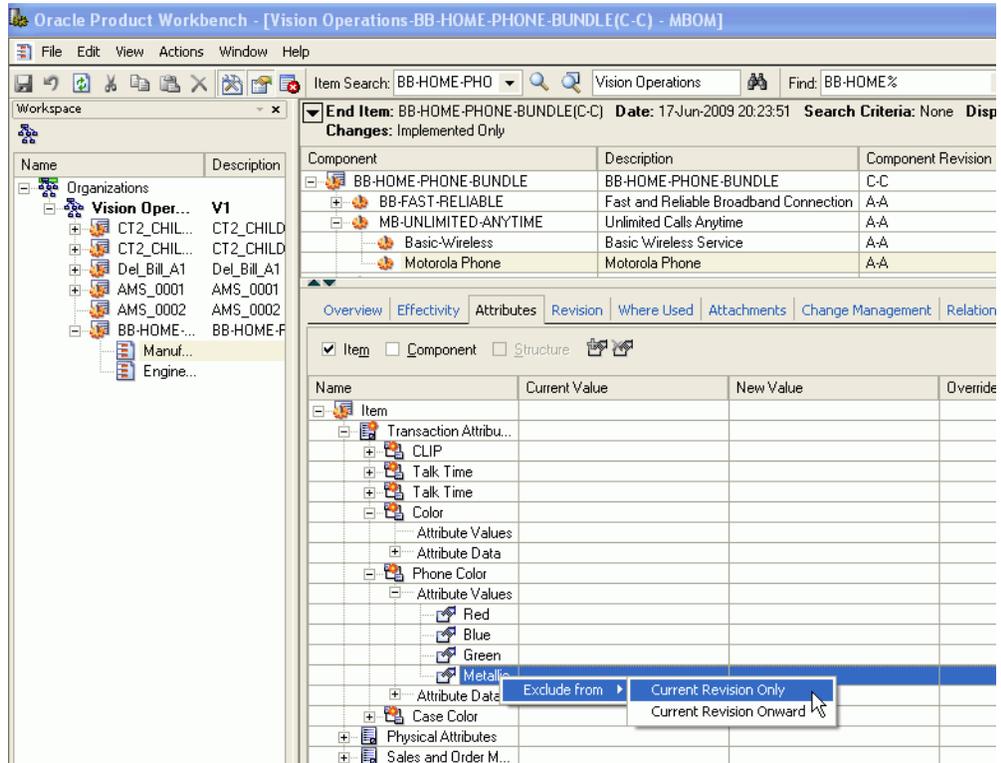
- You must have a role that includes the Edit Transaction Attribute privilege for the end item (the top level item in the structure) in order to exclude a transaction attribute value for an item in the structure.

To exclude a transaction attribute value:

1. Navigate to the Product Workbench. Search for and select an end item from the favorite items list or from the item search results.
2. Select one of the end item's non-primary structures. Right click and select Open to view the end item's structure.
3. Select the component for which you want to exclude a transaction attribute value.
4. In the tabbed region below, select the Attributes tab, then the Item checkbox.
The list of attribute groups for the component appears.
5. Drill down into the transaction attributes and select the attribute value that you want to exclude.
6. Right click on the attribute value to exclude and select Exclude From, then either:
 - Current Revision Only

- Current Revision Onward

This excludes the current revision as well as all revisions valid in the future.



Once you exclude an attribute value, the value appears in red text with a line through it (strikethrough text).

7. Click Save.

To unexclude a transaction attribute value

8. Right click on the attribute value to unexclude and select Remove Exclusion, then either:
 - Current Revision Only
 - Current Revision Onward

The value now appears in plain black text.

9. Click Save.

Overriding Component Attribute Values

Component attributes apply to the relationship between a parent and a component item

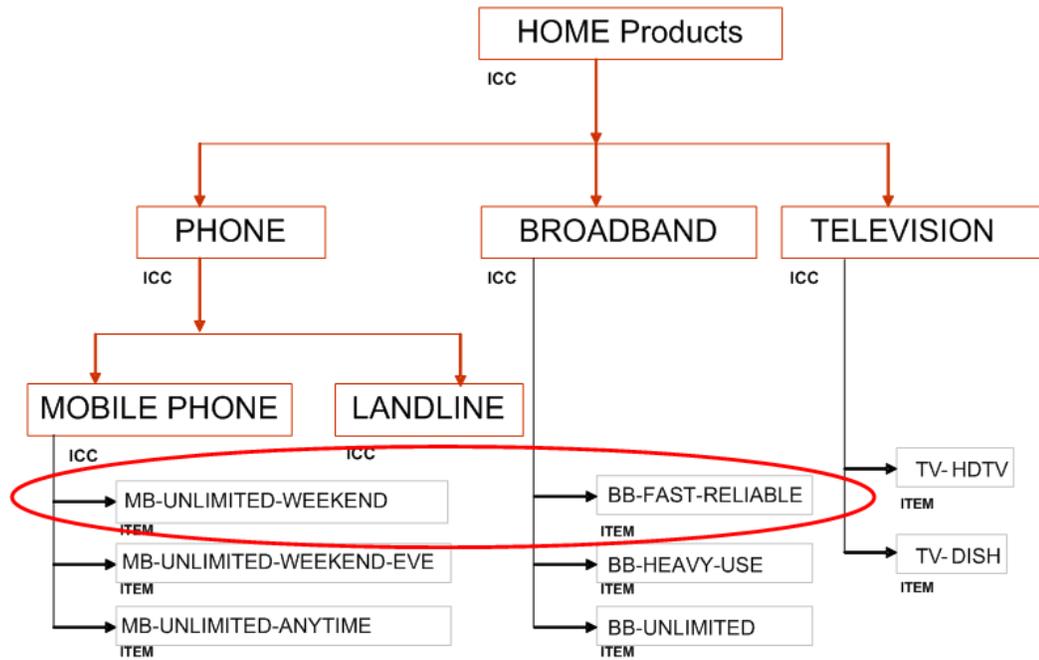
for a specific structure type. All structures of the same structure type have the same component attributes available to them between any level of parent and component items in the structure. A component item could have multiple parents in the same item structure. If this is the case, the component attributes for the component can have different values for each unique parent child relationship since a component attribute is specific to the relationship between a component item and its immediate parent item.

The Product Workbench enables you to override a component attribute value for a component item in a parent child relationship within the context of a specific end item (top assembly item) and only for a specific instance of the relationship. If you use the same parent child relationship in another structure, then the component attribute values remain the same as they were when originally set within the relationship between the component and its parent item. You can choose to override a component attribute value for the current revision of the end item only or for the current and future revisions. You can also remove an override at any time. If you remove an override, the original component attribute value becomes effective. The following scenario provides an example of overriding component attribute values.

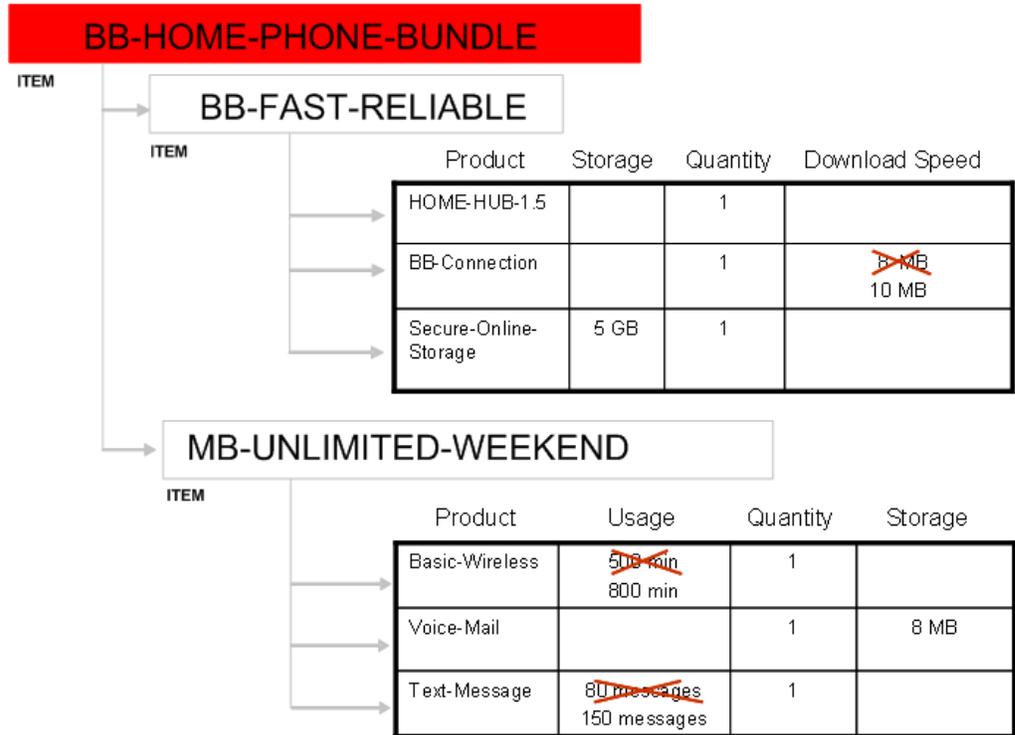
Bundle Product Promotion Offer

The following graphics show two items, a cell phone package and broadband internet access, that a telecommunications company wants to sell as a bundled item to consumers. The company bundles to encourage customers to buy more items in total. The company gives customers better features on the bundled items than they do when selling the items separately. In this case, if you buy the bundle, you get 10 MB of internet download speed instead of the usual 8 MB, 800 minutes of cell phone usage instead of the usual 500 minutes, and 150 text messages instead of the usual 80.

Overall Product Model



Phone-Internet Bundle with Overrides



Prerequisites

- Optionally, create a display format for the structure type of the end item's structure that includes the component attributes. See: Defining Display Formats and Search Criteria for Structures, *Oracle Product Information Management Implementation Guide*
- Ensure that you are working within a revision effective structure. You can only override component attribute values within revision effective structures.
- When adding a component to a structure, save the structure before overriding component attribute values.

When you add a component to a structure, the component is in markup mode and you cannot override component attribute values. You must save the structure after adding components before you can override values.

To override a component attribute value:

1. Navigate to the Product Workbench. Search for and select an end item from the favorite items list or from the item search results.
2. Select one of the end item's structures. Right click and select Open to view the end

item's structure.

Tip: If you have a display format that includes component attributes, then select the Open With option. In the Open With... page, select the display format you want to use. If the component attributes are visible in the upper page view, then you can override their values from there as well as from the lower page view.

3. Select the component for which you want to override a component attribute value.
4. Override the current component attribute value.

You can override the value in either the upper or lower page view.

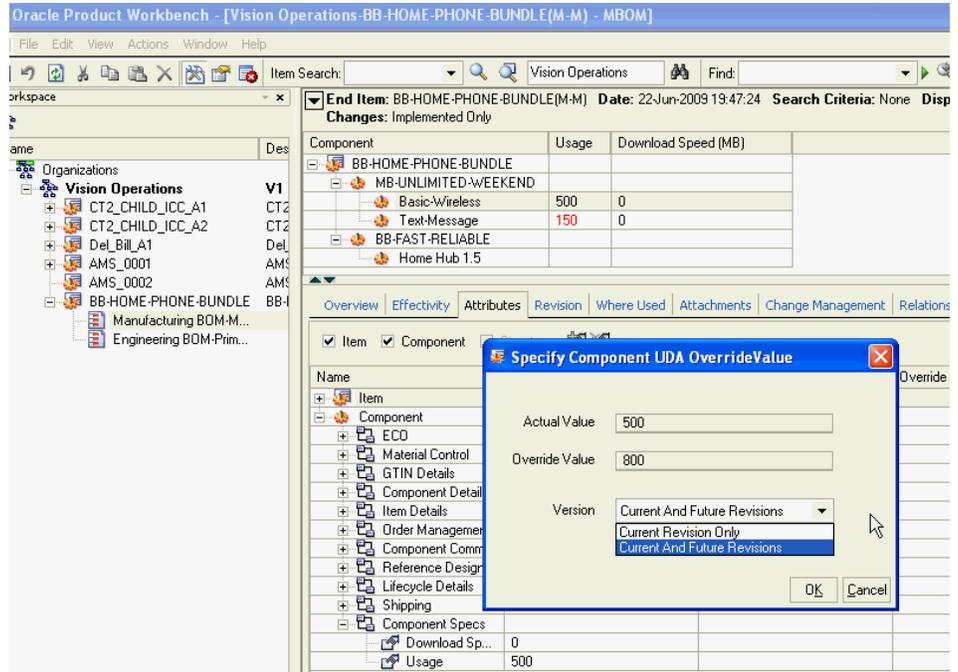
Important: You cannot view multi-row component attributes in the upper page view, so you must enter multi-row component attribute override values in the lower page view.

To override the value using the upper page view

- Right click in the component attribute field.
The Specify Component UDA OverrideValue window appears.
- Double click in the Override Value field and enter the override value.
Note: You can use the Actual Value field in this window to change the component attribute value in all instances of this lowest level parent child relationship. This has the same effect as if you double clicked on the field and changed the value.
See: Editing Structure Information, page 6-78.

- In the Version field, select either:
 - Current Revision Only
 - Current and Future Revisions

This applies to the revision level of the structure's end item.



- Click OK.

To override the value using the lower page view

- In the lower page view, select the Attributes tab.
- Check the Component box.
- Find the component attribute group that contains the component attribute values that you want to override. Expand the attribute group name so the component attributes are visible in the Name column.
- Click on a component attribute to select it, then double click in the Override Value field.

The Specify Component UDA OverrideValue window appears.

- Double click in the Override Value field and enter the override value.
- In the Version field, select either:
 - Current Revision Only
 - Current and Future Revisions

This applies to the revision level of the structure's end item.

- Click OK.

Once you enter an override value, the value in the component attribute field appears in bold red text in the upper page view. In the lower page view, the value appears in the Override Value field, while still showing the original value in the Current Value field.

5. Click Save.

After saving, the the value in the component attribute field appears in regular red text in the upper page view.

- You can only view component attribute override values from the end item structure. Using the example above, if you enter the component attribute override value of 10 MB for the component BB-Connection, you can only view this value from the structure for BB-HOME-PHONE-BUNDLE, not from BB-FAST-RELIABLE.
- Since component attributes are organization specific, the override values are organization specific, also.
- When you view the end item structure in Oracle Applications HTML pages, for example, in the Structure: (structure type) page, a new column appears next to the overridden component attribute column. For example, if the component attribute column name is Download Speed, the override column name is Download Speed_OVD.
- You can export the structure with override values from the Structure: (structure type) page. From the Actions drop down menu, select Export to Excel. You cannot change the override values in the Excel spreadsheet; an error message says that the cells are read-only.

To remove an override value:

1. In the upper page view of the structure, select the component.
2. Right click on the component attribute value field, then select Remove Override. Choose either:
 - Current Revision Only
 - Current and Future Revisions

Alternatively, in the lower page view of the structure, you can double click on the Override Value field. In the Specify Component UDA OverrideValue window,

double click on the Override Value field and delete the value.

3. Click Save.

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, associate an ICC 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

The screenshot shows the 'Create Structure' dialog box with the following fields and options:

- 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: [text box] [icon]
 - Item: [text box] [icon]
 - Hierarchy: [text box] [icon]
 - Preferred Structure
 - Open Structure After Creation

Buttons: OK, Cancel

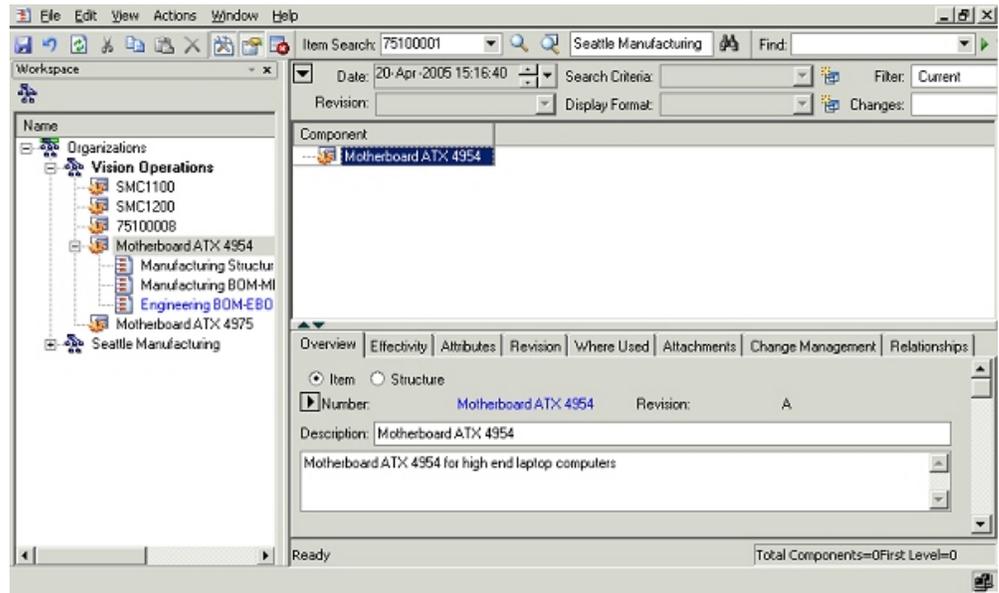
2. If the selected item is an engineering item, the Engineering check box will be selected and cannot be edited. In case of a manufacturing item, user can choose to create a manufacturing or engineering structure.
3. Select a structure type and a structure name. Only those combinations are available 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.

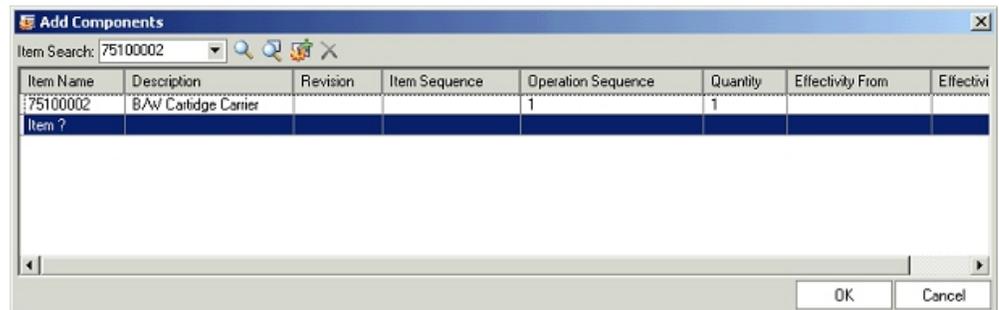
7. Check the Open structure after creation if you want to continue editing the structure.
8. Click the OK button. This will open up the new window where the user can specify other information related to the structure. The structure is not yet saved.

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.

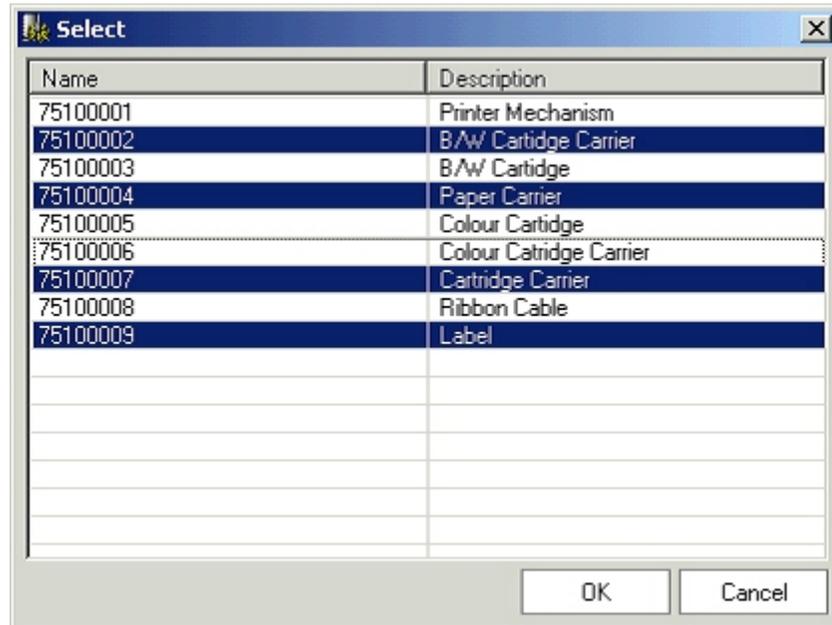
Add Components



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 associate an ICC structure with an item:

If an item belongs to an item catalog category with an associated structure, you can associate this ICC structure with the item. ICC structures are useful when many of the items within an item catalog category use a similar structure. After associating an ICC structure with an item, you can add components, but you cannot edit or delete

components or component attributes from the item's defaulted ICC structure.

Tip: You can delete components from the item's defaulted ICC structure in the **Structure: (Structure Name)** page, but to add components, you must use the Product Workbench. See: To associate an ICC structure with an item, page 5-6.

For more information about ICC structures, see *Creating an Item Catalog Category Structure*, *Oracle Product Information Management Implementation Guide*.

1. Follow the steps described above in "To create a structure:"
2. In order to associate an ICC structure with an item, specify the following during the structure creation process:
 - Verify that the item is an Engineering item.
 - Select the same structure type and structure name as the ICC structure.
 - Select revision effectivity control.

If the system finds an ICC structure to associate, you receive the message "Components inherited from Item Catalog Category exist for this Structure. To view the inherited components, please save the Structure."

3. Save the structure.

You can now add components to the structure if you choose as described in "To create a structure:".

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

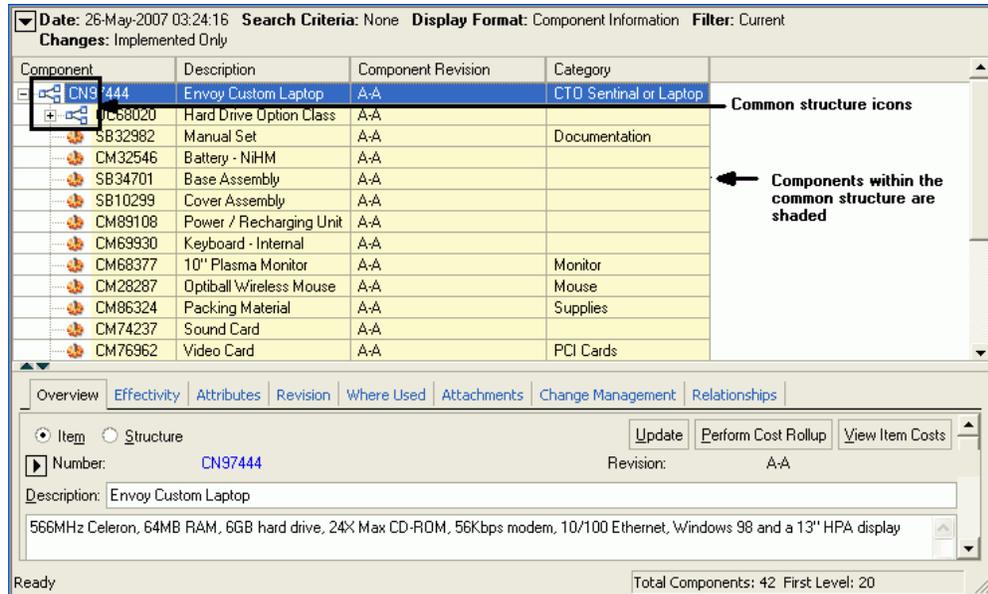
- Include in Cost Rollup

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, Oracle Product Information Management Implementation Guide*

See: *Viewing Structure Information, page 6-72*

See: *Defining Structures, Oracle Product Information Management Implementation Guide*

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

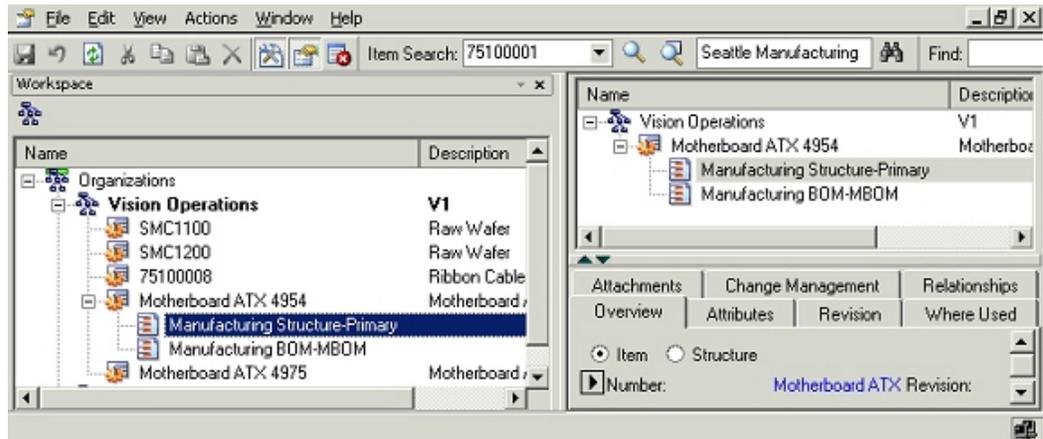
Referencing Common Bills and Routings, Oracle Bills of Material User's Guide

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.

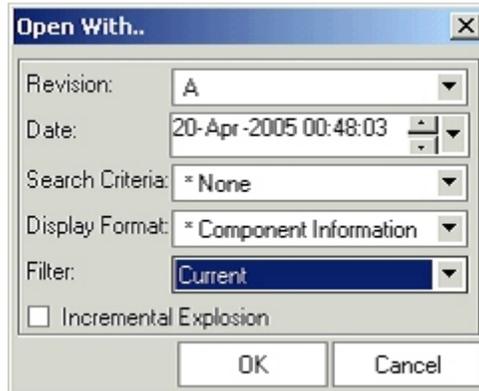
Structure list for an item



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

The screenshot displays the 'Exploded Structure' window for item CNS2777. The main table lists the following components:

Component	Description	Revision	Category
CNS2777	Sentinel Custom Desktop	A	CTO Sentinel or Laptop
WR11531	Desktop PC Warranty	A	
SB86662	Desktop Case	A	PC Cases
SB56349	Drive Mount Assembly	A	
MC61888	Drive Mount - Bottom - White	A	
MC48735	Drive Mount - Top - White	A	
RW40302	Resin	A	
RW15027	Plastic Stock - White	A	
CM96717	Screws, Steel 32, Phillips	A	Screw
CM45470	Drive Mount Faceplate	A	
SB32982	Manual Set	A	
DC68020	Hard Drive Option Class	A	

The interface also includes a summary section with the following details:

- Type: Root
- Name: Primary
- Effectivity Control: Date
- Engineering:

At the bottom right, a status bar indicates: Total Components=69 First Level=19

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

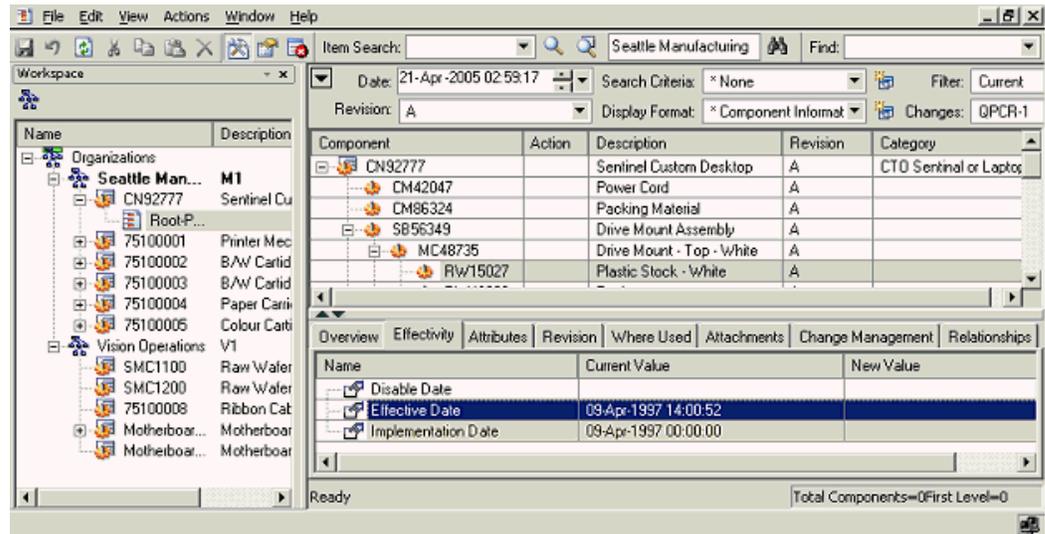
Effectivity tab

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



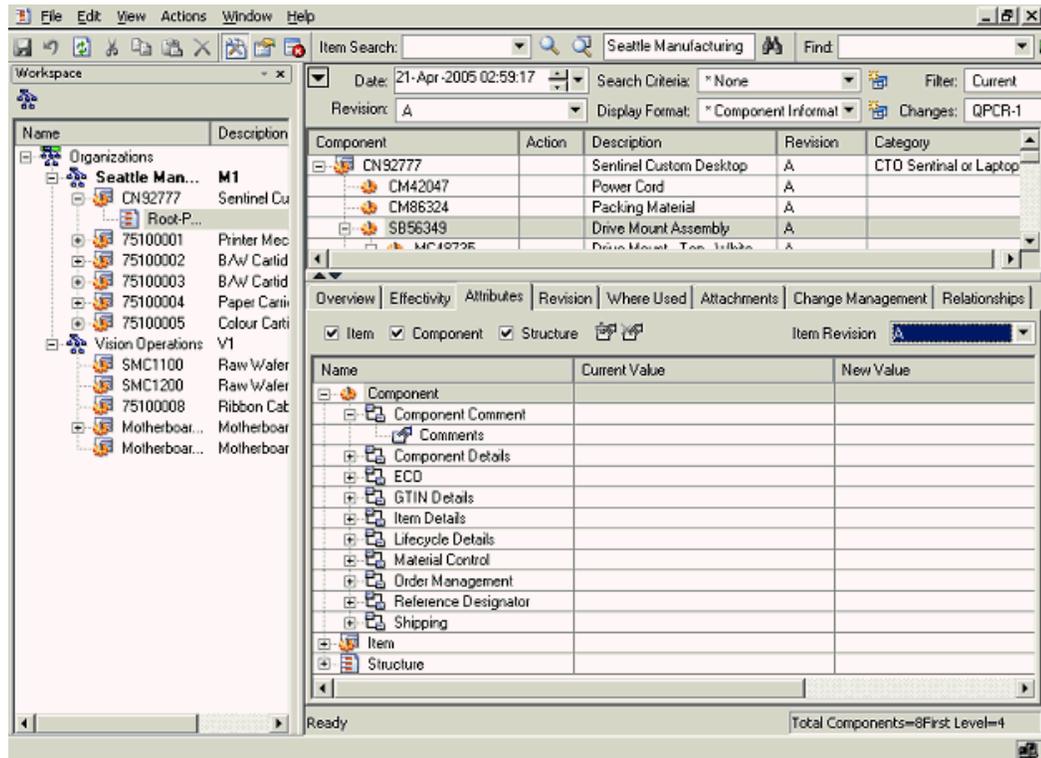
Attributes tab

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 6-3.

- 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.

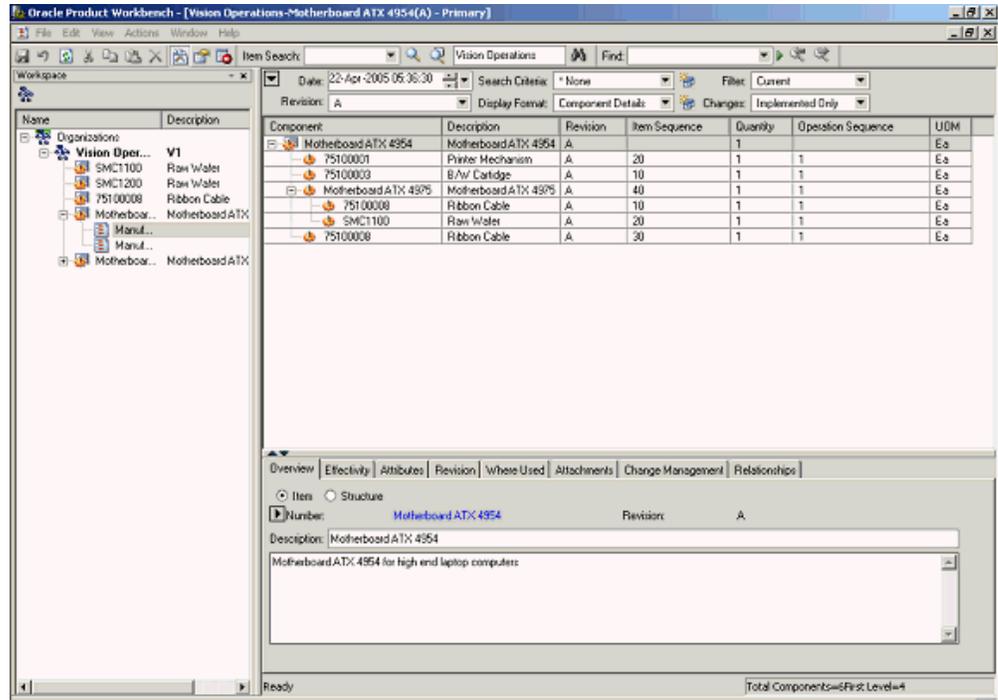
Sometimes, similar changes need to be made to component attributes and item

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

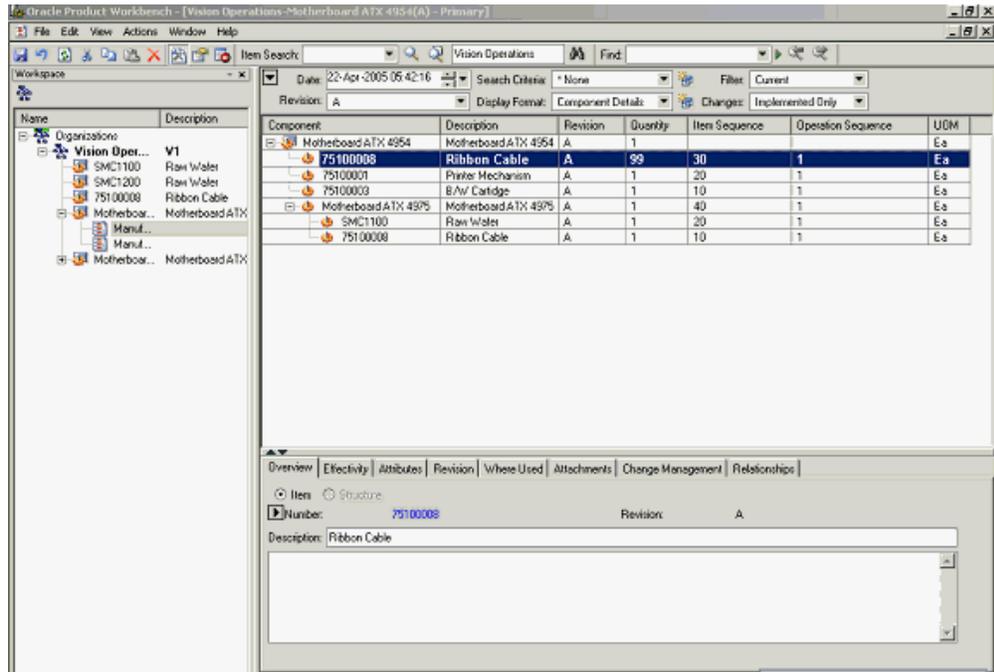


2. Modify any component or item attribute.

The structure is displayed in the mark up mode with the change highlighted.

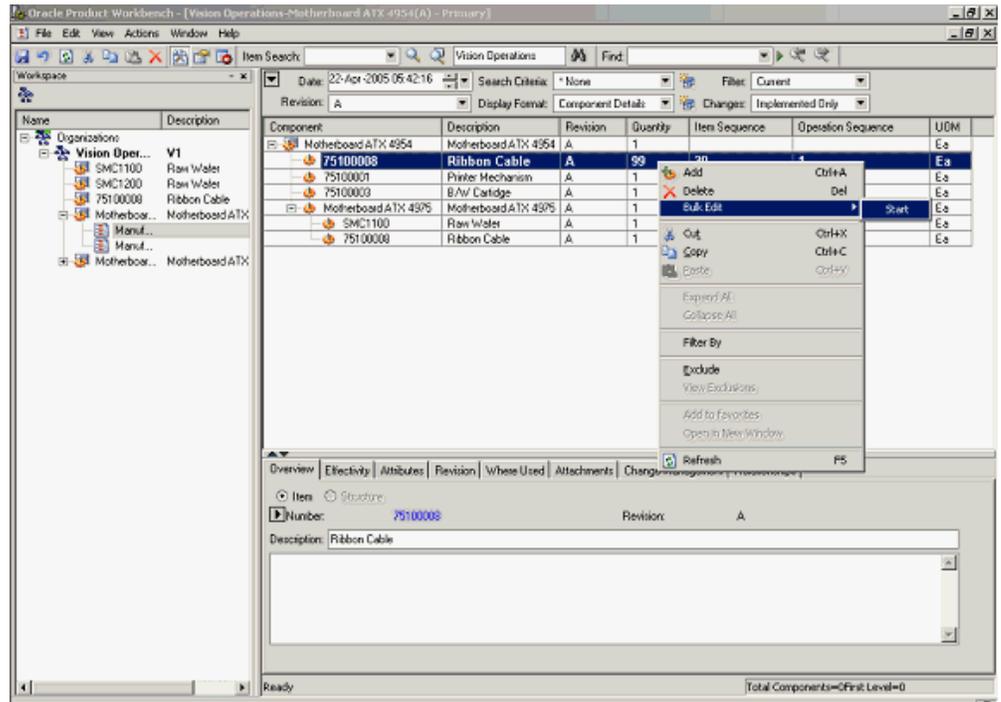
In the example below, the quantity of component#75100008 (at level 1 in the structure) is changed from 1 to 99

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

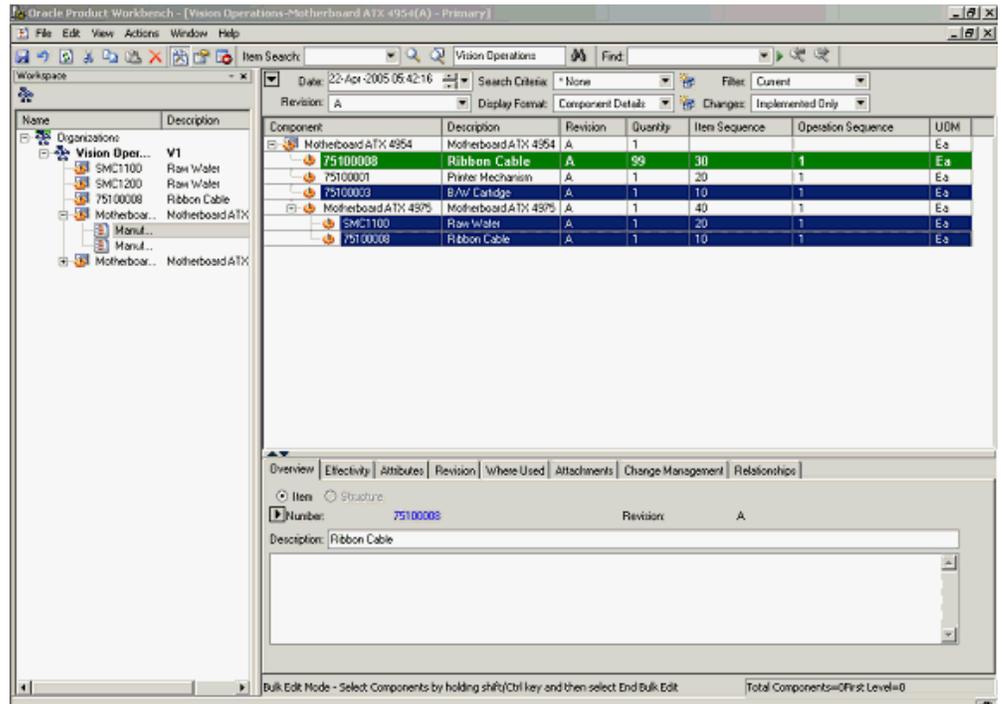
The screenshot displays the Oracle Product Workbench interface in Bulk Edit Mode. The main window shows a hierarchical tree on the left and a table of components on the right. The table lists components with their descriptions, revisions, quantities, and sequences. The component '75100008 Ribbon Cable' is highlighted in green. Below the table, there are tabs for 'Overview', 'Effectivity', 'Attributes', 'Revision', 'Where Used', 'Attachments', 'Change Management', and 'Relationships'. The 'Attributes' tab is active, showing the 'Number' field set to '75100008' and the 'Revision' field set to 'A'. The 'Description' field contains 'Ribbon Cable'. At the bottom, a status bar indicates 'Bulk Edit Mode - Select Components by holding shift/Ctrl key and then select End Bulk Edit' and 'Total Components=0First Level=0'.

Component	Description	Revision	Quantity	Item Sequence	Operation Sequence	UDM
Motherboard ATX 4954	Motherboard ATX 4954	A	1			Ea
75100008	Ribbon Cable	A	99	30	1	Ea
75100001	Printer Mechanism	A	1	20	1	Ea
75100003	B/W Cartridge	A	1	10	1	Ea
Motherboard ATX 4979	Motherboard ATX 4979	A	1	40	1	Ea
SMC1100	Raw Water	A	1	20	1	Ea
75100008	Ribbon Cable	A	1	10	1	Ea

5. Select all other components for which this change in attribute value should be implemented.

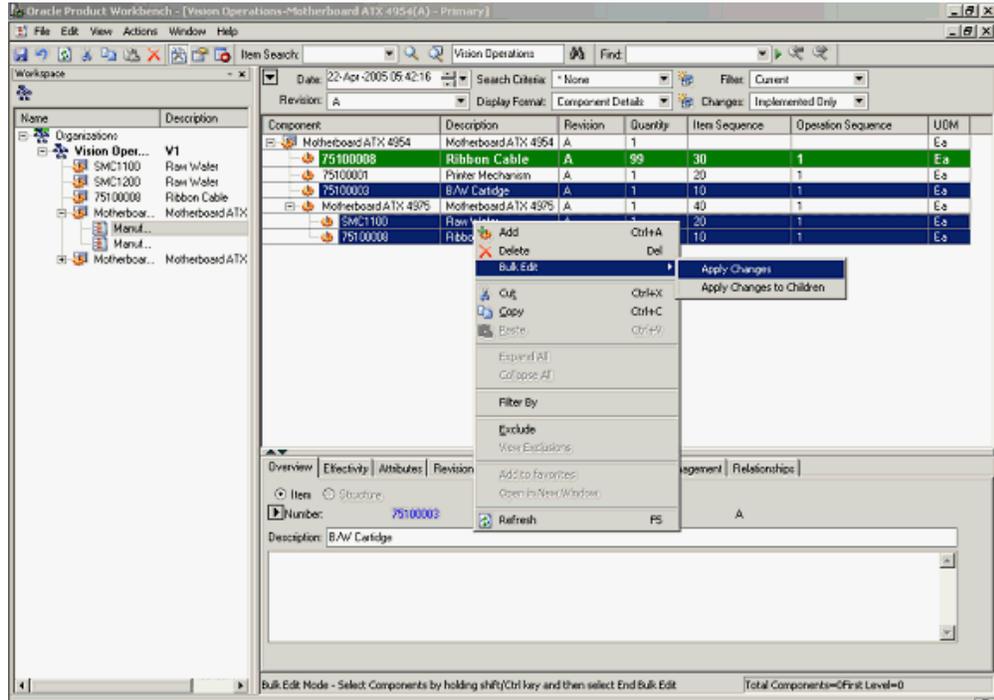
Note: You can use the [SHIFT] and [CTRL] keys to select the components.

Bulk Edit - Component Selection



6. Launch Bulk Edit - Apply Changes action from the right click menu.

Bulk Edit - Apply Changes

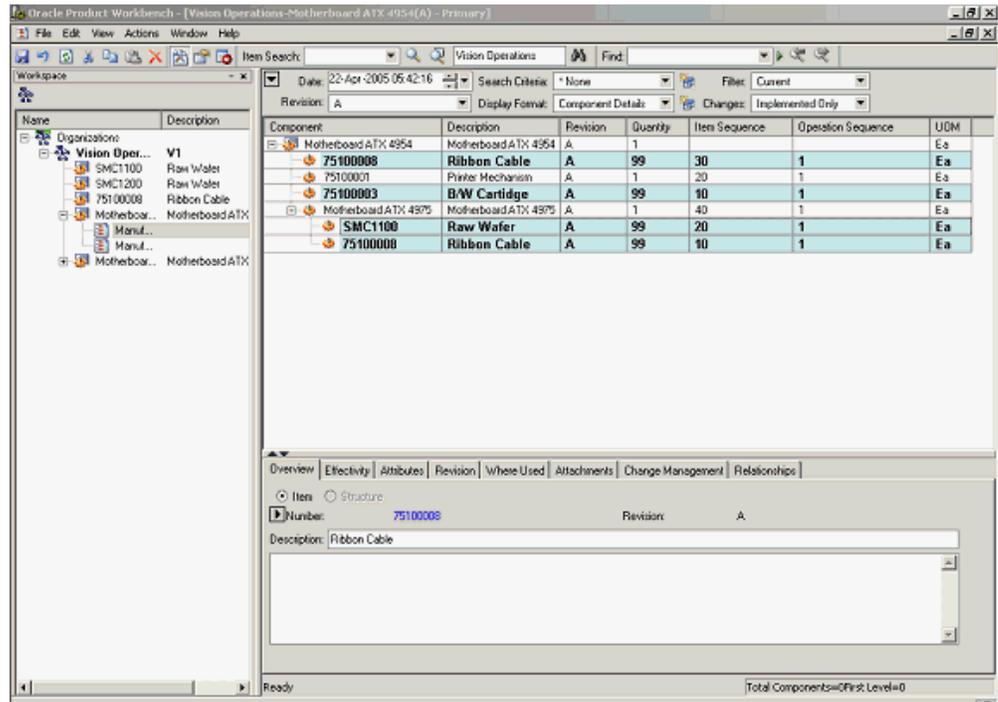


You can also select the **Bulk Edit -- Apply Changes** to Children action from the right click menu to change the attribute value of all children in a sub-assembly.

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.

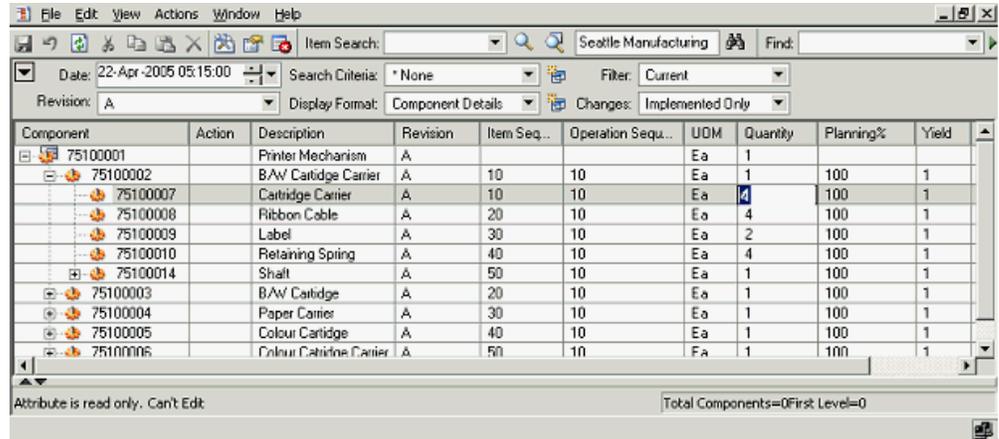
In-place Editing or Excel like Editing

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

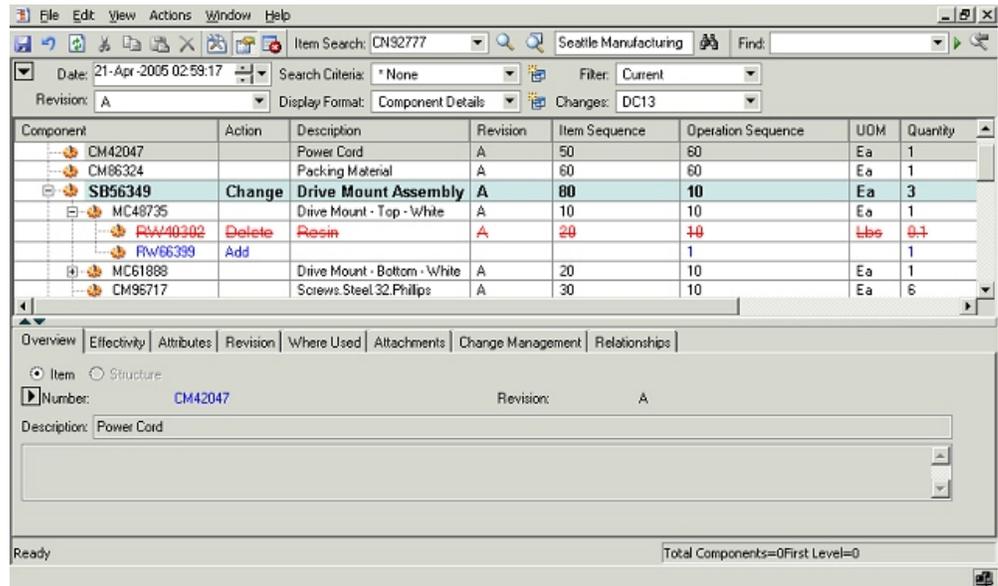
How to view structures in a change order:

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



3. 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:

1. Create/edit a structure in markup mode as per the procedure outlined for the create structure flow.
2. 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.

- 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

Create Change Order - Enter Header Information - Seattle Manufacturing

Category:

Change Type:

Change Number:

Change Name:

Description:

Item: Revision:

Additional Information

Assigned To: Requestor:

Priority: Reason:

Source Type: Source Name:

Organization Hierarchy:

< Back Next > Cancel

- Choose a change order based category from the category poplist.
- Choose a change order type from the change type poplist.
- 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.
- 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

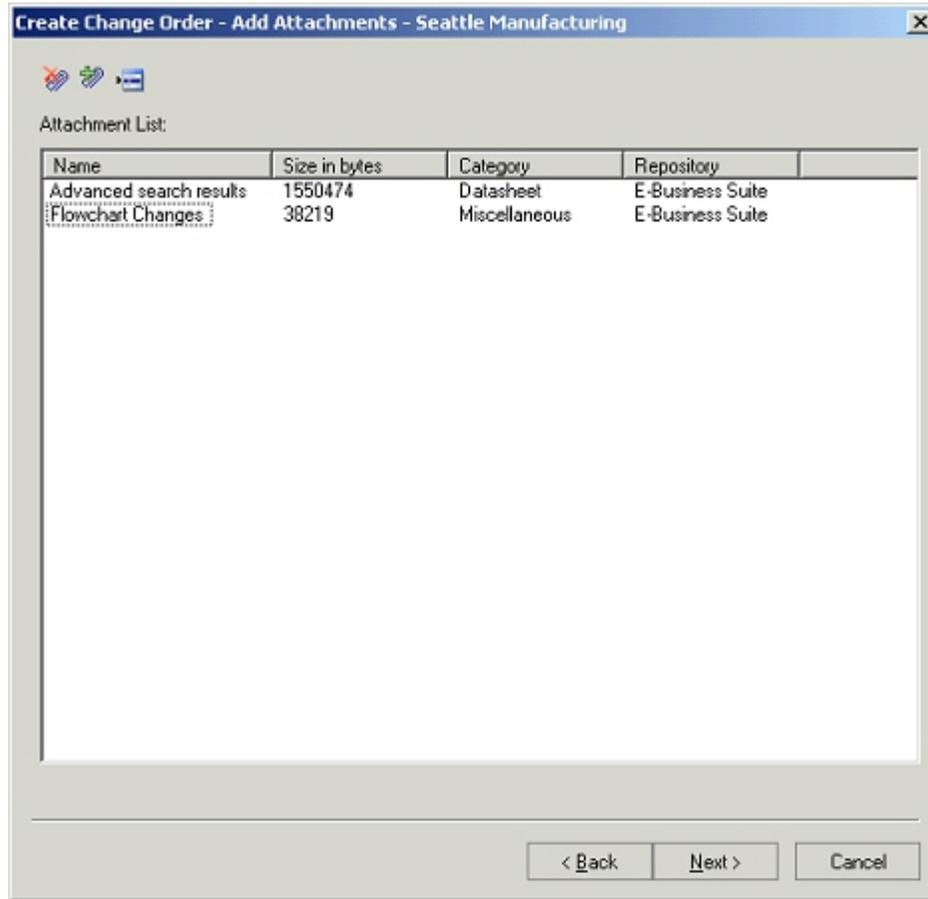
the current item revision. Please note that item and item revision fields are editable based on the subject type specified for the selected change order type.

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.

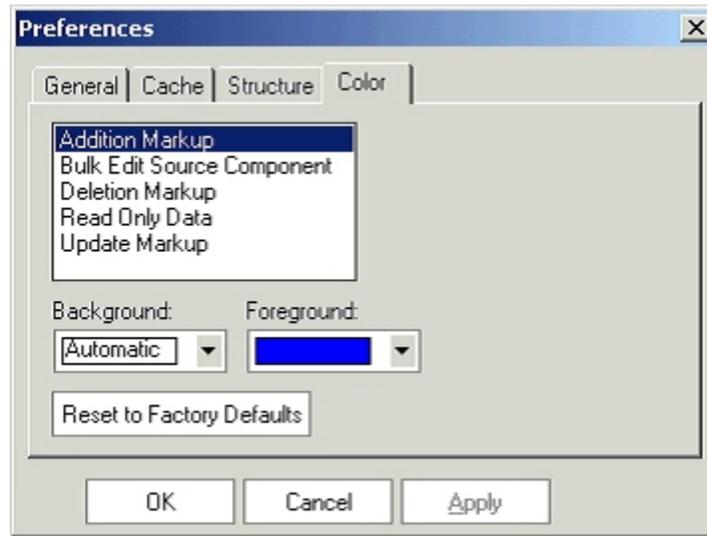
Marking Up Structures

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



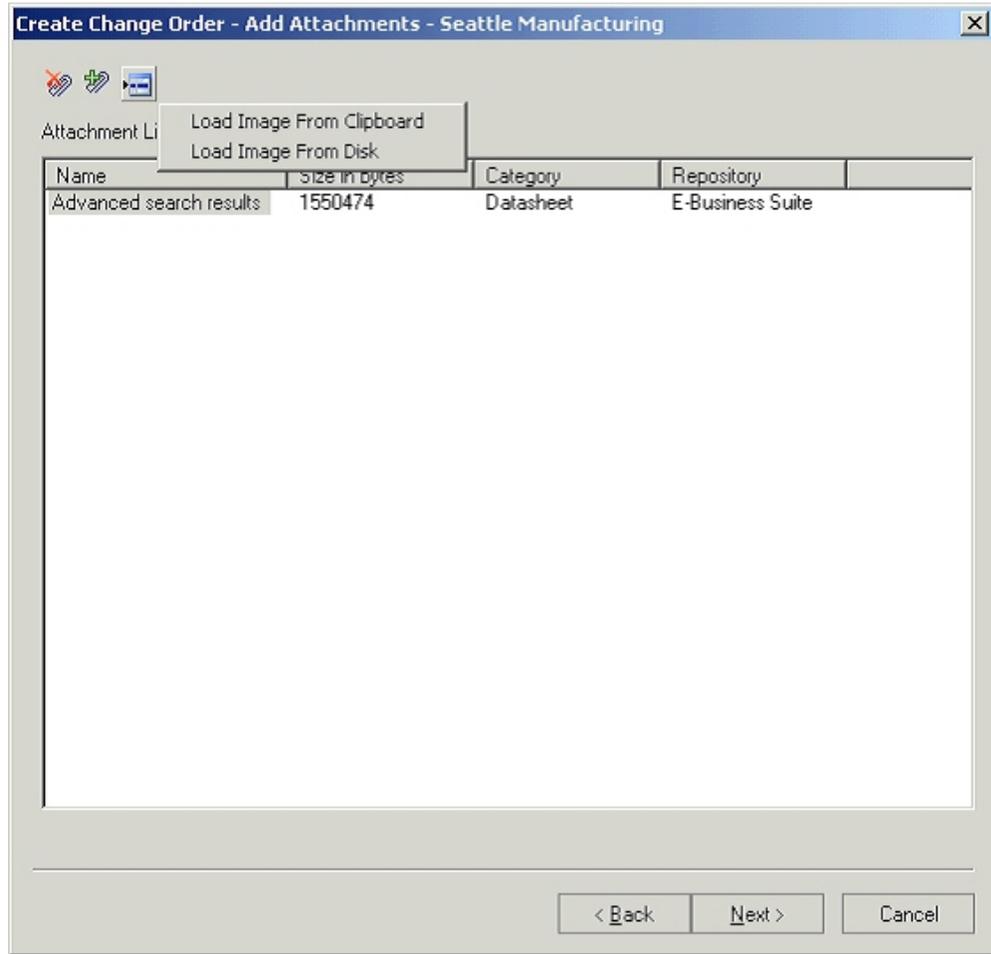
1. In the Product Workbench, invoke the Preferences dialog from the main menu (Edit->Preferences)
2. Navigate to the Color TAB.
3. Select the type of markup and specify a combination of background and foreground colors for the selected markup type. E.g. if the settings for Addition markup is an automatic 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:

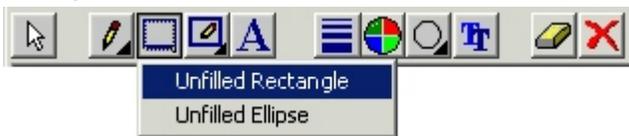
1. On the create change order/issue flow, navigate to the attachment list screen.
2. Click on the image attachment icon and choose to load an image from the clipboard or from an existing file from the disk.

Image Attachments



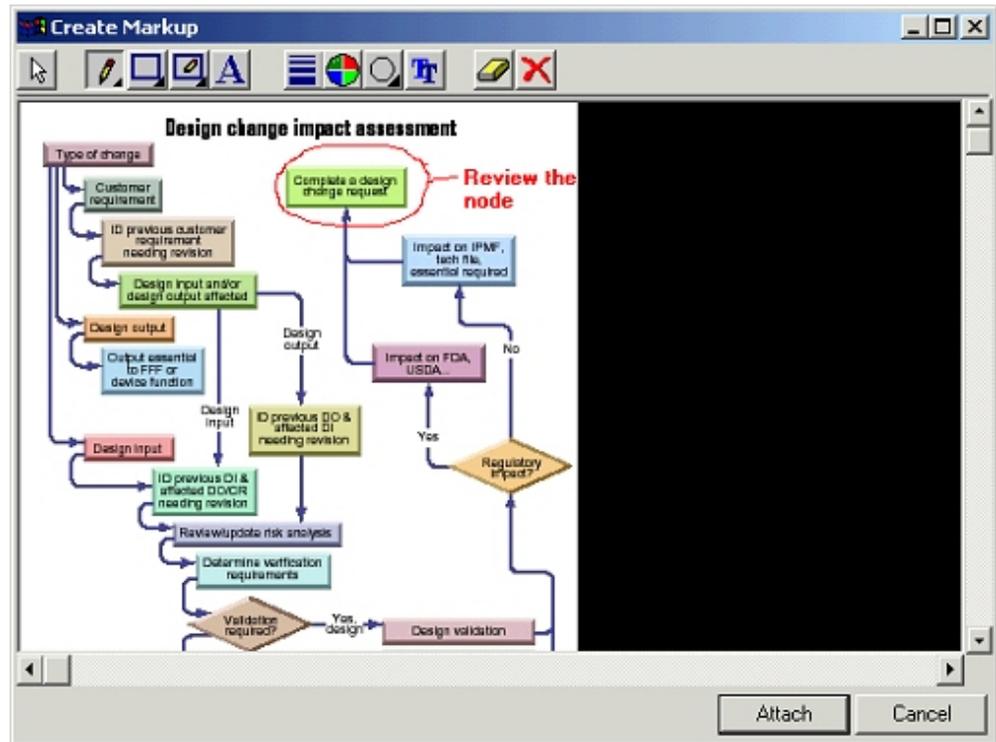
3. On the create markup screen, use the markup tools to draw lines with arrows or outline shapes, for example, to highlight areas in the image.

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



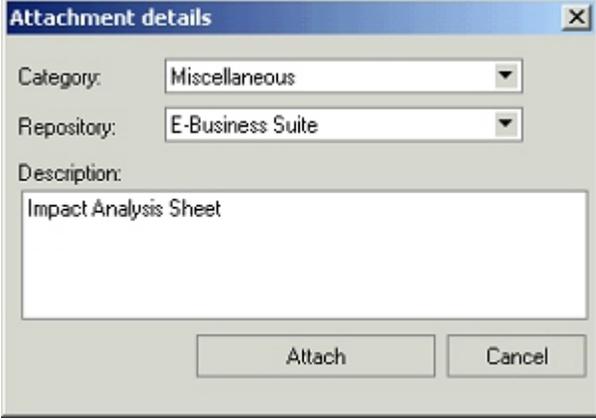
6. After the markup is completed, click on the attach button. Provide a name for the markup in the popup.

Create Markup as

The screenshot shows a 'Create Markup As...' dialog box. It has a title bar 'Create Markup As...' and a text input field labeled 'Name:' 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 screenshot of a software dialog box titled "Attachment details". The dialog has a blue title bar with a close button (X) in the top right corner. Inside the dialog, there are two dropdown menus: "Category:" with "Miscellaneous" selected, and "Repository:" with "E-Business Suite" selected. Below these is a text area labeled "Description:" containing the text "Impact Analysis Sheet". At the bottom of the dialog 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 [v]
Issue Type: Safety Iss [v]
Issue Number: QPCR-1
Issue Name: Problem Countermeasure report for Safety Sy

Description [...]
Issues with the safety system of Sentinel Desktop

Item: CN92777 [A] Revision: [v]

Additional Information

Assigned To: Supplier Core Group [A] Source Type: Customer [v]
Requestor: Amit Bansal [A] Source Name: Kim Reynolds [A]
Priority: Urgent [v]
Reason: Function [v]

< Back Next > Cancel

The screenshot shows a software window titled "Create Change Order - Enter Header Information - Boston Manufacturing". It contains the following fields and values:

- Category: Change Order
- *Change Type: ECO
- *Change Number: ECO137
- *Change Name: New component added at Op Seq 25
- Description: Supplier has taken the old component out of production, and we will now use the newer version.
- Item: AS54888
- Revision: A-A

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:

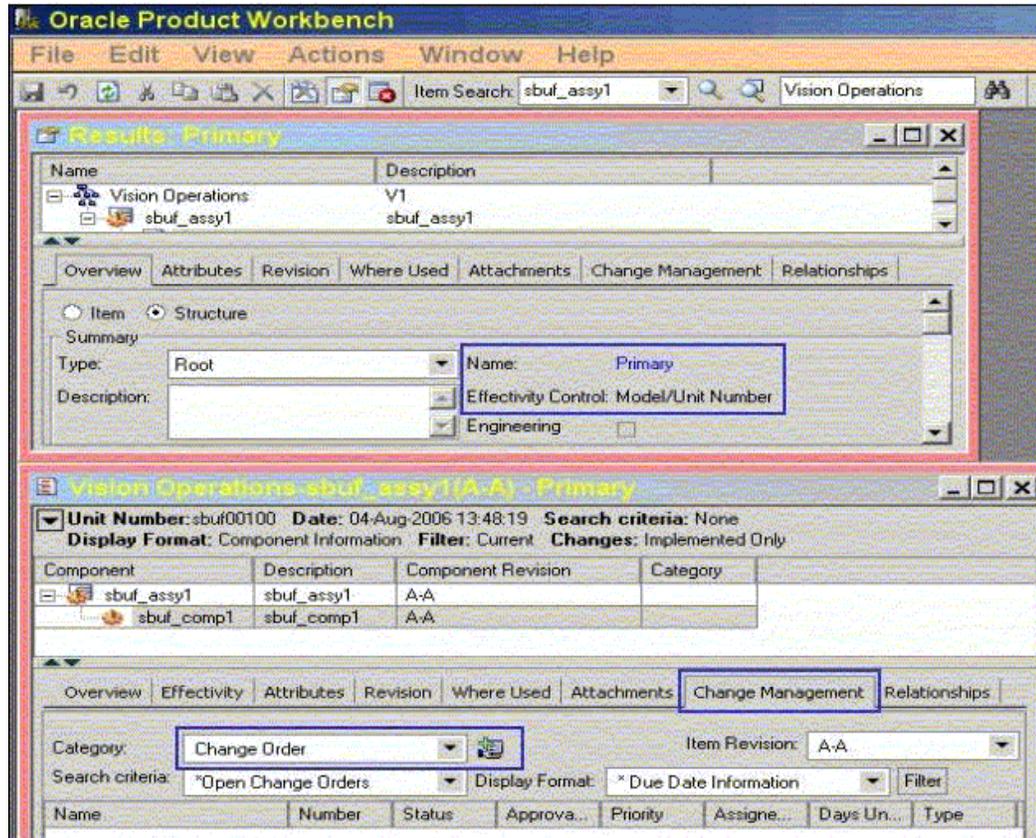
Name	Size in bytes	Category	Repository
Create Item Dialog	958222	Control Plan	E-Business Suite
Item Details	104453	APQPStatus Report	E-Business Suite

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 Universal Content Management (UCM). UCM is an embedded file system within the Oracle Database. UCM is certified for use as a content repository in three EBS applications - Oracle Projects, Oracle Internal Controls Manager, and Oracle Product Information 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, 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 Universal Content Management

The Oracle Universal Content Management product is part of Oracle Middleware. It offers advanced file management features, such as:

- Folders and workspaces for file management
- Content updates with file versioning
- 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 the content repository used:

- Adding Attachments, page 7-3
- Managing Attachments, page 7-14, 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 7-24

Troubleshooting Attachments, page 7-24

Managing Item Attachments, page 1-96

Setting Up a Content Management Repository, *Oracle Product Information Management Implementation Guide*

Attachments, *Oracle E-Business Suite 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.

Important: For items, you can add an attachment for a specific revision or for the item in general. In the Item Revision field, select a specific revision for Item Revision attachments or None for Item Level attachments from the dropdown list, then click Go.

If you want to view the attachment in other applications, such as Oracle Inventory or Oracle Purchasing, that do not support revisions, you must select None from the Item Revision dropdown list.

The screenshot displays the Oracle Item Catalog interface for Item VI40001, Revision B. The 'Attachments' tab is active, showing a table of existing attachments. A dropdown menu is open over the 'Add Attachment' button, with 'Desktop Files' selected. The table below shows the following data:

Select	Name	Description	Version	Modified Date	Status
<input type="checkbox"/>	Motherboard	Motherboard		23-Jan-2007 21:05:23	
<input type="checkbox"/>	38628_r12_ebs_attachments_to_i_func2.ppt		Miscellaneous	23-Jan-2007 20:54:21	
<input type="checkbox"/>	FDD_Business_Object_APIs_R12.doc	FDD_Business Object APIs_R1...	Assembly Instructions	23-Jan-2007 20:23:33	
<input type="checkbox"/>	FDD_BusinessObject_Events_R12.doc	FDD_BusinessObject_Events_R...	Assembly Instructions	23-Jan-2007 20:23:33	
<input type="checkbox"/>	TechnicalProductSpecification28182002.pdf	TechnicalProductSpecificati...	Technical Design	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 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 UCM or Oracle Content DB integrated with WebServices. See: *Setting Up a Content Management Repository, 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.

Important: For items, you can add an attachment for a specific revision or for the item in general. In the Item Revision field, select

a specific revision or None from the dropdown list, then click Go.

If you want to view the attachment in other applications, such as Oracle Inventory or Oracle Purchasing, that do not support revisions, you must select None from the Item Revision dropdown list.

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 a UCM or an Oracle Content DB repository integrated with WebServices. See: *Setting Up a Content Management Repository, Oracle Product Information Management Implementation Guide.*

4. In the Select column, check the files or folders that you want to attach.

- In the Attachment Category column, select the attachment category for each file and folder selected.
- 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 UCM or Oracle Content DB integrated with WebServices. See: *Setting Up a Content Management Repository, Oracle Product Information Management Implementation Guide.*

Add Attachment: Repository Files and Folders

Select Repository

Personalize "Select Repository"
 Repository ContentDB WS

Search

Name Description
 Created Date Within Days ▼ Last Modified Date Within
 Document Contains Search Version History
Go

Select All | Select None

us > EBS Container >

		Select Focus Name	Size	Attachment Category	Version	Created Date
<input type="checkbox"/>		Product		CADView-3D Model		21-Oct-2006
<input checked="" type="checkbox"/>		Motherboard		CADView-3D Model		21-Oct-2006
<input type="checkbox"/>		Documentation		CADView-3D Model		21-Oct-2006
<input type="checkbox"/>		Drawing-thani		CADView-3D Model		07-Nov-2006
<input type="checkbox"/>		MSS1[MSS1-10]		CADView-3D Model		19-Jan-2007
<input type="checkbox"/>		Motherboard		CADView-3D Model		24-Jan-2007
<input type="checkbox"/>		Specifications		CADView-3D Model		21-Oct-2006
<input checked="" type="checkbox"/>		CPIM.pdf	2.4 KB	CADView-3D Model	<input style="width: 30px;" type="text" value="4"/>	19-Jan-2007
<input type="checkbox"/>		cc1.pdf	2.4 KB	CADView-3D Model		26-Dec-2006

- Click Apply.

To attach a new folder:

- Navigate to the **Attachments** page. Select New Folder from the Add Attachment dropdown list, then click Go.

Important: For items, you can add an attachment for a specific revision or for the item in general. In the Item Revision field, select

a specific revision or None from the dropdown list, then click Go.

If you want to view the attachment in other applications, such as Oracle Inventory or Oracle Purchasing, that do not support revisions, you must select None from the Item Revision dropdown list.

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 a UCM or an Oracle Content DB repository integrated with WebServices. See: *Setting Up a Content Management Repository, 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

Repository

* Folder Location

* Name

Description

Set as Default

* Attachment Category

3. Click Apply.

To attach a URL:

1. Navigate to the **Attachments** page. Select URL from the Add Attachment dropdown list, then click Go.

Important: For items, you can add an attachment for a specific revision or for the item in general. In the Item Revision field, select a specific revision or None from the dropdown list, then click Go.

If you want to view the attachment in other applications, such as Oracle Inventory or Oracle Purchasing, that do not support revisions, you must select None from the Item Revision dropdown list.

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)

Recent Home Logout Preferences Help Page Personalize

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.

Important: For items, you can add an attachment for a specific revision or for the item in general. In the Item Revision field, select a specific revision or None from the dropdown list, then click Go.

If you want to view the attachment in other applications, such as Oracle Inventory or Oracle Purchasing, that do not support revisions, you must select None from the Item Revision dropdown list.

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)

Recent Home Logout Preferences Help Page Diag Personalize

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 23-Jan-2007 Meeting No

Description 23-Jan-2007 Meeting Notes

Attachment Category Miscellaneous

* Text 23-Jan-2007 Meeting Agenda

- 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 7-1

Managing Attachments, page 7-11

Logging On to Repositories, page 7-24

Troubleshooting Attachments, page 7-24

Managing Item Attachments, page 1-96

Setting Up E-Business Suite Attachments, *Oracle Product Information Management Implementation Guide*

Defining Item Attachment Categories, *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 displays the Oracle Item Catalog interface for Item VI40001, Revision B. The 'Attachments' tab is active. A search filter for 'Category' is set to 'All', with a dropdown menu open showing options: All, Assembly Instructions, Functional Design, Miscellaneous, and Technical Design. Below the search area is a table of attachments:

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	
<input type="checkbox"/>	FDD_BusinessObject_Events_R1...	FDD_BusinessObject_Events_R1...		Assembly	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 7-14.
- **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 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 7-16*.
- **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 7-17*.

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 4-21)

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 4-21)

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, Oracle Product Information Management Implementation Guide*.
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
 Specifications | Revisions | **Attachments** | Organizations | People | Associations | Syndication
 Shortcuts Create Document

Recent Home Logout Preferences Help

Item.Revision

Attachments

View

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 7-19

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 a UCM or 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 UCM or 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.

UCM or Oracle Content DB opens in a new page at the particular folder location.

To manage all file versions (version history):

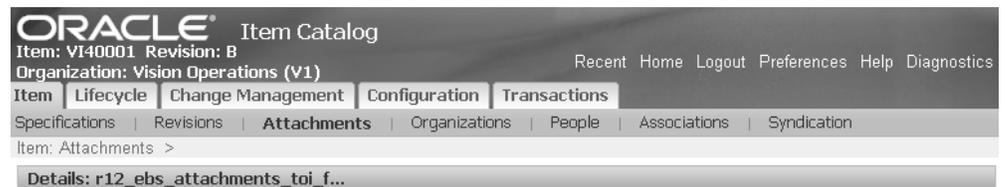
1. In the **Attachments** page, click the Attachment Details icon in the Details column for a particular attachment.

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

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 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 UCM or Oracle Content DB:

Users are granted access to folders in UCM or Oracle Content DB in one or more of the following ways:

- directly, in UCM or Oracle Content DB
- by inheriting access from a parent folder in UCM or 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, Oracle Product Information Management Implementation Guide*)
- 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 1-96.

Related Topics

Using E-Business Suite Attachments, page 7-1

Adding Attachments, page 7-3

Logging On to Repositories, page 7-24

Troubleshooting Attachments, page 7-24

Managing Item Attachments, page 1-96

Setting Up Content Management Repositories, *Oracle Product Information Management Implementation Guide*

Setting Up E-Business Suite Attachments, *Oracle Product Information Management*

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 Universal Content Management (UCM) or 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, UCM, 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, UCM, or OCD. See: *Setting Up a Content Management Repository, Oracle Product Information Management Implementation Guide*

Related Topics

Viewing Attachments, page 7-14

Adding Attachments, page 7-3

Troubleshooting Attachments, page 7-24

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 UCM or 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 UCM or 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 UCM or WebServices-based Content DB Repository, you can only see those files and folders in the Attachments list for which you have view access.

Publishing Items and Structures to Multiple Systems

This chapter covers the following topics:

- Publishing Overview
- Publishing Items and Structures
- Viewing the Publishing History

Publishing Overview

You can publish the following product data to various consuming systems:

- Metadata
 - Value sets
 - Item catalog categories
- Items
- Structures

Publishing to different systems enables you to centrally define products in Oracle Product Information Management and maintain a common product data model across an enterprise with multiple systems. Before publishing items and structures, you must publish their related value sets and item catalog categories.

For more information about how product data synchronizes with participating applications using the publishing process, see Chapter 2: Oracle Product Master Data Management Integration Base Pack, *Oracle Product Master Data Management Integration 2.5 - Implementation Guide*. This guide is part of the Oracle Application Integration Architecture Release 2.5 Media Pack , which you can download from <http://edelivery.oracle.com>.

Related Topics

Publishing Value Sets, *Oracle Product Information Management Implementation Guide*

Assigning Systems to an Item Catalog Category, *Oracle Product Information Management Implementation Guide*

Publishing Item Catalog Categories, *Oracle Product Information Management Implementation Guide*

Publishing Items and Structures, page 8-2

Viewing the Publishing History, page 8-6

Oracle Product Information Management Web Services Overview, *Oracle Product Information Management Implementation Guide*

Publishing Items and Structures

You can publish an item and its structure from the item's simple **Search Results** page, the advanced **Search Results** page, the **Favorite Items** page, the **Browse Catalog** page, the item's **Overview** page, or directly from the Oracle Applications Home Page using the Publish Items link. You can include items from multiple item catalog categories and organizations in the same batch.

Important: You can only publish items that have the Publish privilege. The Publish action is only available from an item's **Overview** page if the item has the Publish privilege. However, for practical reasons, you can only publish items that have the View privilege, too. You are only able to publish those items that you can view.

Prerequisites

- Before publishing any data, you must set up Oracle Data Integrator Artifacts and Web Services for Oracle Product Information Management. For set up instructions, refer to My Oracle Support ID 888696.1. For more information about the Web Services used during publishing, see: Oracle Product Information Management Web Services Overview, *Oracle Product Information Management Implementation Guide*.

To publish items and structures to a new batch:

1. From the **Oracle Applications Home Page**, select an appropriate responsibility, then select one of the following options to find items:
 - Item Simple Search

See: Searching for Items, page 1-17 for instructions on how to find items.

- Item Advanced Search
See: Searching for Items, page 1-17 for instructions on how to find items.
- Favorite Items
See: Managing Favorite Items, page 1-23
- Browse Catalog
See: Browsing the Item Catalog and Alternate Catalogs, page 1-2

2. Depending on which option you use to find items, do the following:
 - In the **Search Results** page, select the items that you want to publish.
 - In the **Favorite Items** page, select the items that you want to publish.
 - In the **Browse Catalog** page, under the items tab, select the items that you want to publish.

You can also publish an item from the item's **Overview** page or from the **Oracle Applications Home Page**, by selecting an appropriate responsibility, then selecting Publish Items.

3. In the Select Items field, select Publish, then click Go.

If publishing from an item's **Overview** page, in the Actions field, select Publish, then click Go to automatically select the item for publishing.

Alternatively, in the Shortcuts field, select Publish Item, then click Go or, from the **Oracle Applications Home Page**, select the Publish Items link. You can create a new batch or copy an existing batch using either of these navigation methods (see "To publish items and structures copied from an existing batch" below).

4. In the **Publish Items: Batch Details** page, enter the following:

- Batch Name
Required. Enter a unique batch name to identify the batch.
- Structure Name
Optional. If you want to publish a structure for the selected items, select a structure name from the list. The list includes all available structure names defined in the system irrespective of the items selected. The selected structure is relevant to only those items that have this structure defined.
- Structure Explosion Date

If you selected a structure name, then select the effective date of the structure. This date determines which revision of the item is selected and the components effective for the item revision selected.

- Number of Levels to Publish

If you selected a structure name, then enter the number of structure levels to publish. The default value is 60, which is the maximum number of levels supported.

- Explode Standard BOM

If you selected a structure name, selecting this option explodes the standard BOM.

5. In the Selected Items region, you can remove any selected items by clicking Remove or you can add new items to the list by clicking Add to Batch.

6. Click Continue.

7. In the **Publish Items: Source Systems** page, enter the following:

- Batch Name

You can change the batch name entered earlier if desired.

- Workspace Name

Required. This field is used by Siebel for grouping multiple batches into a single group. Enter the name of the Siebel workspace project. If you are not using Siebel, enter any value.

- Auto-Release

Required. Select Default, Yes, or No from the list. This field refers to auto-releasing a Siebel workspace project.

- Default - the workspace project auto-releases based on the setting of Auto Release within Siebel.
- Yes - once the items are published to Siebel, the workspace project is automatically released.
- No - once the items are published to Siebel, you need to manually release the workspace project.

8. Select the systems to which you want to publish by clicking Add Another Row. Click Add Another Row as many times as needed to publish to multiple systems.

Tip: You can define default systems for an item catalog category (see: *Assigning Systems to an Item Catalog Category, Oracle Product Information Management Implementation Guide*). The default systems appear automatically in the **Publish Items: Source Systems** page. You can delete these default systems by selecting them and clicking Remove, if necessary.

9. Click Finish.

The **Publish History** page displays a confirmation message, saying the batch has been submitted. The search region of the page displays the status of each individual item and system combination selected.

To publish items and structures copied from an existing batch:

You have the choice to either create a new batch or copy an existing batch when publishing items and structures using one of the following navigation paths.

1. Navigate to the **Publish: Copy Batch** page using one of the following methods:
 - From the **Oracle Applications Home Page**, select an appropriate responsibility, then select Publish Items.
 - Search for and select an item. In the item's **Overview** page, in the Shortcuts field, select Publish Item.
2. In the **Publish: Copy Batch** page, in the Create field, select Copy of Existing Batch. In the Select Batch field, search for and select a batch to copy. Click Continue.

Note: Alternatively, you can select New Batch. Follow the instructions above in "To publish items and structures to a new batch".

3. In the **Publish Item: Batch Details** page, all fields are pre-filled with the values copied from the selected existing batch. Enter a unique batch name.
You can change any of the pre-filled field values as well as add or remove items from the batch.
4. Click Continue.
5. In the **Publish Items: Source Systems** page, all fields are pre-filled with the values copied from the selected existing batch.
You can change any of the pre-filled field values as well as add or remove systems from the batch.

6. Click Finish.

The **Publish History** page displays a confirmation message, saying the batch has been submitted. The search region of the page displays the status of each individual item and system combination selected.

Related Topics

Publishing Overview, page 8-1

Publishing Value Sets, *Oracle Product Information Management Implementation Guide*

Assigning Systems to an Item Catalog Category, *Oracle Product Information Management Implementation Guide*

Publishing Item Catalog Categories, *Oracle Product Information Management Implementation Guide*

Viewing the Publishing History, page 8-6

Oracle Product Information Management Web Services Overview, *Oracle Product Information Management Implementation Guide*

Viewing the Publishing History

You can access the **Publish History** page from the Setup Workbench (Publish History tab), the Import Workbench (Publish History tab), an item's **Overview** page (Publish History shortcut), after the item publication process, and using a link from the **Oracle Applications Home Page**.

Plan to periodically purge the publishing history so that large amounts of data do not affect the database's performance.

To view the publishing history of item catalog categories and value sets:

1. From the **Oracle Applications Home Page**, select an appropriate responsibility, then click Setup Workbench.
2. In the **Item Catalog Categories** page, click the Publish History tab.
3. In the **Publish History** page, View field, select whether you want to view only item catalog categories (ICCs), value sets, or all ICCs and value sets published.
4. Select one of the following options to filter the data:
 - Show table data when all conditions are met.
 - Show table data when any condition is met.
5. You must enter a search criteria value in at least one of the following fields:

- Batch ID
 - Batch Name
 - System
 - Status
6. Optionally, add additional search criteria by selecting a criteria in the Add Another field. Click Add.

You can add as many additional search criteria as needed. In addition to adding more of the search criteria fields listed above, you can also add the following criteria:

- Name
Enter the name of an ICC or value set.
 - Published By
Enter the user's name who published the data.
 - Published Date
 - Show Associated Entities
Select Yes to show published parent or child ICCs, for example. Select No to show only the entities that meet the search criteria.
 - Workspace Name
7. Click Go.

To view item publishing history:

1. From the **Oracle Applications Home Page**, select an appropriate responsibility, then click Item Publish History.

Alternatively, you can navigate to the item Publish History page from:

- An item's **Overview** page. In the Shortcuts field, select Publish History. The **Publish History** page opens, automatically displaying the selected item's publishing history.
- Import Workbench, Publish History tab.

The **Publish History** page also displays immediately following the submittal of a batch for publication.

2. In the **Publish History** page, select one of the following options to filter the data:
 - Show table data when all conditions are met.
 - Show table data when any condition is met.

3. You must enter a search criteria value in at least one of the following fields:
 - Batch ID
 - System
 - Status
 - Item

4. Optionally, add additional search criteria by selecting a criteria in the Add Another field. Click Add.

You can add as many additional search criteria as needed. In addition to adding more of the search criteria fields listed above, you can also add the following criteria:

 - Batch Name
 - Organization
Enter the name of the organization where the data was published.
 - Published By
Enter the user's name who published the data.
 - Published Date
 - Show Associated Entities
Select Yes to show published parent or child structures, for example. If the item structure is published, the status of the components display. Select No to show only the entities that meet the search criteria.
 - Workspace Name

5. Click Go.

To view the batch details:

1. From the **Publish History** page search results, click Show to view the Publish Status Message for a batch row.

2. Click a Batch ID number to view the **Batch Details** page.

This read-only page displays all of the batch parameters originally selected.

To purge the publishing history:

The system administrator (or someone designated by the system administrator) must purge the publishing history periodically so that large amounts of data do not affect the database's performance. Purging also enables the system to use previously used Batch ID numbers again.

1. From the **Oracle Applications Home Page**, select the System Administrator responsibility, then click Requests.
2. In the **Find Requests** window, click Submit a New Request.
3. In the **Submit Request** window, Name field, search for and select the EGO Publish History Purge Program.
4. In the **Parameters** window, you can optionally enter the following to narrow the range of data purged:
 - Batch ID
 - Target System Code
Enter the system code for which you want to purge data.
 - Date From
 - Date To
 - Status
The publication status, such as Succeeded.
 - Publish By
The name of the person who published the data.
 - Entity Type
For example, item, item catalog category, or value set.Click OK.
5. Click Submit.

Related Topics

Publishing Overview, page 8-1

Publishing Value Sets, *Oracle Product Information Management Implementation Guide*

Assigning Systems to an Item Catalog Category, *Oracle Product Information Management Implementation Guide*

Publishing Item Catalog Categories, *Oracle Product Information Management Implementation Guide*

Publishing Items and Structures, page 8-2