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<td>26-6</td>
<td>Predefined Data for Inter-Organization Transfers - Standard to First-in, First-out (FIFO) Costing Organizations- FOB Receipt-Sub-Inventory-Asset-Asset Flow</td>
</tr>
<tr>
<td>26-7</td>
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<td>26-11</td>
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<td>26-12</td>
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<td>Setup Data for Standard Discrete Job - Standard Costing Organization Flow</td>
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<td>36-5</td>
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<td>42-6</td>
<td>Setup Data for Create, Transact and Complete Standard Discrete Job Flow</td>
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</table>
Preface

This document describes the test flows available with the Starter Pack of the Functional Testing Suite for E-Business applications. The test flows cover features of the E-Business Suite Release 12.1.3.

Audience

This document should be used by implementers and testers of E-Business Suite applications. The document can also be referenced by end users to seek details about the test flows.

Using This Guide

This guide is organized as follows:


Part II, "Customer Relationship Management" provides information about the test flows for Customer Relationship Management applications.

Part III, "Financials" provides information about the test flows for Financial applications.

Part IV, "Human Capital Management" provides information about the test flows for Human Capital Management applications.

Part V, "Lease Management" provides information about the test flows for Lease Management applications.

Part VI, "Procurement" provides information about the test flows for Procurement applications.

Part VII, "Projects" provides information about the test flows for Projects applications.

Part VIII, "Supply Chain Management" provides information about the test flows for Supply Chain Management applications.

Appendix A, "Test Flow Name Mappings" provides a mapping between the functional and technical names of the test flows.

In this Document

This document refers to or provides information as follows:

- The acronym OATS refers to the Oracle Application Testing Suite product.
- “Seed data” is referred to as "Predefined data".
"Form" is referred to as "Window".

- The chapter name mirrors the exact navigation path to the test flow in Oracle Flow Builder.
- Product level prerequisites and setups are explained in the chapter overview. Flow specific details, if any, are explained along with the flow description.
- All profile options are set at User level, unless indicated otherwise for a test flow.

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**Related Documents**

For more information, see the following documents in the Oracle Application Testing Suite documentation set:

- Oracle Functional Testing OpenScript User’s Guide
- Oracle Functional Testing OpenScript Programmer’s Reference

For instructions on how to assign a responsibility, or set a profile option, see:

- Human Resources Configuring, Reporting, and System Administration Guide 12.2

**Conventions**

The following text conventions are used in this document:

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.</td>
</tr>
<tr>
<td><em>italic</em></td>
<td>Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.</td>
</tr>
<tr>
<td>monospace</td>
<td>Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.</td>
</tr>
</tbody>
</table>
Part I

Introduction


This Part contains the following chapter:

- Chapter 1, "Introduction"
This document provides information on the Starter Pack of Functional Testing Suite for Oracle E-Business Suite, Release 12.1.3, which is delivered as part of the Oracle Flow Builder module.

The document provides description of each flow, thereby providing an insight about the purpose of the flow. These test flows are built using E-Business Suite of applications on Release 12.1.3 with a sample database, which is required to run these flows. You can also modify these flows or use them as examples for creating functional test flows against your own EBS instance and database. The generated automated test scripts will run in the Oracle Functional Testing OpenScript scripting platform, which is a component of the Oracle Application Testing Suite product.
Part II
Customer Relationship Management

This Part of the Oracle Flow Builder Starter Pack for E-Business Suite Release 12.1.3 provides information about the flows used with Customer Relationship Management applications.

This Part contains the following chapters:

- Chapter 2, "Oracle Advanced Scheduler"
- Chapter 3, "Oracle Customer Support"
- Chapter 4, "Oracle Field Service"
- Chapter 5, "Oracle Incentive Compensation"
- Chapter 6, "Oracle iStore"
- Chapter 7, "Oracle Quoting"
- Chapter 8, "Oracle Spares Management"
- Chapter 9, "Oracle TeleSales"
- Chapter 10, "Oracle TeleService"
Oracle Advanced Scheduler is a key component that transforms field service representatives from strict service delivery agents to proactive customer relationship managers. Advanced Scheduler creates more productive and cost-effective schedules by using a set of predefined constraints and associated costs.

This chapter describes the following test flows in Oracle Advanced Scheduler:

- Create Scheduler Rule

### Prerequisites

- User is logged in with Field Service Manager responsibility.

### Profile Options

Not applicable.

### Predefined Data

Not applicable.

### Setup Data

Not applicable.

#### 2.1 Create Scheduler Rule

Creates a scheduler rule based on the user ID of the logged in user and also deletes the rule.

### Prerequisites

- User is logged in with Field Service Manager responsibility.

### Profile Options

Not applicable.

### Predefined Data

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Scheduler Rule</td>
<td>Route Mode</td>
<td>Only Route (Pick schedule rule from the list)</td>
</tr>
</tbody>
</table>

### Setup Data

Not applicable.
Customer Support is a module of Oracle TeleService. It enables support specialists to effectively create, manage, and resolve customer issues. Its components like Service Desk offers a comprehensive employee help desk solution that improves the effectiveness and quality of internal support operations. Case management is targeted to meet the needs of law enforcement agencies, human and social services organizations, and claims and benefits departments.

This chapter describes the following test flows in Oracle Customer Support:

- Create Service Request Task in Customer Support Specialist
- Create Service Request Task in Service Desk Analyst
- Create Service Request Task in Case Worker

**Prerequisites**

- User is logged in with Service, Standard responsibility.
- Task types and task status.

**Profile Options**

**Table 3–1  Profile Options for Oracle Customer Support**

<table>
<thead>
<tr>
<th>Profile</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service: Default Operating Unit</td>
<td>Vision Operations</td>
</tr>
</tbody>
</table>

**Predefined Data**

**Table 3–2  Predefined Data for Oracle Customer Support**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Service Request</td>
<td>Type</td>
<td>Customer Call</td>
</tr>
<tr>
<td></td>
<td>Severity</td>
<td>High</td>
</tr>
<tr>
<td></td>
<td>Status</td>
<td>Open</td>
</tr>
</tbody>
</table>

**Setup Data**

Not applicable.

### 3.1 Create Service Request Task Customer Support Specialist

Agents can create service requests and tasks in Customer Support Specialist.
Prerequisites
Customers and contacts.

Profile Options
Not applicable.

Predefined Data

Table 3–3  Predefined Data for Create Service Request Task Customer Support Specialist Flow

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update Service Request</td>
<td>Task Type</td>
<td>Activate Service</td>
</tr>
</tbody>
</table>

Setup Data
Not applicable.

3.2 Create SR Task Service Desk Analyst

Agents can create service requests and tasks in Service Desk Analyst.

Prerequisites
- Customers and contacts.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data

Table 3–4  Setup Data for Create SR Task Service Desk Analyst Flow

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agent Dashboard</td>
<td>Search key----Employee</td>
<td>A Bakker (Pick appropriate resource)</td>
</tr>
<tr>
<td></td>
<td>Name: Value</td>
<td></td>
</tr>
</tbody>
</table>

3.3 Create SR Task Case Worker

Agents can create cases and tasks in Case Worker.

Prerequisites
- Case types or service request types.
- Task types and task status.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.
Oracle Field Service helps users by automating the process of dispatching field technicians to service calls in remote locations based on their qualification, availability, and geographic relevance.

4.1 Oracle Field Service Dispatch Center

The Oracle Field Service Dispatch Center is a one stop dashboard and workbench for dispatchers. It assists with planning, scheduling, committing, monitoring, and adjusting field service activities and schedules.

This chapter describes the following test flows in Oracle Field Service Dispatch Center:

- Schedule Task with Intelligent Mode
- Schedule Task with Autonomous Scheduler

Prerequisites

- Field service dispatcher role is assigned to Field Service Manager responsibility.
- Logged in user, Operations, is assigned to Field Service Manager responsibility.

Profile Options

<table>
<thead>
<tr>
<th>Table 4–1 Profile Options for Oracle Field Service Dispatch Center Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile</td>
</tr>
<tr>
<td>---------</td>
</tr>
<tr>
<td>CSF: Scheduler Active</td>
</tr>
<tr>
<td>CSF: Dispatch Center Auto Refresh Period</td>
</tr>
</tbody>
</table>

Predefined Data

Not applicable.

Setup Data

Not applicable.

4.1.1 Schedule Task with Intelligent Mode

Schedules a field service task from Dispatch Center in Intelligent Mode; uses territory qualifiers as the selection criteria for picking up the eligible resources. Creates a service request and a task of type Field Service for a customer and generates trips for all the resources before scheduling the task.
Prerequisites

- A resource with Field Service Technician role and associated to a territory and calendar.

Profile Options

Table 4-2 Profile Options Schedule Task with Intelligent Mode Flow

<table>
<thead>
<tr>
<th>Profile</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSF: Default Dispatch Center Display</td>
<td>Detail Tabbed</td>
</tr>
<tr>
<td>CSF: Default Scheduling Type</td>
<td>Assisted</td>
</tr>
<tr>
<td>CSF: Default Planned Task status for planned task</td>
<td>Planned</td>
</tr>
<tr>
<td>CSF: Default &quot;In planning&quot; task status</td>
<td>In Planning</td>
</tr>
</tbody>
</table>

Predefined Data

Not applicable.

Setup Data

Not applicable.

4.1.2 Schedule Task with Autonomous Scheduler

Schedules all the tasks in the Inbox of Dispatch Center through background process, creates a service request and a field service task. The process is verified through the completion of concurrent request "Select and schedule tasks automatically".

Prerequisites

- A resource with Field Service Technician role and associated to a territory and calendar.
- The scheduler rule dashboard contains a rule with the user login and with Preferred Territory Resources set to Yes.

Profile Options

Table 4-3 Profile Options for Schedule Task with Autonomous Scheduler Flow

<table>
<thead>
<tr>
<th>Profile</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSF: Default Planned Task status for planned task</td>
<td>Planned</td>
</tr>
<tr>
<td>CSF: Default &quot;In planning&quot; task status</td>
<td>In Planning</td>
</tr>
</tbody>
</table>

Predefined Data

Table 4-4 Predefined Data for Schedule Task with Autonomous Scheduler Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Service Request - Task Tab</td>
<td>Task Type</td>
<td>Dispatch</td>
</tr>
</tbody>
</table>

Setup Data

Not applicable.
4.2 Oracle Field Service Portal

Oracle Field Service Portal has a full range of debrief capabilities to support call closure and reporting time, parts, and expenses associated with task execution.

This chapter describes the following test flows in Oracle Field Service Portal:

- Post Debrief Install Lines
- Field Service Technician Portal Receive Parts

Prerequisites

- At least one resource with Field Service Technician role and Field Service Technician Portal responsibility.
- A resource associated with the user ID and added to the calendar and territory.

Profile Options

Table 4–5 Profile Options for Oracle Field Service Portal Flow

<table>
<thead>
<tr>
<th>Profile</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>MO: Default Operating Unit</td>
<td>Vision Operations</td>
</tr>
<tr>
<td>MO: Operating Unit</td>
<td>Vision Operations</td>
</tr>
</tbody>
</table>

Predefined Data

Table 4–6 Predefined Data for Oracle Field Service Portal Flow

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Service Technician Dashboard</td>
<td>Task Status</td>
<td>Accepted</td>
</tr>
</tbody>
</table>

Setup Data

Not applicable.

4.2.1 Post Debrief Install Lines

Creates debrief material install line with line type order for all the transactions where the item is installed at the customer site.

Prerequisites

- User assigned to sub inventory is provided with on hand quantity for the item used in the flow.
- Business Process with a service activity code in Charges module.
- Inventory accounting periods for the corresponding period of the flow in Open status.
- The following setups for the item used as part of the flow in Inventory module:
  - The Service Billable attribute set to Material.
  - The Item Transactable check box is selected.
  - If the item used in the flow is a trackable item, the instance numbers are already generated.
  - Price lists associated with the item.
Profile Options

<table>
<thead>
<tr>
<th>Profile</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSF: Disable HTML Debrief</td>
<td>No</td>
</tr>
<tr>
<td>CSF: Default Debrief Business Process</td>
<td>Field Service</td>
</tr>
<tr>
<td>CSF: Default Debrief Service Activity Code</td>
<td>Install</td>
</tr>
<tr>
<td>CSF: Inventory Organization ID</td>
<td>Vision Operations</td>
</tr>
</tbody>
</table>

Predefined Data

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update Task Debrief tab</td>
<td>Debrief Status</td>
<td>Completed</td>
</tr>
</tbody>
</table>

Setup Data
Not applicable.

4.2.2 Field Service Technician Portal Receive Parts

Field Service Technician Portal Receive Parts functionality supports receiving parts to the destination sub-inventory in one transaction. This transaction receives the quantity to a default destination sub-inventory.

Prerequisites
- Shipping network setup between source and destination organizations.
- Internal Order Required check box is selected.
- Source to destination (exact or region) entry in delivery time UI.
- In Planners Desktop, warehouse is defined as Manned.

Profile Options

<table>
<thead>
<tr>
<th>Profile</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSP: Part Search Method</td>
<td>Inventory</td>
</tr>
</tbody>
</table>

Predefined Data

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part Requirement</td>
<td>Status</td>
<td>Ordered</td>
</tr>
<tr>
<td>Inbound Reservations and Orders</td>
<td>Confirmation message</td>
<td>Parts received successfully</td>
</tr>
</tbody>
</table>

Setup Data
Not applicable.
4.3 Oracle Field Service Wireless

Oracle Field Service Wireless is for field service representatives using mobile devices that have a continuous connection to the CRM enterprise applications. The field service representatives connect to this application by choosing a URL on their mobile device’s web browser. Once connected to the database, users interact with the browser based application on the mobile device.

This chapter describes the following test flows in Oracle Field Service Wireless:

■ Post Debrief Labor Lines
■ Create Reservation Parts Search

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

4.3.1 Post Debrief Labor Lines

Creates and posts a debrief labor line from Field Service Wireless application to record time spent on a task by the technician.

Prerequisites

■ Business process with a service activity code in Charges module.

Profile Options

Table 4–11 Profile Options for Post Debrief Labor Lines Flow

<table>
<thead>
<tr>
<th>Profile</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSF: Allow Overlapping Labor Lines for Debrief</td>
<td>Yes</td>
</tr>
<tr>
<td>CSF: Default Service Activity Code for Labor</td>
<td>FS_Labor</td>
</tr>
<tr>
<td>CSF: Debrief Service Date Validation</td>
<td>Between service request incident time and current time</td>
</tr>
</tbody>
</table>

Predefined Data

Table 4–12 Predefined Data for Post Debrief Labor Lines Flow

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Labor Line</td>
<td>Debrief Status</td>
<td>Completed</td>
</tr>
</tbody>
</table>

Setup Data
Not applicable.
4.3.2 Create Reservation Parts Search

Sourcing of parts for a task can be done through either Internal Order or Reservation. When the parts requested for a task are available in the Technician trunk itself, then reservation should be created. This ensures that the part is forbidden for usage in other tasks.

Prerequisites

- Shipping network between source and destination organizations.
- Internal Order Required check box is deselected in Shipping Network form.
- Source to destination (exact or region) entry in Delivery Time UI.
- In Planners Desktop, warehouse is defined as Manned.

Profile Options

Table 4–13 Profile Options for Create Reservation Parts Search Flow

<table>
<thead>
<tr>
<th>Profile</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSP: Part Search Method</td>
<td>Inventory</td>
</tr>
</tbody>
</table>

Predefined Data

Table 4–14 Predefined Data for Create Reservation Parts Search Flow

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parts Search</td>
<td>Order Status</td>
<td>Item Reserved</td>
</tr>
</tbody>
</table>

Setup Data

Not applicable.
Oracle Incentive Compensation is a sophisticated application that helps enterprises manage their business objectives by controlling the way they compensate their sales forces. Oracle Incentive Compensation is designed to calculate and pay compensation to salespeople (resources). It is flexible enough to compensate, vendors, suppliers, and partners.

This chapter describes the following test flows in Oracle Incentive Compensation:

- Create Role Group Resource
- Create Rate Table

**Prerequisites**

None.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.

**Setup Data**

Not applicable.

### 5.1 Create Role Group Resource

Creates roles of type Sales Compensation, and groups having usage as Sales Compensation. Creates resources, and quota sales credits are added to resources to convert them from resources to sales representatives. Finally these resources are assigned with the above created role and associated to the above created group.

**Prerequisites**

- User is logged in with the CRM Resource Manager responsibility.

**Profile Options**

Not applicable.
Predefined Data

### Table 5-1 Predefined Data for Create Role Group Resource Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource</td>
<td>Category LOV</td>
<td>Other (It can be an Employee, if created in HRMS and imported in CRM Resource Manager application)</td>
</tr>
<tr>
<td></td>
<td>Sales Credit Type</td>
<td>Quota Sales Credit</td>
</tr>
<tr>
<td></td>
<td>Role Type</td>
<td>Sales Compensation</td>
</tr>
</tbody>
</table>

Setup Data

### Table 5-2 Setup Data for Create Role Group Resource Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource - Receivables tab</td>
<td>Operating Unit</td>
<td>Vision Operations</td>
</tr>
</tbody>
</table>

5.2 Create Rate Table

Creates rate dimension of type Percent with a single tier, and rate table of type Percent. The rate dimension is mapped to the rate table and rates are updated for the rate table.

Prerequisites

- Logged in user has Plan Administrator responsibility.

Profile Options

Not applicable.

Predefined Data

### Table 5-3 Predefined Data for Create Rate Table Flow

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Rate Dimension</td>
<td>Type</td>
<td>Percent</td>
</tr>
<tr>
<td>Create Rate Table</td>
<td>Rate Type</td>
<td>Percent</td>
</tr>
</tbody>
</table>

Setup Data

Not applicable.
Oracle iStore allows businesses from all industries to establish business-to-business (B2B) and business-to-consumer (B2C) electronic commerce (e-commerce). Oracle iStore provides merchants with an easy-to-use interface for setting up Internet-based sites that capture and process customer orders. In addition, integration with other Oracle applications provides a broad range of e-commerce capabilities.

This chapter describes the following test flows in Oracle iStore:

- Checkout
- Direct Item Entry
- Save Cart
- Shopping Cart Share Cart
- Shopping Cart Save to List

**Prerequisites**

- The predefined and newly registered B2B and B2C users have the access to list of mini sites.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.

**Setup Data**

Not applicable.

### 6.1 Checkout

Adds an item to the shopping cart, checks it out and places order for B2B and B2C users. During checkout process user can select the Bill To and Ship To address, payment method, shipping method, end customer information, and terms and conditions, and review order details.

**Prerequisites**

- Default values of bill to, ship to, payment method, shipping method, end customer information, terms and conditions for B2B and B2C users are set up.

**Profile Options**

Not applicable.
6.2 Direct Item Entry

Enters an item in the shopping cart, checkout and then place order.

**Prerequisites**

None.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.

**Setup Data**

**Table 6–1 Setup Data for Checkout Flow**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site-Home</td>
<td>Vision Pad DX - Mobile Computer</td>
<td>By clicking on Add to Cart, this item can be added to the shopping cart.</td>
</tr>
</tbody>
</table>

**Table 6–2 Setup Data for Direct Item Entry Flow**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site: Direct Item Entry</td>
<td>Inventory Part Number</td>
<td>AS72111. Items can be Standard Or Model. A model item needs to be configured after adding it to the shopping cart.</td>
</tr>
</tbody>
</table>

6.3 Save Cart

Enters the name for the cart and saves the cart.

**Prerequisites**

- Item is standard or model.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.

**Setup Data**

Not applicable.

6.4 Shopping Cart Share Cart

Saves shopping cart, shares cart and stops sharing the carts.
Prerequisites

- Saved carts are listed in the carts.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site: Search and Select Members</td>
<td>Results - Amy Miller</td>
<td>Select the checkbox for “Amy Miller”</td>
</tr>
</tbody>
</table>

6.5 Shopping Cart Save to List

Saves to shopping list and adds the item from shopping list to the shopping cart.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.
Oracle Quoting is an automated sales quote generation application that enables the easy, consistent and secure creation and management of customer quotes across the following customer interaction channels - field sales, telesales, e-commerce and business partners. Sales representatives using Oracle Quoting can submit a quote as an order, perform manual price overrides, and create new customer information.

This chapter describes the following test flows in Oracle Quoting:

- Create Quote Lines with Different Shipping and Billing Details at Header and Lines
- Create Quotes with Multiple Template Form
- Copy Quote with All Quote Information

**Prerequisites**

- Logged in user has the Quoting User, Quoting Sales Agent, and Quoting Sales Manager responsibility.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.

**Setup Data**

Not applicable.

### 7.1 Create Quote with Different Shipping and Billing Details

Creates a quote which has different shipping and billing details at header and line levels.

**Prerequisites**

None.

**Profile Options**

Not applicable.
Create Quote with Multiple Templates Form

Predefined Data

<table>
<thead>
<tr>
<th>Table 7–1 Predefined Data for Create Quote with Different Shipping and Billing Details Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page Name</td>
</tr>
<tr>
<td>Payment or Shipping</td>
</tr>
<tr>
<td>Credit Card Brand</td>
</tr>
<tr>
<td>Requested Date Type</td>
</tr>
<tr>
<td>Shipping Priority</td>
</tr>
<tr>
<td>Freight Terms</td>
</tr>
<tr>
<td>FOB</td>
</tr>
</tbody>
</table>

| Quote Lines or Bill to, Payment | Payment Type | Check |
| Quote Lines or Ship To | Shipping Priority | High Priority |

| Demand Class | Central US |

Setup Data

<table>
<thead>
<tr>
<th>Table 7–2 Setup Data for Create Quote with Different Shipping and Billing Details Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page Name</td>
</tr>
<tr>
<td>Quote Lines</td>
</tr>
<tr>
<td>Payment or Shipping</td>
</tr>
<tr>
<td>Quote Lines or Ship To</td>
</tr>
</tbody>
</table>

7.2 Create Quote with Multiple Templates Form

In Oracle Quoting, you can create quote templates that specify products and quantities, thus automating recurrent quote content. For configured products, add a product to your template, launch configurator and save the resulting configuration in the template. You can also add service products to templates.

Creates a quote by selecting multiple quote templates to verify the ability to apply one or more quote templates to the quote.

Prerequisites

None.

Profile Options

Not applicable.

Predefined Data

Not applicable.

Setup Data

Not applicable.
7.3 Copy Quote with All Quote Information

In Oracle Quoting, one can copy existing quotes to create new quotes. Copies a quote with all the information, to a new quote for a different customer. All the options are selected while copying a quote.

**Prerequisites**
None.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

**Setup Data**
Not applicable.
Oracle Spares Management is positioned in the Oracle Field Service solution as a product providing both logistics and inventory planning functionality to manage a service parts inventory.

This chapter describes the following test flows in Oracle Spares Management:

- Create Parts Requirement and Internal Order through Parts Search
- Return Defective Parts with Return Routing Rule
- Create Supersession and Internal Order

**Prerequisites**

- User is logged in with Field Service Manager responsibility.

**Profile Options**

<table>
<thead>
<tr>
<th>Profile</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>MO: Default Operating Unit</td>
<td>Vision Operations</td>
</tr>
<tr>
<td>MO: Operating Unit</td>
<td>Vision Operations</td>
</tr>
<tr>
<td>CSP: Order Type</td>
<td>Order Only</td>
</tr>
</tbody>
</table>

**Predefined Data**

Not applicable.

**Setup Data**

Not applicable.

### 8.1 Create PR and IO through Parts Search

Creates part requirement for a resource and item, and creates internal order for the required item through parts search method.

**Prerequisites**

- Source organization is added as manned warehouse in Planner's Desktop.
- Resource with sub inventory and primary address in Addresses and Sub inventories form.
- Shipping network between source and destination organizations.
Return Defective Parts with RRR

- Internal Order Required check box selected in Shipping Network UI from source organization to destination organization.
- Delivery time for the shipping method with lead time from the source organization.
- Item is assigned to both source and destination organizations.
- Open inventory accounting periods for both source and destination organizations.

Profile Options
Not applicable.

Predefined Data

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning</td>
<td>Stocking Site Type</td>
<td>Manned warehouse</td>
</tr>
<tr>
<td>Define Delivery Time</td>
<td>Lead Time</td>
<td>1</td>
</tr>
<tr>
<td>Define Delivery Time</td>
<td>Lead time UOM</td>
<td>Day</td>
</tr>
</tbody>
</table>

Setup Data
Not applicable.

8.2 Return Defective Parts with RRR

Creates excess quantity for an item and then returns defective parts from source organization to return organization by defining return routing rules.

Prerequisites
- Source organization and destination organization are defined in Planner’s Desktop.
- Open inventory accounting periods for both source and destination organizations.
- Internal Order Required checkbox deselected in shipping network UI, from source organization to destination organization.

Profile Options
Not applicable.

Predefined Data

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shipping Networks</td>
<td>Transfer Type</td>
<td>In transit</td>
</tr>
<tr>
<td></td>
<td>FOB</td>
<td>Receipt</td>
</tr>
<tr>
<td></td>
<td>Receipt Routing</td>
<td>Standard</td>
</tr>
<tr>
<td></td>
<td>Internal Order Required</td>
<td>No</td>
</tr>
</tbody>
</table>

Setup Data
Not applicable.
8.3 Create Supersession and IO

Creates new supersession relationship for an item and creates internal order for the superseded item.

Prerequisites

- Superseded item is assigned to the source and destination organization.
- Source organization and destination organization are defined in Planner's Desktop.
- Shipping network between source and destination organizations.
- Internal Order Required check box is selected in shipping network UI, from source organization to destination organization.
- Delivery time is defined for the shipping method with proper lead time from the source organization.
- Open inventory accounting periods for both source and destination organizations.

Profile Options

Not applicable.

Predefined Data

Not applicable.

Setup Data

Not applicable.
Oracle TeleSales is an application designed for telesales agents, and provides a set of tools to manage the sales cycle, from prospects to booked orders. The E-Business Center within Oracle TeleSales offers a cross-application desktop for all Oracle call center applications, and provides elements of Service and Collections for a comprehensive customer view.

This chapter describes the following test flows in Oracle TeleSales:

- Operations in Sales Lead Center

**Prerequisites**

None.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.

**Setup Data**

Not applicable.

### 9.1 Operations in Sales Lead Center

Sales lead center is used to manage the details of a specific lead. It is used to create new leads or to add more detail to leads, which have been created using the E-Business center. Creates a lead and adds a product to this lead. It converts the lead to an opportunity and searches and declines a lead.

**Prerequisites**

- User is logged in with the Telesales Agent responsibility.

- A sales person, having Sales Representative role and associated to a group having Sales and Telesales usage.

- Customer or party, with address and account number.

- Opportunity is created for the customer or party.
Profile Options

Table 9–1 Profile Options for Operations in Sales Lead Center Flow

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>OTS: Default User Role</td>
<td>A Sales or Telesales role that the user is assigned with. For example, Telesales Agent</td>
<td></td>
</tr>
<tr>
<td>OTS: Default User Sales</td>
<td>A group having Sales and Telesales usage. For example, Industry Accounts</td>
<td></td>
</tr>
<tr>
<td>Group</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OS: Enable Real Time Lead</td>
<td>No</td>
<td>Site</td>
</tr>
<tr>
<td>Assignment</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Predefined Data

Table 9–2 Predefined Data for Operations in Sales Lead Center Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Center</td>
<td>Party Type LOV</td>
<td>Organization</td>
</tr>
<tr>
<td></td>
<td>Status LOV</td>
<td>New</td>
</tr>
<tr>
<td>Decline Lead</td>
<td>Decline Reason LOV</td>
<td>Assign Error (Pick appropriate status)</td>
</tr>
</tbody>
</table>
Oracle TeleService automates not just the call center but the whole problem resolution process from the time a customer calls in, sends an e-mail, or enters a service request on the web. Agents can use Oracle Teleservice to update customer records, validate product ownership and contract coverage, provide proactive and personalized customer service, and resolve many problems during the initial contact, using a knowledge base.

This chapter describes the following test flows in Oracle TeleService:

- Create Service Request for Customer Organization and Employee Contact
- Create, Update, Audit and Validate Task
- Create Charge Lines and Orders

Prerequisites

- User is logged in with Service, Standard responsibility.

Profile Options

Table 10–1 Profile Options for Oracle TeleService

<table>
<thead>
<tr>
<th>Profile</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service: Default Operating Unit</td>
<td>Vision Operations</td>
</tr>
</tbody>
</table>

Predefined Data

Table 10–2 Predefined Data for Oracle TeleService

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Request</td>
<td>Type</td>
<td>Customer Call</td>
</tr>
<tr>
<td></td>
<td>Severity</td>
<td>High</td>
</tr>
<tr>
<td></td>
<td>Status</td>
<td>Open</td>
</tr>
</tbody>
</table>

Setup Data

Not applicable.

10.1 Create Service Request for Customer Organization and Employee Contact

Creates service request with customer type organization and person with different contact types (customer and employee contact types). Associates product information
to service request. Attaches file to service request. Copy service request linking the original to the new service request. The different types of links are reference, caused by and duplicate links.

Prerequisites

- Customers and contacts.

Profile Options

<table>
<thead>
<tr>
<th>Table 10–3  Profile Options for Create Service Request for Customer Organization and Employee Contact Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile</td>
</tr>
<tr>
<td>Service: Inventory Validation Organization</td>
</tr>
</tbody>
</table>

Predefined Data

<table>
<thead>
<tr>
<th>Table 10–4 Predefined Data for Create Service Request for Customer Organization and Employee Contact Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Window Name</td>
</tr>
<tr>
<td>Service Request</td>
</tr>
<tr>
<td>Customer Type</td>
</tr>
</tbody>
</table>

Setup Data

Not applicable.

10.2 Create, Update, Audit and Validate Task

Creates field service and non field service tasks for a service request. Creates debrief lines for a field service task. Posts debrief lines to generate charge lines. Submits the charge lines to Oracle Order Management for creation of sales orders. Creates, audits and validates tasks.

Prerequisites

- The user is assigned to a sub inventory that is provided with available on hand quantity for the item.
- Business Process with service activity code in Charges module.
- Inventory accounting periods for the corresponding period, in Open status.
- Following setups done for the item used, as part of the flow in Inventory module:
  - The Service Billable attribute is set to Material.
  - The Item Transactable check box is selected.
  - If the item used in the flow is a trackable item, the instance numbers are generated.
  - Price lists are associated with the item.
Profile Options

**Table 10–5  Profile Options for Create, Update, Audit and Validate Task Flow**

<table>
<thead>
<tr>
<th>Profile</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSF: Disable HTML Debrief</td>
<td>No</td>
</tr>
<tr>
<td>CSF: Default Debrief Business Process</td>
<td>Field Service</td>
</tr>
<tr>
<td>CSF: Default Debrief Service Activity Code</td>
<td>Install</td>
</tr>
<tr>
<td>CSF: Inventory Organization ID</td>
<td>Vision Operations</td>
</tr>
</tbody>
</table>

Predefined Data

**Table 10–6  Predefined Data for Create, Update, Audit and Validate Task Flow**

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Request - Tasks tab</td>
<td>Task Type</td>
<td>Follow up Action</td>
</tr>
<tr>
<td></td>
<td>Task Type</td>
<td>Dispatch</td>
</tr>
</tbody>
</table>

Setup Data

Not applicable.

**10.3 Create Charge Lines and Orders**

Creates different types of charge lines for service requests and submits charge lines to Oracle Order Management. Creates estimate charge lines and converts estimate to actual charge lines through Charges form and Charges and Service Logistics page. Creates material, labor, expense lines, and install base order and return lines using Charges form and Charges and Service Logistics page.

**Prerequisites**

- Service activity code is created for billing type Material or Labor or Expense with Mixed order type, and is associated to business process.
- Following setups are done for the item used as part of the flow in inventory module:
  - The Service Billable attribute is set to Material.
  - The Item Transactable check box is selected.
  - If the item used in the flow is a trackable item, the instance numbers are generated.
  - Price lists are associated with the item.

**Profile Options**

Not applicable.
Predefined Data

Table 10–7  Predefined Data for Create Charge Lines and Orders Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Request - Charges tab</td>
<td>Charge line</td>
<td>Estimate (Pick valid charge line from list)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Charge line</td>
</tr>
</tbody>
</table>

Setup Data

Table 10–8  Setup Data for Create Charge Lines and Orders Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Request - Charges tab</td>
<td>Operating Unit</td>
<td>Vision Operations</td>
</tr>
<tr>
<td></td>
<td>Service Activity</td>
<td>CHRT_Exp1202121376</td>
</tr>
<tr>
<td></td>
<td>Business Process</td>
<td>Service Charges1202121533</td>
</tr>
<tr>
<td></td>
<td>Service activity</td>
<td>CHRT_Lab1202121367</td>
</tr>
<tr>
<td></td>
<td>Service activity</td>
<td>CHRT_Mat1202121386</td>
</tr>
</tbody>
</table>
This Part of the Oracle Flow Builder Starter Pack for E-Business Suite Release 12.1.3 provides information about the flows used with Financials applications.

This Part contains the following chapters:

- Chapter 11, "Oracle Payables"
- Chapter 12, "Oracle Receivables"
Oracle Payables improves margins, instills corporate and fiscal discipline, and optimizes business relationships. Oracle Payables works seamlessly with other Oracle E-Business Suite products to drive better decision-making, sustainable financial discipline, regulatory compliance, and optimized business processes at the lowest cost. Oracle Payables has a highly responsive, multi-window graphical user interface (GUI) with complete point and click capability.

This chapter describes the following test flows in Oracle Payables:

- Create and Pay a Standard Invoice with Distribution Set
- Recurring Invoices with Distribution Set
- Create Standard Invoice
- Creation of Interest Invoice
- Create Credit Memo and Match it to a Standard Invoice
- Create and Pay Prepayment and Apply it to Standard Invoice with Multiple Lines
- Create and Pay Prepayment and Apply it to Standard Invoice Both Having Line Level Tax
- Create a Standard Invoice with AWT, Generate AWT Invoice at Validation
- Create a Standard Invoice with AWT, Generate AWT Invoice at Payment
- Match a Standard Invoice and Match it to a Receipt
- Create Invoice and Verify Correct Discount is Taken Based on Payment Date (Multiple Discounts)
- Create Invoice Batch with Credit Memo and Standard Invoice

**Prerequisites**

- Purchasing periods are open for the current date.
- Inventory accounting periods are open for the current date.
- GL periods are open for the current date.
- Payables periods are open for the current date.
- Supplier Advanced Network Devices.
Profile Options

Table 11–1 Profile Options for Oracle Payables

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>AP: Use Invoice Batch Controls</td>
<td>No</td>
</tr>
<tr>
<td>POS: SM: Enable Supplier Profile Management Extension</td>
<td>No</td>
</tr>
<tr>
<td>POS: SM: Supplier Data Hub Configuration</td>
<td>None</td>
</tr>
</tbody>
</table>

Predefined Data
Not applicable.

Setup Data
Not applicable.

11.1 Create and Pay a Standard Invoice with Distribution Set

Creates and pays a standard invoice with full distribution set and allocates a freight amount to the distribution set.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

11.2 Recurring Invoices with Distribution Set

Recurring invoices with distribution set defines a recurring invoice calendar, enters a recurring invoice and validates the invoice.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.
11.3 Create Standard Invoice

Creates a standard invoice through the invoice gateway.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

11.4 Creation of Interest Invoice

Creates an invoice and makes payment of the invoice beyond due date, and queries the invoice.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

11.5 Create Credit Memo and Match it to a Standard Invoice

Creates a credit memo and matches it to a standard invoice using Quick Credit.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.
11.6 Create and Pay Prepayment and Apply it to Standard Invoice with Multiple Lines

Creates and makes prepayment and applies it to standard invoice with multiple lines. Does not distribute the prepayment application to any specific invoice line.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

11.7 Create and Pay Prepayment and Apply it to Standard Invoice Both Having Line Level Tax

Creates and makes prepayment and applies it to a standard invoice, both prepayment and invoice having line level tax.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

11.8 Create a Standard Invoice with AWT, Generate AWT Invoice at Validation

Creates a standard invoice with AWT at invoice header and automatically generates AWT invoice during validation.

Prerequisites
- Tax code with standard type, flat rate and withholding tax group.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.
11.9 Create a Standard Invoice with AWT, Generate AWT Invoice at Payment

Creates a standard invoice with AWT at invoice header and automatically generates AWT invoice on payment.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

11.10 Match a Standard Invoice and Match it to a Receipt

Creates a three way purchase order, creates a receipt, and matches a standard invoice to the receipt.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

11.11 Create Invoice and Verify Correct Discount is Taken Based on Payment Date (Multiple Discounts)

Creates payment terms, creates a standard invoice, verifies payment schedules and validates the invoice.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.
11.12 Create Invoice Batch with Credit Memo and Standard Invoice

Creates an invoice batch with credit memo and standard invoice, and runs the Payment Process request with the batch name.

Prerequisites

None.

Profile Options

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>AP: Use Invoice Batch Controls</td>
<td>Yes</td>
<td>User</td>
</tr>
</tbody>
</table>

Predefined Data

Not applicable.

Setup Data

Not applicable.
Oracle Receivables allows you to streamline invoicing, receipt, and customer deduction processing while improving cash flow, optimizing customer relationships, and providing strategic information. As a sub ledger, Oracle Receivables provides the flexibility to meet the demands of a global market with strong financial controls to assist in instilling corporate and fiscal discipline.

This chapter describes the following test flows in Oracle Receivables:

- Create Receipt and Take Earned Discount
- Create Receipt and Clear using Cash Management
- Create Standard Receipt Reversal
- Create Invoice with ‘In Advance’ Accounting Rule
- Create Debit Memo Receipt Reversal
- Create Invoice with Split Payment Term and Apply Credit Memo
- Create Adjustment - within Approval Limits
- Create Invoice with Document Number when Saved
- Create Deposit and Attach to Invoice

**Prerequisites**

None.

**Profile Options**

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>POS: SM: Enable Supplier Profile Management Extension</td>
<td>No</td>
</tr>
<tr>
<td>POS: SM: Supplier Data Hub Configuration</td>
<td>None</td>
</tr>
</tbody>
</table>

**Predefined Data**

Not applicable.
Create Receipt and Take Earned Discount

12.1 Create Receipt and Take Earned Discount

Creates payment term without discount, creates invoice and receipt, and takes earned discount. Verifies invoice balance and receipt accounting.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

12.2 Create Receipt and Clear using Cash Management

Creates a receipt class method by matching, creates invoices, creates receipts, verifies receipt accounting, clears receipt through cash management, and verifies receipt accounting.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.
12.3 Create Standard Receipt Reversal
Creates receipt, reverses receipt, and verifies invoice balance and receipt accounting.
Prerequisites
None.
Profile Options
Not applicable.
Predefined Data
Not applicable.
Setup Data
Not applicable.

12.4 Create Invoice with 'In Advance' Accounting Rule
Creates accounting rule, raises an invoice on the customer with in-advance invoicing rule. Runs Revenue Recognition program and verifies accounting.
Prerequisites
None.
Profile Options
Not applicable.
Predefined Data
Not applicable.
Setup Data
Not applicable.

12.5 Create Debit Memo Receipt Reversal
Creates transaction type, creates invoice, creates receipt and reverse receipt, and verifies receipt accounting, invoice balance and debit memo balance.
Prerequisites
None.
Profile Options
Not applicable.
Predefined Data
Not applicable.
Setup Data
Not applicable.
12.6 Create Invoice with Split Payment Term and Apply Credit Memo

Creates invoice with split payment term, verifies invoice balance, and applies credit memo to invoice.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

12.7 Create Adjustment - within Approval Limits

Creates receivable activity for adjustment, creates invoice and adjusts it, and verifies the invoice and adjustment accounting.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

12.8 Create Invoice with Document Number when Saved

Creates transaction type, sets document sequence, defines category, creates invoice, and verifies the generated document.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.
12.9 Create Deposit and Attach to Invoice

Creates transaction type for deposit, creates deposit, raises an invoice on the customer, and applies the deposit. Verifies deposit balance, creates accounting, creates receipt and applies to deposit. Verifies deposit balance and receipt accounting.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.
This Part of the Oracle Flow Builder Starter Pack for E-Business Suite Release 12.1.3 provides information about the flows used with Human Capital Management applications.

This Part contains the following chapter:

- Chapter 13, "Oracle Human Resources"
Oracle Human Resources (HR) enables the efficient management of workforce data and supports all standard HR activities, including workforce organization, development, and measurement.

This chapter describes the following test flows in Oracle Human Resources:

- Create a Location
- Create a Organization
- Create an Organization Hierarchy
- Create a Grade
- Create Grade Rate
- Create Job Group
- Create a Job
- Create a Position
- Create a Position Hierarchy
- Create an Applicant
- Create an Employee
- Create a Contingent Worker
- Create Person Multiple Assignments
- Update Phone for an Employee
- Hire an Applicant as an Employee
- Terminate an Employee
- Terminate a Contingent Worker
- Reverse Employee Termination
- Rehire as an Employee
- Rehire as a Contingent Worker
- Create an Employee using Template
- Rehire as an Employee using Template
- Create a Contingent Worker using Template
- Terminate a Contingent Worker using Template
- Add Person Phone Details
13.1 Create a Location

Creates a new location by providing the name, description and address details.

**Prerequisites**
None.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

**Setup Data**
Not applicable.

13.2 Create an Organization

Creates a new organization by providing the name, From and To dates, location and organization classification.

**Prerequisites**
- Location.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

**Setup Data**
Not applicable.
13.3 Create an Organization Hierarchy

Creates an organization hierarchy by providing the name, version number and organization name.

Prerequisites
- Two or more HR organizations.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

13.4 Create a Grade

Create a new grade by providing the sequence number, range, level and region.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

13.5 Create Grade Rate

Creates grade rate by creating a grade and then providing units, grade name, currency, and minimum and maximum values.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

 Setup Data
Not applicable.
13.6 Create Job Group

Creates job group by providing the group name and flex field structure.

**Prerequisites**
None.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

**Setup Data**
Not applicable.

13.7 Create a Job

Creates a job by providing the job group, code, name and From date.

**Prerequisites**

- Job group.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

**Setup Data**
Not applicable.

13.8 Create a Position

Creates a new position by providing the name, start date, type, organization, job, and hiring status.

**Prerequisites**

- Job.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

**Setup Data**
Not applicable.
13.9 Create a Position Hierarchy

Creates a new position and provides the hierarchy name, number, From date and name of the manager.

Prerequisites
- Two or more positions.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

13.10 Create an Applicant

Creates a person by providing name, title and gender. Subsequently, selects Create Applicant from list of actions and provides the social security number (SSN), date of birth and status.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

13.11 Create an Employee

Creates an employee by providing the title, name, gender, action as Create Employment, person type as Employee, SSN, date of birth, location details of residence and office, and medical details.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.
Create a Contingent Worker

13.12 Create a Contingent Worker

Creates a contingent worker by providing the title, name, person type as Contingent Worker, SSN, date of birth and status.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

13.13 Create Person Multiple Assignments

Creates a person with employment details, and provides the organization, multiple assignments, name and worker number.

Prerequisites
- Person of type Employee or Contingent Worker.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

13.14 Update Phone for an Employee

Creates a person with phone details. Updates the phone with phone number and From date.

Prerequisites
- Employee with phone details.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.
13.15 Hire an Applicant as an Employee

Creates a person and selects the Create Applicant action. Updates the applicant's application by selecting the status as Accepted and selecting the Hire Applicant action.

Prerequisites
- Person of type Applicant.
- Accepted application.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

13.16 Terminate an Employee

Creates a person and provides the employment details. Selects End Employment from Find and provides termination details.

Prerequisites
- Person of type Employee.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

13.17 Terminate a Contingent Worker

Creates a contingent worker and terminates the worker by searching the person and providing the actual termination date.

Prerequisites
- Person of type Contingent Worker.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.
13.18 Reverse Employee Termination

Creates a person and provides the employment details, and terminates the employee. Selects reverse termination to reverse the employee termination.

Prerequisites

- Person of type Employee.

Profile Options

Not applicable.

Predefined Data

Not applicable.

Setup Data

Not applicable.

13.19 Rehire as an Employee

Creates a person and provides the employment details and terminates the employee. Searches for the person and selects Create employment action and provides the person type for action as Employee.

Prerequisites

- Person of type Ex-Employee.
- Ex-Contingent Worker.

Profile Options

Not applicable.

Predefined Data

Not applicable.

Setup Data

Not applicable.

13.20 Rehire as a Contingent Worker

Creates a person and provides the contingent worker details and terminates the contingent worker. Searches for the person and selects the Create Placement action and provides the person type for action as Contingent Worker.

Prerequisites

- Person of type Ex-Employee.
- Ex-Contingent Worker.

Profile Options

Not applicable.

Predefined Data

Not applicable.

Setup Data

Not applicable.
13.21 Create an Employee using Template

Creates an employee using a template and by providing the title, name, gender, person type as Employee, assignment status and organization.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

13.22 Rehire as an Employee using Template

Creates a person and provides the employment details and terminates the employee. Provides the person's last name, start date, type as Employee and action as Hire into Job.

Prerequisites
■ Person of type Ex-Employee.
■ Ex-Contingent Worker.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

13.23 Create a Contingent Worker using Template

Creates a contingent worker using a template and by providing the title, name, start date, address and organization.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.
13.24 Terminate a Contingent Worker using Template

Creates a contingent worker. Terminates the person by providing the last name, actual termination date and selecting the termination person type as Ex-contingent Worker.

Prerequisites
- Person of type Contingent Worker.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

13.25 Add Person Phone Details

Creates a person and provides the phone number and From date values.

Prerequisites
- Person of any person type.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

13.26 Create a Competence Profile

Creates an employee and selects Competence Profile. Provides the current competency detail which includes the competency, proficiency level and From date.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.
13.27 Add Person Qualifications

Creates a person and provides the qualification type for the person.

**Prerequisites**
- Person of any person type.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

**Setup Data**
Not applicable.

13.28 Enter Work Preferences

Creates an employee and provides the relocation preference for the person.

**Prerequisites**
- Person of any person type.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

**Setup Data**
Not applicable.

13.29 Create Person Absence

Creates a person and update the address, assignment details and selects Absence. Provide the type, and date and time details of projected start and end, and the actual start and end dates.

**Prerequisites**
- Person of type Employee or Contingent Worker.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

**Setup Data**
Not applicable.

13.30 Enter Performance Ratings for an Employee

Creates an employee and selects Assignment tab. Provides the date, location and rating for the performance.
Enter Person Secondary Address

Prerequisites
■ Person of type Employee.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

13.31 Enter Person Secondary Address

Creates a person with an address. Provides the city, state, zip code, country, and phone and From date for the secondary address.

Prerequisites
■ Person of any person type.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

13.32 Change Job in Person Assignment

Creates an employee and attaches assignments. Searches for the person and in the assignment, provides the job and position.

Prerequisites
■ Person of type Employee or Contingent Worker.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

13.33 Change Location in Person Assignment

Creates a person with employment details. Searches for the person and provides the location for changing the location.

Prerequisites
■ Person of type Employee or Contingent Worker.
13.34 Change Organization in Person Assignment

Creates a person with employment details and assign an organization. Searches for the person and provides the organization name.

Prerequisites
- Person of type Employee or Contingent Worker.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

13.35 Change Supervisor in Person Assignment

Creates a person with employment details and assigns a manager. Searches for the person and provides the manager name.

Prerequisites
- Person of type Employee or Contingent Worker.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

13.36 Change Assignment Category in Person Assignment

Creates a person with part time employment details. Searches for the person and changes the assignment category to Full time- Regular.

Prerequisites
- Person of type Employee or Contingent Worker.

Profile Options
Not applicable.
13.37 Change Salary in Person Assignment

Creates a person with employment details on annual salary basis. Updates the salary details by providing From date, new salary, change amount, and status.

Prerequisites
- Person of type Employee.

Profile Options
Not applicable.

13.38 Assign Security Profile

Enters the user, application, responsibility, business group, security profile and start date.

Prerequisites
- Person of type Employee.
- Enable Multiple Security Groups process is executed to configure the security groups.

Profile Options

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
<th>Profile Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Security Groups</td>
<td>Yes</td>
<td>Site</td>
</tr>
</tbody>
</table>

Predefined Data
Not applicable.

Setup Data
Not applicable.
This Part of the Oracle Flow Builder Starter Pack for E-Business Suite Release 12.1.3 provides information about the flows used with Lease Management applications.

This Part contains the following chapter:

- Chapter 14, "Oracle Lease and Finance Management"
Oracle Lease and Finance Management, an Oracle E-Business Suite application, integrates Oracle Financials applications and is designed to meet the business requirements of asset-based finance companies spanning the entire lease life cycle. The Oracle Lease and Finance Management solution extends from lease origination to contract termination and asset disposition.

This chapter describes the following test flows in Oracle Lease and Finance Management:

- Lease Booking to Expiry

**Prerequisites**
None.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

**Setup Data**
Not applicable.

### 14.1 Lease Booking to Expiry

The lease booking to expiry flow covers lease accruals, invoice generation and receipt application transactions.

**Prerequisites**
None.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.
## Table 14–1 Setup Data for Lease Booking to Expiry Flow

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create or Update Contract</td>
<td>Customer</td>
<td>OLFM_Customer</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Product</td>
<td>BASE TEST OP_ISG1</td>
<td>Product is in Approved status and has the required Stream Generation</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Template and Accounting Template Set setups.</td>
</tr>
<tr>
<td></td>
<td>Item</td>
<td>IT Magna 17 inches flat screen monitor</td>
<td></td>
</tr>
<tr>
<td>Create or Update Asset</td>
<td>FA Location</td>
<td>USA.CA.SAN DIEGO.1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Asset Category</td>
<td>COMPUTER EQUIPMENT.PC</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Depreciation Method</td>
<td>STL</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Asset Tax Book</td>
<td>LEASEQA RPT1</td>
<td></td>
</tr>
<tr>
<td>Create Payment</td>
<td>Stream Type</td>
<td>RENT QA</td>
<td></td>
</tr>
<tr>
<td>Create Manual Receipt</td>
<td>Receipt Method</td>
<td>Check - BofA</td>
<td>Receipt method should be associated with a receipt class which has Creation Method = Manual and has bank accounts defined against it for the operating unit.</td>
</tr>
</tbody>
</table>
This Part of the Oracle Flow Builder Starter Pack for E-Business Suite Release 12.1.3 provides information about the flows used with Procurement applications.

This Part contains the following chapter:

- Chapter 15, “Oracle Purchasing”
Oracle purchasing is the formal process of buying goods and services. The process usually starts with a demand or requirement - this could be for a physical part (inventory) or a service. A requisition is generated, which details the requirements, and which actions the procurement department to raise the purchase order.

Purchase orders can be of various types, including:
- Standard purchase order - a one-time buy.
- Blanket purchase agreement - an agreement on specific terms and conditions: date and quantity and amount are not specified.

Purchase orders are normally accompanied by terms and conditions which form the contractual agreement of the transaction. The supplier delivers the products or service and the customer records the delivery. An invoice is sent by the supplier which is checked against the purchase order and documents specifying the goods received. The payment is then made and transferred to the supplier.

This chapter describes the following test flows in Oracle Purchasing:
- Online Standard Purchase Order Creation
- Online Blanket Purchase Agreement and Release Creation
- Standard Purchase Order Creation using Autocreate
- Release Creation using Autocreate
- Release Creation using Autocreate with Approved Supplier List and Sourcing Rules
- Standard Purchase Order Creation using Autocreate with Contract Purchase Agreement Reference
- Online Standard Purchase Order Creation in Buyer Work Center
- Standard Purchase Order Creation using Autocreate in Buyer Work Center
- Standard Purchase Order Creation with Global Blanket Purchase Agreement Reference using Autocreate in Buyer Work Center
- Standard Purchase Order Creation with Global Blanket Purchase Agreement Reference using Autocreate with Approved Supplier List and Sourcing Rules in Buyer Work Center
- Standard Purchase Order Creation using Autocreate with Contract Purchase Agreement Reference in Buyer Work Center
- Requisition Change Order
- Online Standard Purchase Order Creation for Services Item using Forms
- Online Standard Purchase Order Creation for Services Item using Buyer Work Center
- Modification of Standard Purchase Order in Forms
- Modification of Standard Purchase Order in Buyer Work Center
- Cancellation of Standard Purchase Order in Forms and Backing Requisition Cancellation
- Cancellation of Standard Purchase Order in Buyer Work Center and Backing Requisition Cancellation
- Copy of Standard Purchase Order in Forms
- Copy of Standard Purchase Order in Buyer Work Center
- eBtax for Purchasing

**Prerequisites**
None.

**Profile Options**

<table>
<thead>
<tr>
<th>Table 15–1 Profile Options for Oracle Purchasing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Name</td>
</tr>
<tr>
<td>MO: Operating Unit</td>
</tr>
<tr>
<td>MO: Default Operating Unit</td>
</tr>
<tr>
<td>MO: Security Profile</td>
</tr>
<tr>
<td>HR: Security Profile</td>
</tr>
<tr>
<td>HR: Business Group</td>
</tr>
<tr>
<td>GL: Data Access Set</td>
</tr>
<tr>
<td>POR: Amount Based Services Line Type</td>
</tr>
</tbody>
</table>

**Predefined Data**
Not applicable.

**Setup Data**

- Org Data
  - Operating Unit: **Vision Operations** (Used for Creating Requisition, POs, Invoices and Payments)
  - Inventory Org: **V1** (Used for Receiving Goods)
### User Setup Data

**Table 15–2 User Setup Data for Oracle Purchasing**

<table>
<thead>
<tr>
<th>User</th>
<th>Employee</th>
<th>Role</th>
<th>Position</th>
<th>Job</th>
<th>Hierarchy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tgreen</td>
<td>Green, Mr. Terry</td>
<td>Requestor</td>
<td>ACC430.Senior Accountant</td>
<td>ACC400.Accountant</td>
<td>Materials</td>
</tr>
<tr>
<td>Operations</td>
<td>Stock, Ms. Pat</td>
<td>Buyer or Approver</td>
<td>MM400.Materials Manager</td>
<td>MGR500.Manage r</td>
<td>Materials</td>
</tr>
<tr>
<td>Cbaker</td>
<td>Baker, Catherine</td>
<td>Buyer or Approver</td>
<td>BUY501.Buyer 1</td>
<td>BUY500.Buyer</td>
<td>Materials</td>
</tr>
<tr>
<td>Mfg</td>
<td>Smith, Mr. Jonathan</td>
<td>Receiver</td>
<td>VPM200.VP Materials</td>
<td>VPM200.Vice President Of Materials</td>
<td>Materials</td>
</tr>
<tr>
<td>Cbrown</td>
<td>Brown, Ms. Casey</td>
<td>Account Payable or Buyer</td>
<td>EX140.Chief Financial Officer</td>
<td>EX100.Executive</td>
<td>Materials</td>
</tr>
</tbody>
</table>

### Approval Setup Data

**Table 15–3 Approval Setup Data for Oracle Purchasing**

<table>
<thead>
<tr>
<th>Employee</th>
<th>Position</th>
<th>Approval Assignments</th>
<th>Approval Group</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Green, Mr. Terry</td>
<td>ACC430.Senior Accountant</td>
<td>Requisition, Standard Purchase Order, Blanket Purchase Agreement, Contract Purchase Agreement, Release</td>
<td>Manager</td>
<td>Can approve doc total Up to $25,000</td>
</tr>
<tr>
<td>Stock, Ms. Pat</td>
<td>MM400.Materials Manager</td>
<td>Requisition, Standard Purchase Order, Blanket Purchase Agreement, Contract Purchase Agreement, Release</td>
<td>Manager</td>
<td>Can approve doc total Up to $25,000</td>
</tr>
<tr>
<td>Baker, Catherine</td>
<td>BUY501.Buyer 1</td>
<td>Requisition, Standard Purchase Order, Blanket Purchase Agreement, Contract Purchase Agreement, Release</td>
<td>Buyer Materials</td>
<td>Can approve doc total Up to $50,000</td>
</tr>
</tbody>
</table>

### Additional Information:
- If the document total is more than $25,000, the document moves to the next approver in the hierarchy, which in this case is cbaker.
- If the document total is more than $50,000, the document moves to the next approver in the hierarchy, which in this case is cbrown.
Responsibility Setup Data

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>Responsibility</td>
<td>Purchasing, Vision Operations(USA)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>iProcurement</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Inventory, Vision Operations(USA)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Payables, Vision Operations(USA)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Human Resource, Vision Enterprises</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Tax Managers</td>
</tr>
</tbody>
</table>

Item Setup Data

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Master</td>
<td>Item</td>
<td>CM00042 (with all orgs assigned and with the properties: Inventory, Stackable, Transactable, Reservable, Purchased, Purchasable, Invoiceable, Costing Enabled and Inventory Asset Value)</td>
</tr>
</tbody>
</table>

Purchasing Related Setup Data

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchasing Options</td>
<td>Line Type</td>
<td>Goods</td>
</tr>
<tr>
<td></td>
<td>Accrue Expense Items</td>
<td>Period end</td>
</tr>
<tr>
<td></td>
<td>Accrue Inventory Items</td>
<td>At Receipt</td>
</tr>
<tr>
<td></td>
<td>Expense Ap Accrual Account</td>
<td>01-000-2220-0000-000</td>
</tr>
<tr>
<td></td>
<td>PO Number</td>
<td>Automatic</td>
</tr>
<tr>
<td></td>
<td>Requisition Number</td>
<td>Automatic</td>
</tr>
<tr>
<td>Receiving Options</td>
<td>Receiving Inventory Account</td>
<td>01-000-1410-0000-000</td>
</tr>
<tr>
<td></td>
<td>Clearing Account</td>
<td>01-000-1410-0000-000</td>
</tr>
<tr>
<td></td>
<td>Next Receipt Number</td>
<td>Any value</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Options</td>
<td>Use Approval Hierarchies</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Document Styles

Table 15–8 Document Styles for Oracle Purchasing

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document Styles</td>
<td>Standard Purchase Order</td>
<td>Goods, Services, Temp Labor</td>
</tr>
<tr>
<td></td>
<td>Blanket Purchase Agreement</td>
<td>Price Breaks, Price Differentials</td>
</tr>
</tbody>
</table>

Document Types

Table 15–9 Document Types for Oracle Purchasing

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard Purchase Order</td>
<td>Default Hierarchy</td>
<td>Materials</td>
</tr>
<tr>
<td></td>
<td>Owner can Approve</td>
<td>Check</td>
</tr>
<tr>
<td></td>
<td>Forward Method</td>
<td>Hierarchy</td>
</tr>
<tr>
<td></td>
<td>Security Level</td>
<td>Public</td>
</tr>
<tr>
<td></td>
<td>Archive On</td>
<td>Approve</td>
</tr>
<tr>
<td>Blanket Purchase Agreement</td>
<td>Default Hierarchy</td>
<td>Materials</td>
</tr>
<tr>
<td></td>
<td>Owner can Approve</td>
<td>Check</td>
</tr>
<tr>
<td></td>
<td>Forward Method</td>
<td>Hierarchy</td>
</tr>
<tr>
<td></td>
<td>Security Level</td>
<td>Public</td>
</tr>
<tr>
<td></td>
<td>Archive On</td>
<td>Approve</td>
</tr>
<tr>
<td>Contract Purchase Agreement</td>
<td>Default Hierarchy</td>
<td>Materials</td>
</tr>
<tr>
<td></td>
<td>Owner can Approve</td>
<td>Check</td>
</tr>
<tr>
<td></td>
<td>Forward Method</td>
<td>Hierarchy</td>
</tr>
<tr>
<td></td>
<td>Security Level</td>
<td>Public</td>
</tr>
<tr>
<td></td>
<td>Archive On</td>
<td>Approve</td>
</tr>
<tr>
<td>Purchase Requisition</td>
<td>Default Hierarchy</td>
<td>Materials</td>
</tr>
<tr>
<td></td>
<td>Owner can Approve</td>
<td>Check</td>
</tr>
<tr>
<td></td>
<td>Forward Method</td>
<td>Hierarchy</td>
</tr>
<tr>
<td></td>
<td>Security Level</td>
<td>Public</td>
</tr>
</tbody>
</table>

15.1 Online Standard Purchase Order Creation

Buyer logs in with Purchasing responsibility and creates a standard purchase order with Goods line type for an inventory item. Receiver logs in with Inventory responsibility and receives the full quantity of the goods against standard purchase order and a receipt is created in the inventory organization. The Accounts Officer logs in with Payables responsibility and creates a standard invoice, matches the invoice to the standard purchase order and validates the invoice. Once the invoice is validated, a quick payment is done and payment document is created.

Prerequisites

None.
15.2 Online Blanket Purchase Agreement and Release Creation

Buyer logs in with Purchasing responsibility and creates a blanket purchase agreement with goods line type for an inventory item. Buyer creates a blanket release against the agreement. Receiver logs in with Inventory responsibility and receives the full quantity of the goods against blanket release and a receipt is created in the Inventory organization. The Accounts Officer logs in with Payables responsibility and creates a standard invoice, matches the invoice to the standard purchase order and validates the invoice. Once the invoice is validated, a quick payment is done and payment document is created.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

15.3 Standard Purchase Order Creation using Autocreate

This flow covers approval functionality. Once the buyer approves the standard purchase order which has a document total more than $25000, the document goes for approval for the next approver. The approver approves the standard purchase order from the notification received.

Requester logs in with Purchasing responsibility and creates a purchase requisition with Goods line type for an inventory item. Buyer creates standard purchase orders from requisition using Auto Create process. After submitting for approval, standard purchase order goes to the next approver in the hierarchy as the document total is more than $25000. Receiver logs in with Inventory responsibility and receives the full quantity of the goods against standard purchase order and a receipt is created in the inventory organization. Accounts Officer logs in with Payables responsibility and creates a standard invoice, matches the invoice to the standard purchase order and validates the invoice. Once the invoice is validated, a quick payment is done and payment document is created.

Prerequisites
None.

Profile Options
Not applicable.
15.4 Release Creation using Autocreate

Requester logs in with Purchasing responsibility and creates a purchase requisition with Goods line type for an inventory item. Buyer creates blanket purchase agreement and creates a release from requisition using auto create process. Receiver logs in with Inventory responsibility and receives the full quantity of the goods against blanket release and a receipt is created in the inventory organization. Accounts Officer logs in with Payables responsibility and creates a standard invoice, matches the invoice to the standard purchase order and validates the invoice. Once the invoice is validated, a quick payment is done and payment document is created.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

15.5 Release Creation using Autocreate with Approved Supplier List and Sourcing Rules

Requester logs in with Purchasing responsibility and creates a purchase requisition with Goods line type for an inventory item. Buyer creates blanket purchase agreement. Buyer then creates approved supplier lists, sourcing rules for the item and sources the blanket agreement. Now Buyer creates a release from requisition using auto create process. Receiver logs in with Inventory responsibility and receives the full quantity of the goods against blanket release and a receipt is created in the Inventory organization. Accounts Officer logs in with Payables responsibility and creates a standard invoice, matches the invoice to the standard purchase order and validates the invoice. Once the invoice is validated, a quick payment is done and payment document is created.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.
15.6 Standard Purchase Order Creation using Autocreate with Contract Purchase Agreement Reference

Requester logs in with purchasing responsibility and creates a purchase requisition with Goods line type for an inventory item. Buyer creates contract purchase agreement and then a standard purchase order is created from requisition using auto create process referring the contract purchase agreement. Receiver logs in with inventory responsibility and receives the full quantity of the goods against standard purchase order and a receipt is created in the inventory organization. Accounts Officer logs in with payables responsibility and creates a standard invoice, matches the invoice to the standard purchase order and validates the invoice. Once the invoice is validated, a quick payment is done and payment document is created.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

15.7 Online Standard Purchase Order Creation in Buyer Work Center

Buyer logs in with purchasing responsibility and creates a standard purchase order with Goods line type for an inventory item in Buyer Work Center. Receiver logs in with inventory responsibility and receives the full quantity of the goods against standard purchase order and a receipt is created in the inventory organization. Accounts Officer logs in with payables responsibility and creates a standard invoice, matches the invoice to the standard purchase order and validates the invoice. Once the invoice is validated, a quick payment is done and payment document is created.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

15.8 Standard Purchase Order Creation using Autocreate in Buyer Work Center

Requester logs in with iProcurement responsibility and creates a purchase requisition with goods line type for an inventory item. Buyer creates standard purchase orders from requisition using Auto Create process in Buyer Work Center. After submitting for approval, standard purchase order goes to the next approver in the hierarchy as the...
document total is more than $25000. Receiver logs in with Inventory responsibility and receives the full quantity of the goods against standard purchase order and a receipt is created in the Inventory organization. Accounts Officer logs in with Payables responsibility and creates a standard invoice, matches the invoice to the standard purchase order and validates the invoice. Once the invoice is validated, a quick payment is done and payment document is created.

**Prerequisites**

None.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.

**Setup Data**

Not applicable.

15.9 Standard Purchase Order Creation with Global Blanket Purchase Agreement Reference using Autocreate in Buyer Work Center

Requester logs in with iProcurement responsibility and creates a purchase requisition with Goods line type for an inventory item. Buyer creates a global blanket purchase agreement and then a standard purchase order is created from requisition using auto create process referring the global blanket purchase agreement in buyer work center. Receiver logs in with inventory responsibility and receives the full quantity of the goods against standard purchase order and a receipt is created in the inventory organization. Accounts Officer logs in with payables responsibility and creates a standard invoice, matches the invoice to the standard purchase order and validates the invoice. Once the invoice is validated, a quick payment is done and payment document is created.

**Prerequisites**

None.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.

**Setup Data**

Not applicable.

15.10 Standard Purchase Order Creation with Global Blanket Purchase Agreement Reference using Autocreate with Approved Supplier List and Sourcing Rules in Buyer Work Center

Requester logs in with iProcurement responsibility and creates a purchase requisition with Goods line type for an inventory item. Buyer creates approved supplier list, sourcing rules for the item. Creates a global blanket purchase agreement and then a standard purchase order is created from requisition using auto create process referring
the global blanket purchase agreement in buyer work center. Receiver logs in with inventory responsibility and receives the full quantity of the goods against standard purchase order and a receipt is created in the inventory organization. Accounts Officer logs in with payables responsibility and creates a standard invoice, matches the invoice to the standard purchase order and validates the invoice. Once the invoice is validated, a quick payment is done and payment document is created.

**Prerequisites**
None.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

**Setup Data**
Not applicable.

### 15.11 Standard Purchase Order Creation using Autocreate with Contract Purchase Agreement Reference in Buyer Work Center

Requester logs in with iProcurement responsibility and creates a purchase requisition with Goods line type for an inventory item. Buyer creates contract purchase agreement and then a standard purchase order is created from requisition using auto create process referring the contract purchase agreement in Buyer Work Center. Receiver logs in with inventory responsibility and receives the full quantity of the goods against standard purchase order and a receipt is created in the inventory organization. Accounts Officer logs in with payables responsibility and creates a standard invoice, matches the invoice to the standard purchase order and validates the invoice. Once the invoice is validated, a quick payment is done and payment document is created.

**Prerequisites**
None.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

**Setup Data**
Not applicable.

### 15.12 Requisition Change Order

Requester logs in with iProcurement responsibility and creates a purchase requisition with Goods line type for an inventory item. Buyer creates standard purchase order from requisition using auto create process in Buyer Work Center. Requester creates a change order by changing the quantity and need by date and submits for buyer’s approval. Buyer receives the notification for change request and all the changes will be reflected to the standard purchase order automatically once the buyer approves the notification.
Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

15.13 Online Standard Purchase Order Creation for Services Item using Forms

Buyer logs in with purchasing responsibility and creates a standard purchase order with Fixed Price Services line type in forms. Receiver logs in with iProcurement responsibility and receives the services against the standard purchase order and a receipt is created. Accounts Officer logs in with payables responsibility and creates a standard Invoice, matches the invoice to the standard purchase order and validates the invoice. Once the invoice is validated, a quick payment is done and payment document is created.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

15.14 Online Standard Purchase Order Creation for Services Item using Buyer Work Center

Buyer logs in with purchasing responsibility and creates a standard purchase order with Fixed Price Services line type in Buyer Work Center. Receiver logs in with iProcurement responsibility and receives the services against the standard purchase order and a receipt is created. Accounts Officer logs in with payables responsibility and creates a standard Invoice, matches the invoice to the standard purchase order and validates the invoice. Once the invoice is validated, a quick payment is done and payment document is created.

Prerequisites
None.

Profile Options
Not applicable.
15.15 Modification of Standard Purchase Order in Forms

Buyer logs in with purchasing responsibility and creates a standard purchase order with Goods line type for an inventory item in forms. Once the document is approved, buyer updates the quantity and approves the document.

**Prerequisites**
None.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

**Setup Data**
Not applicable.

15.16 Modification of Standard Purchase Order in Buyer Work Center

Buyer logs in with purchasing responsibility and creates a standard purchase order with Goods line type for an inventory item in Buyer Work Center. Once the document is approved, buyer updates the quantity and approves the document.

**Prerequisites**
None.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

**Setup Data**
Not applicable.

15.17 Cancellation of Standard Purchase Order in Forms and Backing Requisition Cancellation

Requester logs in with purchasing responsibility and creates a purchase requisition with Goods line type for an inventory item in forms. Buyer creates standard purchase order from requisition using auto create process. Buyer cancels the standard purchase order along with backing requisition.

**Prerequisites**
None.
Copy of Standard Purchase Order in Buyer Work Center

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

15.18 Cancellation of Standard Purchase Order in Buyer Work Center and Backing Requisition Cancellation

Requester logs in with purchasing responsibility and creates a purchase requisition with Goods line type for an inventory item. Buyer creates standard purchase order from requisition using auto create process in buyer work center. Buyer cancels the standard purchase order along with backing requisition.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

15.19 Copy of Standard Purchase Order in Forms

Buyer logs in with purchasing responsibility and creates a standard purchase order with Goods line type for an inventory item in forms. Once the document is approved, buyer copies the same document to create another standard purchase order.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

15.20 Copy of Standard Purchase Order in Buyer Work Center

Buyer logs in with purchasing responsibility and creates a standard purchase order with Goods line type for an inventory item in Buyer Work Center. Once the document is approved, buyer duplicates to create another standard purchase order in Buyer Work Center.
15.21 eBtax for Purchasing

Requester logs in with purchasing responsibility and creates a purchase requisition with Goods line type for an inventory item in forms and specify the ship to location (Costa Mesa, CA) for which the tax is enabled and verifies that the tax is applied to the requisition. Buyer creates standard purchase order from requisition using auto create process in forms and verifies that the tax is applied to the standard purchase order.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

<table>
<thead>
<tr>
<th>Table 15–10 Window Setup Data for eBtax for Purchasing Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Window Name</strong></td>
</tr>
<tr>
<td>Define Locations</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Table 15–11 Page Setup Data for eBtax for Purchasing Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Page Name</strong></td>
</tr>
<tr>
<td>Tax configuration</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Tax Rules</td>
</tr>
<tr>
<td>Parties</td>
</tr>
</tbody>
</table>
This Part of the Oracle Flow Builder Starter Pack for E-Business Suite Release 12.1.3 provides information about the flows used with Projects applications.

This Part contains the following chapters:

- Chapter 16, "Oracle Grants Accounting"
- Chapter 17, "Oracle Project Billing"
- Chapter 18, "Oracle Project Costing"
- Chapter 19, "Oracle Project Management"
- Chapter 20, "Oracle Project Resource Management"
- Chapter 21, "Oracle Property Manager"
Oracle Grants Accounting extends the functionality of Oracle Projects to provide an integrated award and project management solution for grant receiving organizations. Oracle Grants Accounting tracks multi-funded projects and the required compliance terms and conditions by award.

This chapter describes the following test flows in Oracle Grants Accounting:

- **Award Revenue and Invoice Generation**

  **Prerequisites**
  None.

  **Profile Options**
  Not applicable.

  **Predefined Data**
  Not applicable.

  **Setup Data**
  Not applicable.

### 16.1 Award Revenue and Invoice Generation

Award revenue and invoice generation covers the award template creation, award creation, incurring actuals, and revenue and invoice generation.

A sponsored capital project is created which gets funded by an agreement. Award budgets are created and baselined. Pre-approved miscellaneous expenditure items are created and cost distributed. Burden transactions are also created for this expenditure item. Award revenue is generated and accounted. Project invoices are also generated and fully processed by interfacing the same to Receivables.

**Prerequisites**
None.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

**Setup Data**
Not applicable.
## Setup Data

### Table 16–1 Setup Data for Award Revenue and Invoice Generation Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Type</td>
<td>Service Type</td>
<td>Administration</td>
<td></td>
</tr>
<tr>
<td>Burden Schedule</td>
<td>GMS_Schedule</td>
<td></td>
<td>Raw expenditure of type Consulting, results in Burden Expenditure of type Overhead. Burden Multiplier of 0.1 is applicable</td>
</tr>
<tr>
<td>Budget Entry Method</td>
<td>By Lowest Task, GL Period (Rev)</td>
<td></td>
<td>Budget entry method has Entry Level = Lowest Tasks, Categorized by Resources = Yes and Time Phased By = GL Period</td>
</tr>
<tr>
<td>Resource List</td>
<td>GMS_Resource_List</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Award Template</td>
<td>Indirect Cost Schedule</td>
<td>GMS_Schedule</td>
<td>Raw expenditure Type - Consulting results in Burden Expenditure Type - Overhead Burden Multiplier of 0.1 is applicable</td>
</tr>
<tr>
<td>Customer</td>
<td>Department of Labor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Award type</td>
<td>Federal Agency Grants</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>Palmer, Mr. James John (Jim)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Award Budget</td>
<td>Budget Entry Method</td>
<td>By Lowest Task, GL Period (Rev)</td>
<td>Budget Entry Method is defined as: Entry Level - Lowest Tasks Categorized by Resources - Yes Time Phased By - GL Period</td>
</tr>
<tr>
<td>Resource List</td>
<td>GMS_Resource_List</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pre Approved Batches</td>
<td>Expenditure Type</td>
<td>Professional Computers Consulting Airfare Overhead Fringe</td>
<td></td>
</tr>
<tr>
<td>Project Template</td>
<td>Employee</td>
<td>Palmer, Mr. James John (Jim)</td>
<td></td>
</tr>
<tr>
<td>Window Name</td>
<td>Field Name</td>
<td>Field Value</td>
<td>Comments</td>
</tr>
<tr>
<td>--------------</td>
<td>----------------</td>
<td>--------------------------------------------------</td>
<td>----------</td>
</tr>
<tr>
<td>Project Asset</td>
<td>Employee</td>
<td>Palmer, Mr. James John (Jim)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Asset Category</td>
<td>COMPUTER-SERVER</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Asset Book</td>
<td>PROGRESS SandL</td>
<td></td>
</tr>
<tr>
<td></td>
<td>FA Location</td>
<td>GERMANY-NONE-BER LIN-MANUFACTURING</td>
<td></td>
</tr>
</tbody>
</table>
Oracle Project Billing enables simple client invoicing, improved cash flow, and measurement of the profitability of contract projects with support for planning, execution, and analysis. It utilizes information from the work breakdown structure and provides flexible revenue accrual and invoice generation features.

This chapter describes the following test flows in Oracle Project Billing:

- Project Revenue and Invoice Generation

**Prerequisites**

None.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.

**Setup Data**

Not applicable.

### 17.1 Project Revenue and Invoice Generation

Project revenue and invoice generation covers the integration between Project Billing and the other modules within Projects product family, like Project Foundation and Project Costing and also with Financials products like Receivables and E Business Tax.

A contract project is created which gets funded by an agreement. Costs and billing events are recorded on the projects. For these costs and events, project revenue is generated and accounted. Projects invoices are also generated and fully processed by interfacing the same to receivables.

**Prerequisites**

None.

**Profile Options**

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>PA: Transaction Billability derived from Work Type</td>
<td>Yes</td>
<td>Site</td>
</tr>
</tbody>
</table>
### Table 17–1  (Cont.)  Profile Options for Project Revenue and Invoice Generation Flow

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>PA: Require Work Type Entry for Expenditures</td>
<td>Yes</td>
<td>Site</td>
</tr>
</tbody>
</table>

### Predefined Data

#### Table 17–2  Predefined Data for Project Revenue and Invoice Generation Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Implementation Options</td>
<td>Transaction Source</td>
<td>PROJECTS INVOICES-600</td>
</tr>
</tbody>
</table>

### Setup Data

#### Table 17–3  Setup Data for Project Revenue and Invoice Generation Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Template</td>
<td>Employee</td>
<td>Marlin, Ms. Amy</td>
<td></td>
</tr>
<tr>
<td>Customer</td>
<td></td>
<td>Hilman and Associates</td>
<td></td>
</tr>
<tr>
<td>Tax Classification Code</td>
<td>PJB_TAX_RATE</td>
<td>Tax Rate of 10% is defined</td>
<td></td>
</tr>
<tr>
<td>Agreement Type</td>
<td>Agreement</td>
<td>Purchase Orders</td>
<td></td>
</tr>
<tr>
<td>Payment Terms</td>
<td></td>
<td>30 NET</td>
<td></td>
</tr>
<tr>
<td>Pre-Approved Batch</td>
<td>Expenditure Type</td>
<td>Consulting</td>
<td></td>
</tr>
<tr>
<td>Billing Events</td>
<td>Event Type</td>
<td>Manual</td>
<td></td>
</tr>
</tbody>
</table>
Oracle Project Costing provides a completely integrated cost management solution for all projects and activities across an enterprise, with the ability to cross currency and organizational boundaries. It has the capability to capture detailed cost information to monitor project performance in a format that optimizes their productivity.

This chapter describes the following test flows in Oracle Project Costing:

- Project Expenditure Entry

**Prerequisites**

None.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.

**Setup Data**

Not applicable.

### 18.1 Project Expenditure Entry

Project expenditure entry covers the integration between project costing and the other modules within Projects product family, like Project Foundation.

A project with separate line burdening is created in Project Foundation. Against this project, pre-approved time cards are created and cost distributed. Burden transactions are also created for the expenditure item. All the cost transactions are then verified in the Projects Expenditure Inquiry window.

**Prerequisites**

None.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.
### Setup Data

**Table 18-1  Setup Data for Project Expenditure Entry Flow**

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Type</td>
<td>Operating unit</td>
<td>Vision Project Mfg</td>
<td>Organization Type for the Organization should be Division and classifications to be attached are - Project Expenditure or Event Organization or Project Task Owning Organization</td>
</tr>
<tr>
<td>Service Type</td>
<td>Consulting</td>
<td></td>
<td>Work Type - Billable or Chargeable option deselected</td>
</tr>
<tr>
<td>Work Type</td>
<td>Internal-Overhead</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resource List</td>
<td>Expenditure Category by Employee or Expense Type</td>
<td>Resource list of name expenditure category by employee or expense type has to be created with group resource by expenditure category with the resource employee Marlin, Ms. Amy should be created</td>
<td></td>
</tr>
<tr>
<td>Burden Schedule</td>
<td>Labor Burden Only</td>
<td></td>
<td>Burden Schedule name Labor Burden only should be created. The structure attached to the burden schedule should have cost base as Labor and the expenditure type Professional with burden cost code Overhead. The burden multiplier 0.5 for the organization Vision Project Manufacturing should be created</td>
</tr>
<tr>
<td>Project Template or Key Member</td>
<td>Employee</td>
<td>Marlin, Ms. Amy</td>
<td>Employee in Human Resources, with active assignment</td>
</tr>
<tr>
<td>Pre-Approved Batch</td>
<td>Employee</td>
<td>Marlin, Ms. Amy</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Organization</td>
<td>Vision Project Mfg</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Expenditure Type</td>
<td>Professional</td>
<td>Expenditure Type-Professional with the below data UOM = Currency Rate Required = No Expenditure Type Class = Straight Time</td>
</tr>
</tbody>
</table>
### Table 18–1 (Cont.) Setup Data for Project Expenditure Entry Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expenditure Inquiry</td>
<td>Expenditure Type</td>
<td>Overhead</td>
<td>Expenditure Type-Overhead with the below data</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>UOM = Currency</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Rate Required = No</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Expenditure Type Class = Burden Transaction</td>
</tr>
</tbody>
</table>
Oracle Project Management provides project managers the visibility and control they need to deliver their projects successfully, improve profitability, and operate more efficiently. Oracle Project Management empowers project managers to plan the work, assign resources, forecast to completion, and communicate to stakeholders, while streamlining the collaborative execution of project work.

This chapter describes the following test flows in Oracle Project Management:

- Project Template Creation

**Prerequisites**

None.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.

**Setup Data**

Not applicable.

### 19.1 Project Template Creation

The project template creation covers the creation of a planning resource list with resource formats and planning resources. A project template is created and structures are enabled, and team members and customer details are added to the template. Work plan setups are performed by assigning the planning resource list. Work breakdown structure is created in the project template and resources are assigned to the tasks.

**Prerequisites**

Rate schedule RC_Cost1 with resource class having all four resource classes as per the table below.

<table>
<thead>
<tr>
<th>Resource class</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>People</td>
<td>10</td>
</tr>
<tr>
<td>Equipment</td>
<td>20</td>
</tr>
<tr>
<td>Material items</td>
<td>1</td>
</tr>
<tr>
<td>Financial Element</td>
<td>1</td>
</tr>
</tbody>
</table>

Table 19–1  Prerequisites for Project Template Creation Flow
### Profile Options
Not applicable.

### Predefined Data
Not applicable.

### Setup Data

<table>
<thead>
<tr>
<th>Table 19–2</th>
<th>Setup Data for Project Template Creation Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Page Name</strong></td>
<td><strong>Field Name</strong></td>
</tr>
<tr>
<td>Planning Resource List</td>
<td>Job Group</td>
</tr>
<tr>
<td></td>
<td>Expenditure Type</td>
</tr>
<tr>
<td></td>
<td>Organization</td>
</tr>
<tr>
<td>Project Template</td>
<td>Project Type</td>
</tr>
<tr>
<td>Project Template</td>
<td>Organization</td>
</tr>
<tr>
<td>Project Template or Key Members</td>
<td>Employee</td>
</tr>
<tr>
<td></td>
<td>Role</td>
</tr>
<tr>
<td>Project Template or Customer and contacts</td>
<td>Customer Name</td>
</tr>
<tr>
<td>Task Type</td>
<td>Name</td>
</tr>
</tbody>
</table>
Oracle Project Resource Management helps to manage the capacity and deployment of people and assets for project work by finding and deploying the most qualified resources to the projects. Oracle Project Resource Management centralizes information to empower project, resource, and staffing managers to better utilize their single most critical resource: people.

This chapter describes the following test flows in Oracle Project Resource Management:

- Project Requirement Creation to Approval

**Prerequisites**

None.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.

**Setup Data**

Not applicable.

### 20.1 Project Requirement Creation to Approval

Project requirement creation to approval covers the creation of a project from a project template. It creates a requirement for the project, assigns a person to the requirement to convert into an assignment and approves the assignment of the project.

**Prerequisites**

- Users with responsibilities as:
  - Employees with roles as:

**Table 20–1 Users Prerequisites for Project Requirement Creation to Approval Flow**

<table>
<thead>
<tr>
<th>User</th>
<th>Responsibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>00amason</td>
<td>Project Super User</td>
</tr>
<tr>
<td>00bclark</td>
<td>Staffing Manager</td>
</tr>
<tr>
<td>00Dgeorge</td>
<td>Resource Manger</td>
</tr>
</tbody>
</table>

- Employees with roles as:
Table 20–2  Employees Prerequisites for Project Requirement Creation to Approval Flow

<table>
<thead>
<tr>
<th>Employee name</th>
<th>Role</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>00Langer, Daniel</td>
<td>Employee for assigning to a requirement</td>
<td></td>
</tr>
<tr>
<td>Clark, Ms. Boris</td>
<td>Staffing owner</td>
<td></td>
</tr>
<tr>
<td>George, Mr. David</td>
<td>Approver for requirement</td>
<td></td>
</tr>
<tr>
<td>00Mason, Abraham</td>
<td>Project manager</td>
<td></td>
</tr>
</tbody>
</table>

- PRC: Maintain Project Resources run to access the employees in Projects.
- Open Accounting and GL periods for the current year.

Profile Options

Table 20–3  Profile Options for Project Requirement Creation to Approval Flow

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
<th>Level</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>PA: Licensed to use Project Resource Management</td>
<td>Yes</td>
<td>Site</td>
<td></td>
</tr>
<tr>
<td>PA: Availability Duration</td>
<td>0</td>
<td>Site</td>
<td></td>
</tr>
<tr>
<td>PA: Availability or Overcommitment Calculation Period</td>
<td>Daily</td>
<td>Site</td>
<td></td>
</tr>
<tr>
<td>MO: Operating Unit</td>
<td>Vision Services</td>
<td>Site</td>
<td></td>
</tr>
<tr>
<td>MO: Security Profile</td>
<td>Vision Corporation</td>
<td>Site</td>
<td></td>
</tr>
<tr>
<td>HR: Business Group</td>
<td>Vision Corporation</td>
<td>Site</td>
<td></td>
</tr>
</tbody>
</table>

Predefined Data

Not applicable.

Setup Data

Table 20–4  Setup Data for Project Requirement Creation to Approval Flow

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Template</td>
<td>Cost Plus</td>
<td>Organization</td>
<td>Project type Contract is used in the template</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PJR Organization1</td>
<td>Organization Type-Division Classification-HR Organization, Project Expenditure or Event Organization and Project Task Owning Organization</td>
</tr>
<tr>
<td>Customer Name</td>
<td>Hilman and Associates</td>
<td></td>
<td>Customer must be created in Accounts Receivables</td>
</tr>
<tr>
<td>Role</td>
<td>Name</td>
<td>DBA</td>
<td>Job CON600. Consultant should be attached to the role</td>
</tr>
</tbody>
</table>
### Table 20–4 (Cont.) Setup Data for Project Requirement Creation to Approval Flow

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calendar</td>
<td>Name</td>
<td>PJR Calendar 1</td>
<td>Calendar exceptions [Holidays] defined and Shifts assigned to it [Shift: 8x5] the calendar periods should fall in the project start and end dates</td>
</tr>
</tbody>
</table>
Oracle Property Manager provides the ability to manage major real estate tasks, including creation and administration of property, lease administration and office space allocation.

This chapter describes the following test flows in Oracle Property Manager:

- Property Lease Management

**Prerequisites**
None.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

**Setup Data**
Not applicable.

### 21.1 Property Lease Management

Property lease management covers defining properties and creating expense leases for these, till export payment. Lease is then finalized and payment schedule is approved and exported to Payables module.

**Prerequisites**
None.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.
## Setup Data

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lease</td>
<td>Term Template</td>
<td>PN-Pay-Norm TX NO</td>
</tr>
<tr>
<td></td>
<td>Supplier Name</td>
<td>PN-Supplier-1</td>
</tr>
<tr>
<td></td>
<td>Supplier Site</td>
<td>Main Site</td>
</tr>
</tbody>
</table>
Part VIII
Supply Chain Management

This Part of the Oracle Flow Builder Starter Pack for E-Business Suite Release 12.1.3 provides information about the flows used with Supply Chain Management applications.

This Part contains the following chapters:

- Chapter 22, "Oracle Advanced Pricing"
- Chapter 23, "Oracle Asset Tracking"
- Chapter 24, "Oracle Bill of Materials"
- Chapter 25, "Oracle Contracts Core"
- Chapter 26, "Oracle Cost Management"
- Chapter 27, "Oracle Engineering"
- Chapter 28, "Oracle Enterprise Asset Management"
- Chapter 29, "Oracle Flow Manufacturing"
- Chapter 30, "Oracle Install Base"
- Chapter 31, "Oracle Inventory Management"
- Chapter 32, "Oracle Item Master"
- Chapter 33, "Oracle Landed Cost Management"
- Chapter 34, "Oracle Manufacturing Execution Systems for Discrete Manufacturing"
- Chapter 35, "Oracle Manufacturing Execution System for Process Manufacturing"
- Chapter 36, "Oracle Order Management"
- Chapter 37, "Oracle Process Manufacturing"
- Chapter 38, "Oracle Quality"
- Chapter 39, "Oracle Service Contracts"
- Chapter 40, "Oracle Shipping Execution"
- Chapter 41, "Oracle Shop Floor Management"
- Chapter 42, "Oracle Work in Process"
- Chapter 43, "Oracle Warehouse Management System"
Oracle Advanced Pricing supports E-Business Suite applications by providing a flexible pricing engine that executes pricing and promotional calculations for Oracle Order Management and other Oracle applications. Oracle Advanced Pricing provides the flexibility to meet the needs of complex pricing situations for a range of demanding industry business requirements which include:

- Consumer goods, telecommunications, services, high technology, automotive businesses and aerospace or defense businesses that sell to other businesses.
- Telemarketing, mail order catalog and web store businesses that sell directly to consumers.

Consumer goods, telecommunications, services, high technology, automotive businesses and aerospace or defense businesses that sell to other businesses.
Telemarketing, mail order catalog and web store businesses that sell directly to consumers.

This chapter describes the following test flows in Oracle Advanced Pricing:

- Create, Update Price Lists and Modifiers

**Prerequisites**

None.

**Predefined Data**

Not applicable.

**Setup Data**

Not applicable.

### 22.1 Create, Update Price Lists and Modifiers

Creation of various price lists, formulae and modifiers through Forms based user interface. This flow verifies the archiving of pricing data which archives price lists and modifiers, purging pricing entities which purges price list, and searching or querying pricing organizer form with various modifiers.

**Prerequisites**

- User is logged in with Order Management Super User responsibility.
**Profile Options**

*Table 22–1  Profile Options for Create, Update Price Lists and Modifiers Flow*

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>QP: Source System Code</td>
<td>Oracle Pricing</td>
</tr>
<tr>
<td>QP: Pricing Transaction Entity</td>
<td>Order Fulfillment</td>
</tr>
</tbody>
</table>

**Predefined Data**

Not applicable.

**Setup Data**

*Table 22–2 Setup Data for Create, Update Price Lists and Modifiers Flow*

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advanced Pricing-Price Lists</td>
<td>Name</td>
<td>Corporate (Pick a price list)</td>
</tr>
<tr>
<td>Item Master</td>
<td>Name</td>
<td>AS54888 (Pick a standard finished good item)</td>
</tr>
</tbody>
</table>
Oracle Asset Tracking is an asset lifecycle management application that provides tracking, visibility and control of dispersed assets for capital-intensive companies. Oracle Asset Tracking maximizes asset utilization and return on investment by automatically synchronizing the operational and physical events of assets with the financial updates in Oracle Assets.

This chapter describes the following test flows in Oracle Asset Tracking:

- Deployment Transactions on Item Instances

Prerequisites
None.

Profile Options

Table 23–1 Profile Options for Oracle Asset Tracking

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSE: FA Book Type Code</td>
<td>ALM CORP01</td>
<td>Site</td>
</tr>
</tbody>
</table>

Predefined Data

Table 23–2 Predefined Data for Oracle Asset Tracking

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>User Name / Password</td>
<td>Operations / welcome</td>
</tr>
<tr>
<td>Responsibility</td>
<td>Responsibility Name</td>
<td>Manufacturing and Distribution Manager</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Asset Tracking Super User</td>
</tr>
<tr>
<td>Item Template</td>
<td>Template</td>
<td>Purchased Item</td>
</tr>
</tbody>
</table>

Setup Data

Table 23–3 Setup Data for Oracle Asset Tracking

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Organization</td>
<td>V1 - Vision Operations</td>
</tr>
<tr>
<td>Organization</td>
<td>Inventory Organization</td>
<td>M1 - Seattle Manufacturing</td>
</tr>
<tr>
<td>Install Base Parameters</td>
<td>Party Name</td>
<td>Vision Corporation</td>
</tr>
</tbody>
</table>
23.1 Deployment Transactions on Item Instances

Installs and puts into service deployment transactions for a depreciable serialized Item instance.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data

<table>
<thead>
<tr>
<th>Table 23–4 Window Setup Data for Deployment Transactions on Item Instances Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Window Name</strong></td>
</tr>
<tr>
<td>Create Item</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Table 23–5 Page Setup Data for Deployment Transactions on Item Instances Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Page Name</strong></td>
</tr>
<tr>
<td>Create Instance</td>
</tr>
</tbody>
</table>
Oracle Bill of Material delivers a strong tool for manufacturing complicated finished products, which is the combination of a number of multilevel components. It supports standard, model, option class, and planning bills. BOM can be defined with date affectivity and unit affectivity of components, and provides the ability to copy and common huge bills of material across organizations.

This chapter describes the following test flows in Oracle Bill of Materials:

- Create a Common BOM and Routing

**Prerequisites**

None.

**Profile Options**

Not applicable.

**Predefined Data**

<table>
<thead>
<tr>
<th>OA Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>Responsibility Name</td>
<td>Manufacturing and Distribution Manager</td>
</tr>
</tbody>
</table>

**Setup Data**

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>User Name / Password</td>
<td>mfg/welcome</td>
<td></td>
</tr>
<tr>
<td>Organization</td>
<td>Organization</td>
<td>V1, M1, M2</td>
<td></td>
</tr>
<tr>
<td>Item Template</td>
<td>Template</td>
<td>Finished Goods</td>
<td>Enable finished goods related attributes</td>
</tr>
</tbody>
</table>

### 24.1 Create a Common BOM and Routing

Creates items for BOM; creates BOM, routing, common routing and common BOM to another organization.

**Prerequisites**

None.
Profile Options

Not applicable.

Predefined Data

Table 24–3  Predefined Data for Create a Common BOM and Routing Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>Responsibility Name</td>
<td>Manufacturing and Distribution Manager</td>
</tr>
<tr>
<td>Resources</td>
<td>Type</td>
<td>Person</td>
</tr>
<tr>
<td></td>
<td>Charge Type</td>
<td>WIP Move</td>
</tr>
<tr>
<td></td>
<td>UOM</td>
<td>HR (Hour)</td>
</tr>
</tbody>
</table>

Setup Data

Table 24–4  Setup Data for Create a Common BOM and Routing Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>User Name / Password</td>
<td>mfg/welcome</td>
<td></td>
</tr>
<tr>
<td>Item Template</td>
<td>Template</td>
<td>Finished Goods</td>
<td>Enable finished goods related attributes</td>
</tr>
</tbody>
</table>
Oracle Contracts Core automates the entire contracts lifecycle. It has a unified data model which provides a single, accurate view of contract-related activities which enable organizations to streamline management, prevent revenue leakage, and enforce compliance.

This chapter describes the following test flows in Oracle Contracts Core:

- Create, Update and Duplicate Clauses
- Create Incompatible Clauses and Add Clauses to the Clause Folder
- Create a Clause with a User Defined Variable and Localize a Clause

Prerequisites
None.

Profile Options

<table>
<thead>
<tr>
<th>Table 25–1 Profile Options for Oracle Contracts Core</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Name</td>
</tr>
<tr>
<td>MO: Security</td>
</tr>
</tbody>
</table>

Predefined Data
Not applicable.

Setup Data

<table>
<thead>
<tr>
<th>Table 25–2 Setup Data for Oracle Contracts Core</th>
</tr>
</thead>
<tbody>
<tr>
<td>Window Name</td>
</tr>
<tr>
<td>Contracts Terms Setup</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

25.1 Create, Update and Duplicate Clauses

Creates and updates clauses across organizations. Creates a clause from an existing clause by using Duplicate Clause option.

Prerequisites
None.
25.2 Create Incompatible Clauses and Add Clauses to the Clause Folder

Creates and views incompatible clauses at different levels. Inserts global clauses into clause folder in local organization for which the Auto Adoption option is set to Yes.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

25.3 Create a Clause with a User Defined Variable and Localize a Clause

Creates a clause with user defined variable with Allow External Party Entry set to Yes. Creates global articles, localizes and approves, rejects and resubmits them in a local organization.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.
Oracle Cost Management is a comprehensive solution that helps organizations project costs and perform cost accounting for supply chain transactions. These activities serve as a key component for complying with regulatory reporting and accounting requirements, streamlining the use of working capital in organizations, and improving profitability for businesses. Oracle Cost Management is part of the Oracle E-Business Suite, an integrated set of applications that are engineered to work together.

This chapter describes the following test flows in Oracle Cost Management:

- Inter-organization Transfers -Standard to Average costing organizations- FOB Receipt-Sub-inventory-Asset-Asset
- Inter-organization Transfers -Standard to Last-in, First-out (LIFO) costing organizations- FOB Receipt-Sub-inventory-Asset-Asset
- Inter-organization Transfers -Standard to First-in, First-out (FIFO) costing organizations- FOB Receipt-Sub-inventory-Asset-Asset
- Purchase Order Receipt - Asset Item- Asset-Sub-inventory-Average Costing Organization
- Purchase Order Receipt-Asset Item- Asset-Sub-inventory-Standard Costing Organization
- Standard Discrete Job - Standard Costing Organization
- Standard Discrete Job - Average Costing Organization
- Sales Invoice and Revenue Recognition - Standard Costing Organization

**Prerequisites**

- Organization parameters.
- Receiving parameters.
- WIP parameters.
- BOM parameters.
- Shipping parameters.
- Open inventory accounting period.
- Open GL period.
- Open AP period.
- Open PO period.
- Open AR period.
Profile Options
Not applicable.

Predefined Data

<table>
<thead>
<tr>
<th>Table 26–1 Predefined Data for Oracle Cost Management</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Window Name</strong></td>
</tr>
<tr>
<td>Responsibility</td>
</tr>
<tr>
<td>GL - Accounting Setup Manager -Ledger</td>
</tr>
<tr>
<td>Item Costs</td>
</tr>
<tr>
<td>Item Template</td>
</tr>
<tr>
<td>Sub-Inventory</td>
</tr>
</tbody>
</table>

Setup Data
Not applicable.

26.1 Inter-Organization Transfers -Standard to Average Costing Organizations- FOB Receipt-Sub-Inventory-Asset-Asset

Transfers materials from standard to average costing organizations within the operating unit, where shipping network is FOB Receipt, and verifies the distributions for all transactions.

Prerequisites
Organizations are standard and average costing organizations.
Shipping network is FOB-receipt.

Profile Options
Not applicable.

Predefined Data

<table>
<thead>
<tr>
<th>Table 26–2 Predefined Data for Inter-Organization Transfers -Standard to Average Costing Organizations- FOB Receipt-Sub-Inventory-Asset-Asset Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Window Name</strong></td>
</tr>
<tr>
<td>Organization Parameters</td>
</tr>
</tbody>
</table>

Setup Data

<table>
<thead>
<tr>
<th>Table 26–3 Setup Data for Inter-Organization Transfers -Standard to Average Costing Organizations- FOB Receipt-Sub-Inventory-Asset-Asset Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Window Name</strong></td>
</tr>
<tr>
<td>Organization</td>
</tr>
<tr>
<td>Organization</td>
</tr>
</tbody>
</table>
26.2 Inter-Organization Transfers - Standard to Last-in, First-out (LIFO) Costing Organizations- FOB Receipt-Sub-inventory-Asset-Asset

Transfers material from standard to LIFO (Last-In, First-out) costing organization within the operating unit, where shipping network is FOB receipt, and verifies the distributions for all transactions.

**Prerequisites**
- Organizations are standard and average costing organizations.
- Shipping network is FOB-receipt.

**Profile Options**
Not applicable.

**Predefined Data**

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Parameters</td>
<td>Costing Method</td>
<td>Standard and LIFO</td>
</tr>
</tbody>
</table>

**Setup Data**

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Organization</td>
<td>M1- Seattle Manufacturing (Standard Costing Enabled Organization)</td>
</tr>
<tr>
<td></td>
<td>Organization</td>
<td>M6 - Phoenix Manufacturing (LIFO Costing Enabled Organization)</td>
</tr>
<tr>
<td>Master Items</td>
<td>Template</td>
<td>Purchased Item Template</td>
</tr>
</tbody>
</table>

26.3 Inter-Organization Transfers - Standard to First-in, First-out (FIFO) Costing Organizations- FOB Receipt-Sub-Inventory-Asset-Asset

Transfers material from standard to FIFO (First-In, First-out) costing organization within the operating unit, where shipping network is FOB receipt, and verifies the distributions for all transactions.

**Prerequisites**
- Organizations are standard and FIFO (First-in, First-out) costing enabled organizations.
- Shipping network is FOB-receipt.
Profile Options
Not applicable.

Predefined Data

Table 26–6 Predefined Data for Inter-Organization Transfers - Standard to First-in, First-out (FIFO) Costing Organizations- FOB Receipt-Sub-Inventory-Asset-Asset Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Parameters</td>
<td>Costing Method</td>
<td>Standard and FIFO</td>
</tr>
</tbody>
</table>

Setup Data

Table 26–7 Setup Data for Inter-Organization Transfers - Standard to First-in, First-out (FIFO) Costing Organizations- FOB Receipt-Sub-Inventory-Asset-Asset Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Organization</td>
<td>M1- Seattle Manufacturing (Standard Costing Enabled Organization)</td>
</tr>
<tr>
<td></td>
<td>Organization</td>
<td>M7- New Orleans Manufacturing (FIFO Costing Enabled Organization)</td>
</tr>
<tr>
<td>Master Items</td>
<td>Template</td>
<td>Purchased Item Template</td>
</tr>
</tbody>
</table>

26.4 Purchase Order Receipt - Asset Item- Asset-Sub-Inventory-Average Costing Organization

Creates on hand stock through purchase order receipts and verifies the distributions in an average costing organization.

Prerequisites
- Organization is average costing enabled organization.
- Sub-inventory is asset sub-inventory.
- Tax setup is disabled.

Profile Options
Not applicable.

Predefined Data

Table 26–8 Predefined Data for Purchase Order Receipt - Asset Item- Asset-Sub-Inventory-Average Costing Organization Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Parameters</td>
<td>Costing Method</td>
<td>Average</td>
</tr>
<tr>
<td>Purchase Order</td>
<td>Type</td>
<td>Standard Purchase Order</td>
</tr>
</tbody>
</table>
Setup Data

Table 26–9  Setup Data for Purchase Order Receipt - Asset Item-Asset-Sub-Inventory-Average Costing Organization Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Organization</td>
<td>AVG - Average Organization</td>
</tr>
<tr>
<td>Master Items</td>
<td>Template</td>
<td>Purchased Item Template</td>
</tr>
<tr>
<td>Supplier</td>
<td>Supplier Name</td>
<td>Use Supplier as &quot;Office Supplies, Inc.&quot; for creating Purchase Orders and site as &quot;NEW YORK&quot;</td>
</tr>
</tbody>
</table>

26.5 Purchase Order Receipt-Asset Item-Asset-Sub-Inventory-Standard Costing Organization

Creates on hand stock through purchase order receipts and verifies the distributions in a standard costing organization.

Prerequisites

- Organization is average costing enabled organization.
- Sub-inventory is asset sub-inventory.
- Tax setup is disabled.

Profile Options

Not applicable.

Predefined Data

Table 26–10  Predefined Data for Purchase Order Receipt-Asset Item-Asset-Sub-Inventory-Standard Costing Organization Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Parameters</td>
<td>Costing Method</td>
<td>Standard</td>
</tr>
<tr>
<td>Purchase Order</td>
<td>Type</td>
<td>Standard Purchase Order</td>
</tr>
</tbody>
</table>

Setup Data

Table 26–11  Setup Data for Purchase Order Receipt-Asset Item-Asset-Sub-Inventory-Standard Costing Organization Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Organization</td>
<td>M1- Seattle Manufacturing</td>
</tr>
<tr>
<td>Master Items</td>
<td>Template</td>
<td>Items are created through Purchased Item template</td>
</tr>
<tr>
<td>Supplier</td>
<td>Supplier Name</td>
<td>Use Supplier as Office Supplies, Inc. for creating purchase orders and site as NEW YORK.</td>
</tr>
</tbody>
</table>
26.6 Standard Discrete Job - Standard Costing Organization

Creates on hand stock for the components through purchase order receipts, creates and releases standard discrete job, performs the move, issues the material, completes WIP, closes the job and verifies distributions for all the transactions in a standard costing organization.

Prerequisites

- Organization is standard costing organization.
- Sub-inventory is asset sub-inventory.
- Discrete job type is Standard.
- 3 components and 1 assembly.
- 3 resources and 3 departments.
- Tax setup is disabled.

Profile Options

Not applicable.

Predefined Data

<table>
<thead>
<tr>
<th>Table 26–12 Predefined Data for Standard Discrete Job - Standard Costing Organization Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Window Name</td>
</tr>
<tr>
<td>-------------</td>
</tr>
<tr>
<td>Item Template</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Purchase Order</td>
</tr>
</tbody>
</table>

Setup Data

<table>
<thead>
<tr>
<th>Table 26–13 Setup Data for Standard Discrete Job - Standard Costing Organization Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Window Name</td>
</tr>
<tr>
<td>-------------</td>
</tr>
<tr>
<td>Organization</td>
</tr>
<tr>
<td>Master Items</td>
</tr>
<tr>
<td>Master Items</td>
</tr>
<tr>
<td>Supplier</td>
</tr>
<tr>
<td>WIP Accounting Classes</td>
</tr>
</tbody>
</table>

26.7 Standard Discrete Job - Average Costing Organization

Creates on hand stock for the components through purchase order receipts, creates and releases standard discrete job, performs the move, issues the material, completes WIP, closes the job and verifies distributions for all the transactions in an average costing organization.
Prerequisites

- Organization is standard costing organization.
- Sub-inventory is asset sub-inventory.
- Discrete job type Standard.
- 3 components and 1 assembly.
- 3 resources and 3 departments.
- Tax setup is disabled.

Profile Options

Not applicable.

Predefined Data

Table 26–14 Predefined Data for Standard Discrete Job - Average Costing Organization Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Parameters</td>
<td>Costing Method</td>
<td>Average</td>
</tr>
<tr>
<td>Purchase Order</td>
<td>Type</td>
<td>Standard Purchase Order</td>
</tr>
</tbody>
</table>

Setup Data

Table 26–15 Setup Data for Standard Discrete Job - Average Costing Organization Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Organization</td>
<td>M3</td>
</tr>
<tr>
<td>Master Items</td>
<td>Components</td>
<td>Components are created through Purchased Item template</td>
</tr>
<tr>
<td></td>
<td>Assembly</td>
<td>Assembly is created through Finished Good template</td>
</tr>
<tr>
<td>Supplier</td>
<td>Supplier Name</td>
<td>Use Supplier as Office Supplies, Inc. for creating purchase orders and site as NEW YORK.</td>
</tr>
<tr>
<td>WIP Accounting Classes</td>
<td>Define Ledger Accounts</td>
<td>Discrete</td>
</tr>
</tbody>
</table>

26.8 Sales Invoice and Revenue Recognition - Standard Costing Organization

Creates on hand stock for components through purchase order receipt, books the sales order, issues the material to customer, identifies the COGS and revenue, and verifies distribution for all the transactions.

Prerequisites

- Organization is standard costing organization.
- Sub-inventory is asset sub-inventory.

Profile Options

Not applicable.
Predefined Data

Table 26–16  Predefined Data for Sales Invoice and Revenue Recognition - Standard Costing Organization Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Template</td>
<td>Template</td>
<td>Finished Good</td>
</tr>
<tr>
<td>Enter Price List</td>
<td>Price List Name</td>
<td>Corporate</td>
</tr>
</tbody>
</table>

Table 26–17  Predefined Data for Sales Invoice and Revenue Recognition - Standard Costing Organization Flow

<table>
<thead>
<tr>
<th>Concurrent Request Name</th>
<th>Parameter</th>
<th>Parameter Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workflow background</td>
<td>Item Type</td>
<td>OM Order Line</td>
</tr>
<tr>
<td>Process</td>
<td>Process Deferred</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Process Timed out</td>
<td>No</td>
</tr>
<tr>
<td>Autoinvoice Master</td>
<td>Invoice Source</td>
<td>Order Entry</td>
</tr>
<tr>
<td>Program</td>
<td>Default Date</td>
<td>Enter as per requirement</td>
</tr>
<tr>
<td>Revenue Recognition</td>
<td>Ledger</td>
<td>Vision Operations (USA)</td>
</tr>
<tr>
<td>Master Program</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Record Order Management</td>
<td>Ledger</td>
<td>Vision Operations (USA)</td>
</tr>
<tr>
<td>Transactions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Collect Revenue</td>
<td>Ledger</td>
<td>Vision Operations (USA)</td>
</tr>
<tr>
<td>Recognition Information</td>
<td>Start Date</td>
<td>Enter as per requirement</td>
</tr>
<tr>
<td></td>
<td>End Date</td>
<td>Enter as per requirement</td>
</tr>
<tr>
<td>Generate COGS</td>
<td>Ledger</td>
<td>Vision Operations (USA)</td>
</tr>
<tr>
<td>Recognition Events</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Setup Data

Table 26–18  Setup Data for Sales Invoice and Revenue Recognition - Standard Costing Organization Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Organization</td>
<td>M1- Seattle Manufacturing</td>
</tr>
<tr>
<td>Master Items</td>
<td>Assembly</td>
<td>Item is created through Finished Good template</td>
</tr>
<tr>
<td>Purchase Order</td>
<td>Type</td>
<td>Standard Purchase Order.</td>
</tr>
<tr>
<td>Supplier</td>
<td>Supplier Name</td>
<td>Use Supplier as Office Supplies, Inc. for creating purchase orders and site as NEW YORK.</td>
</tr>
<tr>
<td>Customer</td>
<td>Customer Name</td>
<td>User Customer as Computer Service and Rentals for creating Sales Order.</td>
</tr>
<tr>
<td>Unit of Measure</td>
<td>Code</td>
<td>EA</td>
</tr>
</tbody>
</table>
Oracle Engineering enables you to control new item revisions and bill of material changes. Its prototype also enables you to move toward concurrent engineering by integrating engineering prototype data with manufacturing data.

This chapter describes the following test flows in Oracle Engineering:

- Create, Copy ENG to MFG, Propagate and Implement Engineering Change Order.
- Create Engineering Change Order (ECO) and Implement.

Prerequisites

None.

Profile Options

Not applicable.

Predefined Data

<table>
<thead>
<tr>
<th>Table 27–1 Predefined Data for Oracle Engineering</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Window Name</strong></td>
</tr>
<tr>
<td>Responsibility</td>
</tr>
<tr>
<td>Organization</td>
</tr>
<tr>
<td>Engineering Bills Of Material</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Component Changes</td>
</tr>
<tr>
<td>Engineering Bills Of Material</td>
</tr>
</tbody>
</table>

Setup Data

<table>
<thead>
<tr>
<th>Table 27–2 Setup Data for Oracle Engineering</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Window Name</strong></td>
</tr>
<tr>
<td>User</td>
</tr>
<tr>
<td>Item Template</td>
</tr>
</tbody>
</table>
27.1 Create, Copy ENG to MFG, Propagate and Implement Engineering Change Order

Creates an engineering BOM; transfers item bill from engineering to manufacturing, propagates engineering change order to child organization and implements engineering change order in child organization.

Prerequisites
None.

Profile Options

<table>
<thead>
<tr>
<th>Table 27–3</th>
<th>Profile Options for Create, Copy ENG to MFG, Propagate and Implement Engineering Change Order Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Name</td>
<td>Profile Value</td>
</tr>
<tr>
<td>Enable Security Group</td>
<td>No</td>
</tr>
</tbody>
</table>

Predefined Data

<table>
<thead>
<tr>
<th>Table 27–4</th>
<th>Predefined Data for Create, Copy ENG to MFG, Propagate and Implement Engineering Change Order Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page Name</td>
<td>Field Name</td>
</tr>
<tr>
<td>Responsibility</td>
<td>Responsibility Name</td>
</tr>
</tbody>
</table>

Setup Data

<table>
<thead>
<tr>
<th>Table 27–5</th>
<th>Setup Data for Create, Copy ENG to MFG, Propagate and Implement Engineering Change Order Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Window Name</td>
<td>Field Name</td>
</tr>
<tr>
<td>User</td>
<td>User Name / Password</td>
</tr>
<tr>
<td>Organization</td>
<td>Organization</td>
</tr>
<tr>
<td>Item Template</td>
<td>Template</td>
</tr>
</tbody>
</table>

27.2 Create Engineering Change Order and Implement

Defines engineering change order approval list, creates engineering change order, transfers and copies engineering items and bills to manufacturing, implements engineering change order and generates engineering change order detail report.

Prerequisites
None.

Profile Options
Not applicable.
Predefined Data

Table 27–6  Predefined Data for Create Engineering Change Order and Implement Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>Responsibility Name</td>
<td>Manufacturing and Distribution Manager</td>
</tr>
</tbody>
</table>

Setup Data

Table 27–7  Setup Data for Create Engineering Change Order and Implement Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>User Name / Password</td>
<td>plmmgr / welcome</td>
</tr>
<tr>
<td>Item Template</td>
<td>Template</td>
<td>Purchased Item</td>
</tr>
<tr>
<td>Approval Lists</td>
<td>Lists</td>
<td>JEAL</td>
</tr>
<tr>
<td>Employee</td>
<td>Name</td>
<td>Williams, Steve, Smith, Mr. Jonathan</td>
</tr>
<tr>
<td>Master Item</td>
<td>Item</td>
<td>EBS_COMP_10</td>
</tr>
<tr>
<td></td>
<td>Item</td>
<td>EBS_COMP_11</td>
</tr>
<tr>
<td></td>
<td>Item</td>
<td>EBS_COMP_12</td>
</tr>
<tr>
<td></td>
<td>Item</td>
<td>EBS_COMP_11</td>
</tr>
</tbody>
</table>
Oracle Enterprise Asset Management (Oracle eAM) supports sophisticated, condition-based maintenance strategies for property, plants and public infrastructure. Oracle eAM's single instance design ensures best practices and quality compliance globally, eliminates excess and obsolete spare parts inventories, promotes environmental, health and safety policies, ensures smooth coordination of production and maintenance schedules, and improves both, the responsiveness and accuracy of contracted maintenance.

This chapter describes the following test flows in Oracle Enterprise Asset Management:

- Create Work Request
- Creation and Completion of Work Order for Assets
- Asset Transactions in Inventory Forms
- Creating Preventive Maintenance Schedule for Asset number
- Generate Budget forecast for Work Order

Prerequisites

- Open inventory accounting period.
- Open GL period.
- Organization parameters.
- EAM parameters.

Profile Options

Table 28–1  Profile Options for Oracle Enterprise Asset Management

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>EAM: Maintenance</td>
<td>Yes</td>
<td>Site</td>
</tr>
<tr>
<td>Supervisor</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Predefined Data

Table 28–2  Predefined Data for Oracle Enterprise Asset Management

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>User Name/ Password</td>
<td>mnt / welcome</td>
</tr>
</tbody>
</table>
Create Work Request

28.1 Create Work Request

Creates work request for asset number and verifies that the work request is saved.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data

Table 28–3 Setup Data for Oracle Enterprise Asset Management

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>Responsibility Name</td>
<td>Enterprise Asset Management Maintenance Super User, Vision Operations</td>
</tr>
<tr>
<td>Item Template</td>
<td>Template</td>
<td>@Asset Group for Asset Group @Rebuildable for Rebuildable Items @Activity for Activity</td>
</tr>
</tbody>
</table>

Table 28–4 Setup Data for Create Work Request Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>EAM Parameters</td>
<td>Auto Approve</td>
<td>Enable</td>
</tr>
</tbody>
</table>
28.2 Creation and Completion of Work Order for Assets

Creates work order for asset number without any activity or material or operation up to the completion of the work order, and verifies that the completion is successful.

Prerequisites

None.

Profile Options

| Table 28–5 Profile Options for Creation and Completion of Work Order for Assets Flow |
|---|---|---|
| Profile Name | Profile Value | Level |
| EAM: FA Book Type Code | ALM CORP | Site |

Predefined Data

Not applicable.

Setup Data

| Table 28–6 Setup Data for Creation and Completion of Work Order for Assets Flow |
|---|---|---|
| Window Name | Field Name | Field Value |
| Define FA Book | FA Book Type | ALM CORP |

28.3 Asset Transactions in Inventory Forms

Performs miscellaneous receipt transaction and miscellaneous issue transaction for asset using Inventory Forms.

Prerequisites

None.

Profile Options

Not applicable.

Predefined Data

Not applicable.

Setup Data

| Table 28–7 Setup Data for Asset Transactions in Inventory Forms Flow |
|---|---|---|
| Window Name | Field Name | Field Value |
| Create Asset Group | Use Item Template | @Asset Group and Enable Transactable in Inventory tab |

28.4 Creating Preventive Maintenance Schedule for Asset Number

Creates preventive maintenance schedule for asset number using day based rules with scheduling option as Scheduled Start Date and generates PM work orders. Verifies the work orders are generated as per schedule definition.

Prerequisites

None.
Profile Options
Not applicable.

Predefined Data

Table 28–8  Predefined Data for Creating Preventive Maintenance Schedule for Asset Number Flow

<table>
<thead>
<tr>
<th>Concurrent Request Name</th>
<th>Parameter</th>
<th>Parameter Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generate PM Work Orders</td>
<td>Set Name</td>
<td>Main</td>
</tr>
</tbody>
</table>

Setup Data

Table 28–9  Setup Data for Creating Preventive Maintenance Schedule for Asset Number Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set Name Definition</td>
<td>Create Set Name</td>
<td>Enable Global Parameter</td>
</tr>
<tr>
<td>EAM Parameters</td>
<td>Implement from Start Date</td>
<td>Enable</td>
</tr>
<tr>
<td></td>
<td>PM WO Prefix</td>
<td>PMWO</td>
</tr>
</tbody>
</table>

28.5 Generate Budget Forecast for Work Order

Creates budget forecast based on historical planned work orders and verifies the projected budget.

Prerequisites

- Planned work orders generated from preventive maintenance.
- Closed and complete-no charge work orders.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data

Table 28–10  Setup Data for Generate Budget Forecast for Work Order Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>PM Schedule</td>
<td>PM Schedule</td>
<td>PM Schedule</td>
</tr>
</tbody>
</table>

Table 28–11  Setup Data for Generate Budget Forecast for Work Order Flow

<table>
<thead>
<tr>
<th>Concurrent Request Name</th>
<th>Parameter</th>
<th>Parameter Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generate PM Work Orders</td>
<td>Set Name</td>
<td>Main</td>
</tr>
</tbody>
</table>
Oracle Flow Manufacturing is a comprehensive manufacturing software solution that supports demand driven flow and lean manufacturing techniques designed to reduce product cycle times, minimize inventories, simplify production, and improve product quality. These techniques provide manufacturing operations with the ability to quickly respond to changing customer needs in an E-Business environment. Oracle Flow Manufacturing is part of the Oracle E-Business Suite, an integrated set of applications that are engineered to work together.

This chapter describes the following test flows in Oracle Flow Manufacturing:

■ Define Setup for Flow Routing
■ Flow Schedule Completion in Workstation

Prerequisites

None.

Profile Options

Not applicable.

Predefined Data

| Table 29–1 Predefined Data for Oracle Flow Manufacturing |
|---------------------------------|-----------------|-----------------|
| OA Page Name | Field Name     | Field Value     | Comments       |
| User         | User name /password | MFG/welcome   |                 |
| Responsibility | Responsibility Name | Manufacturing and Distribution Manager |                 |

Setup Data

| Table 29–2 Setup Data for Oracle Flow Manufacturing |
|---------------------------------|-----------------|-----------------|-----------------|
| OA Page Name | Field Name     | Field Value     | Comments       |
| Organization | Organization Name | V1             | V1 master organization |
|              | Organization Name | S1             | S1 child organization |
29.1 Define Setup for Flow Routing

Defines new flow line, standard line operations, standard processes and flow events. Creates new flow assembly and defines the flow routing.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>Department</td>
<td>skr-dept1</td>
</tr>
<tr>
<td>Resource</td>
<td>Resource</td>
<td>skr-res1</td>
</tr>
</tbody>
</table>

29.2 Flow Schedule Completion in Workstation

Creates flow schedule for lot and serial controlled assembly in line schedule workbench, opens and updates workstation parameters Schedule Selection Mode in HTML flow workstation. Performs flow schedule and completes with back flush items.

Prerequisites
- Finished assembly is lot and serial controlled.
- BOM, flow routing.
- All dependent components have on-hand inventory.
- Flow routing for the assembly with three standard operations or events and processes.
- Network routing for the assembly and line is defined in graphical line work designer.
- Flow schedule defined for the line and assembly combination on the given date.

Profile Options
Not applicable.

Predefined Data

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>WIP Parameters</td>
<td>Class</td>
<td>Flow</td>
</tr>
<tr>
<td>Define Schedule Rules</td>
<td>Leveling</td>
<td>Mixed Model</td>
</tr>
</tbody>
</table>
Setup Data

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Assembly</td>
<td>CHA_FLM_LSR_ASSY</td>
<td></td>
</tr>
<tr>
<td>Bill of Material</td>
<td>Components</td>
<td>CHA_LOT_SR_CMP1 Lot and serial controlled component with supply type Operation Pull</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Components</td>
<td>CHA_SR1 Serial controlled component with supply type Operation Pull</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Components</td>
<td>CHA_CMP1 Plain component with supply type Assembly Pull</td>
<td></td>
</tr>
<tr>
<td>Flow Routing</td>
<td>Standard Operation</td>
<td>op10 Attach standard operations to the event</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Standard Operation</td>
<td>Op20 Attach standard operations to the event</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Standard Operation</td>
<td>Op30 Attach standard operations to the event</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Standard Events</td>
<td>e1  Attach standard events to the resource</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Standard Events</td>
<td>e2  Attach standard events to the resource</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Standard Events</td>
<td>e3  Attach standard events to the resource</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Standard Processes</td>
<td>pr10 Attach standard processes to the events</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Standard Processes</td>
<td>Pr20 Attach standard processes to the events</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Standard Processes</td>
<td>Pr30 Attach standard processes to the events</td>
<td></td>
</tr>
</tbody>
</table>
Oracle Install Base is an item instance life cycle tracking application that facilitates enterprise wide Item life cycle management and tracking capabilities. Oracle Install Base tracks an item from the time it is received in Inventory, to Work In Process, in Projects, through to customer sites, and throughout the return and repair process. Oracle Install Base is a centralized repository of information for an item instance and its tracking details include location, status, ownership, party relationships, account relationships, contact relationships, configuration data, and the change history of customer items and corporate assets.

This chapter describes the following test flows in Oracle Install Base:

- Creation of Counter with Counter Group and Counter Template
- Creation of Item Instance for an Internally Owned item

Prerequisites

None.

Profile Options

Table 30–1 Profile Options for Oracle Install Base

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service: Inventory Validation Site</td>
<td>Vision Operations</td>
<td>Site</td>
</tr>
<tr>
<td>CSI: Allow Install Parameter Update</td>
<td>No</td>
<td>Site</td>
</tr>
</tbody>
</table>

Predefined Data

Table 30–2 Predefined Data for Oracle Install Base

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>User Name / Password</td>
<td>Operations / welcome</td>
</tr>
<tr>
<td>Responsibility</td>
<td>Responsibility Name</td>
<td>Manufacturing and Distribution Manager</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Oracle Install Base Agent User</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Install Base Administrator</td>
</tr>
<tr>
<td>Item Template</td>
<td>Item Template</td>
<td>Purchased Item</td>
</tr>
</tbody>
</table>
30.1 Creation of Counter with Counter Group and Counter Template

Creates a counter with counter group and counter template.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Organization</td>
<td>V1 - Vision Operations</td>
</tr>
<tr>
<td></td>
<td>Inventory Organizations</td>
<td>EM1- Seattle Maintenance (EAM enabled organization) M1- Seattle Manufacturing(Production organization)</td>
</tr>
<tr>
<td>Install Base Parameters</td>
<td>Party Name</td>
<td>Vision Corporation</td>
</tr>
<tr>
<td>Create Inventory Item</td>
<td>In Service Tab</td>
<td>Enable Track in Installed Base field</td>
</tr>
</tbody>
</table>

30.2 Creation of Item Instance for an Internally Owned Item

Creates item instance for an internally owned item.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Instance</td>
<td>Internal</td>
<td>Non-Serial</td>
</tr>
</tbody>
</table>
Oracle Inventory Management is part of the supply chain management solution and integrates seamlessly with other supply chain management applications, including Oracle Warehouse Management, Oracle Mobile Supply Chain Applications, Oracle Order Management, Oracle Purchasing, Oracle Discrete Manufacturing, Oracle Process Manufacturing, and Oracle Cost Management.

Oracle Inventory Management allows organizations to consolidate their disparate inventory tracking and control systems into a single, global inventory management solution for material in every stage of the product or production lifecycle as well as for different business types.

This chapter describes the following test flows in Oracle Inventory Management:

- Inventory Miscellaneous Receipt
- Inventory Miscellaneous Issue
- Move Order Requisition of Type Move Order Issue with Automatic Allocation
- Direct Transfer between Two Inventory Organizations
- Inventory Intransit Shipment with Direct Receipt between Two Inventory Organizations
- Inventory Sub-inventory Transfer
- Perform Cycle Counting
- Perform Physical Inventory
- Kanban Replenishment
- Min- Max Planning
- Replenishment Count
- Standard PO Partial Receipt with Immediate Mode
- Positive Correction Transactions
- Return to Vendor from Inventory Transactions
- Material Issue through Sales Order
- RMA Direct Receipt

**Prerequisites**

- Organization (M1) with Non WMS and Non Process Manufacturing options enabled.
- Open cost periods for corresponding transaction dates.
### 31.1 Inventory Miscellaneous Receipt

Miscellaneous receipts are used to receive material from general accounts ledger into the current organization. This feature can be used to perform receipts of items that were acquired by means other than a purchase order.

**Prerequisites**

- Transactable inventory item.
- If the item is locator enabled, sub inventory used is also locator enabled.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.

**Setup Data**

Not applicable.

---

### 31.2 Inventory Miscellaneous Issue

Miscellaneous Issue is used to issue material from general accounts ledger in the current organization. This feature can be used to issue items to individuals, departments, projects or to issue damaged goods to expense accounts such as scrap.

**Prerequisites**

- Transactable inventory item.
Profile Options
Not applicable.
Predefined Data
Not applicable.
Setup Data
Not applicable.

31.3 Move Order Requisition of Type Move Order Issue with Automatic Allocation

Move order issue is used to issue material from a stock location in the organization. This transaction will check for sufficient material at the stock location, and on approval, will deliver the material to the destination location specified by the user. The material is automatically allocated for transfer from the source location.

Prerequisites
■ Reservable stock for the material.

Profile Options
Not applicable.
Predefined Data
Not applicable.
Setup Data
Not applicable.

31.4 Direct Transfer between Two Inventory Organizations

Direct transfer is used to transfer material from one inventory organization to another. In this type of transfer the receiving organization is not required to perform any operation to receive the material. The material is transferred from the source to the destination organization as soon as the transaction is saved.

Prerequisites
■ Material is available at the source organization.

Profile Options
Not applicable.
Predefined Data
Not applicable.
Setup Data
Not applicable.
31.5 Inventory Intransit Shipment with Direct Receipt between Two Inventory Organizations

Inventory intransit shipment is used to transfer material from one inventory organization to another. For this type of transfer, the user creates a shipment from the source organization and saves it. The receiving organization is expected to create a receipt to receive the material. The creation of the receipt concludes the transfer.

**Prerequisites**
- Material is available at the source organization.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

**Setup Data**
Not applicable.

31.6 Inventory Sub-inventory Transfer

Sub-inventory transfer is used to transfer material within the current organization between sub-inventories or between two locators within a sub-inventory. This transfer can be performed from an asset to expense sub-inventory and from a tracked to a non tracked sub-inventory.

**Prerequisites**
- Material is available at the source sub-inventory.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

**Setup Data**
Not applicable.

31.7 Perform Cycle Counting

Cycle counting is used to check the inventory in a specific location that can be restricted to a particular sub-inventory. Cycle counting is performed in a specific location that can be restricted to a particular sub inventory.

**Prerequisites**
None.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.
31.8 Perform Physical Inventory

Physical inventory is used to check and update the system with the actual on hand inventory. Snapshots are taken of the system inventory values and cross checked with the actual on hand quantity. Reconciliation is performed based on the difference.

During this activity the system will not prevent the user from performing inventory transactions.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

31.9 Kanban Replenishment

Kanban replenishment is a pull based replenishment to be used on items with a fairly constant demand and high production volume. A Kanban item is defined along with the pull sequence to indicate from where the replenishment will take place. A color card can be used to serve as a trigger to start the replenishment. It is a means of supporting pull-based replenishment in manufacturing systems, which can be replenished from an external supplier or an internal organization.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

31.10 Min-Max Planning

Min-max planning maintains inventory levels, or sub-inventory level, for all of the items or selected items. With min-max planning, minimum and maximum inventory levels can be specified for the items. When the inventory level, or sub-inventory level, for an item (on-hand quantities plus quantities on order) drops below the minimum, Oracle Inventory suggests a new purchase requisition, internal requisition, move order, or job to bring the balance back up to the maximum.
Replenishment Count

Prerequisites
None.

Profile Options
Not applicable.
Predefined Data
Not applicable.
Setup Data
Not applicable.

31.11 Replenishment Count
Replenishment count is used to plan and create requisition orders for items that need to be replenished. Verify the replenishment count when the order quantity and the maximum ordered quantity are defined for the item.

Prerequisites
- Replenishment count can only be used at the sub-inventory level.
- Item-sub-inventory relationship.

Profile Options
Not applicable.
Predefined Data
Not applicable.
Setup Data
Not applicable.

31.12 Standard PO Partial Receipt with Immediate Mode
A standard purchase order is used to receive material from a supplier to the inventory organization. The user creates a purchase order and sends it for approval. After approval the material is shipped to the organization. The receiving organization creates a receipt for the material. During receipt the receiver can choose to receive a partial quantity.

Prerequisites
- Receiving sub-inventory for receipt of material.

Profile Options
Not applicable.
Predefined Data
Not applicable.
Setup Data
Not applicable.
31.13 Positive Correction Transactions
Positive correction transactions are used for purchase orders. This feature permits the user to increase the quantity on a receipt for a previously received order.

Prerequisites
- Purchase order receipt.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

31.14 Return to Vendor from Inventory Transactions
Return to vendor feature is used when the receiver wants to return the goods previously received through a purchase order. After receipt of a purchase order, if any goods are to be returned, a return to vendor transaction is created and the goods are sent back to the supplier of the purchase order.

Prerequisites
- Purchase order receipt.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

31.15 Material Issue through Sales Order
Sales order is used to ship goods to the customer. During the outbound flow, the user creates a sales order. Based on the availability of the goods, the sales order is booked and released. Material is allocated against this sales order and then shipped out to the customer.

Prerequisites
- Reservable and transactable quantity in the inventory location.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.
31.16 RMA Direct Receipt

Return material authorization (RMA) is used when the customer, to whom goods have been previously sold, wants to return the goods. These are the goods for which a sales order was previously created. When the goods are returned at the receiving dock, an RMA is created. A receipt is made against this RMA to acknowledge the returned goods.

**Prerequisites**

- Sales Order that was previously shipped.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.

**Setup Data**

Not applicable.
Oracle Item Master allows you to define and control items that you stock in inventory. You can set up other parameters here to control the use of items.

This chapter describes the following test flows in Oracle Item Master:

- Create and Copy Item, Apply Template, Assign to Organization and Add Revision
- Create Item With and Without Template and Assign to Organizations
- Update Item Catalog, Categories and MPN through Tools Operations

**Prerequisites**

None.

**Profile Options**

Not applicable.

**Predefined Data**

| Table 32–1  Predefined Data for Oracle Item Master |
|-----------|-----------|-----------|
| **Page Name** | **Field Name** | **Field Value** |
| User | User Name | MFG |
| | Password | welcome |
| Responsibility | Responsibility Name | Manufacturing and Distribution Manager |

**Setup Data**

| Table 32–2  Setup for Oracle Item Master |
|-----------|-----------|-----------|
| **Window Name** | **Field Name** | **Field Value** |
| Organization | Organization | V1, M1 |
| Organization Hierarchy | Organization Hierarchy | M1 is the child organization of V1 |
32.1 Create and Copy Item, Apply Template, Assign to Organization and Add Revision

Create item with finished goods template. Copy created item with Finished Goods template.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data

Table 32–3 Predefined Data for Create and Copy Item, Apply Template, Assign to Organization and Add Revision Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item template</td>
<td>Template</td>
<td>Finish goods</td>
<td>BOM allowed</td>
</tr>
<tr>
<td></td>
<td>Template</td>
<td>ATO Model</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Template</td>
<td>Purchased Item</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Template</td>
<td>Equipment Item</td>
<td></td>
</tr>
</tbody>
</table>

Setup Data
Not applicable.

32.2 Create Item With and Without Template and Assign to Organizations

Creates item with and without template, copies item and assigns item to organization.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data

Table 32–4 Predefined Data for Create Item With and Without Template and Assign to Organizations Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item template</td>
<td>Template</td>
<td>Finish goods</td>
<td>Enable finished good related attributes</td>
</tr>
<tr>
<td></td>
<td>Template</td>
<td>Purchased Item</td>
<td>Enable purchased goods related attributes</td>
</tr>
</tbody>
</table>

Setup Data
Not applicable.
32.3 Update Item Catalog, Categories and MPN through Tools Operations

Updates item catalog, categories and manufacturing part number through tools operations navigation.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data

<table>
<thead>
<tr>
<th>Table 32–5  Predefined Data for Update Item Catalog, Categories and MPN through Tools Operations Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Window Name</td>
</tr>
<tr>
<td>-----------------</td>
</tr>
<tr>
<td>Item Catalog</td>
</tr>
<tr>
<td>Manufacturer</td>
</tr>
</tbody>
</table>

Setup Data
Not applicable.
Oracle Landed Cost Management (LCM) gives organizations financial visibility into their extended supply chain costs, including transportation and handling fees, insurance, duties and taxes.

Oracle LCM initially estimates these costs and later updates them with actual amounts as they become known, allocating them to shipments, orders, and products. This allows companies to maximize profits, improve visibility into outstanding liabilities, enhance competitiveness, and ensure that complex trade activities are compliant with regulatory mandates.

This chapter describes the following test flows in Oracle Landed Cost Management:

- Verify Landed Cost Management Shipment Receipt through Mobile in Pre-Receiving Scenario
- Verify Landed Cost Management Shipment Receipt through Forms in Pre-Receiving Scenario
- Verify Purchase Order Receipt through Forms in Landed Cost Management Black Box Scenario
- Verify Copying Simulated Landed Cost (SLC) while Calculating Estimated Landed Cost (ELC) for Standard Purchase Order in Service

Prerequisites

- Purchase order.
- Charge types and cost factors are decided, and modifier created for each charge type.
- Organization is LCM enabled, and LCM options are defined for the organization.

Profile Options

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>QP: Licensed for Product</td>
<td>Purchasing</td>
<td>User</td>
</tr>
<tr>
<td>QP: Blind Discount Option</td>
<td>Yes</td>
<td>User</td>
</tr>
<tr>
<td>QP: Pricing Perspective Request Type</td>
<td>Purchase Order</td>
<td>Site</td>
</tr>
<tr>
<td>QP: Pricing Transaction entity</td>
<td>Procurement</td>
<td>User</td>
</tr>
<tr>
<td>QP: Source System Code</td>
<td>Oracle Purchasing</td>
<td>User</td>
</tr>
</tbody>
</table>
Verify LCM Shipment Receipt through Mobile in Pre Receiving Scenario

33.1 Verify LCM Shipment Receipt through Mobile in Pre Receiving Scenario

Verifies the receipt of a completed shipment, through a mobile application.

Prerequisites
- Approved purchase order.
- Mobile server.

**Predefined Data**

**Table 33–2  Predefined Data for Oracle Landed Cost Management**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shipment Types</td>
<td>Shipment Type Name</td>
<td>St-1</td>
</tr>
<tr>
<td>Shipment Line Types</td>
<td>Shipment Line Type Name</td>
<td>SLT-01</td>
</tr>
</tbody>
</table>

**Setup Data**

**Table 33–3 Window Setup Data for Oracle Landed Cost Management**

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Modifier</td>
<td>Modifier Name</td>
<td>LCM modifier</td>
</tr>
<tr>
<td>Inventory Accounting Periods</td>
<td>Accounting Periods</td>
<td>Open the current Period</td>
</tr>
<tr>
<td>Organizations</td>
<td>Organization Name</td>
<td>LC1-Seattle Org (Pre-Receiving)</td>
</tr>
<tr>
<td></td>
<td>Organization Name</td>
<td>LC2-Seattle Org (Service)</td>
</tr>
</tbody>
</table>

**Table 33–4 Page Setup Data for Oracle Landed Cost Management**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>LCM options</td>
<td>Shipment Number Generation</td>
<td>Shipment Number Generation</td>
</tr>
<tr>
<td></td>
<td>Shipment Number Type</td>
<td>Shipment Number Type</td>
</tr>
<tr>
<td></td>
<td>PO Price Tolerance (%)</td>
<td>PO Price Tolerance (%)</td>
</tr>
</tbody>
</table>

**Table 33–1 (Cont.) Profile Options for Oracle Landed Cost Management**

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>INL: Default currency conversion type</td>
<td>Corporate</td>
<td>User</td>
</tr>
<tr>
<td>INL: Default currency code for QP Charge</td>
<td>USD</td>
<td>User</td>
</tr>
<tr>
<td>INL: Default Shipment type for Open interface</td>
<td>St-1</td>
<td>User</td>
</tr>
<tr>
<td>INL: Quantity UOM class</td>
<td>Quantity</td>
<td>Site</td>
</tr>
<tr>
<td>INL: Weight UOM class</td>
<td>Weight</td>
<td>Site</td>
</tr>
<tr>
<td>INL: Volume UOM class</td>
<td>Volume</td>
<td>Site</td>
</tr>
</tbody>
</table>
33.2 Verify LCM Shipment Receipt through Forms in Pre Receiving Scenario

Verifies receipt of a completed shipment, through Forms. The receiving flow is similar with the purchase order receiving; the difference being that the quantity cannot be updated.

Prerequisites
- Approved purchase order.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

33.3 Verify PO Receipt through Forms in LCM Black Box Scenario

The whole estimated landed Cost (ELC) process is not required to be done manually. Once we receive the purchase order and submit the requests, the estimated landed cost is generated automatically.

Prerequisites
- Approved purchase order.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.
33.4 Verify Copying Simulated Landed Cost while Calculating Estimated Landed Cost for Standard Purchase Order in Service

When we request for some new materials, simulate all possible charges during the process of buying it, such as freight, insurance, packing, duty and other charges, then using this flow, we come to know whether the budget is enough for approving the purchase order.

Prerequisites
- Approved purchase order.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.
Oracle Manufacturing Execution System for Discrete Manufacturing (MES for Discrete) provides "enhanced" shop floor execution capabilities to enable discrete manufacturers to deploy directly as the Manufacturing Execution System (MES) on their shop floor. Focusing on improving the productivity of the shop floor operator and supervisor, MES for Discrete Manufacturing provides rich, out of the box capabilities to perform their daily tasks. The product enables shop floor operators and supervisors to perform, record, and monitor shop floor activities in a highly efficient and effective manner in addition to providing key performance and status indicators for the shop floor. More importantly, the MES for Discrete Manufacturing application facilitates the removal of non value-added activities on the shop floor and helps maximize shop floor productivity.

This chapter describes the following test flows in Oracle Manufacturing Execution Systems for Discrete Manufacturing:

- Move Transaction with Electronic Records and Electronic Signatures
- Lot Controlled Assembly Transactions

**Prerequisites**

None.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.

**Setup Data**

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Organization</td>
<td>M1</td>
</tr>
<tr>
<td>WIP Parameters</td>
<td>Intra operation tab - Queue, Run, To Move</td>
<td>Enabled</td>
</tr>
</tbody>
</table>
34.1 Move Transaction with Electronic Records and Electronic Signatures

Creates a discrete job; performs E-record signing for the move transaction.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data

Table 34–2 Page Setup Data for Oracle Manufacturing Execution Systems for Discrete Manufacturing

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>User Name</td>
<td>MFG</td>
</tr>
<tr>
<td></td>
<td>Password</td>
<td>welcome</td>
</tr>
</tbody>
</table>

Table 34–3 Window Setup Data for Move Transaction with Electronic Records and Electronic Signatures Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master Item</td>
<td>Item Name</td>
<td>AS54888 assembly with BOM and routing defined.</td>
</tr>
<tr>
<td>Approvals Management</td>
<td>Discrete MES ERES Job Assembly Move</td>
<td>To be configured.</td>
</tr>
<tr>
<td>Business Analyst (Standard) - AME Setups</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workflow Administrator Web Applications</td>
<td>Business Event : oracle.apps.wip.mes.job.assembly.move (Discrete MES ERES Job Assembly Move)</td>
<td>To be enabled and subscribed.</td>
</tr>
<tr>
<td>Manufacturing Execution System Parameters</td>
<td>Allow Moves from Prior Operations</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Require Badge Number for Move Transactions</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Single User Mode</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>Job Selection Mode</td>
<td>Dispatch List</td>
</tr>
</tbody>
</table>

Table 34–4 Page Setup Data for Move Transaction with Electronic Records and Electronic Signatures Flow

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approvals Management</td>
<td>Discrete MES ERES Job Assembly Move</td>
<td>To be configured.</td>
</tr>
<tr>
<td>Business Analyst (Standard) - AME Setups</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workflow Administrator Web Applications</td>
<td>Business Event : oracle.apps.wip.mes.job.assembly.move (Discrete MES ERES Job Assembly Move)</td>
<td>To be enabled and subscribed.</td>
</tr>
</tbody>
</table>
34.2 Lot Controlled Assembly Transactions

Creates and queries a discrete job, completes the assembly with quality results, and performs return assembly with quality results for lot controlled assembly.

**Prerequisites**
None.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

**Setup Data**

<table>
<thead>
<tr>
<th>Table 34–5 Window Setup Data for Lot Controlled Assembly Transactions Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Window Name</strong></td>
</tr>
<tr>
<td>Master Item</td>
</tr>
<tr>
<td>Collection Plan - Discrete Quality</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Table 34–6 Page Setup Data for Lot Controlled Assembly Transactions Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Page Name</strong></td>
</tr>
<tr>
<td>Manufacturing Execution System Parameters</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>
Lot Controlled Assembly Transactions

Table 34–6  (Cont.) Page Setup Data for Lot Controlled Assembly Transactions Flow

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Operation</td>
<td>View Work Content</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Work Content</td>
<td>Complete Assembly</td>
<td>Update the MES parameter given by deselecting the Inherit values from Upper level check box, choosing the values Complete Assembly and Return Assembly, from the Available Choice List Actions and moving them to Select.</td>
<td></td>
</tr>
<tr>
<td>Actions</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Oracle Manufacturing Execution System (MES) for Process Manufacturing is an add-on application to Oracle Process Manufacturing that provides intensive, multifaceted shop floor execution capabilities. The application allows process manufacturers to deploy Oracle Process Manufacturing directly on their shop floors as the manufacturing execution system (MES). For most process manufacturers, this removes the requirement to invest in a third party or a homegrown MES system, and helps reduce costs while eliminating integration and support issues. MES for Process Manufacturing eliminates many unnecessary and non-value-added activities by providing a structured and standards based shop floor execution toolset.

This chapter describes the following test flows in Oracle Manufacturing Execution System for Process Manufacturing:

- Create Dispensing Setup (Organization Vs Recipe Vs Item)
- Control Batch Record for Material Dispensing
- Control Batch Record Flow for Batch Step Close and Re-open

**Prerequisites**

- Organization parameters.
- Process execution parameters.
- Open inventory accounting period.
- Open general ledger period.

<table>
<thead>
<tr>
<th>Concurrent Program Name</th>
<th>Parameter</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable MES for Process Manufacturing Functionality</td>
<td>Not applicable.</td>
<td>Not applicable.</td>
</tr>
<tr>
<td>Enable Control Batch Record</td>
<td>Not applicable.</td>
<td>Not applicable.</td>
</tr>
</tbody>
</table>
Profile Options

Table 35–2  Profile Options for Oracle Manufacturing Execution System for Process Manufacturing

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDR: E-records and E-signatures</td>
<td>No</td>
</tr>
</tbody>
</table>

Predefined Data

Table 35–3  Predefined Data for Oracle Manufacturing Execution System for Process Manufacturing

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>User Name</td>
<td>Process_ops</td>
</tr>
<tr>
<td>Password</td>
<td></td>
<td>welcome</td>
</tr>
<tr>
<td>Responsibility</td>
<td>Responsibility Name</td>
<td>Formulator, Production Supervisor, Workflow Administrator, ERES Administrator, Approvals Management Business Analyst, MES for Process Manufacturing Administrator (Setup, administration and execution, accessibility to MES for Process Manufacturing module.)</td>
</tr>
<tr>
<td>Item Template</td>
<td>Template</td>
<td>Process Item (with process manufacturing attributes enabled)</td>
</tr>
</tbody>
</table>

Setup Data

Table 35–4  Setup Data for Oracle Manufacturing Execution System for Process Manufacturing

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Organization</td>
<td>PRU- US Operations (Process Manufacturing)</td>
</tr>
<tr>
<td></td>
<td>Inventory Organization</td>
<td>PR1-Main Process Manufacturing LAB - Process organization</td>
</tr>
<tr>
<td>Recipe</td>
<td>Recipe</td>
<td>Recipe and Validity Rule</td>
</tr>
<tr>
<td>Product Development</td>
<td>Laboratory</td>
<td>Enabled</td>
</tr>
</tbody>
</table>

35.1 Create Dispensing Setup (Organization Vs Recipe Vs Item)

Creates dispensing setup with the combination of organizations, recipe and item.

Prerequisites

None.
Profile Options

Table 35–5  Profile Options for Create Dispensing Setup (Organization Vs Recipe Vs Item) Flow

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDR: E-records and E-signatures</td>
<td>No</td>
</tr>
</tbody>
</table>

Predefined Data

Table 35–6  Predefined Data for Create Dispensing Setup (Organization Vs Recipe Vs Item) Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recipe</td>
<td>Recipe</td>
<td>9010v1</td>
</tr>
</tbody>
</table>

Setup Data

Not applicable.

35.2 Control Batch Record Flow for Material Dispense

Sets up E-record for material dispense event, creates a batch, dispenses material to batch and views the control batch record.

Prerequisites

- User has privilege to update business events and subscription.
- A container item with the Unit of Measure same as the Unit of Measure for the dispensable item.
- Dispensing setups for recipe 9010, Version 1.

Profile Options

Table 35–7  Profile Options for Control Batch Record Flow for Material Dispense Flow

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDR: E-records and E-signatures</td>
<td>No</td>
</tr>
</tbody>
</table>

Predefined Data

Not applicable.

Setup Data

Not applicable.

35.3 Control Batch Record Flow for Batch Step Close and Re-open

Sets up E-record for batch and batch step transactions, performs batch transactions and views the control batch record for performed transactions.

Prerequisites

- Batch Step in completed status.
Profile Options

Table 35–8  Profile Options for Control Batch Record Flow for Batch Step Close and Re-open Flow

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDR: E-records and E-signatures</td>
<td>No</td>
</tr>
</tbody>
</table>

Predefined Data
Not applicable.

Setup Data
Not applicable.
Oracle Order Management is an order-to-cash solution that provides the capabilities for customers, partners and employees to select the right products and services, negotiate the best prices and ensure timely order fulfillment. Oracle Order Management drives the order fulfillment process of any business. The open, workflow based architecture supports non-customized, tailored and automated fulfillment processes. It captures multi-channel demand from sources including EDI, XML, Telesales and web storefronts. As part of a complete order to cash solution, it enables global order promising and is integrated with Transportation Management.

This chapter describes the following test flows in Oracle Order Management:

- Create Order from Quote for a Standard Line
- Generate Invoice for PTO Model, ATO Model and Standard Line
- Verify Scheduling Dates for Sales Order by Assigning to Ship Sets
- Verify Split Configuration Concurrent Program for PTO Model Line, ATO Model Line and Kit
- Verify Authorization of a Sales Order with Credit Card and Cash
- Create and Verify Tax on Sales Order
- Verify Intercompany Invoicing for Sales Order
- Fulfillment of a Bill Only Line With Standard Item
- Multiple Processing Constraints Validations for a Sales Order Header and Line
- Verify Audit History for a Sales Order Header and Line
- Create Processing Constraints for Customer PO

**Prerequisites**

- User is logged in with Order Management Super User responsibility.

### 36.1 Create Order from Quote for a Standard Item

Oracle Quoting offers limited capability to create quotes and progress it through the negotiation phase and finally creates sales order, thus acting as a single point of entry into Oracle Order Management.

The Create Order from Quote for a Standard Item flow creates an order from quote for a standard line, with approvals and converts the same to a sales order.
Prerequisites

- Transaction type Mixed of workflow type Negotiation Flow-Generic.
- Transaction type Mixed of workflow type Negotiation Flow-Generic, with Use Approvals Management Engine check box deselected.
- A customer or party, with address and account number.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data

| Table 36–1 Setup Data for Create Order from Quote for a Standard Item Flow |
|---------------------|-----------------|-----------------|
| Window Name         | Field Name      | Field Value                      |
| Quote               | Customer Number | 1005 (Pick a Party of type Organization) |
|                     | Ordered Item    | AS54888 (Pick a standard item of finished goods template) |
|                     | Order Type      | Mixed (Pick an Order Type)       |
|                     | Price List      | Corporate (Pick a Price List)    |

36.2 Generate Invoice for PTO Model, ATO Model and Standard Line

Invoice processing in Oracle Order Management is the process by which data from orders and returns is interfaced to Oracle Receivables for the creation of invoices and credit memos, to recognize revenue and manage sales credits. This flow verifies the generation of invoice for the PTO Model, ATO Model and Standard Line.

Prerequisites

- A standard item of type 'Finished Good' template.
- An item of PTO model type with optional classes and optional items.
- An item of ATO model type with optional classes and optional items.
- A customer or party, with address and account number.
- A non-WMS warehouse.

Profile Options
Not applicable.

Predefined Data
Not applicable.
Table 36–2 Setup Data for Generate Invoice for PTO Model, ATO Model and Standard Line Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Order</td>
<td>Customer Number</td>
<td>1005 (Pick a customer number)</td>
</tr>
<tr>
<td></td>
<td>Order Type</td>
<td>Mixed (Pick an order type)</td>
</tr>
<tr>
<td></td>
<td>Warehouse</td>
<td>M1 (Pick a non-WMS organization)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(Pick a PTO model with optional classes and items)</td>
</tr>
<tr>
<td></td>
<td>Ordered Item</td>
<td>Vision-ATO-Model -Vision-ATO-Op-Item</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(Pick an ATO model with optional classes and items)</td>
</tr>
<tr>
<td></td>
<td>Ordered Item</td>
<td>AS54888 (Pick a finished good)</td>
</tr>
</tbody>
</table>

36.3 Verify Scheduling Dates for Sales Order by Assigning to Ship Sets

Creates a sales order and verifies the scheduling dates. This flow assigns the new ship set, adds to the existing ship set and verifies whether lines are getting scheduled or not.

Prerequisites

- A customer or party, with address and account number.
- A non-WMS warehouse.
- Two standard items with finished good template.
- A Hold Source for an item.
- PTO Model with PTO-Model template.
- ATO Model with ATO-Model template.
- Kit Model with Kit-Model template.

Profile Options

Not applicable.

Predefined Data

Not applicable.
36.4 Verify Split Configuration Concurrent Program for PTO Model Line, ATO Model Line and Kit

Users can split lines in the background using the concurrent request Split Configuration in the Sales Orders window. This applies to ATO Models, PTO configurations and Kits. The Defer Split check box in the Split Line window enables splitting configuration lines in the background and continuing with other actions on the sales order. When a user selects the Defer Split box and clicks Split, the Split Configuration concurrent program splits the lines as a background process.

This test flow verifies the split line functionality using the Split Configuration concurrent program for PTO Model line, ATO Model Line and Kit.

**Prerequisites**
- An item of PTO model type with optional classes and optional items.
- An item of ATO model type with optional classes and optional items.
- An item of type Kit.
- A customer or party, with address and account number.
- A non WMS warehouse.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

---

### Setup Data

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Parameters</td>
<td>Schedule Lines on Hold</td>
<td>Yes or No</td>
</tr>
<tr>
<td>OM: Auto Schedule Sets</td>
<td></td>
<td>Yes or No</td>
</tr>
<tr>
<td>OM: Auto Schedule</td>
<td></td>
<td>Yes or No</td>
</tr>
<tr>
<td>Schedule Lines on Hold</td>
<td></td>
<td>Yes or No</td>
</tr>
<tr>
<td>Sales Order</td>
<td>Customer Number</td>
<td>1005 (Pick A customer Number)</td>
</tr>
<tr>
<td></td>
<td>Warehouse</td>
<td>V1 (Select a non WMS warehouse)</td>
</tr>
<tr>
<td></td>
<td>Ordered Item</td>
<td>AS549888 (Select a product)</td>
</tr>
<tr>
<td></td>
<td>Ordered Item</td>
<td>AS549999 (Select a product)</td>
</tr>
<tr>
<td></td>
<td>Ordered Item</td>
<td>(Select a PTO Model product)</td>
</tr>
<tr>
<td></td>
<td>Ordered Item</td>
<td>(Select an ATO Model product)</td>
</tr>
<tr>
<td></td>
<td>Ordered Item</td>
<td>(Select a KIT Model product)</td>
</tr>
<tr>
<td>Ship Set</td>
<td>Ship Set</td>
<td>Any value for a ship set</td>
</tr>
</tbody>
</table>
36.5 Verify Authorization of a Sales Order With Credit Card and Cash

This flow tests the authorization of a sales order with credit card and cash. It also verifies multiple payments for a standard item.

**Prerequisites**
- Credit check rule.
- Credit option for the payment terms in the sales order is selected.
- A customer or party, with address and account number.
- A transaction type with the Credit Check rule set at ordering level.
- A non WMS warehouse.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

**Setup Data**

*Table 36–4 Setup Data for Verify Split Configuration Concurrent Program for PTO Model Line, ATO Model Line and Kit Flow*

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Order</td>
<td>Customer Number</td>
<td>1006 (Pick a customer number)</td>
</tr>
<tr>
<td></td>
<td>Order Type</td>
<td>Mixed (Pick an Order Type)</td>
</tr>
<tr>
<td></td>
<td>Warehouse</td>
<td>M1 (Pick a non-WMS organization)</td>
</tr>
<tr>
<td></td>
<td>Ordered Item</td>
<td>Vision-PTO-Model (Pick a valid PTO model with optional classes)</td>
</tr>
<tr>
<td></td>
<td>Ordered Item</td>
<td>Vision-ATO-Model (Pick a valid ATO model with optional classes)</td>
</tr>
<tr>
<td></td>
<td>Ordered Item</td>
<td>Vision-SMC-Kit (Pick an item of type Kit template)</td>
</tr>
</tbody>
</table>

*Table 36–5 Setup Data for Verify Authorization of a Sales Order With Credit Card and Cash Flow*

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Order</td>
<td>Transaction Type</td>
<td>Mixed (Pick a Transaction Type)</td>
</tr>
<tr>
<td></td>
<td>Rule</td>
<td>CC-Rule1</td>
</tr>
<tr>
<td></td>
<td>Customer Number</td>
<td>1005 (Pick a Party of type Organization)</td>
</tr>
<tr>
<td></td>
<td>Warehouse</td>
<td>V1 (Select a valid non WMS warehouse )</td>
</tr>
<tr>
<td></td>
<td>Ordered Item</td>
<td>AS54888 (Select a product)</td>
</tr>
<tr>
<td></td>
<td>Ordered Item</td>
<td>AS54999 (Select a product)</td>
</tr>
<tr>
<td></td>
<td>Name</td>
<td>N30 (Pick a Payment Term)</td>
</tr>
</tbody>
</table>
36.6 Create and Verify Tax on Sales Order

This test flow verifies the tax applicability for a customer who comes under the United States jurisdiction. A tax rate is set up using Tax Manager responsibility with tax rate as 10% with United States jurisdiction, and tax calculation is verified when a sales order is created for the customer falling under that tax jurisdiction.

Prerequisites

- A new tax rate for a transaction:
  - New tax.
  - New tax status.
  - New tax rate with 10%.
  - New tax jurisdiction with geography as NY, United States.
- A customer or party, with address and account number, with bill to site under New York location.
- A tax code.

Profile Options

Not applicable.

Predefined Data

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Order</td>
<td>Payment Type</td>
<td>Cash</td>
</tr>
</tbody>
</table>

Setup Data

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Order</td>
<td>Customer Number</td>
<td>1001 (Pick a Party of Type Organization)</td>
</tr>
<tr>
<td></td>
<td>Warehouse</td>
<td>M1 (Pick a non-WMS organization)</td>
</tr>
<tr>
<td></td>
<td>Order Type</td>
<td>Mixed (Pick an Order Type)</td>
</tr>
<tr>
<td></td>
<td>Price List</td>
<td>Corporate (Pick a Price List)</td>
</tr>
<tr>
<td></td>
<td>Ordered Item</td>
<td>AS54888 (Pick a finished good)</td>
</tr>
<tr>
<td></td>
<td>Tax Code</td>
<td>VISIONUSSALESTAX (Select a Tax Code)</td>
</tr>
</tbody>
</table>

36.7 Verify Intercompany Invoicing for Sales Order

When a customer processes and invoices an order, the selling organization records entries to Accounts Receivable for revenue, tax and freight. The shipping warehouse records entries to the inventory asset account and cost of goods sold (COGS) account. When the above scenario involves a selling organization in one operating unit and a shipping organization in another operating unit, additional accounting takes place.

The shipping organization must bill the selling organization at the transfer price and the selling organization must make the corresponding payment. The intercompany
accounts receivable invoice is the transaction the system uses, to record the intercompany receivable accounting for the shipping organization. It debits the intercompany accounts receivable at transfer price, charges tax and freight cost, and credits the intercompany revenue.

The intercompany Accounts Payable invoice is the transaction the system uses to record the payable accounting for the selling organization. The system debits the intercompany COGS and freight, and credits the intercompany payable account.

This flow verifies the inter-company invoicing as follows:

1. Places an order with the selling operating unit.
2. The system ships the order to the customer from a shipping warehouse associated with an operating unit that differs from the selling operating unit.
3. The shipping operating unit issues an intercompany receivable invoice to the selling operating unit at the transfer price.
4. The selling operating unit issues an intercompany invoice payable to the shipping operating unit.

If the customer is external, then the selling operating unit sends a separate invoice to the customer.

Prerequisites

- Shipping networks between the selling and shipping organizations.
- Intercompany transaction flows between the selling and shipping operating units.
- An internal location for the selling organization.
- An internal customer with an internal location to the customer's ship-to site attached.
- Price lists for selling and shipping OU, and the internally used price lists attached to the internal customer’s bill-to site.
- Tax structures in Oracle Payables and Oracle Receivables.
- Oracle Receivables system options are defined.
- Account Generator for the COGS accounts is set up.

Profile Options

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>AR: Use Parallel Hints</td>
<td>No</td>
</tr>
</tbody>
</table>

Predefined Data

Not applicable.
36.8 Fulfillment of a Bill Only Line with Standard Item

This process refers to the fulfillment of a line, the line type being Bill Only, with standard item and Generic - Bill only with Inventory Interface workflow.

Prerequisites

- A standard item with finished good template.
- A transaction type with line type as Bill Only and process name as Line Flow - Generic, Bill only with Inventory Interface.
- A customer or party.

Profile Options

Not applicable.

Predefined Data

Not applicable.

Setup Data

Table 36–9 Setup Data for Verify Intercompany Invoicing for Sales Order Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisitions</td>
<td>Item</td>
<td>AS54888 (Pick a finished good)</td>
</tr>
<tr>
<td></td>
<td>Organization</td>
<td>M1 Seattle Manufacturing (Pick a non-WMS organization)</td>
</tr>
<tr>
<td></td>
<td>Organization (Source)</td>
<td>D1 Singapore Distribution Center (Pick a non-WMS organization)</td>
</tr>
</tbody>
</table>

Table 36–10 Setup Data for Fulfillment of a Bill Only Line with Standard Item Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Order</td>
<td>Order Type</td>
<td>Mixed (Pick an Order Type)</td>
</tr>
<tr>
<td></td>
<td>Customer Number</td>
<td>1006 (Pick a Party of Type Organization)</td>
</tr>
<tr>
<td></td>
<td>Warehouse</td>
<td>V1 (A non WMS Warehouse can be selected)</td>
</tr>
<tr>
<td></td>
<td>Ordered Item</td>
<td>AS54888 (A product can be selected)</td>
</tr>
<tr>
<td></td>
<td>Payment Terms</td>
<td>N30 (A Payment Term value can be selected)</td>
</tr>
</tbody>
</table>
36.9 Multiple Processing Constraints Validations for a Sales Order Header and Line

This test flow verifies multiple processing constraints validations for a sales order header and line for change in payment terms, customer purchase order and warehouse.

**Prerequisites**

- Processing constraints for the warehouse, customer PO and payment terms attributes are created for both header and line.
- A non WMS warehouse.
- A valid customer or party, with address and account number.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.

**Setup Data**

Table 36–11 Setup Data for Multiple Processing Constraints Validations for a Sales Order Header and Line Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Parameters</td>
<td>Audit Trail</td>
<td>Enable when Order is Entered</td>
</tr>
<tr>
<td>Sales Order</td>
<td>Order Type</td>
<td>Mixed (Pick an Order Type)</td>
</tr>
<tr>
<td></td>
<td>Payment Terms</td>
<td>N30 (Pick a Payment Term)</td>
</tr>
<tr>
<td></td>
<td>Customer Number</td>
<td>1006 (Pick a Party of type Organization)</td>
</tr>
<tr>
<td></td>
<td>Warehouse</td>
<td>M1 (Pick a Non-WMS Warehouse)</td>
</tr>
<tr>
<td></td>
<td>Ordered Item</td>
<td>AS54888 (Pick a product)</td>
</tr>
<tr>
<td>Processing Constraints</td>
<td>Operation</td>
<td>Update</td>
</tr>
<tr>
<td>(Application:Order Management)</td>
<td>Group</td>
<td>101</td>
</tr>
<tr>
<td>(Entity: Order Header and Order Line)</td>
<td>Scope</td>
<td>Any</td>
</tr>
<tr>
<td></td>
<td>Validation Entity</td>
<td>Order Header</td>
</tr>
<tr>
<td></td>
<td>Record Set</td>
<td>Order</td>
</tr>
<tr>
<td></td>
<td>Validation Template</td>
<td>Booked</td>
</tr>
<tr>
<td></td>
<td>User Message</td>
<td>Booked</td>
</tr>
<tr>
<td></td>
<td>User Action</td>
<td>Require Reason and Require History</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Generate Version and Require Reason</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Not Allowed</td>
</tr>
<tr>
<td></td>
<td>Attribute</td>
<td>Payment Term</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Warehouse</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Customer PO</td>
</tr>
</tbody>
</table>
36.10 Verify Audit History for a Sales Order Header and Line

This flow verifies the audit history recorded for a sales order header and line, for change in payment terms.

**Prerequisites**

- Processing constraints for the attribute payment terms for both header and line.
- A non WMS warehouse.
- A customer or party, with address and account number.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.

**Setup Data**

### Table 36–12 Setup Data for Verify Audit History for a Sales Order Header and Line Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Parameters</td>
<td>Audit Trail</td>
<td>Enable when order is entered</td>
</tr>
<tr>
<td>Sales Order</td>
<td>Customer Number</td>
<td>1006 (Pick a party of type Organization)</td>
</tr>
<tr>
<td></td>
<td>Warehouse</td>
<td>V1 (Pick a non WMS warehouse)</td>
</tr>
<tr>
<td></td>
<td>Ordered Item</td>
<td>AS54888 (Pick a product)</td>
</tr>
<tr>
<td></td>
<td>Payment Terms</td>
<td>N 30 (Pick a payment term)</td>
</tr>
</tbody>
</table>

**Processing Constraints**

(Application :Order Management) (Entity: Order Header)

<table>
<thead>
<tr>
<th>Operation</th>
<th>Attribute</th>
<th>User Action</th>
<th>Group</th>
<th>Scope</th>
<th>Validation Entity</th>
<th>Record Set</th>
<th>Validation Template</th>
<th>User Message</th>
<th>Scope</th>
<th>Validation Entity</th>
<th>Record Set</th>
<th>Validation Template</th>
<th>User Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update</td>
<td>Payment Term</td>
<td>Require Reason and Require History</td>
<td>101</td>
<td>Any</td>
<td>Order Header</td>
<td>Order</td>
<td>Booked</td>
<td>Booked</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(Application :Order Management) (Entity: Order Line)

<table>
<thead>
<tr>
<th>Operation</th>
<th>Attribute</th>
<th>User Action</th>
<th>Group</th>
<th>Scope</th>
<th>Validation Entity</th>
<th>Record Set</th>
<th>Validation Template</th>
<th>User Message</th>
<th>Scope</th>
<th>Validation Entity</th>
<th>Record Set</th>
<th>Validation Template</th>
<th>User Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update</td>
<td>Payment Term</td>
<td>Require Reason and Require History</td>
<td>101</td>
<td>Any</td>
<td>Order Line</td>
<td>Line</td>
<td>Booked</td>
<td>Booked</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
36.11 Create Processing Constraints for Customer PO

The processing constraints for a customer PO attribute are checked for the processing constraints with user action as Versioning and Not Allowed. User can create the processing constraints for Not Allowed user action for customer PO and verify the same in the sales order. Also, the versions of a sales order are generated whenever the customer PO is updated.

Prerequisites
- A customer or party.
- A non WMS warehouse.

Profile Options
Not applicable.

Predefined Data

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Processing Constraints</td>
<td>Validation Entity</td>
<td>Order Header</td>
</tr>
<tr>
<td></td>
<td>Attribute</td>
<td>Customer PO</td>
</tr>
<tr>
<td></td>
<td>User Action</td>
<td>Not Allowed</td>
</tr>
</tbody>
</table>

Setup Data

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Order</td>
<td>Customer</td>
<td>Business World (Pick a party of type organization)</td>
</tr>
<tr>
<td></td>
<td>Warehouse</td>
<td>V1 (Pick a warehouse)</td>
</tr>
<tr>
<td></td>
<td>Ordered Item</td>
<td>AS54888 (Pick a product)</td>
</tr>
</tbody>
</table>
This chapter describes flows for Oracle Process Manufacturing (OPM).

### 37.1 Oracle Process Manufacturing Costing

Oracle Process Manufacturing (OPM) Costing combines detailed cost tracking features with flexible analytical tools to help process manufacturers determine their true product costs. OPM Costing supports Standard, Actual and Lot costing types to calculate costs and create reports to analyze data at the most granular level. Using Oracle Sub-ledger application, necessary accounting entries are created for all the transactions. OPM Costing is part of Oracle Process Manufacturing (OPM), an integrated suite of E-Business applications, which addresses specific needs of process manufacturers.

This chapter describes the following test flows in Oracle Process Manufacturing Costing:

- OPM Costing Distributions for Inventory Transfers across Organizations

#### Prerequisites

- Open inventory accounting period.
- Open general ledger period.

#### Profile Options

Not applicable.

#### Predefined Data

Not applicable.

#### Setup Data

Not applicable.

### 37.1.1 OPM Costing Distributions for Inventory Transfers across Organizations

Creates dual unit of measure enabled lot items, purchase orders and shipping networks. Performs inter organization transfer and material receipts. Runs OPM Actual Cost Processor, Cost Update and Pre-Processor.

#### Prerequisites

None.
Profile Options

Table 37–1 Profile Options for OPM Costing Distributions for Inventory Transfers across Organizations Flow

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>SLA: Accounting Methods Builder Context</td>
<td>OPM (Owner &gt; User)</td>
</tr>
</tbody>
</table>

Predefined Data

Table 37–2 Window Predefined Data for OPM Costing Distributions for Inventory Transfers across Organizations Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>Responsibility Name</td>
<td>1. Manufacturing and Distribution Manager (Process Operations) , Inventory, Items , Master Items</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Purchasing, Purchase Orders, Purchase Orders</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Inventory, Transactions, Receiving, Receipts</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. OPM Financials</td>
</tr>
<tr>
<td>Item Template</td>
<td>Template</td>
<td>Process Item (with process manufacturing attributes enabled)</td>
</tr>
<tr>
<td>OPM Financials, setup, Fiscal Policy</td>
<td>Cost Type</td>
<td>PMAC (Actual Costing)</td>
</tr>
</tbody>
</table>

Table 37–3 Page Predefined Data for OPM Costing Distributions for Inventory Transfers across Organizations Flow

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>GL &gt; Accounting Setup Manager &gt; Ledger</td>
<td>Ledger Name</td>
<td>OPM US</td>
</tr>
</tbody>
</table>

Setup Data

Table 37–4 Setup Data for OPM Costing Distributions for Inventory Transfers across Organizations Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Organization</td>
<td>PRU - US Operations (Process Manufacturing)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PR is the item master org</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PR1-Shipping Organization</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PR2-Receiving Organization</td>
</tr>
<tr>
<td>Supplier</td>
<td>Supplier Name</td>
<td>Use Supplier as &quot;Bigmart&quot; for creating Purchase Orders and site as &quot;BENTONVILLE&quot;.</td>
</tr>
<tr>
<td>Unit Of Measure</td>
<td>Unit of Measure</td>
<td>LB &amp; EA</td>
</tr>
</tbody>
</table>
37.2 Oracle Process Manufacturing Execution

Oracle Process Manufacturing Execution ensures manufacturing consistency throughout the production cycle by providing tight control over ingredients and processes, balanced with the flexibility to respond to changing plant conditions. OPM Process Execution is part of the Oracle E-Business Suite, an integrated set of applications that are engineered to work together.

This chapter describes the following test flows in Oracle Process Manufacturing Execution:

Process Manufacturing Batch Creation

Prerequisites

- Organization parameters.
- Process execution parameters.
- Open inventory accounting period.
- Open general ledger period.

Profile Options

Table 37–5 Profile Options for Oracle Process Manufacturing Execution Flow

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDR: Server Time zone</td>
<td>(GMT -07:00) Pacific Time (Make sure to set this value in line with server time zone)</td>
</tr>
<tr>
<td>EDR: E-records and E-signatures</td>
<td>No</td>
</tr>
</tbody>
</table>

Predefined Data

Table 37–6 Predefined Data for Oracle Process Manufacturing Execution Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Responsibility</td>
<td>Responsibility Name</td>
<td>Process Engineer (Access to Process Engineer Functionality (Engineering Workbench, Routings, Operations, Recipes)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Formulator (Access to Formulator (New Product Development, Formula/Recipe Management)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Manufacturing and Distribution Manager, Process Operations</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Order management super user</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Advanced Pricing (Access to Price list name: Process)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Production supervisor (Access to Process manufacturing Make to order program, Make to order rules)</td>
</tr>
</tbody>
</table>

Oracle Process Manufacturing
37.2.1 Process Manufacturing Batch Creation Flow

Creates setup for process execution parameters, creates items, on-hand quantity, recipes and batches, reservations and move orders.

**Prerequisites**

None.

**Profile Options**

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDR: Server Time zone</td>
<td>Profile value should match the value in the server time zone</td>
</tr>
<tr>
<td>EDR: E-records and E-signatures</td>
<td>No</td>
</tr>
</tbody>
</table>

**Predefined Data**

Not applicable.

**Setup Data**

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production supervisor &gt; Setup &gt; Process Execution parameters</td>
<td>Document Numbering</td>
<td>Automatic</td>
</tr>
</tbody>
</table>
37.3 Oracle Process Manufacturing Product Development

Oracle Process Manufacturing Product Development delivers comprehensive and powerful tools that allow process manufacturers to manage the product lifecycle from inception through production, accelerate innovation to market, assure consistent, quality products, and minimize costs and compliance risks. Oracle Process Manufacturing Quality Management empowers process companies to achieve product consistency, enforce proactive quality assurance, streamline quality lab productivity, and assure customer and regulatory compliance.

This chapter describes the following test flows in Oracle Process Manufacturing Product Development:

- Process Manufacturing Product Development Setups

**Prerequisites**

- Organization parameters.
- Product development parameters.

**Profile Options**

**Table 37–11 Profile Options for Oracle Process Manufacturing Product Development Flow**

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDR: E-records and E-signatures</td>
<td>No</td>
</tr>
</tbody>
</table>

**Predefined Data**

**Table 37–12 Predefined Data for Oracle Process Manufacturing Product Development Flow**

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>User Name / Password</td>
<td>Process_ops/welcome</td>
</tr>
<tr>
<td>Item Template</td>
<td>Template</td>
<td>Process Item (with process manufacturing attributes enabled)</td>
</tr>
<tr>
<td>Formula Status</td>
<td>Status Code</td>
<td>Approved for General Use</td>
</tr>
</tbody>
</table>
37.3.1 Process Manufacturing Product Development Setups

Creates setup for product development parameters, formula, routing, recipes and recipe validity rules.

**Prerequisites**

None.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.

**Setup Data**

Not applicable.

37.3.2 Quality Sampling for Purchase Order Receiving

Creates setup for quality specification, validity rules. Creates purchase order and receives inventory, auto-create production samples through workflow.

**Prerequisites**

None.

**Profile Options**

Not applicable.

---

**Setup Data**

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Organization</td>
<td>PRU - US Operations (Process Manufacturing)</td>
</tr>
<tr>
<td>Inventory Organization</td>
<td>Lab Organization</td>
<td>LA0 - Lab Organization</td>
</tr>
<tr>
<td>Inventory Organization</td>
<td>Default LAB</td>
<td>LAB-LAB: Default LAB</td>
</tr>
<tr>
<td>Inventory Organization</td>
<td>PR1-Process Manufacturing</td>
<td>PR1-Main Process Manufacturing</td>
</tr>
<tr>
<td>Inventory Organization</td>
<td>PR2 - Process Organization</td>
<td>PR2 - Process Organization</td>
</tr>
<tr>
<td>Unit Of Measure</td>
<td>Unit of Measure</td>
<td>LB, EA, CSE, %, g/ml</td>
</tr>
<tr>
<td>Formula Security Enabled</td>
<td>No (Disable)</td>
<td></td>
</tr>
<tr>
<td>Sub inventory</td>
<td>PR1 &amp; GEN-RM in Org PR1</td>
<td></td>
</tr>
<tr>
<td>Locator</td>
<td>PR1.1.1. in PR1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>GEN-RM.1.1 in GEN-RM</td>
<td></td>
</tr>
<tr>
<td>Item</td>
<td>Item</td>
<td>9010 (process enabled, Dual UOM item, Primary UOM : CSE,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Secondary UOM: LB, Defaulting=Default), non revision control</td>
</tr>
<tr>
<td>Recipe Generation</td>
<td>Recipe Generation</td>
<td>Manual</td>
</tr>
</tbody>
</table>

Table 37–13 Setup Data for Oracle Process Manufacturing Product Development Flow
Predefined Data

Not applicable.

Setup Data

Table 37–14  Setup Data for Quality Sampling for Purchase Order Receiving Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier</td>
<td>Supplier</td>
<td>Bigmart, Site BENTONVILLE</td>
</tr>
<tr>
<td>Quality Manager &gt; Setup &gt; Tests</td>
<td>Tests</td>
<td>PLPDENSITY</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PRIACTIVE</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PRIBRIGHT</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PRIDENSITY</td>
</tr>
</tbody>
</table>
Oracle Quality is a flexible enterprise-wide quality management system that lets you collect, distribute and analyze critical quality data throughout your supply chain. Oracle Quality is part of the Oracle E-Business Suite, and is tightly integrated with Oracle Work In Process, Oracle Flow Manufacturing, Oracle Shop Floor Management, Oracle MES for Discrete Manufacturing, Oracle Purchasing, Oracle Internet Supplier Portal, Oracle Mobile Supply Chain, Oracle Warehouse Management System, Oracle Enterprise Asset Management, Oracle Depot Repair, and Oracle Service, enabling you to collect quality data at source.

This chapter describes the following test flows in Oracle Quality:

- Create Quality Setups and Capture Quality Results
- Purchase Order Inspection with Quality

**Prerequisites**
None.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

**Setup Data**
Not applicable.

### 38.1 Create Quality Setups and Capture Quality Results

Creates collection element and collection plan. Enters, updates, and views quality results and generates reports.

**Prerequisites**
None.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.
38.2 Purchase Order Inspection with Quality

Creates, receives, and inspects purchase order and moves it to sub-inventory.

Prerequisites
None.

Profile Options

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Default Value or User value</th>
<th>Profile Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>QA:PO inspection</td>
<td>Default Value</td>
<td>Oracle Quality</td>
</tr>
<tr>
<td>ICX: Date format mask</td>
<td></td>
<td>31-DEC-1999</td>
</tr>
</tbody>
</table>

Predefined Data
Not applicable.

Setup Data

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>User name /password</td>
<td>MFG/welcome</td>
<td></td>
</tr>
<tr>
<td>Master Item</td>
<td>Item</td>
<td>G1000</td>
<td>Plain item</td>
</tr>
<tr>
<td>Collection Element</td>
<td>Element Name</td>
<td>Item</td>
<td>Mandatory, Enabled, Displayed</td>
</tr>
<tr>
<td></td>
<td>Element Name</td>
<td>RP_NUM3</td>
<td>Enabled, Displayed</td>
</tr>
<tr>
<td></td>
<td>Element Name</td>
<td>RP_NUM4</td>
<td>Enabled, Displayed</td>
</tr>
<tr>
<td></td>
<td>Element Name</td>
<td>Comments</td>
<td>Mandatory, Enabled, Displayed</td>
</tr>
<tr>
<td>Collection plan template</td>
<td>Template Name</td>
<td>RP_CP_SPEC</td>
<td>Contains following element: Item, RP_NUM3, RP_NUM4</td>
</tr>
<tr>
<td>Organization</td>
<td>Organization Name</td>
<td>V1 - Master Organization</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Organization Name</td>
<td>M1 - Child Organization</td>
<td></td>
</tr>
<tr>
<td>Master Item</td>
<td>Item Name</td>
<td>MS-PUR2</td>
<td>Inventory item, Stackable, Transactable, Reserveable, Purchased, Purchasable, List price:10</td>
</tr>
<tr>
<td>Location</td>
<td>Location</td>
<td>123</td>
<td></td>
</tr>
</tbody>
</table>
Create collection plan with the following collection elements.

Item, Inspection Result (prompt: Inspect Result and it is mandatory), Quantity (mandatory) UOM Name (Prompt: UOM), PO Quality Code (Prompt: Quality Code), Inspection Reason Code (Prompt: Inspect Reason), Inspection Supplier Lot Number (Prompt: Sup Lot Number), Transaction Date (Prompt: Transact Date and mandatory), Comments.

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collection plan</td>
<td>Collection plan</td>
<td>PO INSPECTION PLAN</td>
<td>Mandatory for receiving transaction. Trigger: Item is MS-PUR2</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Mandatory for inspection transaction. Trigger: Item is MS-PUR2</td>
</tr>
</tbody>
</table>

| Sub inventory   | Sub inventories| FGI              | Qty Tracked, Asset, Locator Control: Item level control |

**Table 38–4 Page Setup Data for Purchase Order Inspection with Quality Flow**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier</td>
<td>Supplier Name</td>
<td>Allied Manufacturing</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Supplier Site</td>
<td>SAN JOSE-ERS</td>
<td></td>
</tr>
</tbody>
</table>
Oracle Service Contracts simplifies contract management and provides a centralized repository for entitlement information. It helps to rapidly create, manage, and update service contracts, warranties, and extended warranties on sales of goods or services. It also provides service based on real-time entitlement data. As a result, organizations can minimize contract leakage, increase recurring revenues, and provide targeted services while reducing operational costs.

This chapter describes the following test flows in Oracle Service Contracts:

- Authoring a Contract
- Bank Account and Credit Card Consolidation
- Verify Deferred Revenue Recognition

**Prerequisites**

None.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.

**Setup Data**

Not applicable.

### 39.1 Authoring a Contract

Authors a service contract with different lines and corresponding sub lines. The contract is authored with the help of a template and by copying an existing contract. Authors a service contract with usage lines and contract status as QA hold.

**Prerequisites**

None.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.
39.2 Bank Account and Credit Card Consolidation

Authors a service agreement with payment method as Credit Card, using different credit cards at header and line level, and billing them.

Prerequisites
None.

Profile Options

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>OKS: Payment Method for AR Interface</td>
<td>Credit Card</td>
<td>User</td>
</tr>
</tbody>
</table>

Predefined Data
Not applicable.

Setup Data

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer</td>
<td>Customer name</td>
<td>Business World</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit card</td>
<td>Number</td>
<td>4111111111111111</td>
</tr>
<tr>
<td></td>
<td>Credit Brand</td>
<td>Master</td>
</tr>
<tr>
<td></td>
<td>Expiration Date</td>
<td>31-Dec-2013</td>
</tr>
<tr>
<td></td>
<td>Statement Billing Address</td>
<td>2391 L Street, San Jose, CA 95106, US</td>
</tr>
</tbody>
</table>
39.3 Verify Deferred Revenue Recognition

Creates a service contract with a covered product with acceptance from Oracle Order Management and checks the revenue generated for it. The revenue will not be recognized as the lines in sales order are not recognized.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Period Type</td>
<td>Period Type</td>
<td>Day</td>
</tr>
<tr>
<td></td>
<td>Periods Per Year</td>
<td>365</td>
</tr>
<tr>
<td></td>
<td>Year Type</td>
<td>Calendar</td>
</tr>
<tr>
<td></td>
<td>Description</td>
<td>365 Days Per Year</td>
</tr>
<tr>
<td>Accounting Calendar</td>
<td>Prefix</td>
<td>01-JAN-2013</td>
</tr>
<tr>
<td></td>
<td>Type</td>
<td>Day</td>
</tr>
<tr>
<td></td>
<td>Year</td>
<td>2013</td>
</tr>
<tr>
<td></td>
<td>Qtr</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Num</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>From</td>
<td>01-Jan-2013</td>
</tr>
<tr>
<td></td>
<td>To</td>
<td>01-Jan-2013</td>
</tr>
<tr>
<td></td>
<td>Name</td>
<td>01-Jan-2013</td>
</tr>
<tr>
<td>Accounting Calendar setup</td>
<td>Date</td>
<td>2 Months</td>
</tr>
<tr>
<td>Accounting Rules</td>
<td>Name</td>
<td>Variable - Day</td>
</tr>
<tr>
<td></td>
<td>Type</td>
<td>Accounting, Variable Duration</td>
</tr>
<tr>
<td></td>
<td>Period</td>
<td>Day</td>
</tr>
<tr>
<td>Schedule</td>
<td>Period</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Percent</td>
<td>10</td>
</tr>
</tbody>
</table>
Oracle Shipping helps manage picking, packing, containerization and shipping of goods to customers. Additionally, it supports trip and delivery planning, pick release and shipment confirmation.

This chapter describes the following test flows in Oracle Shipping Execution:

■ Perform Delivery Actions like Autocreate Delivery, Auto Create Trip, Pick Release from Shipping Transaction Form, Generate BOL, Generate Packing Slip and Ship All.

■ Perform Trip Confirm of Ship Model Complete (SMC) Pick to Order (PTO) Model from Shipping Transaction Form by Autocreating the Trip

■ Define Two Level Container Item Relationship and Perform Autopack Master from Delivery Details and Ship Confirm.

**Prerequisites**
Shipping parameters and global parameters defined for the specific organization.
Role with grants to access Shipping Transaction Form (STF) actions and user associated with the role.

**Profile Options**
Not applicable.

**Predefined Data**
Not applicable.

**Setup Data**
Not applicable.

### 40.1 Perform Delivery Actions like Autocreate Delivery, Auto Create Trip, Pick Release from Shipping Transaction Form, Generate BOL, Generate Packing Slip and Ship All.

Major actions that user can perform from Delivery tab of Shipping Transaction Form (STF) are auto creating a delivery for a delivery detail, auto creating the trip from delivery actions and printing various shipping documents.

**Prerequisites**
None.
Perform Trip Confirm of Ship Model Complete (SMC) Pick to Order (PTO) Model from Shipping Transaction Form by Autocreating the Trip

Ship confirming an order using trip, creates order with SMC PTO model and pick releases, auto creates trip and completes the ship confirmation.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
- Unit of measure conversions to be defined between Each and DZ.
- Sales order lines created with unit of measure as DZ.

40.3 Define Two Level Container Item Relationship and Perform Autopack Master from Delivery Details and Ship Confirm

Using Autopack Master functionality user packs delivery details into container and packs the packed container into a master container. User can also check two level packing associated containers and LPN in Shipping Transaction Form.

Prerequisites
None.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
- Item container relationship to be defined for shipping items and first level of container, master container and container item.
Oracle Shop Floor Management provides complete visibility of all the manufacturing work order activity. It can extend across different plants to track product lot activities from raw materials to finished goods as a single repository of shop floor information. It helps ensure the continuum between planning, scheduling, and execution including complex lot transactions, dynamic routing, and end-to-end genealogy of products, modeling and tracking of operation yield costs.

This chapter describes the following test flows in Oracle Shop Floor Management:

- Move Lot Based Job

**Prerequisites**

None.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.

**Setup Data**

<table>
<thead>
<tr>
<th>Table 41–1 Window Setup Data for Oracle Shop Floor Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Window Name</td>
</tr>
<tr>
<td>Organization</td>
</tr>
<tr>
<td>Organization Parameters</td>
</tr>
<tr>
<td>WIP Parameters</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Table 41–2 Page Setup Data for Oracle Shop Floor Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page Name</td>
</tr>
<tr>
<td>User</td>
</tr>
</tbody>
</table>
41.1 Move Lot Based Job

Creates lot based work order; performs jump, move, and undo move operations, and completes job with scrap operation.

Prerequisites

None.

Profile Options

Table 41–3 Profile Options for Move Lot Based Job Flow

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>WSM: Allow Operation Jumps</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Predefined Data

Not applicable.

Setup Data

Table 41–4 Setup Data for Move Lot Based Job Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master Items</td>
<td>Item Name</td>
<td>CM61000</td>
<td>Lot controlled assembly having BOM and routing and assigned to M4 organization. (components are of Push supply type)</td>
</tr>
</tbody>
</table>
Oracle Work in Process

Oracle Work in Process is the core of Oracle’s Discrete Manufacturing solution. Oracle Work in Process by itself provides a complete production management system that improves productivity, quality, and responsiveness while maximizing throughput and production. Complete picture of transactions, materials, resources, costs, and job and schedule progress can be tracked. In conjunction with other modules within Oracle Discrete Manufacturing foot print, Oracle Work in Process provides support for enterprise wide quality management, lot and serial genealogy and traceability and support for various methods of planning and cost accounting, irrespective of whether your entire manufacturing is in-house or you use services of contract manufacturers.

This chapter describes the following test flows in Oracle Work in Process:

- Create, Transact and Complete Standard Discrete Job
- Work Order Less Completion Transactions
- Mobile Serialized Transactions

Prerequisites

None.

Profile Options

<table>
<thead>
<tr>
<th>Table 42–1</th>
<th>Profile Options for Oracle Work in Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Name</td>
<td>Profile Value</td>
</tr>
<tr>
<td>WIP: Define Discrete Job Form</td>
<td>Interactive definition</td>
</tr>
</tbody>
</table>

Predefined Data

<table>
<thead>
<tr>
<th>Table 42–2</th>
<th>Page Predefined Data for Oracle Work in Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page Name</td>
<td>Field Name</td>
</tr>
<tr>
<td>User</td>
<td>User name /password</td>
</tr>
<tr>
<td>Responsibility</td>
<td>Responsibility Name</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Table 42–3</th>
<th>Mobile Predefined Data for Oracle Work in Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mobile</td>
<td>Field Name</td>
</tr>
<tr>
<td>Telnet</td>
<td>Responsibility Name</td>
</tr>
</tbody>
</table>
Setup Data

Table 42–4  Setup Data for Oracle Work in Process

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Organization Name</td>
<td>V1</td>
<td>V1 master organization</td>
</tr>
<tr>
<td></td>
<td>Organization Name</td>
<td>M1</td>
<td>M1 child organization</td>
</tr>
</tbody>
</table>

42.1 Create, Transact and Complete Standard Discrete Job

Creates standard work order; performs move, issue and resource transactions and completes the work order.

Prerequisites
- Finished assembly is plain.
- BOM, routing for the item.
- All the dependent components with on-hand inventory.
- Routing for the assembly with two standard operations.

Profile Options
Not applicable.

Predefined Data

Table 42–5  Predefined Data for Create, Transact and Complete Standard Discrete Job Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discrete Job</td>
<td>Type</td>
<td>Standard</td>
</tr>
<tr>
<td>WIP Parameters</td>
<td>Class</td>
<td>Discrete</td>
</tr>
<tr>
<td>Discrete Job</td>
<td>Status</td>
<td>Released</td>
</tr>
<tr>
<td>Discrete Job Routing tab</td>
<td>Sub inventory</td>
<td>Stores</td>
</tr>
</tbody>
</table>

Setup Data

Table 42–6  Setup Data for Create, Transact and Complete Standard Discrete Job Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discrete Job</td>
<td>Assembly</td>
<td>FORTE_STND_ASSY</td>
<td>Plain component with supply type : push</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Sub inventory : Stores</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Operation sequence : 20</td>
</tr>
<tr>
<td>Bill of Material</td>
<td>Components</td>
<td>RP_COMP1</td>
<td>Serial controlled component with supply type : Push</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Sub inventory : Stores</td>
</tr>
<tr>
<td></td>
<td>Components</td>
<td>CHA_SR1</td>
<td>Operation sequence : 20</td>
</tr>
</tbody>
</table>
42.2 Work Order Less Completion Transactions

Work order less completion transaction for plain and lot controlled assembly, work order less scrap transaction for plain.

Prerequisites

- Finished assemblies are plain and lot controlled.
- BOM, routing for the item.
- All the dependent components with on hand inventory.
- Routing for the assemblies with two standard operations.

Profile Options

Not applicable.

Predefined Data

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Components</td>
<td>CHA_LOT_SR_CMP1</td>
<td>Lot and serial controlled component with supply type: Push Sub inventory: Stores Operation sequence: 20</td>
</tr>
<tr>
<td>Components</td>
<td>RP_COMP2</td>
<td>Plain component with supply type: assembly pull Sub inventory: Stores Operation sequence: 10</td>
</tr>
<tr>
<td>Components</td>
<td>CHA_SR3</td>
<td>Serial controlled component with supply type: assembly pull Sub inventory: Stores Operation sequence: 10</td>
</tr>
<tr>
<td>Components</td>
<td>CHA_LOT_SR_CMP3</td>
<td>Lot and serial controlled component with supply type: assembly pull Sub inventory: Stores Operation sequence: 10</td>
</tr>
</tbody>
</table>

Routing

- Standard Operation APRT Standard operation should have resource attached
- Standard Operation ASBL Standard operation should have resource attached

Table 42–7 Predefined Data for Work Order Less Completion Transactions Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>WIP Parameters</td>
<td>Class</td>
<td>Discrete</td>
</tr>
<tr>
<td></td>
<td>Sub inventory</td>
<td>Stores</td>
</tr>
</tbody>
</table>
42.3 Mobile Serialized Transactions

Creates work order for a serialized assembly; performs move, scrap, reject, and return, issue and resource transactions, and completes the work order.

**Prerequisites**

- Finished assembly is serial controlled.
- BOM and routing for the item.
- All the dependent components with on hand inventory.
- Lot & serial control assemblies with more than one lot number.
- Routing for the assembly with three operations, first two being standard.

**Profile Options**

Not applicable.
Predefined Data

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discrete Job</td>
<td>Sub inventory</td>
<td>Stores</td>
<td></td>
</tr>
<tr>
<td>WIP Parameters</td>
<td>Default serialization start operation</td>
<td>Check</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Class</td>
<td>Discrete</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Required Scrap Account</td>
<td>Check</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Default Scrap Account</td>
<td>Alias and Scrap Number should be empty</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Transaction Processing Mode</td>
<td>Online</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Default Intra Operating Step for Assembly Moves</td>
<td>To move</td>
<td></td>
</tr>
</tbody>
</table>

Setup Data

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master Items</td>
<td>Assembly</td>
<td>MOB_SER_ASSY</td>
<td>Serial controlled assembly</td>
</tr>
<tr>
<td>Bill of Material</td>
<td>Components</td>
<td>MOB_PLAIN1</td>
<td>Plain component with supply type Push, Sub inventory as Stores at Operation sequence: 10</td>
</tr>
<tr>
<td></td>
<td>Components</td>
<td>MOB_SR1</td>
<td>Serial controlled component with supply type Push, Sub inventory as Stores at Operation sequence: 10</td>
</tr>
<tr>
<td></td>
<td>Components</td>
<td>MOB_LOT_SR1</td>
<td>Lot and serial controlled component with supply type Push, Sub inventory as Stores at Operation sequence: 10</td>
</tr>
<tr>
<td></td>
<td>Components</td>
<td>MOB_LOT_SR2</td>
<td>Lot and serial controlled component with supply type operation Pull, Sub inventory as Stores at Operation sequence: 10</td>
</tr>
<tr>
<td></td>
<td>Components</td>
<td>MOB_SR2</td>
<td>Serial controlled component with supply type operation Pull, Sub inventory as Stores at Operation sequence: 10</td>
</tr>
<tr>
<td></td>
<td>Components</td>
<td>MOB_PLAIN2</td>
<td>Plain component with supply type operation pull, Sub inventory as Stores at Operation sequence: 10</td>
</tr>
<tr>
<td></td>
<td>Components</td>
<td>MOB_PLAIN3</td>
<td>Plain component with supply type Assembly pull at Operation sequence: 20</td>
</tr>
</tbody>
</table>
Table 42–10  (Cont.) Setup Data for Mobile Serialized Transactions Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Components</td>
<td>MOB_SR3</td>
<td></td>
<td>Serial controlled component with supply type Assembly Pull, Sub inventory as Stores at Operation sequence: 20</td>
</tr>
<tr>
<td></td>
<td>MOB_LOT_SR3</td>
<td></td>
<td>Lot and serial controlled component with supply type Assembly Pull, Sub inventory as Stores at Operation sequence: 20</td>
</tr>
<tr>
<td>Routing</td>
<td>Standard Operation</td>
<td>APRT</td>
<td>At Operation sequence 10</td>
</tr>
<tr>
<td></td>
<td>Standard Operation</td>
<td>ASBL</td>
<td>At Operation sequence 20</td>
</tr>
<tr>
<td></td>
<td>Non Standard Operation</td>
<td></td>
<td>Operation (without referring to standard operations) should be added at operation sequence 30</td>
</tr>
</tbody>
</table>

Table 42–10 (Cont.) Setup Data for Mobile Serialized Transactions Flow
Oracle Warehouse Management System

Oracle Warehouse Management System (WMS) is the next-generation warehousing solution which includes an excellent task management system. Oracle Warehouse Management System brings operational flexibility via its rules-based architecture. It is capable of handling warehouse environments where transaction volumes are high and business processes are complex.

This chapter describes the following test flows in Oracle Warehouse Management System:

- Over Pick Under Pick Without Exception
- Work In Progress PutAway
- Inspection Purchase Order Receipt and Put Away With New Operation Plan Attached to Plain Item
- Direct Ship Base Case
- Perform License Plate Number Ship for Alias-Enabled Sub Inventory
- Express Return from Inventory to Supplier
- Pick None and Curtail Pick Exceptions
- Return Material Authorization
- Bulk Pack Cartonization

Prerequisites

- Earliest acceptable date and latest acceptable date in Sales Order Line - Shipping tab are in Hide status.

Profile Options

**Table 43–1  Profile Options for Oracle Warehouse Management System**

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>RC: Processing Mode</td>
<td>On-line</td>
</tr>
</tbody>
</table>

Predefined Data

Not applicable.
Setup Data

- Warehouse management system enabled organization (W1).
- Create a resource by assigning it to a department.
- Sub inventories get created along with the storage locator, receiving locator and staging locator.
- Define shipping parameters as below:
  - Weight, volume class and unit of measure values are defined.
  - Release sequence rule, pick slip grouping rule and default staging sub inventory are set as per the requirement.
  - Ship confirm rule is optionally defined.
- Define picking methodologies.
- Open inventory accounting periods.
- Create item using the Purchase Item template and added to the price list.

43.1 Over Pick Under Pick Without Exception

Warehouse Management System picking process supports picking more than the requested quantity, but only after the user has selected an exception to indicate intent to over pick. This process also validates the confirmed quantity against the over pick tolerance that is defined either at the time of creation of a sales order or is defined for a customer and item combination as a part of setup in Order Management. The requirement is to change the picking process, so that the user does not have to select pick over exception to be able to pick over. Same is the case with pick partial flow.

Prerequisites

- Transaction reasons - Pick Over and Pick Partial.
- Advanced Pick Load (APL) template associated with user task type.
- "Allow under pick without exception" is set to Yes in APL template.
- WMS picking rules assigned in WMS Rules Workbench.

Profile Options

<table>
<thead>
<tr>
<th>Table 43–2</th>
<th>Profile Options for Over Pick Under Pick Without Exception Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Name</td>
<td>Profile Value</td>
</tr>
<tr>
<td>WSH: Over picking Enabled</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Predefined Data

<table>
<thead>
<tr>
<th>Table 43–3</th>
<th>Predefined Data for Over Pick Under Pick Without Exception Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Window Name</td>
<td>Field Name</td>
</tr>
<tr>
<td>Organization Parameters</td>
<td>Over Pick Checkbox</td>
</tr>
</tbody>
</table>
Setup Data

Table 43–4  Setup Data for Over Pick Under Pick Without Exception Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pick Load Page Template</td>
<td>Template Name</td>
<td>GENERAL</td>
</tr>
<tr>
<td>Define Picking Methodologies</td>
<td>Rule Name</td>
<td>Order Picking</td>
</tr>
</tbody>
</table>

43.2 Work In Progress PutAway

Work in Progress (WIP) completion can be performed for discrete jobs that have quantity available to complete. After identifying the License Plate Number (LPN) to complete into, and the job or assembly which is being completed, there is an option of either completing directly into inventory, or allowing the LPN to reside in WIP until another operator puts the LPN away. The completion and put away process can be included in one continuous flow, or the process can be split into two separate parts. In this flow LPN resides in WIP until the operator puts the LPN away.

Prerequisites

- Item is created in the organization by copying from the Finished Goods template.
- WMS putaway rules and putaway strategy is assigned in WMS Rules Workbench.
- In Rules Workbench page, under PutAway tab, Seq no: 1 is deleted.

Profile Options

Not applicable.

Predefined Data

Not applicable.

Setup Data

Table 43–5  Setup Data for Work In Progress PutAway Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Parameters</td>
<td>Organization</td>
<td>W1</td>
</tr>
</tbody>
</table>

43.3 Inspection PO Receipt and Put Away With New Operation Plan Attached to Plain Item

Advanced task framework uses operation plans to define the routing of material from a receiving area to the storage area. An operation plan is similar to manufacturing routing. Like routing, an operation plan defines the sequence of operations and when the operations occur. An operation plan has a unique name, and a description to describe what the operation plan does.

Prerequisites

- Operation plan for plan type defined as inspection.
- WMS task type assignment rule is defined with Inbound as activity and return value as defined operation plan.
- WMS putaway rules and putaway strategy is assigned in WMS Rules Workbench.
43.4 Direct Ship Base Case

Oracle WMS enables users to ship confirm material for a sales order line without having to pick release or pick confirm the delivery lines. This feature is enabled by selecting the Direct Shipping Allowed check box located on the Warehouse tab of the Organizational Parameters desktop window. Selecting this check box allows normal pick release shipping methods. Both direct shipping and normal pick release shipping can be utilized by selecting Direct Shipping Allowed.

Prerequisites
- Direct shipping enabled at organization parameter level.

Profile Options
Not applicable.

Predefined Data
Not applicable.

Setup Data
Not applicable.

43.5 Perform LPN Ship for Alias-Enabled Sub Inventory

When a mobile page containing the locator field is rendered and presented to the user, it displays the actual locator name. When an operator attempts to confirm the locator, he or she is required to enter or scan the locator alias. The system does not accept any value other than the locator alias. On typing the alias name, the locator name corresponding to that alias name in that sub-inventory is returned automatically.

For uniqueness defined at the sub inventory level, the alias name for locators belonging to one sub inventory has to be unique. No two locators in one sub inventory can have the same locator alias name. But locators from two different sub inventories within the same organization can have the same locator name.

For uniqueness defined at organization level, the alias name across the organization has to be unique; that is, two different sub inventories belonging to the same org cannot have the same locator alias name.
Prerequisites

- Enable Locator Alias is selected at sub inventory level.
- Locator alias name is specified.

Profile Options

Not applicable.

Predefined Data

Not applicable.

Setup Data

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Parameters</td>
<td>Enforce Locator Alias Uniqueness</td>
<td>Checked</td>
</tr>
</tbody>
</table>

### 43.6 Express Return from Inventory to Supplier

Receiving returns functionality enables users to perform returns to suppliers and receiving. Users use the receiving returns functionality to return delivered items to receiving or to return received or delivered items to the supplier. Oracle Warehouse Management offers a one step or a two step process for returns. This option is determined by the WMS: Express Returns profile option. If enabled, the operator can perform return in one way (through desktop only). If disabled, the operator can perform return in two ways - desktop and mobile. In this test flow, we perform the express return from inventory to supplier.

Prerequisites

None.

Profile Options

<table>
<thead>
<tr>
<th>Profile Name</th>
<th>Profile Value</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>WMS: Express Returns</td>
<td>Yes</td>
<td>Site</td>
</tr>
</tbody>
</table>

Predefined Data

Not applicable.

Setup Data

Not applicable.

### 43.7 Pick None and Curtail Pick Exceptions

To raise a task exception in Oracle Warehouse Management, a transaction reason setup is required and it should be linked to the reason type. While entering an exception during the picking process, we need to select the reason for the exception.

Curtail Pick and Pick None are the two reason contexts, in which Pick None is applied when there is no need to perform the task from that locator or the system assumes that there is no on-hand quantity available in that locator while Curtail Pick ends the
picking process after picking a few license plate numbers (LPN) or lots and loads the contents.

This flow tests APL Exceptions like Pick None and Curtail Pick and finally performs LPN ship. The script also periodically checks the inventory before and after critical transactions so as to keep track of the material being moved or transacted and to check the validity and the accuracy of the transactions.

**Prerequisites**

- Transaction reasons - pick none and curtail pick are created.
- WMS picking rules are assigned in WMS Rules Workbench.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.

**Setup Data**

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pick Load Page Template</td>
<td>Template Name</td>
<td>GENERAL</td>
</tr>
<tr>
<td>Define Picking Methodologies</td>
<td>Rule Name</td>
<td>Order Picking</td>
</tr>
</tbody>
</table>

### 43.8 Return Material Authorization (RMA)

Oracle WMS enables reverse logistics tasks by supporting receipt of return material authorizations in all three types of routing methods. Account Receivables allows users to authorize the return of sales orders from the customers as well as sales made by other dealers or suppliers. This flow tests the receiving of return material authorization.

**Prerequisites**

- Returnable item.

**Profile Options**

Not applicable.

**Predefined Data**

Not applicable.

**Setup Data**

Not applicable.

### 43.9 Bulk Pack Cartonization

Oracle WMS bulk pack feature is used to suggest containers while packing material in a particular locator in the warehouse. Mobile bulk packing automatically generates the appropriate LPN labels. The user can either enter only the container item if the user wants the system to suggest the appropriate quantity of that container, or alternately let the system suggest both the type and quantity of containers. This flow tests bulk pack for given items.
Prerequisites

- Container parameter checked for container item.
- Contained item and container item attached to organization.

Profile Options

Not applicable.

Predefined Data

Not applicable.

Setup Data

Table 43–10  Setup Data for Bulk Pack Cartonization Flow

<table>
<thead>
<tr>
<th>Window Name</th>
<th>Field Name</th>
<th>Field Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Parameters</td>
<td>Enable Cartonization</td>
<td>Always cartonize for pick release process</td>
</tr>
<tr>
<td></td>
<td>Cartonize Sales Orders</td>
<td>Checked</td>
</tr>
</tbody>
</table>
This Appendix lists the mapping between the functional and technical names of the test flows.

<table>
<thead>
<tr>
<th>Product Family</th>
<th>Product</th>
<th>Test Flow Name in Document</th>
<th>Test Flow Name in Oracle Flow Builder</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRM</td>
<td>Oracle Advanced Scheduler</td>
<td>Create Scheduler Rule</td>
<td>Create_Scheduler_Rule</td>
</tr>
<tr>
<td></td>
<td>Oracle Customer Support</td>
<td>Create Service Request Task in Customer Support Specialist</td>
<td>Create_SR_Task_Customer_support_Specialist</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Create Service Request Task in Service Desk Analyst</td>
<td>Create_SR_Task_Service_Desk_Analyst</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Create Service Request Task in Case Worker</td>
<td>Create_SR_Task_Case_Worker</td>
</tr>
<tr>
<td>Field Service Dispatch Center</td>
<td>Schedule Task With Intelligent Mode</td>
<td>Schedule_Task_With_Intelligent_Mode</td>
<td>Schedule_Task_With_Autonomous_Scheduler</td>
</tr>
<tr>
<td>Field Service Portal</td>
<td>Post Debrief Install Lines</td>
<td>Post_Debrief_Install_Lines</td>
<td>Receive_Parts_FSTP</td>
</tr>
<tr>
<td>Field Service Wireless</td>
<td>Post Debrief Labor Lines</td>
<td>Post_Debrief_Labor_Lines</td>
<td>Create_Reservation_Parts_Search</td>
</tr>
<tr>
<td>Oracle Incentive Compensation</td>
<td>Create Role Group Resource</td>
<td>Create_Role_Group_Resource</td>
<td>Create_Role_Group_Resource</td>
</tr>
<tr>
<td>Oracle iStore</td>
<td>Checkout</td>
<td>Checkout</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Direct Item Entry</td>
<td>Direct_Item_Entry</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Save Cart</td>
<td>Save_Cart</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Shopping Cart Share Cart</td>
<td>Shopping_Cart_Share_Cart</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Shopping Cart Save to List</td>
<td>Shopping_Cart_Save_To_List</td>
<td></td>
</tr>
<tr>
<td>Oracle Quoting</td>
<td>Create Quote Lines With Different Shipping and Billing Details</td>
<td>Create_Quote_With_Different_Shipping_Billing_Details</td>
<td></td>
</tr>
<tr>
<td>Product Family</td>
<td>Product</td>
<td>Test Flow Name in Document</td>
<td>Test Flow Name in Oracle Flow Builder</td>
</tr>
<tr>
<td>----------------</td>
<td>---------------------------------</td>
<td>----------------------------</td>
<td>-------------------------------------</td>
</tr>
<tr>
<td></td>
<td>Create Quotes With Multiple Template Form</td>
<td>Create_Quote_With múltiples_Templates_Fo rms</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Copy Quote With All Quote Information</td>
<td>Copy_Quote_With_all_Quote_Information</td>
<td></td>
</tr>
<tr>
<td>Oracle Spares Management</td>
<td>Create Parts Requirement and Internal Order through Parts Search</td>
<td>Create_PR_and_IO_Through_Parts_Search</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Return Defective Parts With Return Routing Rule</td>
<td>Return_Defective_Parts_With_RRR</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create Supersession and Internal Order</td>
<td>Create_Supersession_And_IO</td>
<td></td>
</tr>
<tr>
<td>Oracle TeleSales</td>
<td>Operations in Sales Lead Center</td>
<td>Operations_In_Sales_Lead_Center</td>
<td></td>
</tr>
<tr>
<td>Oracle TeleService</td>
<td>Create Service Request for Customer Organization and Employee Contact</td>
<td>Create_Service_Request_Customer_Organization_Employee</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create, Update, Audit and Validate Task</td>
<td>Create_Update_Audit_Validate_Task</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create Charge Lines and Orders</td>
<td>Create_Charge_Lines_And_Orders</td>
<td></td>
</tr>
<tr>
<td>Financials</td>
<td>Oracle Payables</td>
<td>Create and Pay a Standard Invoice with Distribution Set</td>
<td>Create_And_Pay_A_Standard_Invoice_With_Distribution_Set</td>
</tr>
<tr>
<td></td>
<td>Recurring Invoices with Distribution Set</td>
<td>Recurring_Invoices_With_Distribution_Set</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create Standard Invoice</td>
<td>Create_Standard_Invoice_Through_The_Invoice_Gateway</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Creation of Interest Invoice</td>
<td>Create_A_Interest_Invoice</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create Credit Memo and Match it to a Standard Invoice</td>
<td>Create_Credit_Memo_And_Match_It_To_A_Standard_Invoice</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create and Pay Prepayment and Apply it to Standard Invoice with Multiple Lines</td>
<td>Create_And_Pay_Prepayment_For_Invoice_With_Multiple_Lines</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create and Pay Prepayment and Apply it to Standard Invoice Both Having Line Level Tax</td>
<td>Create_And_Pay_Prepayment_For_Invoice_With_Line_Level_Tax</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create a Standard Invoice with AWT, Generate AWT Invoice at Validation</td>
<td>Create_Invoice_And_Generate_AWT_Invoice_At_Validation</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create a Standard Invoice with AWT, Generate AWT Invoice at Payment</td>
<td>Create_Standard_Invoice_And_Autogen_AWT_Invoice_At_Payment</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Match a Standard Invoice and Match it to a Receipt</td>
<td>Match_A_Standard_Invoice_And_Match_It_To_A_Receipt</td>
<td></td>
</tr>
<tr>
<td>Product Family</td>
<td>Product</td>
<td>Test Flow Name in Document</td>
<td>Test Flow Name in Oracle Flow Builder</td>
</tr>
<tr>
<td>----------------</td>
<td>------------------</td>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Create Invoice and Verify</td>
<td>Multiple_Discounts_Verification_Based_</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Correct Discount is Taken</td>
<td>On_Payment_Date</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Based on Payment Date</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Multiple Discounts</td>
<td></td>
</tr>
<tr>
<td>Oracle</td>
<td>Receivables</td>
<td>Create Invoice Batch with</td>
<td>Create_Invoice_Batch_With_Credit_Memo_And_Standard_Invoice</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Credit Memo and Standard</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Invoice</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Create Receipt and Take</td>
<td>Create_Receipt_And_Take_Earned_Discount</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Earned Discount</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Create Receipt and Clear</td>
<td>Create_Receipt_And_Clear_Using_Cash_Management</td>
</tr>
<tr>
<td></td>
<td></td>
<td>using Cash Management</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Create Standard Receipt</td>
<td>Create_Standard_Receipt_Reversal</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Reversal</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Create Invoice with</td>
<td>Create_Invoice_with_Accounting_Rule_In_Advance</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Accounting Rule, in</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Advance</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Create Debit Memo Receipt</td>
<td>Create_Debit_Memo_Receipt_Reversal</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Reversal</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Create Invoice with Split</td>
<td>Create_Invoice_with_Payment_And_Apply_Credit_Memo</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Payment Term and Apply</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Credit Memo</td>
<td></td>
</tr>
<tr>
<td></td>
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Table A–1 (Cont.) Test Flow Name Mappings
### Table A–1  (Cont.) Test Flow Name Mappings

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Table A–1 (Cont.) Test Flow Name Mappings
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**Table A–1 (Cont.) Test Flow Name Mappings**
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