Oracle® Process Manufacturing

System Administration User's Guide

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Oracle Process Manufacturing System Administration User's Guide, Release 12.2

Part No. E49069-04

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Primary Author: Laurel Dale

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Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
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If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

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

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Process Manufacturing System Administration User's Guide.*

This guide assumes that you have working knowledge of your business area's processes, tools, principles, and customary practices. It also assumes that you are familiar with Oracle Process Manufacturing. If you have never used Oracle Process Manufacturing, we suggest you attend one or more of the Oracle Process Manufacturing training classes available through Oracle University.

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

Documentation Accessibility

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

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Structure

1 OPM System Setup

This topic explains how to set up and manage the OPM System Administration

functions. This includes Document Types, Users, and Organizations, as well as several others.

2 Understanding Migration

This topic explains how to set up data for migration using the Convergence Migration Setup window and to view the errors of migration using the View Migration Log window.

3 Archive and Purge

You can periodically archive and purge data to meet data retention requirements and improve your system performance.

4 Workflow Setup

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

From the OPM System Administration application, you can use the seeded data that comes with the system, or create your own workflow activities, column definitions, and role associations. In addition, you can activate and deactivate a workflow activity from the Workflow Activation window.

A Navigation Paths

Although your System Administrator may have customized your Navigator, typical navigation paths are described in the following tables. In some cases, there is more than one way to navigate to a window. These tables provide the most typical default path.

B Audit Trail Seed Data

If you want to keep track of the changes made to your data by application users, you should set up AuditTrail for the relevant tables.

Glossary

Related Information Sources

Related Guides

Oracle Process Manufacturing shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other guides when you set up and use Oracle Process Manufacturing. You can read the guides online in the Oracle Help Center. Navigate to https://docs.oracle.com. Select On-Premises Applications, then E-Business.

Guides Related to All Products

Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter and query data, and run concurrent requests using the user interface (UI) of Oracle E-Business Suite. It includes information on setting preferences and customizing the UI. In addition, this guide describes accessibility features and keyboard shortcuts for Oracle E-Business Suite.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle E-Business Suite Concepts

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12.2, or contemplating significant changes to a configuration. After describing the Oracle E-Business Suite architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

Oracle E-Business Suite Flexfields Guide

This guide provides flexfields planning, setup, and reference information for the Oracle Applications implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

Oracle Application Framework Personalization Guide

This guide covers the design-time and run-time aspects of personalizing applications built with Oracle Application Framework.

Oracle E-Business Suite Installation Guide: Using Rapid Install

This book is intended for use by anyone who is responsible for installing or upgrading Oracle E-Business Suite. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle E-Business Suite Release 12.2, or as part of an upgrade to Release 12.2.

Oracle E-Business Suite: Administering Enterprise Command Centers

This book describes various tools and features of Oracle Enterprise Command Center Framework that can be used to manage and monitor Enterprise Command Centers.

Oracle E-Business Suite: Extending Enterprise Command Centers

This book provides an overview of the Oracle Enterprise Command Center Framework architecture and the anatomy of an Enterprise Command Center dashboard. It also describes how to extend Enterprise Command Center dashboards to meet requirements specific to your implementation.

Oracle Fusion Middleware Adapter for Oracle Applications User's Guide (Oracle Application Server Adapter for Oracle Applications User's Guide)

This guide covers the use of Adapter for Oracle Applications in developing integrations between Oracle E-Business Suite and trading partners.

Note that the user's guide can be found in the following documentation libraries:

- As part of the Oracle Fusion Middleware and SOA Suite in 11g, Oracle Fusion Middleware Adapter for Oracle Applications User's Guide is available in the Oracle Fusion Middleware 11g Documentation Library.

- As part of the Oracle Application Server in 10g, *Oracle Application Server Adapter for*

Oracle Applications User's Guide is available in the Oracle Application Server 10g Documentation Library.

Oracle E-Business Suite Maintenance Guide

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

Oracle E-Business Suite Security Guide

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

Oracle E-Business Suite Setup Guide

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

Maintaining Oracle E-Business Suite

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

Oracle E-Business Suite Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle E-Business Suite User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms integrate with Oracle Applications.

Oracle e-Commerce Gateway User's Guide

This guide describes the functionality of Oracle e-Commerce Gateway and the necessary setup steps in order for Oracle Applications to conduct business with trading partners through Electronic Data Interchange (EDI). It also contains how to run extract programs for outbound transactions, import programs for inbound transactions, and the relevant reports.

Oracle e-Commerce Gateway Implementation Guide

This guide describes implementation details, highlights additional setups for trading partner, code conversion, and Oracle Applications as well as provides the architecture

guidelines for transaction interface files. This guide also contains troubleshooting information and how to customize EDI transactions.

Oracle Report Manager User's Guide

Oracle Report Manager is an online report distribution system that provides a secure and centralized location to produce and manage point-in-time reports. Oracle Report Manager users can be either report producers or report consumers. Use this guide for information on setting up and using Oracle Report Manager.

Oracle iSetup User Guide

This guide describes how to use Oracle iSetup to migrate data between different instances of the Oracle E-Business Suite and generate reports. It also includes configuration information, instance mapping, and seeded templates used for data migration.

Oracle XML Gateway User's Guide

This guide describes Oracle XML Gateway functionality and each component of the Oracle XML Gateway architecture, including Message Designer, Oracle XML Gateway Setup, Execution Engine, Message Queues, and Oracle Transport Agent. The integrations with Oracle Workflow Business Event System and the Business-to-Business transactions are also addressed in this guide.

Oracle XML Publisher Report Designer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce a variety of outputs to meet a variety of business needs. Using Microsoft Word or Adobe Acrobat as the design tool, you can create pixel-perfect reports from the Oracle E-Business Suite. Use this guide to design your report layouts.

Oracle XML Publisher Administration and Developer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce a variety of outputs to meet a variety of business needs. Outputs include: PDF, HTML, Excel, RTF, and eText (for EDI and EFT transactions). Oracle XML Publisher can be used to generate reports based on existing E-Business Suite report data, or you can use Oracle XML Publisher's data extraction engine to build your own queries. Oracle XML Publisher also provides a robust set of APIs to manage delivery of your reports via e-mail, fax, secure FTP, printer, WebDav, and more. This guide describes how to set up and administer Oracle XML Publisher as well as how to use the Application Programming Interface to build custom solutions.

Oracle interMedia User's Guide and Reference

This user guide and reference provides information about Oracle interMedia. This product enables Oracle9i to store, manage, and retrieve geographic location information, images, audio, video, or other heterogeneous media data in an integrated fashion with other enterprise information. Oracle Trading Community Architecture Data Quality Management uses interMedia indexes to facilitate search and matching.

Oracle Self–Service Web Applications Implementation Guide

This manual contains detailed information about the overview and architecture and setup of Oracle Self–Service Web Applications. It also contains an overview of and procedures for using the Web Applications Dictionary.

Guides Related to This Product

Oracle Process Manufacturing Cost Management User's Guide

The Oracle Process Manufacturing Cost Management application is used by cost accountants to capture and review the manufacturing costs incurred in their process manufacturing businesses. The guide describes how to set up and use this application.

Oracle Manufacturing Execution System for Process Manufacturing User's Guidè

Oracle Manufacturing Execution System (MES) for Process Manufacturing provides a seamless integration to product development and process execution applications for rapid deployment and tracking of procedures, work instruction tasks, and batch records. Set up and manage material dispensing operations and produce electronic batch records interactively with full electronic signature control, nonconformance management, and label printing routines. The Oracle Manufacturing Execution System for Process Manufacturing User's Guide delivers the information to set up and use the application.

Oracle Process Manufacturing Product Development User's Guide

The Oracle Process Manufacturing Product Development application provides features to manage formula, routing, recipe, and validity rule development within process manufacturing operations. Use it to manage multiple laboratory organizations and support varying product lines throughout the enterprise. Characterize and simulate the technical properties of ingredients and their effects on formula performance and cost. Simulate and optimize formulations before beginning expensive laboratory test batches. Product Development coordinates each development function to provide a rapid, enterprise-wide implementation of new products in your plants. The guide describes how to set up and use this application.

Oracle Process Manufacturing Quality Management User's Guide

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

Oracle Process Manufacturing Process Execution User's Guide

The Oracle Process Manufacturing Process Execution application lets you track firm planned orders and production batches from incoming materials through finished

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

Oracle Process Manufacturing Regulatory Management User's Guide

Oracle Process Manufacturing Regulatory Management provides solutions for document management that help meet the FDA 21 CFR Part 11 and other international regulatory compliance requirements. Regulatory information management is facilitated by use of electronic signatures. Manage hazard communications by collaborating with Oracle partners to dispatch safety documents, attached printed documentation sets such as the MSDS to shipments, and set up workflows to manage documentation revisions, approvals, and transmittals. The *Oracle Process Manufacturing Regulatory Management User's Guide* provides the information to set up and use the application.

Oracle Manufacturing Execution System for Process Manufacturing User's Guide

Oracle Manufacturing Execution System (MES) for Process Manufacturing provides a seamless integration to product development and process execution applications for rapid deployment and tracking of procedures, work instruction tasks, and batch records. Set up and manage material dispensing operations and produce electronic batch records interactively with full electronic signature control, nonconformance management, and label printing routines. The Oracle Manufacturing Execution System for Process Manufacturing User's Guide delivers the information to set up and use the application.

Oracle Engineering User's Guide

This guide enables your engineers to utilize the features of Oracle Engineering to quickly introduce and manage new designs into production. Specifically, this guide details how to quickly and accurately define the resources, materials and processes necessary to implement changes in product design.

Oracle Inventory User's Guide

This guide describes how to define items and item information, perform receiving and inventory transactions, maintain cost control, plan items, perform cycle counting and physical inventories, and set up Oracle Inventory.

Oracle Bills of Material User's Guide

This guide describes how to create various bills of material to maximize efficiency, improve quality and lower cost for the most sophisticated manufacturing environments. By detailing integrated product structures and processes, flexible product and process definition, and configuration management, this guide enables you

to manage product details within and across multiple manufacturing sites.

Oracle Work in Process User's Guide

This guide describes how Oracle Work in Process provides a complete production management system. Specifically this guide describes how discrete, repetitive, assemble–to–order, project, flow, and mixed manufacturing environments are supported.

Oracle Quality User's Guide

This guide describes how Oracle Quality can be used to meet your quality data collection and analysis needs. This guide also explains how Oracle Quality interfaces with other Oracle Manufacturing applications to provide a closed loop quality control system.

Oracle Shipping Execution User's Guide

This guide describes how to set up Oracle Shipping to process and plan your trips, stops and deliveries, ship confirmation, query shipments, determine freight cost and charges to meet your business needs.

Oracle Purchasing User's Guide

This guide describes how to create and approve purchasing documents, including requisitions, different types of purchase orders, quotations, RFQs, and receipts. This guide also describes how to manage your supply base through agreements, sourcing rules and approved supplier lists. In addition, this guide explains how you can automatically create purchasing documents based on business rules through integration with Oracle Workflow technology, which automates many of the key procurement processes.

Other Implementation Documentation

Maintaining Oracle E-Business Suite Documentation Set

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications User Interface Standards for Forms-Based Products

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

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any product that includes workflow-enabled processes. It also describes how to manage workflow processes and business events using Oracle Applications Manager, how to monitor the progress of runtime workflow processes, and how to administer notifications sent to workflow users.

Oracle Workflow Developer's Guide

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

Oracle Workflow User's Guide

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

Oracle Workflow API Reference

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

Oracle eTechnical Reference Manuals

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

Integration Repository

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

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

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

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

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

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

may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

1

OPM System Setup

This topic explains how to set up and manage the OPM System Administration functions. This includes Document Types, Users, and Organizations, as well as several others.

This chapter covers the following topics:

- Querying Document Types
- Querying a Document Order
- Querying Geography Codes
- Querying Organizations
- Editing Paragraphs
- Querying Reason Codes
- Viewing Reason Code Security
- Editing Session Parameters
- Editing Text Tokens
- Units of Measure
- New Unit of Measure Functionality
- Viewing User Organization
- Viewing User Planning Classes
- Lookups
- Actions Menu
- Edit Text
- Setting Up Profile Options

Querying Document Types

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

Note: Do not modify the document types supplied with OPM.

Use the Document Types window to query the following document types.

- ADJI - Inventory Adjustment - Immediate
- ADJR - Inventory Adjustment - Journaled
- BAL - Balance Qty - For MRP
- CMOR - Combined MORD
- CREI - Create New Inventory - Immediate
- CRER - Create New Inventory - Journaled
- DDOR - Dummy DORD
- DMOR - Divided MORD
- DXFR-Process/Discreet Inventory Transfer
- FCST - Forecast
- FPO - Firm Planned Order
- GLVN - General Ledger Voucher Number
- GRDI - Change Grade - Immediate
- GRDR - Change Grade Journaled
- MGRI - Mass Grade Update - Immediate
- MSTI - Journaled Sales Return - Mass Status Update - Immediate
- MTRI - Mass Movement - Immediate
- OMSO - Order Management

- OPBO - Blanket Sales Orders
- OPOP - Order Fulfillment Sales Order Profiles
- OPSP - Order Fulfillment Shipment
- PBPO - Blanket Purchase Orders
- OPCR - Credit Memo Document Number
- OPDB - Debit Memo Document Number
- OPIN - Invoices
- PBPR - Planned BPO Release
- PICY - Physical Inventory - Cycle No
- PIPH - Physical Inventory - Physical
- PORC - Oracle Purchasing Receipts/Returns/Corrections
- POSR - Stock Receipts
- PPRD - Planned Production
- PPUR - Planned Purchase
- PRCV - Material in Receiving
- PREQ - Purchase Requisition
- PROD - Production Batch
- PTRN - Planned Transfer
- RECV - OPM Receipts
- RVAL - Cost Revaluation Process
- REPI - Replace Quantity/Status - Immediate
- REPR - Replace Quantity/Status - Journaled
- RTRN - OPM Purchase Return (Regular/Stock Receipt)
- SHMT - Internal Order Shipment

- SHRT - MRP - Document Type for Shortage
- SMPL - Automatic numbering for samples
- STBL- OPM Quality Stability Study Numbers
- STSI - Change Status - Immediate
- STSR - Change Status - Journaled
- TRNI - Inventory Movement - Immediate
- TRNR - Inventory Movement - Journaled
- XFER - Required to Operate the Transfer window
- XPRD - Phantom
- XSHT - Phantom Shortage

To find a document type:

1. Navigate to the **Find Document Types** window.
2. Enter any of the following criteria to narrow the search:
   - **Type** to find documents of a specific type.
   - **Description** to find documents with a specific description.
   - **English Description** to find documents with a specific description in English.
3. Select **Marked for Deletion** as **Yes** to search for document types marked for deletion.
4. Click **Find**.

To view a document type:

1. Navigate to the **Document Types** window.
2. The following information displays:
   - **Type** is the name of the document type.
   - **Description** is a brief description of the document type.

- **English Description** is a description of the document in English.

Querying a Document Order

Use the Document Ordering window to view the document number assignment for each type of document. A document is an online window that creates a financial, inventory, or resource transaction. Different document numbers are assigned for each document type and organization. All document numbers are prefaced with an organization code; therefore, multiple organizations can use the same number ranges and still uniquely identify their documents.

Numbers can be assigned to documents manually or automatically.

To find a document order:

1. Navigate to the **Find Document Orderings** window.
2. Enter any of the following criteria to narrow the search:
   - **Document Type** as the code of the document type. You can select it from a list of document types that display on the Document Types window.
   - **Organization** as the code that identifies the organization with the document numbering system.
3. Select the **Assignment Type** as:
   - **Manual** to search for a manual document ordering system.
   - **Automatic** to search for an automatic document ordering system.
4. Select **Marked for Deletion** as **Yes** to search for document orders marked for deletion.
5. Click **Find**. The **Document Ordering** window displays the information.

To view a document order:

1. Navigate to the **Document Ordering** window.
2. The following information displays:
   - **Document Type** is the code that identifies the document type to define this document numbering system.
   - **Organization** is the code that identifies the organization to define this

document numbering system. Transactions generated from your documents are associated with the organization chosen here.

- **Assignment Type** displays as:
  - **Manual** when the document numbers are assigned manually.
  - **Automatic** when the document numbers are assigned automatically.
- **Last Assigned Number** is the last assigned document number.
- **Format Size** is the maximum number of digits for the document type and organization. This can be any positive number between 1 and 10. For example, if the purchase order numbers assigned are from 1 to 999, then the value is 3.

Querying Geography Codes

Use the Geography Codes window to view geography codes. Geography codes are used to reference geographical areas on purchase orders, customer receipts, and other documents that contain addresses.

To find a geography code:

1. Navigate to the **Find Geography Codes** window.
2. Enter the **Type** which defines the type of geography code. Valid values are:
   - Country
   - State
   - Province
   - County
3. Enter the **Code** identifying the geographical area; for example, NY for New York.
4. Enter the **Description** describing the geography code.
5. Click **Find**.

To view geography codes:

1. Navigate to the **Geography Codes** window.

2. The following information displays:
    - **Type** is the geography code type and displays as Country, State, Province, or County.
    - **Code** is the geography code.
    - **Description** is a brief description of the geography code.

Querying Organizations

Organizations are entities for assigning resources, warehouses, general ledger accounts, and other cross-application items. An organization, can be a company, a plant, or both. A company is a legal entity that must maintain a balanced set of books. A plant is an organization that manufactures goods.

Both companies and plants are classified as organizations in OPM.

Parent organizations can have multiple child organizations. Child organizations can have independent resources and warehouses that are accounted for on the parent general ledger. You can also have independent organizations. Organizational setup accommodates multi-company accounting.

Organizational Hierarchies

In setting up an organization, you must specify the organization's parent organization. In this way, organizational hierarchies can be constructed. For example, a company can have several subsidiary companies, and each company can have several plants.

To find organizations:

1. Navigate to the **Find Organizations** window.
2. Enter any of the following criteria to narrow your search:
    - **Organization** to find an organization using the organization code.
    - **Parent** to find an organization using the parent organization code.
    - **Company** to find an organization using the name of the company.
    - **Plant** to find an organization using the plant code.
    - **Tax Location** to find an organization by specifying the tax location.
3. Select **Marked for Deletion** as **Yes** to search for organizations that are marked for deletion.

4. Click **Find**.

To view organizations:

1. Navigate to the **Organizations** window.
2. The following fields are display only:
   - **Organization** is the code for the organization.
   - **Name** is the name of the organization.
   - **Parent** is the code for the parent organization.
   - **Company** is the unique code of the company if the organization is a company.
   - **Plant** displays as Manufacturing Plant, Non-Manufacturing Plant, or a Laboratory.
   - **Resource Warehouse Code** is the code for the resource warehouse of the organization.
   - **Tax Location** is the tax location code. The tax location code is set up on the Tax Location Code window. Default is None.
   - **Manufacturing Calendar** displays the calendar.

Editing Paragraphs

Paragraphs in Oracle Process Manufacturing (OPM) are structures that are used to store and categorize text. OPM is installed with one default paragraph per database table, the General Text paragraph. When you select Edit Text and access the Text Editor window, by default, the edited text is put into this General Text paragraph.

The Paragraph window lets you specify different paragraphs that can be associated with tables. After selecting Edit Text, a list of valid paragraphs displays in the Text Paragraph Selection window, even if the only available paragraph code is General Text. Choose one to proceed.

Paragraph codes control whether text prints on hardcopy documents such as orders or shipping forms or what language your text is stored in. The default General Text paragraph is set up as display only, but it can be changed to enable printing.

Most OPM windows enable you to associate text with the document or record you are working with. To add or update text, select Edit Text from the Actions menu, choose the Paragraph you want to associate the text with, and access the Text Editor window. You can display the entered text online and can be print on hard copies of documents.

If you are creating or editing a purchase order header on the Purchase Orders window, then you can select Edit Text from the Actions menu and add the text associated with the document. If you are creating or editing purchase order lines on the Purchase Order Lines window, then you can add text to each line, associated with each line of the document. The text you add is associated only with the purchase order line that was highlighted when you selected Edit Text.

When you display the Text Editor, the entered text is associated only with the paragraph code and record you are working with. For example, if you enter text for a line in an order using the General Text paragraph, then that text is associated only with that line on that order.

> **Note:** Paragraph codes are linked to specific database tables when they are set up; therefore, you cannot see the same list of paragraphs from every OPM window.

For example, you can create a paragraph on the Batch Header table (pm_btch_hdr). When you select Edit Text from the Actions menu, this paragraph displays as an option on the Text Paragraph Selection window. If you have defined a paragraph for Routing Instructions, then select the Routing Instructions paragraph. The entered text is stored in this paragraph.

To create paragraphs:

1. Navigate to the **Paragraphs** window.
2. Enter the database **TableName** linking this paragraph.
3. Enter the **Code** that identifies this paragraph. If you are creating subparagraphs, then each subparagraph has the same paragraph code as the main paragraph.
4. Enter a **Sub Paracode** when you have one paragraph related to another paragraph. Subparagraphs are printed beneath the main paragraph in numerical order. Subparagraph codes must be integers, determining the order the subparagraphs are printed. The subparagraph code for the main paragraph is the default value 0.
5. Determine whether the paragraph text is to be included when documents are printed. Select the **Nonprintable** value as Yes if the text does not print, and the value No if the text does print.
6. Enter a maximum 40-character **Description**. This description displays when you select paragraphs when entering text.
7. Save the changes.

Querying Reason Codes

Reason codes provide information on increases or decreases in inventory. They are used to flag transactions and attach reasons to them.

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

To find a reason code:

1. Navigate to the **Find Reason Codes** window.
2. Enter any of the following criteria to narrow your search:
   - **Code** to find a reason code using the unique identification number.
   - **Type** to find the reason code using the type of effect it has on inventory quantity. You can select Type as:
     - **Increases & Decreases** to find a reason code that increases and decreases the inventory quantity.
     - **Increases** to find a reason code that increases the inventory quantity.
     - **Decreases** to find a reason code that decreases the inventory quantity.
   - **Flow** to find a reason code using the associated stock movement type.
   - **Description** to find a reason code using its description.
   - **Comment** to find a reason code by specifying an associated comment.
   - **Authorization** to find a reason code based on the authorization comments associated with the reason code.
   - **Marked for Deletion** to search for reason codes by specifying whether or not it is marked for deletion. Select **Yes** to find reason codes that are marked for deletion.
3. Click **Find**.

To view a reason code:

1. Navigate to the **Reason Codes** window.

2. The following fields are display only:

   - **Code** is the code that identifies the reason.

   - **Type** is the type of effect the reason has on the inventory quantity. Type displays as:

     - **Increases and Decreases** if the reason increases and decreases the inventory quantity. Reason codes for movement of inventory between warehouses have this reason type because there is a decrease in inventory at one warehouse and an increase at another.

     - **Increases** if the reason increases the inventory quantity.

     - **Decreases** if the reason code decrease the inventory quantity.

   - **Flow** is the type of stock movement. The corresponding inventory adjustment that results from stock movement can be related to the following: an inflow of goods, as in a purchase; an outflow of goods, as in a sale; the usage of goods, consumption; and to other miscellaneous reasons, for example, spillage. Valid values are **Outflows**, **Usages**, **Inflows**, and **Exclude**.

   - **Description** is a brief description of the reason code.

   - **Comment** is a short comment associated to the reason code. They are printed on reports and displayed on documents where the reason code is used.

   - **Authorization** are the authorization comments associated with the reason code.

Viewing Reason Code Security

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

- Document Type

- Oracle User Responsibilities

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

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

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

- One or more document types is entered, with one or more responsibility entered. The reason code can be used for any of the document types entered, with any of the responsibilities entered.

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

- One or more document types is entered and All Responsibilities is checked. The reason code can be used for the document types entered with any responsibility.

To view a reason code:

1. Navigate to the **Reason Code Security** window.

2. **Reason code** is the code that identifies the reason and displays with a brief description.

3. The following fields display in the **Security Definitions** section of the window:

   - **All Document Types** is selected if the reason code is set to all document types.

   - **Document Type** is the type of document associated to the reason code. This displays if the All Document Types indicator is not selected.

   - **All Responsibilities** is selected if the reason code is associated to all responsibilities.

   - **Responsibility** is the name of the responsibility that is associated to the reason code. This displays if the All Responsibilities indicator is not selected.

Editing Session Parameters

In addition to providing current system session information, the Session Parameters window enables you to change your default organization and default schedule by selecting the new entry using the List of Values and clicking OK. You can specify whether you want the change to affect only the current session or all sessions until the default organization value is changed.

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

To edit session parameters:

1. Navigate to the **Sessions Parameter** window.
2. Verify that the following fields are correct:
   - **Session Number** is a unique session ID, created automatically on a per session, per user basis.
   - **Time** displays the logon date and time.
   - **Database Manager** displays the RDBMS name Oracle.
   - **Database** displays the actual database name.
   - **Username** displays the user and user name of the current session's user.
   - **Company** displays the company code associated with the default organization.
3. Enter the **Organization** code for the default organization. You must be authorized to select this code as specified through the **User Organizations** window.
4. Enter the default **Schedule** for this session.
5. Save the changes.

Editing Text Tokens

Text tokens are codes or short descriptions that represent longer descriptions or messages. These tokens are set up on the Text Token window.

After selecting Edit Text from the Actions menu and invoking the Text Editor, specify a token instead of typing the full description of the text by entering a token preceded by a period. Press Tab, and the token is converted to the text it represents.

For example, you might set up a text token called Fragile that represents the text: Fragile, Handle with Care. Whenever you want to include these instructions on a document, you can type Fragile on the Text Editor window rather than typing the message text. You can also use the LOV function to select a text token. After selecting from the list of values, press Tab.

To record the text that is printed when you enter the token, select Edit from the Actions menu and enter the text on the Text Editor window.

To find text tokens:

1. Navigate to the **Find Text Tokens** window.

2. Enter the following criteria to narrow your search:
   - **Token** code to find a token using the code identifying a token.
   - **Language** to find a token in a specific language.
   - **Description** to find a token by its description.
3. Click **Find**.

To view text tokens:

1. Navigate to the **Text Tokens** window.
2. The following fields display:
   - **Token** is the code identifying the text token.
   - **Description** is a brief description of the text token.

Units of Measure

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

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

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

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

Refer to the *Oracle Inventory User's Guide* for more information.

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

For example, if you set up L (liters) as the first UOM for the UOM type VOL (volume),

then you have to define each new volume UOM in terms of liters; therefore, if the new volume is GAL (gallons), then it must be defined in relation to liters. As such, you specify a two-way conversion between GAL (gallons) and L (liters) and L (liters) and GAL (gallons) in the Conversion column.

The two-way conversion equation is as follows:

- One unit of new UOM = *X* unit of reference UOM
- One unit of reference UOM = *X* unit of new UOM

The factor between the newly entered UOM, in this example GAL (gallons), and the reference UOM, L (liters), and vice versa, is entered in the Conversion Factor column. You only need to enter the conversion factor going "one way"; the other conversion factor is automatically calculated.

> **Note:** Altering the UOM conversion once inventory has been created can corrupt inventory balances.

The new UOM is available to the session where you entered the UOM and to all users beginning OPM sessions after you enter it. If you change a conversion, then the change does not take effect in the current session. You must log out of OPM and then log in again. Note that this is not recommended.

New Unit of Measure Functionality

Oracle Process Manufacturing (OPM) is now using the Oracle Inventory Unit of Measure windows for the creation of UOMs, as well as viewing existing UOMs. You can access these windows from either the Oracle Inventory menu or from the Oracle Process Manufacturing System Administration menu.

These windows let you use mixed case when creating your UOMs and their descriptions. All UOMs are three characters, the Oracle Financials standard. You can also create a 25 character name for each UOM in addition to the description.

The Unit of Measure Classes window in Oracle Inventory lets you set up new Base Units of Measure. This is the same as the OPM Unit of Measure Type window, with more information. The Oracle Inventory window lets you set both a name and a description for each UOM.

The Unit of Measure window is the same as the OPM Unit of Measure window, with additional information similar to the Unit of Measure Classes window, where you are able to have both a description and a name for each UOM.

The Unit of Measure Conversions window, also displayed by the Conversions button on the Unit of Measure Classes window, is used for setting the conversion factors. This window replaces the conversion section of the OPM Unit of Measure window.

The Unit of Measure LOVs have also changed. The LOV now features three columns to

accommodate both new and existing UOMs. An LOV looks as follows:

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

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

Refer to the *Oracle Inventory User's Guide* for details on the Oracle Inventory Unit of Measure windows.

Viewing User Organization

Use the User Organizations window to view the number of organizations assigned to a user. Once assigned, a user can work only with an organization from among these authorized organizations.

To view user organizations:

1. Navigate to the **User Organizations** window.
2. **User Name** displays the name of the user for whom the organizations are assigned.
3. The following fields display in the **Organizations** section of the window:
   - **Code** is the organization that is authorized for selection by this user.
   - **Description** of the organization that is authorized for selection by this user.

Viewing User Planning Classes

TheUser Planning Classes window lets you view the planning classes associated to users.

> **Note:** Refer to the *Oracle Process Manufacturing Process Planning User's Guide* for additional information on how User Planning Classes are

defined and used.

To view user planning classes:

1. Navigate to the **User Planning Classes** window.
2. **User** displays the user name with a brief description.
3. The following fields display in the **Planning Classes** section of the window:
   - **Class** is the code for the planning class associated to the user.
   - **Description** is a brief description of the planning class.

Lookups

The Process Manufacturing Systems Lookups window lets you maintain lookups. Each Lookup has a code and a meaning. For example, Lookup type YES_NO has a code Y with meaning Yes, and a code N with a meaning No.

To view the Lookups window:

1. Navigate to the **Process Manufacturing Systems Lookups** window.
2. The following fields are display only:
   - **Type** is the name of the Lookup type.
   - **Meaning** is a brief explanation of the Lookup type.
   - **Application** is the name of the application associated with the Lookup type.
   - **Description** is a brief description of the Lookup type. If you use windows specialized for a particular Lookup type, then the window uses this description in the window title.
   - **Access Level** displays the level at which the changes to a Lookup type are restricted. Access Level displays as:
     - System, when no changes to the Lookup codes are allowed.
     - Extensible, when new Lookup codes can be added. However, you cannot modify seeded Lookup codes.
     - User, when you can change any Lookup code.

- **Code** is the code value for the Lookup type. A maximum of 250 Lookups can be defined for a single Lookup type. When a valid Lookup meaning is entered into a displayed window field, Lookups stores this code into a corresponding hidden field. For example, the Lookup Y displays the meaning Yes but stores the code value Y in a hidden field.

- **Meaning** is the brief explanation of the Code. When a valid Lookup meaning is entered into a displayed window field, Lookups stores the corresponding code into a hidden field. Lookups automatically display the meaning in the Lookups field whenever you query the window. For example, the Lookup Y displays the meaning Yes but stores the code value Y in a hidden field.

- **Description** is a detailed description of the Lookup code.

- **Tag** is the tag to describe the Lookup. This can be used to categorize Lookup values.

- **Effective Dates From** and **To** is the date range in which the Lookup is active. If no dates are entered, then the Lookup is valid indefinitely. Once a Lookup expires, you cannot insert additional records using the Lookup, but can query records that already use the Lookup.

- **Enabled** is selected if applications can use the Lookup.

Actions Menu

From the Actions menu, the Edit Text option lets you edit information. You can edit text in the Edit Text window only if you navigate from the Paragraphs or the Text Tokens window.

Edit Text

If there is only one paragraph code associated with the table, then the Text Editor window appears. If there is more than one paragraph associated with the table, then the Select Text Paragraph window appears first.

> **Note:** If you navigate to the Edit Text window from the Paragraphs or the Text Tokens window, then you can edit text.

To edit text:

1. Navigate to the **Edit Text** option from the **Actions** menu. If the **Select Text Paragraph** window displays, then select a line, and click **Edit Text**. If not, then the

Text Editor window displays.

2. View the following fields for accuracy:
   - **Table Name** displays the table name that the text is stored in.
   - **Description** displays a description of the text.
3. Enter the appropriate **Text**.
4. Click **Paragraph** to return to the previous window to select another paragraph to edit.
5. From the **Select Text Paragraph** window, view the following fields for accuracy:
   - **Non Printable** is selected if the text is printable on the window.
   - **Paragraph Description** displays the description of the text.

Setting Up Profile Options

During your implementation, you set a value for selected profile options to specify how your System Administration application is configured. System Administration uses the GMA: Workflow Delimiter profile option.

Your System Administrator sets user profile options at one or more of the following levels: Site, Application, Responsibility, and User. Use the Personal Profile Options window to view or set your profile options at the user level. Consult your *Oracle E-Business Suite System Administrator's Guide* for a list of profile options common to all Oracle Applications.

2

Understanding Migration

This topic explains how to set up data for migration using the Convergence Migration Setup window and to view the errors of migration using the View Migration Log window.

This chapter covers the following topics:

- Understanding the Migration Process
- Using the Convergence Migration Setup Window
- Viewing Migration Log

Understanding the Migration Process

The migration of data for convergence takes place in three phases – pre-migration, inline migration, and post-migration.

- The pre-migration phase involves activities that are done through the Convergence Migration Setup window. This window lets you set up the data for the actual migration.

  Refer to the "Using the Convergence Migration Setup Window" topic for a detailed description of this window.

- The inline migration phase is the installation of Release 12. During this phase, the actual migration of the data is completed.

- The post-migration phase is where the data is transformed into the new data model and final scripts are run to complete the movement of all data. After Release 12 has been installed, you can check all the data to ensure accurate migration by using the View Migration Log window.

  Refer to the "Viewing Migration Log" topic for more information.

Refer to the *Oracle Process Manufacturing Upgrade Reference Guide* for more information on migration process for inventory convergence.

Using the Convergence Migration Setup Window

The Convergence Migration Setup window lets you setup the data for migration. This window lets you:

- Map the attributes of the migrating organizations
- Specify the conversion of existing warehouses to subinventories
- Specify the default values that the migration scripts can use for the Oracle Process Manufacturing (OPM) items that are enabled for auto lot numbering
- Select the lab where the stability studies needs to be migrated to
- Display all the open batches including Pending, Work in Process (WIP), Completed, and Open Firm Planned Orders (FPOs)

To setup data for migration:

1. Navigate to the **Convergence Migration Setup** window.

Company

2. The following information displays for the **Current** company:
    - **Company** is the name of the company. All the companies from the fiscal policy display. Default.
    - **Cost Type** is the cost type associated to the company.
    - **Operating Unit** is the name of the operating unit associated to the company.
    - **Legal Entity** is the name of the legal entity. By default, all companies that are linked to the same operating unit have the same legal entity attached to the operating unit as the effective legal entity in Release 12.
3. Select **Migrate As**:
    - **Current** to migrate the company to the current legal entity.
    - **New** to migrate the company to a new legal entity.
4. Enter the following information for the company to **Migrate To**:
    - **Legal Entity** as the type of legal entity that you want the company to migrate to. You can move to a new legal entity for any one or more of the companies that are linked to the same operating unit. The new legal entities selected must

have the same ledger mapped to the operating unit as their primary ledger, same chart of accounts, and currency. If only one company is linked to an operating unit, then you cannot move to a new legal entity.

- **Cost Type** as the cost type that you want the company to migrate to.

Organization

5. The following information displays:
   - **Organization** is the code for the organization.
   - **Type** is the organization type and displays as **Manufacturing** , **Non-manufacturing**, or **Laboratory**.
   - **Migrate As** displays as:
     - **Existing**, if there is a resources warehouse code defined for the OPM organization.
     - **Inactive**, if the organization is marked for deletion.
     - **New**, if there is no resource warehouse code association.
     - **None**
6. **Organization Name** is name of the organization. The Organization Name has the following default values based on the Migrate As value:
   - If Migrate As is Existing, then the organization name defaults to the Resource Warehouse: Organization Name. You cannot map an organization to more than one OPM organization. The organization entered must have the same set of books ID as that of the OPM organization, based on the company.
   - If Migrate As is New or Inactive, then the Organization Name defaults to Organization Code: Organization Name. Enter a unique organization name.
7. **Inventory Org** indicator is selected if the organization is a manufacturing plant or a laboratory.
8. **Org** is the unique code for the inventory organization. This is enabled if the Migrate As is set to New and the inventory org indicator is selected. If an organization exists for the code, then the application builds a new organization code with the first two characters of the OPM organization and appends a numeral for the third character. **Org** has the following defaults based on the Migrate As value:
   - If Migrate As is Existing, then the organization is populated with the resource

warehouse code.

- If Migrate As is New or if Inventory Org is enabled, then the first three characters of the OPM Organization are used for the inventory organization. If an organization exists for the code, then the system builds a new organization code with the first two characters of the OPM organization and appending a numeral for the third character. This field is open for updates if the code has to be changed.

9. **Template Org** is the code for the organization to use as a template to default the attribute values when a new inventory organization is created. If the Inventory Org indicator is selected or the Migrate As value is New, then this field defaults from an existing warehouse defined for the organization. If there are multiple warehouses, then the application selects the first warehouse based on the warehouse code. The template organization entered must have the same set of books ID as that of the OPM organization. This is derived from the company value.

10. **Master Org** is the code for the master organization. This is a display only field and is displayed based on the Template Org selected.

11. **Process Enabled** indicator is selected if the Inventory Org indicator is selected. If this is deselected and there are dependents on the organizations, then an error message displays.

12. **Regulatory Org** is selected if the Migrate As value is New, Existing or Inactive.

Warehouse

13. **Cost Warehouse** is the code for the cost warehouse.

14. **Organization** is the OPM organization for the warehouse.

15. **Warehouse** is the code for the warehouse.

16. **Description** is a brief description of the warehouse.

17. Select the **Subinventory** indicator to move the warehouse as a subinventory. The cost warehouse for the warehouses that are moved as subinventory under an organization must be the same.

18. **Organization** is the name of the organization that you want the warehouse to migrate to. This is a display only field. The organization mapped to the warehouse organization is defaulted when the subinventory indicator is selected.

19. **Disable Warehouse** is enabled when a warehouse is mapped to migrate as subinventory. Selecting this indicator would set an inactive date for the inventory organization associated with the warehouse.

Items

20. Enter the default **Lot Prefix** for the OPM item migration. If an item in OPM is not auto lot-enabled, then the migration script uses this value as Lot Prefix for the migrated discrete item.

21. Enter the default **Lot Starting Number** for the OPM item migration. If an item in OPM is not auto lot-enabled, then the migration script uses this value as Lot Starting Number for the migrated discrete item.

22. Enter the default **Child Lot Prefix** for the OPM item migration. If an item in OPM is not auto lot-enabled, then the migration script uses this value as Child Lot Prefix for the migrated discrete item.

23. Enter the default **Child Lot Starting Number** for the OPM item migration. If an item in OPM is not auto lot-enabled, then the migration script uses this value as Child Lot Starting Number for the migrated discrete item.

24. Enter **Lot Sublot Delimiter** to specify a delimiter to be used by the migration script while concatenating the OPM lots and sublots.

Lot/Sublot

25. The following information displays:

    - **Item** is the item number associated to the lot.
    - **Lot** is the OPM lot that has a different lot status in different locations in a warehouse.
    - **Sublot** is the OPM Sublot for sublot controlled items that has a different lot status in different locations in a warehouse.
    - **Warehouse** is the code for the OPM Warehouse where the balance exists.
    - **Location** is the location number of the OPM warehouse where the balance exists.
    - **Status** is the inventory lot status of the OPM Lot.
    - **Parent Lot** is the parent lot number that the OPM Lot migration creates for the OPM lot.
    - **Lot** displays the lot number that OPM migration creates for the OPM lot. You can edit this field by entering a unique lot number.
    - **Organization** is the organization code.

Note: All the lots that have balances with different lot status in different locations under the same warehouse display.

Quality Tab

26. **Default Stability Study Organization** displays the code for the lab to which you want to associate the stability studies. The organization entered must be a valid process-enabled and a lab organization.

27. **Organization Name** displays the name of the Default Stability Study Organization.

Batches

28. Select **View Batches** as:
    - **All** to display all batches.
    - **Pending** to display only pending batches.
    - **WIP** to display only WIP batches.
    - **Complete** to display only completed batches.
    - **Closed** to display only closed batches.

29. The following information displays:
    - **Plant** is the code for the manufacturing plant.
    - **Batch** is the batch number.
    - **Status** is the batch status.
    - **Type** is the document type and displays as Batch or Firm Planned Order.
    - **Planned Start Dt** is the planned start date for the batch.
    - **Planned Completion Dt** is the planned completion date for the batch.

Viewing Migration Log

After installing Release 12, you can check all data to ensure accurate migration by using the View Migration Log window. This window lets you view the messages and errors logged by migration.

To view the migration log:

1. Navigate to the **View Migration Log** window.

2. Enter any of the following criteria to narrow the search for migration messages or error records:

   - **Application** to find errors or messages logged by a specific source application.
   - **Migration Name** to find errors or messages based on the name of the migration.
   - **Table Name** to find errors or messages logged on a specific table being migrated or upgraded.
   - **Context** to find errors or messages logged in a specific context of the migration.
   - **Message Type** to find errors or messages of a specific message type. You can select any one of the following:
     - Error
     - Database Error
     - Informational
     - Progress
   - **Run ID** to find errors or messages from a specific migration run.
   - **Start Date** to find errors or messages logged by migration run of a specific start date.
   - **End Date** to find errors or messages logged by migration run of a specific end date.

3. Click **Find**.

4. The following information displays in the **Results** section of the window:

   - **Run ID** is the identification number of the migration.
   - **Application** is the application name.
   - **Message** is the detailed description of the migration error or message.
   - **Context** is the context of the migration in which the message or error was logged.

- **Message Type** is the type of the message logged as displays as Error, Database Error, Informational, or Progress.
- **Table** is the name of the migrated table in which the error or message was logged.
- **Migration Name** is the name of the migration.
- **Date** is the date on which the message or error was logged.

3

Archive and Purge

You can periodically archive and purge data to meet data retention requirements and improve your system performance.

This chapter covers the following topics:

- Understanding the Archive and Purge Process
- Setting Up Types for Archiving and Purging
- Archiving and Purging
- Running an Archive and Purge Inquiry

Understanding the Archive and Purge Process

For any organization which maintains an ERP system, data is an important asset. Organizations must balance how much data to store and for what period of time against the cost and performance implications of large amounts of data. Periodically removing data that is no longer required enables your organization to operate more efficiently. Many organizations have predefined data retention requirements issued from regulatory authorities, such as the Food and Drug Administration (FDA) in the US and the General Data Protection Regulation (GDPR) in Europe. Due to these data retention requirements, organizations must periodically archive and purge data in their ERP production environment.

Use the following process to archive and purge your data:

1. Retain: Define the retention period for each Purge Type based on your organization's requirements. The default data retention period is 24 or 120 months, depending on the Purge Type. All data that has been created or updated outside of the retention period is eligible for archiving and purging.

2. Test: Select the data that you want to archive or purge, then review a report listing this data. The selected data is copied from the production tables to similarly-named test tables that are duplicates of the production tables. For example, test data copied

from the production table GMO_BATCH_STEP_LOCK_DETAILS is copied into the test table GMA.GMO_BATCH_STP_LOCK_DTLS_T108, where T indicates a test table and 108 is the ID. View the test data and tables created in the output log.

3. Archive: Once the test data report correctly lists the data you want to archive, run the archive request. Archiving moves the data from the production tables to similarly-named archive tables that are duplicates of the production tables. For example, data archived from the production table GMO_BATCH_STEP_LOCK_DETAILS is moved into the archive table GMA. GMO_BATCH_STP_LOCK_DTLS_A108, where A indicates an archive table and 108 is the ID. Verify that the archived data and the names of the archive tables appear in the output log.

4. Purge: Once you no longer need a particular ID's tables, you can delete (or purge) them. The output log lists the tables purged. You can run different requests for an ID to separately purge the ID's test and the archive tables.

5. View the status of each ID: Use the **Archive and Purge Inquiry** window.

> **Warning:** Do not archive or purge data from batches that were closed during the current period. Running costing engines such as the Actual Cost Process (ACP) after archiving or purging current period batches results in inaccurate item costs.

Setting Up Types for Archiving and Purging

Predefined types enable you to test, archive, and purge selected records from OPM production tables associated with each type. Use the **Archive and Purge Setup** window to view the following types and their associated OPM production tables. You can change the record retention period for each type.

Types

- PROD - the default **Retention Period** value is 24 months.

  PROD data eligible for archiving and purging must have a **Last Modification Date** older than (**System Date** - **Retention Period**).

- CSTP - the default **Retention Period** value is 120 months.

  CSTP data eligible for archiving and purging must have an **End Date** older than **(System Date** - **Retention Period**).

- SUBR - the default **Retention Period** value is 120 months.

  SUBR data eligible for archiving and purging must have an **End Date** older than **(System Date** - **Retention Period**).

- QCDT - the default **Retention Period** value is 24 months.

  QCDT data eligible for archiving and purging must have a **Last Modification Date** older than (**System Date** - **Retention Period**).

  > **Additional Information:** Your environment may have other predefined types, but these additional types are not supported.

The PROD Purge Type enables you to test, archive, and purge selected records from the following OPM production tables:

- GMO_CBR_XML
- GMO_BATCH_STEP_LOCK_DETAILS
- GMO_BATCH_STEP_LOCK_HISTP
- GMO_BATCH_PROGRESSION
- GMO_DISPENSE_CONFIG_INST
- GMO_INSTR_SET_INSTANCE_B
- GMO_INSTR_SET_INSTANCE_TL
- GMO_INSTR_INSTANCE_B
- GMO_INSTR_INSTANCE_TL
- GMO_INSTR_ADD_ATTR_INSTANCE_B
- GMO_INSTR_ADD_ATTR_INSTN_TL
- GMO_INSTR_EREC_INSTANCE
- GMO_INSTR_TASK_INSTANCE
- GMO_INSTR_APPR_INSTANCE
- GMO_MATERIAL_UNDISPENSES
- GMO_MATERIAL_DISPENSES
- GME_BATCH_STEPS_QUANTITY
- GME_BATCH_GENEALOGY
- GME_BATCH_SALES_ORDERS

- GME_LAB_BATCH_LOTS
- GMD_RESULTS
- GMD_SAMPLES
- GMD_SAMPLES_LAB
- GMD_COMPOSITE_RESULT_ASSOC
- GMD_COMPOSITE_RESULTS
- GMD_COMPOSITE_SPEC_DISP
- GMD_SPEC_RESULTS
- GMD_SAMPLE_SPEC_DISP
- GMD_EVENT_SPEC_DISP
- GMD_WIP_SPEC_VRS
- GMD_SAMPLING_EVENTS
- GME_TEXT_TABLE_TL
- GME_TEXT_HEADER
- GME_BATCH_STEP_RSRC_SUMMARY
- GME_RESOURCE_TXNS
- GME_BATCH_STEP_RESOURCES
- GME_BATCH_STEP_ACTIVITIES
- GME_BATCH_STEP_TRANSFERS
- GME_BATCH_STEP_DEPENDENCIES
- GME_BATCH_STEP_ITEMS
- GME_BATCH_STEPS
- GME_BATCH_HISTORY
- GME_MATERIAL_DETAILS

- GME_BATCH_HEADER
- GMF_BATCH_VIB_DETAILS
- GMF_BATCH_REQUIREMENTS
- GMF_INCOMING_MATERIAL_LAYERS
- GMF_OUTGOING_MATERIAL_LAYERS
- GMF_RESOURCE_LAYERS

The CSTP Purge Type enables you to test, archive, and purge selected records from the following OPM Costing tables:

- GMF_LAYER_COST_DETAILS
- CM_SCST_LED
- CM_ACST_LED
- CM_BRDN_DTL
- CM_CMPT_DTL

The SUBR Purge Type enables you to test, archive, and purge selected records created by the OPM Accounting Preprocessor output tables:

- GMF_XLA_EXTRACT_HEADERS
- GMF_XLA_EXTRACT_LINES
- GMF_TRANSACTION_VALUATION

The QCDT Purge Type enables you to test, archive, and purge selected records from the following OPM quality sample production tables:

- GMD_COMPOSITE_RESULTS
- GMD_COMPOSITE_RESULT_ASSOC
- GMD_COMPOSITE_SPEC_DISP
- GMD_EVENT_SPEC_DISP
- GMD_RESULTS
- GMD_SAMPLES
- GMD_SAMPLE_SPEC_DISP

- GMD_SAMPLING_EVENTS
- GMD_SPEC_RESULTS

To update the retention period for a type of data:

1. Navigate to the **Archive and Purge Setup** window.
2. Search for a **Type** of data.

   In the **Type** field, use the list of values to select a valid type.
3. In the **Retention Period (months)** field, enter the number of months to keep this type of data in the production tables.

Archiving and Purging

The **Archive and Purge** window enables you to enter criteria for and then run the test, archive, and purge processes across the OPM tables based on Purge Type.

The archive and purge functionality exists only for certain predefined sets of tables. Material transactions related to production are not archived and purged. To remove these, use the Inventory purge functionality. See the *Oracle Inventory User's Guide* for more information.

PROD Criteria Values

Select the record criteria values from the list of values for each field. The PROD type uses the following criteria:

- **Batch status**. Select one of the following values:
  - -3 (Converted Firmed Order)
  - 4 (Closed Batch): Selects the batches with a status of Closed that have also been posted to the general ledger.

    Note: Ensure that all transactions associated with cancelled and converted firmed order batches have been posted to the general ledger before archiving. Archiving occurs regardless of whether or not transactions have posted to the general ledger.

- **First batch number** and **Last batch number**. Select the batch numbers that meet the selected organization code criteria. The list of values displays the batch numbers and selected batch status.

- **First organization code** and **Last organization code**. Enter a range of organizations containing real organization codes. For example, it is valid to enter FBP1 to FBP9 (where FBP1 and FBP9 are valid organization codes).

- **Earliest creation date**, **Latest creation date**, **Earliest modification date**, and **Latest modification date**. Enter the date criteria using the following format: dd-mon-yyyy hh24:mi:ss. If you do not enter the time, the earliest date fields default to 00:00:00 (the beginning of the day) and the latest date fields default to 23:59:59 (the end of the day).

CSTP Criteria Values

Select the record criteria values from the list of values for each field. The CSTP type uses the following criteria:

- **Legal Entity**. Select a valid **Legal Entity Name**. For example, PRU-Vision Process Industries.

- **Calendar Code**. Select a valid accounting calendar **Name**. For example, 2011.

- **Period Code**. Enter a valid period **Name**. For example, 04 (Apr-2011).

- **Cost Method Code**. Enter a supported **Cost Type**. For example, enter PMAC.

SUBR Criteria Values

Select the record criteria values from the list of values for each field. The SUBR type uses the following criteria:

- **Legal Entity**. Select a valid **Legal Entity Name**. For example, PRU Vision Industries.

- **Calendar Code**. Select a valid accounting calendar **Name**. For example, 2012.

- **Period Code**. Select a valid period **Name**. For example, July-2012.

- **Cost Method Code**. Select a supported **Cost Type**. For example, select PMAC.

- **Transaction Source**. Select one of the following Oracle E-Business Suite application sources:

    - A - All

    - C - Costing

    - E - Process Execution

    - I - Inventory

- O - Order Management
- P - Purchasing

QCDT Criteria Values

Select the record criteria values from the list of values for each field. The QCDT type uses the following criteria:

- **Organization Code**. Select a valid **Organization Code** from the list. For example, PR1.
- **Sample Source**. Select one of the following quality sample sources:
  - C - Customer
  - I - Inventory
  - S - Supplier
  - W - WIP
- **Sample Disposition**. Select one of the following quality sample dispositions:
  - 0PL - Planned
  - 4A - Accept
  - 5AV - Accept with Variance
  - 6RJ - Reject
  - 7CN - Cancel
- **Earliest modification date**. The modification date is the last date that the record in the table was updated. Select the earliest modification date for the date range of records to archive or purge.
- **Latest modification date**. Select the latest modification date for the date range of records to archive or purge.

Archive and Purge Process Overview

1. After specifying and saving the criteria values in the **Archive and Purge** window, you can run either a test process or an archive process. You cannot purge test or archive data until after completion of the test or archive process on that data. If the

process is not complete, then the purge process is disabled. After the test or archive process is complete, view the log for either the test or archive process request to determine if there are any errors.

2. If a test process fails, you can fix the problem and then rerun the test process. Rerunning the test process deletes any test tables created during the earlier, failed run and recreates them with the same ID. If an archive process fails, then the selected data can be removed from some, but not all, of the production tables.

3. Review the output log to verify from which tables the data was removed.

4. Run the archive process again with the same criteria to create another ID.

5. Review the output log for the second ID to verify that the data was removed from the remaining production tables.

To archive and purge records:

1. Navigate to the **Archive and Purge** window.

2. In the **Type** field, search for and select one of the following valid types:

   - PROD
   - CSTP
   - SUBR
   - QCDT

   The criteria for selecting records to purge and archive appears in the Details region.

3. Optionally, enter a **Comment** for this set of criteria values.

4. Enter **Criteria Values** for each criteria.

   Refer to the type's **Criteria Value** descriptions above.

5. Click Save.

   A new ID is assigned. Notice that the following fields now contain values:

   - **ID** is a unique identifier that is automatically generated and assigned to this set of criteria values when you save this window.
   - **Test Status** is the status of the test process for the ID. Values are:
     - Defined, not yet run

- Test Archive in progress
- Test Archive Completed Successfully
- Test Purge Completed Successfully
- Test Purge in Progress
- Test Purge Process Failed
- Test Process Failed
- Test Archive Process Failed

- **Archive Status** is the status of the archive process for the ID. Values are:
  - Archive Completed Successfully
  - Archive Process Failed
  - Archive in Progress
  - Defined, not yet run
  - Process Failed
  - Purge Completed Successfully
  - Purge Process Failed
  - Purge in Progress

6. Choose any one of the following options from the **Actions** menu:
   - **Test Process** to test the selected records for archiving.
   - **Purge Test Rows** to purge the tested rows. This option is available after successfully running the test process.
   - **Archive Process** to archive the selected records.
   - **Purge Archived Rows** to purge the archived information. This option is available after successfully running the archive process.

   A dialog box for the selected option displays.

7. Select the **Concurrent Request Datetime** values to indicate when the process should start. If you do not enter the date and time, then the process runs

immediately.

8. Click **OK**. A note displays the request ID. You can use this ID to view the concurrent request output.

9. The following fields are updated when you requery the ID after submitting a test, archive, or purge in the **Total Row Details** section of the window:

   - **Tested** displays the total number of rows that were tested, which are the records that were copied from the production tables.

   - **Archived** displays the total number of rows archived, which are the records that were removed from the production tables.

   - **Purged** displays the total number of rows that were removed from the archive tables.

To find the status of an ID:

1. In the **Archive and Purge** window, enter an **ID**.

2. Click **Find**.

Running an Archive and Purge Inquiry

Use the **Archive and Purge Inquiry** window to view the status of all IDs. The status of the IDs appears in descending order from the most recently submitted ID to the oldest submitted ID.

To view information for an ID:

1. Navigate to the **Archive and Purge Inquiry** window.

2. In the **Type** field, search for and select a type to view all of the IDs submitted for testing, archiving, and purging. The following information displays in the **Details** section of the window:

   - **ID** is the identification value generated in the **Archive and Purge** window.

   - **Start** contains the date and time when the test, archive, or purge for the ID began or is scheduled to begin.

   - **Elapsed (Hours)** displays the elapsed time, in hours, for the ID listed.

   - **Status** specifies the progress of the ID. Values include:

    - 0= Defined; not yet run
    - 1= Archive in progress
    - 2= Archived Successfully
    - 3= Purge in progress
    - 4= Purge Completed Successfully
    - -1 = Unsuccessful Archive
    - -3 = Unsuccessful Purge

- **Tested** indicates the total number of rows that were test archived for this run (copied into test tables).
- **Archived** indicates the total number of rows that were archived for this run (removed from the production tables and added into archive tables).
- **Purged** indicates the total number of rows that were purged for this run (deleted from the production tables).

4

Workflow Setup

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

From the OPM System Administration application, you can use the seeded data that comes with the system, or create your own workflow activities, column definitions, and role associations. In addition, you can activate and deactivate a workflow activity from the Workflow Activation window.

This chapter covers the following topics:

- Requirements
- Business Needs
- Workflow Graphical Process Navigator
- GPN Navigation
- Roles
- Workflow Process Activation
- Defining Configuration Parameters for an Approval Process
- Finding a Process Configuration Parameter
- Defining Configuration Parameters for an Approval Process Activity
- Finding a Workflow Process Configuration Parameter
- Configuring a Workflow Process
- Finding an Approval Configuration Parameter
- Adding Workflow Activity Configuration Parameters
- Viewing Workflow Activations

Requirements

Can an approval process be enabled or disabled instance wide?

Yes. A workflow process can be enabled or disabled instance wide.

Use the Workflow Process Activation window to enable or disable an approval process. Query for approval process or processes and select the Enable checkbox to enable an approval process instance wide.

Can I configure an approval process?

Yes. You can configure an approval process.

Use the Process Configuration Framework window to configure workflow process. Query for approval process defined in the Workflow Process Activation window.

Can I customize an approval process?

Yes. You can customize an approval process.

Use the Process Configuration window to customize an approval process. Query for approval process that needs to be customized. Select the parameter values from list of values provided. Select the Enable checkbox to enable for the current data values.

Can I customize an approval process activity?

Yes. You can customize an approval process activity.

Use the Workflow Activity Configuration window to customize the behavior of approval process activity. Query the approval process activity to be customized. Select the parameter values from list of values provided. Select Enable checkbox to enable for the current data values. Enter an approver for the data values. Deselect the flag to disable for current data values.

Business Needs

Approval process of a business can vary from enterprise to enterprise. Therefore, it is necessary to provide an approval process that is flexible and users can customize them easily. These customizations include enabling or disabling approval process based on certain criteria or sensitivity of information and defining approval authority for each step within the approval process

This design addresses the customization of approval process in a consistent fashion when creating workflow-based applications. By using a generic method instead of application-specific ones, the following objectives can be achieved.

User-oriented objectives lets users:

- Enable or disable approval processes enterprise wide
- Enable or disable approval process based on certain criteria
- Customize steps of the approval process using certain criteria
- Define approver for each steps of the approval process

Developer-oriented objectives developers design:

- Generic and consistent architecture
- More easily readable application code resulting in easier maintenance
- Modularity, enabling performance improvements to be applied across the board
- Smaller body of code
- Less likelihood of error in creating new similar code

Workflow Graphical Process Navigator

Oracle Applications lets you navigate to a window in two ways. First, you can use the navigator menu. This menu is organized by function. For example, if you need to create, modify, or inspect a purchase order, all of these functions are grouped together under the menu item called Purchase Orders. The second method of navigation is at the document level. Documents can be placed on the desktop so that you can go directly to the document that is needed. With the Graphical Process Navigator, you can navigate in the context of a business process.

The Workflow Process Navigator provides you with a high level look at your business processes. By having the ability to look at things from a high-level perspective, managers can become aware of inefficiencies, and other employees understand the overall context of the processes that they are following.

GPN Navigation

There are five steps in the GPN process for the Oracle Process Manufacturing (OPM) Workflow system. The process contains both the definition option and maintenance option, if necessary, for each stage in the GPN.

1. Navigate to the **Workflow Process Activation** window.

   Use this window to define or maintain approval process. To add a new approval

process to the OPM Approval Process Framework, you must create a workflow process and save in to the database. Once you save the Approval Process Workflow, open the Workflow Process Activation window and register the approval process. You can use this window to enable or disable approval processes instance wide.

2. Navigate to the **Process Configuration Framework** window.

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

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

     You have to define configuration parameters in the **Workflow Process Configuration Framework** window. Using these parameters, you can enable or disable the approval process for a set of parameter values using the **Process Configuration** window.

     You can define up to 10 configuration parameters for each approval process. To customize configuration parameters:

   - Open the **Workflow Process Configuration Framework** window.
   - Select the approval process to customize configuration parameters.
   - Enter the configuration parameter hierarchy. This is used to determine display order of configuration parameters on the **Process Configuration** window, as well as to interpret whether approval is required for the given parameter values on the Workflow Process Configuration window.
   - For each parameter, provide Table name, Column Name, Prompt to be shown, table and column names to provide List of Values.
   - Provide a select statement returning all configuration parameter values in the order they are defined. This select statement contains a driving table and returns only one row after appending the primary key where clause for the driving table. The driving table is the main transaction table monitored by the approval process.

3. Navigate to the **Activity Configuration Framework** window.

   This window is used to setup configuration parameters for the approval process at the activity level.

   You have to define configuration parameters on the **Activity Configuration**

Framework window. Using these parameters, you can enable or disable the approval process for a set of parameter values using the **Activity Configuration** window. You can define up to 10 configuration parameters for each approval process. To customize the configuration parameters:

1. Open the **Activity Configuration Framework** window.
2. Select the approval process activity to customize configuration parameters.
3. Enter the configuration parameter hierarchy. This is used to determine the display order of configuration parameters on the **Activity Configuration** window as well as to interpret whether approval is required for the given parameter values on the **Activity Configuration** window.
4. For each parameter, provide Table name, Column Name, Prompt to be shown, table and column names to provide List of Values.
5. Provide a select statement returning all configuration parameter values in the order they are defined. The select statement contains a driving table and returns only one row after appending the primary key where clause for the driving table. The driving table is the main transaction table monitored by the approval process.

4. Navigate to the **Process Configuration** window.

   Use this window to enable or disable the approval process at the process level. Open the **Process Configuration** window.

   1. Query for the approval process you want to setup configuration parameter values for. The window shows configuration parameters in the order defined in theWorkflow Process Configuration Framework window.
   2. Select the parameter values from the List of Values provided.
   3. Select **Yes** if the approval is required for current parameter values, otherwise select **No** from the dropdown list provided for the Approval Required field.

      You can check how conditions are evaluated to determine if approval is required or not by clicking Show Execution Order.

5. Navigate to the **Activity Configuration** window.

Use this window to enable or disable the approval process at the activity level.

1. Open the **Activity Configuration** window.
2. Query for the approval process activity you want to setup configuration parameter values for. The window shows the configuration parameters in the order defined on the Activity Configuration Framework window.

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

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

5. Enter the Approver for the current parameter values.

You can check how conditions are evaluated to determine if approval is required or not by clicking Show Execution Order.

Roles

A Role is the name of a group of Oracle Workflow users, with one receiving notifications for a particular instance of a workflow. That person is generally responsible for responding to notifications, and for making decisions based upon the content of the notifications.

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

In the case of Oracle Applications, workflow roles generally map to elements of the Application responsibilities, Application users and persons defined and workflow local users and roles.

Workflow Process Activation

This window is used to enable the approval processes that use the generic workflow customization framework. Using this window, users can enable or disable approval process throughout the application. Before you can use this window, ensure that an Oracle Process Manufacturing Workflow is defined in the database.

To enable an approval process:

1. Navigate to the **Workflow Process Activation** window.

2. Select **Enable** if necessary. This field lets you set the workflow process to enabled or disabled. When the system is initially set up, all workflow processes are disabled.

3. Save the window.

To find an approval process:

1. Navigate to the **Find Workflow Process** window.

2. Enter the following search criteria:

   - **Workflow Name** to search for a workflow process using the name of the

workflow.

- **Process Name** to search for a workflow process using the name of the process.

3. Click **Find**.

Defining Configuration Parameters for an Approval Process

The Process Configuration Framework window is used to define the configuration parameters for each approval process. Using these configuration parameters, you can customize the approval process behavior. For example, if the configuration parameter is Organization, then you can enable or disable the approval process for any organization.

You can define up to 10 columns from this window.

To add a new configuration parameter:

1. Navigate to the **Process Configuration Framework** window. The following fields display viewable information:
   - The **Workflow** field displays the name of the workflow.
   - The **Process** field displays the process that is taken by the workflow. There can be many processes associated to one workflow.
2. Modify the following fields to define the configuration parameters:
   - **Hierarchy** is used to determine the display order of configuration parameters on the Workflow Process Configuration window as well as to interpret whether approval is required for the given parameter values on the Workflow Process Configuration window.
   - **Table** displays the name of the Oracle Process Manufacturing (OPM) table where the column name can be found.
   - **Column Name** displays the column name from the OPM table.
   - **Column Prompt** displays the name of the column you see on the Role Association window.
   - **List Table** displays the name of the OPM table from where the Role Association List of Values comes.
   - **List Columns** displays the two fields of List of Values column name.
3. Enter a **Data Retrieval Query**, if necessary. This lets you enter a select statement

returning all configuration parameter values in the order they are defined. The select statement contains a driving table and returns only one row after appending the primary key where clause for the driving table. The driving table is the main transaction table monitored by the approval process.

Finding a Process Configuration Parameter

Use the Find Process Configuration Framework window to search for a parameter.

To find a process configuration parameter:

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

Defining Configuration Parameters for an Approval Process Activity

The Activity Configuration Framework window is used to define the configuration parameters for each approval process activity. Using these configuration parameters, you can customize the behavior of an activity. For example, if the configuration parameter is Organization, then you can customize the approval process activity behavior based on any organization.

To add a new configuration parameter:

1. Navigate to the **Activity Configuration Framework** window. The following fields display:
   - **Workflow** is the name of the workflow.
   - **Process** is the process that is taken by the workflow. There can be many processes associated to one workflow.
   - **Activity** is the type of activity the process does. There can be many activities associated to one process.
   - **Description**is a description of the action the activity takes.
2. Modify the following fields to define the configuration parameters:
   - **Hierarchy** is used to determine the display order of configuration parameters on the Workflow Activity Configuration window as well as to interpret whether approval is required for the given parameter values on the Workflow

Activity Configuration window.

- **Table** displays the name of the OPM table where the column name can be found.
- **Column Name** displays the column name from the OPM table.
- **Column Prompt** displays the name of the column that displays on the Role Association window.
- **List Table** displays the name of the OPM table from where the Role Association List of Values comes.
- **List Columns** displays the two fields of List of Values column name.

3. Enter a data retrieval query, if necessary. This lets you enter a select statement returning all configuration parameter values in the order they are defined. The select statement contains a driving table and returns only one row after appending the primary key where clause for the driving table. The driving table is the main transaction table monitored by the approval process.

To find an approval configuration parameter:

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

Finding a Workflow Process Configuration Parameter

Use the Find Process Configuration window to search for a workflow process configuration.

To find the workflow process configuration:

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

Configuring a Workflow Process

This window is used to customize the approval process behavior at the customer site. Approval can be required based on the business process requirement. This window lets you enable or disable the approval process based on configuration parameters defined in the Approval Process Configuration Framework.

Use this window to enable or disable the approval process.

To add workflow process configuration parameters:

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

Finding an Approval Configuration Parameter

Use the Find Activity Configuration window to search for approval configuration parameters.

To find the approval configuration parameter:

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

Adding Workflow Activity Configuration Parameters

Generally, an approval process consists of multiple activities or steps. The Activity Configuration window lets you customize the approval process activities behavior based on the configuration parameters defined in the Activity Configuration Framework. Sometimes, approval can be required based on the business process

requirement. You can enable or disable an activity and define an approver if the activity requires approval.

Before you can use this window, ensure that Roles are defined against the workflow for associating the fields, and the Role Field association is defined for the role.

Use this window to customize approval process activities.

To add a new workflow activity configuration parameter:

1. Navigate to the **Activity Configuration** window. The following fields display viewable information:
   - The **Workflow** field displays the name of the workflow.
   - The **Process** field displays the process that is taken by the workflow. There can be many processes associated to one workflow.
   - The **Activity** field displays the type of activity the process does. There can be many activities associated to one process.
   - The **Description** field displays a description of the action the activity takes.
2. Modify the following fields to define the configuration parameters in the **Configure Activity** section of the window:
3. Enter an **Organization** name.
4. Enter the **Approval Required** parameter. This field determines if you need an approval based on the current set of values and parameters.
5. If the approval is required, then enter the name of the **Approver**.
6. If you have multiple columns, then click **Show Execution Order** to reevaluate the runtime order.
7. Save the window.

Viewing Workflow Activations

The Workflow Activation window displays all currently defined workflows. You can view if a workflow is enabled from this window.

To view the workflow activations:

1. Navigate to the **Workflow Activations** window.

2. View the following information:
   - **WF Item Type** displays the internal name of the workflow.
   - **WF Description** displays a basic description of the workflow.
   - **Trigger Description** field displays a description of that trigger.

To find a workflow activation:

1. Navigate to the **Find Workflow Activations** window:
2. Enter any of the following criteria to search for a workflow activation:
   - **WF Item Type** to search for a workflow activation using the workflow name.
   - **WFDescription** to search for a workflow activation using the workflow description.
   - **Trigger Description** to search for a workflow activation using the description of the trigger activating the workflow.
3. Click **Find**.

A

Navigation Paths

Although your System Administrator may have customized your Navigator, typical navigation paths are described in the following tables. In some cases, there is more than one way to navigate to a window. These tables provide the most typical default path.

This appendix covers the following topics:

- Navigation Paths

Navigation Paths

Navigation Paths

Window	Path
Document Ordering	OPM System Administration : System Setup : Document Ordering
Document Types	OPM System Administration : System Setup : Document Types
Find Document Types	OPM System Administration: System Setup: Document Types: View: Find
Geography Codes	OPM System Administration : System Setup : Geography Codes
Find Geography Codes	OPM System Administration: System Setup: Geography Codes: View: Find

Window	Path
Organizations	OPM System Administration : System Setup : Organizations
Paragraphs	OPM System Administration : System Setup : Paragraphs
Reason Codes	OPM System Administration : System Setup : Reason Codes
Reason Code Security	OPM System Administration : System Setup : Reason Codes : Actions : Reason Code Security
Find Reason Codes	OPM System Administration: System Setup: Reason Codes: View: Find
Session Parameters	OPM System Administration : System Setup : Session Parameters
Units of Measure	OPM System Administration : System Setup : Units of Measure : Units of Measure
Units of Measure Classes	OPM System Administration : System Setup : Units of Measure : Classes
Units of Measure Conversions	OPM System Administration : System Setup : Units of Measure : Conversions
User Organizations	OPM System Administration : System Setup : User Organizations
User Planning Classes	OPM System Administration : System Setup : User Planning Classes
Lookups	OPM System Administration : System Setup : Lookups
Convergence Migration Setup	OPM System Administration: System Setup: Convergence Migration
View Migration Log	OPM System Administration: System Setup: View Migration Log

Window	Path
Archive and Purge Setup	OPM System Administration : Archive and Purge : Setup
Archive and Purge Tables	OPM System Administration : Archive and Purge : Setup : Archive and Purge Setup : Actions : Purge Tables
Archive and Purge	OPM System Administration : Archive and Purge : Archive and Purge
Find Purge Types	OPM System Administration : Archive and Purge : Archive and Purge: View : Find
Archive and Purge Runtime	OPM System Administration : Archive and Purge : Archive and Purge: Actions: Set Runtime
Test Process	OPM System Administration : Archive and Purge : Archive and Purge : Actions : Test Process
Purge Test Rows	OPM System Administration : Archive and Purge : Archive and Purge : Actions : Purge Test Rows
Archive Process	OPM System Administration : Archive and Purge : Archive and Purge : Actions : Archive Process
Purge Archived Rows	OPM System Administration : Archive and Purge : Archive and Purge : Actions : Purge Archived Rows
Archive and Purge Inquiry	OPM System Administration : Archive and Purge : Inquiry
Workflow Process Activation	OPM System Administration : Workflow Setup : Workflow Process Activation
Find Workflow Process	OPM System Administration : Workflow Setup: Workflow Process Activation : View : Find

Window	Path
Workflow Process Configuration Framework	OPM System Administration : Workflow Setup : Workflow Process Configuration Framework : Find Workflow Process Configuration Framework: Find
Find Workflow Process Configuration Framework	OPM System Administration : Workflow Setup : Workflow Process Configuration Framework
Process Configuration	OPM System Administration Workflow Setup : Workflow Process Configuration: Find Process Configuration : Find
Find Process Configuration	OPM System Administration : Workflow Setup : Workflow Process Configuration
Activity Configuration Framework	OPM System Administration : Workflow Setup : Workflow Activity Approval Configuration Framework : Find Activity Configuration Framework : Find
Find Activity Configuration Framework	OPM System Administration : Workflow Setup : Workflow Activity Approval Configuration Framework
Activity Configuration	OPM System Administration : Workflow Setup : Workflow Activity Configuration : Find Activity Configuration : Find
Find Activity Configuration	OPM System Administration : Workflow Setup : Workflow Activity Configuration
Workflow Activation	OPM System Administration : Workflow Setup : Workflow Activations
Find Workflow Activations	OPM System Administration : Workflow Setup : Workflow Activations : Workflow Activations : View : Find

B

Audit Trail Seed Data

If you want to keep track of the changes made to your data by application users, you should set up AuditTrail for the relevant tables.

This appendix covers the following topics:

- Audit Trail Seed Data

Audit Trail Seed Data

Following are the audit groups and tables packaged with OPM.

Audit group_name	Table_name
Audit Setup Group	FND_AUDIT_COLUMNS
Audit Setup Group	FND_AUDIT_GROUPS
Audit Setup Group	FND_AUDIT_SCHEMAS
Audit Setup Group	FND_AUDIT_TABLES
Batch Information Group	GME_BATCH_HEADER
Batch Information Group	GME_MATERIAL_DETAILS
Recipe Information Group	FM_FORM_MST_B
Recipe Information Group	FM_MATL_DTL
Recipe Information Group	FM_ROUT_DTL

Audit group_name	Table_name
Recipe Information Group	GMD_OPERATIONS_B
Recipe Information Group	GMD_RECIPES_B
Recipe Information Group	GMD_RECIPE_VALIDITY_RULES
Recipe Information Group	GMD_ROUTINGS_B
Recipe Information Group	QC_RSLT_MST
Recipe Information Group	QC_SPEC_MST
Recipe Information Group	GMD_RESULTS
Recipe Information Group	GMD_SPEC_RESULTS
Recipe Information Group	GMD_SPECIFICATIONS_B
Recipe Information Group	GMD_SPEC_TESTS_B
Reference Data Group	IC_ITEM_CNV
Reference Data Group	IC_ITEM_MST_B

Glossary

Units of Measure

A UOM definition consists of a UOM code, a description, a type, and the conversions between the reference UOM and all other UOMs of the same type.

Text Tokens

Text tokens are codes or short descriptions that represent longer descriptions or messages.

Reason Codes

Reason codes provide information on increases or decreases in inventory.

Paragraphs

Paragraphs in OPM are structures that are used to store and categorize text. OPM is installed with one default paragraph per database table, the General Text paragraph.

Organizations

Organizations are entities where you can assign resources, warehouses, General Ledger accounts, and other cross-application items.

Assignment Type

Determines whether you assign document numbers manually or automatically for this document type and organization.

Document Types

Documents are used to categorize transaction activity that is generated from many OPM functions including inventory, sales, purchasing, production, etc.

Purge and Archive

Provides for the archiving and removal of old data from the OPM database.

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