Oracle SCM Cloud

Getting Started with Your Maintenance Implementation

19D
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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Help

Use help icons ? to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access the Oracle Help Center to find guides and videos.

Watch: This video tutorial shows you how to find and use help.

You can also read about it instead.

Additional Resources

- Community: Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.

- Training: Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
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<tbody>
<tr>
<td>boldface</td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td>monospace</td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
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Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website. Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.

Contacting Oracle

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 About This Guide

Purpose and Scope

This guide uses simplified setups as a basis to help you get started with the maintenance implementation quickly.

Scope of This Guide

This guide covers the minimum set of tasks required to set up the maintenance organization using the default settings. After you finish these tasks, you are ready to perform the following:

- Adding the maintenance parts list items.
- Adding the assets.
- Defining the resources and rates.
- Completing your first maintenance transaction.

This guide does not include all the tasks that are required for a full implementation of the Manufacturing and Supply Chain Materials Management offering. It does not include all setup and security tasks that are appropriate for a complete implementation.

References and Help

This guide has references to other guides wherever required. You can access help from the Oracle Fusion Applications Help portal or from the Oracle Cloud Documentation Library, unless specified otherwise.

For more information about the full implementation of an offering and implementing advanced features within the offering, see Oracle SCM Cloud Implementing Manufacturing and Supply Chain Materials Management guide.

For more information about subscribing to an Oracle Cloud Service trial, see Getting Started with Oracle Cloud guide.

How to Use This Guide

This section explains the prerequisites and other details in this guide.

Prerequisites

Before performing the steps in this guide, you must set up the common enterprise structure objects. If you have already implemented Oracle Financials Cloud on your instance, then your enterprise structure setup is complete. To get started, you also require access to Oracle Identity Management and Oracle Fusion Applications.
For more information, see the Implementing Common Features for Oracle SCM Cloud guide and the Oracle Financials Cloud Implementing Common Features guide.

Assumptions

The tasks described in this guide assume you have a valid user name and password to sign in to the application and access the work areas.
2 Get Started With Your Implementation

Access the Setup and Maintenance Work Area

To start your implementation for Oracle Maintenance Cloud, you must first sign in to the application and navigate to the Setup and Maintenance work area.

The steps to access the Setup and Maintenance work area are:

1. Use the Oracle Cloud Applications URL, and sign into Oracle Cloud Applications using the user name and password that were provided to access Oracle Identity Management.
2. On the Home page, navigate to the Setup and Maintenance work area. You can access the Setup and Maintenance work area in the following three ways:
   - Click Navigator > Setup and Maintenance.
   - Click the Setup and Maintenance icon on the Home page.
   - Click the Profile icon on the Home page and select Administration > Setup and Maintenance.

Enable the Functional Areas for Maintenance Implementation

The steps to enable the functional areas applicable for Oracle Maintenance Cloud are:

1. In the Setup and Maintenance work area, select the Manufacturing and Supply Chain Materials Management offering.
3. On the Configure: Manufacturing and Supply Chain Materials Management page, select Enable for Implementation for the following functional areas in Manufacturing and Supply Chain Materials Management:
   - Shipping
   - Cost and Profit Planning
   - Maintenance Management
4. Click Done.

How You Provision Roles to the Implementation User

Ensure that the implementation user has all the necessary roles to implement Oracle Maintenance Cloud. You must add the following roles for the implementation user:

- Cost Accountant
- Employee
• Inventory Manager
• Product Data Steward
• Maintenance Manager
• Maintenance Technician

For more information about using the Application Security Console, see the Oracle SCM Cloud: Securing Oracle SCM Cloud guide.

Create Application Implementation Consultant User

You can create additional users for deployment and testing of the product. For example, you may want to create an Application Implementation Consultant. Having different users can be helpful in testing security and messaging.

The steps to create Application Implementation Consultant user are:

1. In the Setup and Maintenance work area, select the Manufacturing and Supply Chain Materials Management offering.
2. Click the Setup button.
4. In the Initial Users region, from the Show drop-down list, select: All Tasks. All the tasks for the Initial Users functional area are displayed.
5. Click the Create Implementation Users link.
7. Click Create User.
8. Select from or enter values for the following required fields:
   - Last Name
   - Organization
   - User Type (For example, Full-Time Employee, Consultant)
9. Click the Save button.

How You Administer Additional Application Users and Roles

You can follow the steps discussed in Creating Application Implementation Consultant User topic for assigning roles to the Maintenance Manager and Maintenance Technician.

You must assign the following roles to the Maintenance Manager:

• Employee
• Inventory Manager
• Maintenance Manager

You must assign the following roles to the Maintenance Technician:

• Employee
• Maintenance Technician
Create Locations for Your Maintenance Organization

A location refers to the physical address of an organization. You must associate a location with the maintenance organization. The locations that you create exist as separate structures that you can use for reporting. The steps to create a location for the maintenance organization are:

1. In the Setup and Maintenance work area, select the Manufacturing and Supply Chain Materials Management offering.
2. Click the Setup button.
4. In the Enterprise Profile region, from the Show drop-down list, select: All Tasks.
5. In the Task region, click the Manage Locations link.
6. On the Manage Locations page, in the Search Results region, click the Create icon.
7. On the Create Location page, select from or enter values for the following required fields:
   - Location Set
   - Effective Start Date
   - Name
   - Code
   - Status
   - Country
   - Address Line 1
   - City
   - State
   - ZIP Code
   - County

   **Note:** When you enter the ZIP code, the city, state, and county are populated automatically.

8. Click the Submit button and then in the confirmation dialog box, click the Yes button to confirm that you want to continue with the request.
9. Click the OK button.
10. On the Manage Locations page, click the Done button to return to the Setup and Maintenance work area.

Create Maintenance Organizations Using Quick Setup

The Manage SCM Common Components Quick Setup defines all required tasks and many commonly required tasks for the Maintenance Management functional area.
Using the Quick Setup, you can define the following:

- Calendar
- Units of Measure
- Inventory Organization

A maintenance organization is an inventory organization that is enabled for maintenance activity. To define a maintenance organization, you must create an inventory organization that is set up as a maintenance organization.

The steps to define a maintenance organization using Quick Setup are:

1. In the Setup and Maintenance work area, select the Manufacturing and Supply Chain Materials Management offering.
2. Click the Setup button.
3. Click the Quick Setup icon in the Facilities functional area.
4. On the Set Up SCM Common Components: Calendar page, select an existing calendar or create a new calendar.
5. Click the Next Button.
6. On the Set Up SCM Common Components: Units of Measure page, select the unit of measure classes.
7. Click the Next button.
8. On the Set Up SCM Common Components: Inventory Organizations page, create an inventory organization by selecting from or entering values for the following fields:
   - Management Business Unit
   - Existing Master Item Organization

   **Note:** You can also create a new master item organization by entering values for Master Item Organization Name and Master Item Organization Code fields.

9. In the Create Inventory Organizations region, click the Add icon to add a row for creating a new inventory organization.
10. In the new row, select from or enter values for the following fields:
    - Organization Name
    - Organization Code
    - Location
    - Additional Usage

   **Note:** To set up the organization as maintenance organization, select Maintenance from the Additional Usage drop-down list.

11. Click the Submit button. A confirmation message is displayed.

   **Note:** You can repeat this task to define additional organizations at any time.

   **Note:** It is highly recommended that you define separate organizations for manufacturing and maintenance.
Set Up Data Access for Maintenance Users

To ensure that the application users have access to inventory, maintenance, and cost organizations, you must set up the data access for the users. You can grant access by user name or role.

For more information, see the SCM Cloud: Implementing Common Features for Oracle SCM Cloud guide.

Note: This task or feature is applicable only for a new installation.

The steps to set up data access for the users:

1. In the Setup and Maintenance work area, select the Manufacturing and Supply Chain Materials Management offering.
2. Click the Setup button.
3. Select the Facilities functional area.
4. In the Facilities region, from the Show drop-down list, select: All Tasks. All the tasks for the Facilities functional area are displayed.
5. In the Task region, click the Manage Inventory Organization Data Access for Users link.
6. Click Create.
7. On the Create Data Access for Users dialog box, click the Add icon to add a new row.
8. In the new row, select from or enter values for the following fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
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<tr>
<td>Role</td>
<td>Maintenance Manager</td>
</tr>
<tr>
<td>Security Context</td>
<td>Inventory Organization</td>
</tr>
<tr>
<td>Security Context Value</td>
<td>The name of the new organization created earlier using Quick Setup.</td>
</tr>
</tbody>
</table>

Note: For predefined roles, such as Maintenance Manager or Maintenance Technician, the value for Security Context is always Inventory Organization.

9. Repeat the previous steps to add the following roles:
   - Maintenance Technician
   - Cost Accountant
10. Click the Save and Close button.

Note: You can copy rows.

11. Click the Done button.
Set Up Profit Center Business Unit for a Maintenance Organization

To create resource rates in a maintenance organization, you must implement the cost management. If you intend to implement the cost management, then first you must associate the profit center business unit with the maintenance organization. The profit center business unit is used as a search parameter when implementing the cost management.

The steps to set up a business unit as a profit center are:

1. In the Setup and Maintenance work area, select the Manufacturing and Supply Chain Materials Management offering.
2. Click the Setup button.
3. Select the Facilities functional area.
4. In the Facilities region, from the Show drop-down list, select: All Tasks. All the tasks for the Facilities functional area are displayed.
5. In the Task region, click the Manage Inventory Organizations link.
6. On the Manage Inventory Organizations page, search and select the newly created organization.
7. Click the Edit icon.
8. If Profit Center Business Unit field is blank, then select a value.
9. Click the Next button.
10. Confirm that the Item Master Organization is correct.
11. Click the Save and Close button.
12. On the Manage Inventory Organizations page, click the Done button.

Set Up Shipping Parameters

The shipping parameters impact the way a shipment is created and confirmed, and how Oracle Fusion Shipping interacts with Oracle Fusion Inventory Management.

The steps to set up shipping parameters are:

1. In the Setup and Maintenance work area, select the Manufacturing and Supply Chain Materials Management offering.
2. Click the Setup button.
3. Select the Shipping functional area.
4. In the Shipping region, from the Show drop-down list, select: All Tasks. All the tasks for the Shipping functional area are displayed.
5. In the Task region, click the Manage Shipping Parameters link.
6. In the Select Organization dialog box, select the newly created organization and click the OK button.
7. On the Manage Shipping Parameters page, provide values for the following required fields:
   - Appending Limit
   - Packing Unit Capacity Method
   - Weight UOM Class
   - Volume UOM Class
• Shipment Set Behavior
• Release Sequence Rule
• Pick Slip Grouping Rule
• Print Pick Slip
• Staging Subinventory

8. Click the Save and Close button.
4 Set Up Cost Accounting for Your Maintenance Organization

Set Up Cost Accounting Using Quick Setup

You can set up cost accounting to get a simple structure in place to create cost accounting distributions and accounting entries for the inventory and maintenance transactions.

The steps to set up the cost accounting using Quick Setup are:

1. In the Setup and Maintenance work area, select the Manufacturing and Supply Chain Materials Management offering.
2. Click Setup.
3. Click the Quick Setup icon in the Cost Accounting functional area.
4. On the Configure Cost Accounting Using Quick Setup page, click the Query by Example icon. In the Profit Center Business Unit column, search for the business unit that you set up as the profit center business unit for the maintenance organization. The search result displays the row with the specific profit center business unit.
5. In the row, select from or enter values for the following fields:
   - Cost Organization Code
   - Cost Organization Name
   - Cost Method
6. Select the row and click Implement.
7. Click Yes in the message dialog box to continue.
8. In the message dialog box confirming the implementation, click OK.
9. In the Implementation Details region, click the Setup Tasks tab to verify that the setup is successful.
10. Click Done.

This setup results in the following starting points in the cost management business processes:

- All prerequisite setups to start the cost planning process.
- All prerequisite setups completed to start the cost processing of inventory transactions. The users can configure the Create Cost Accounting Distributions Run Control, open the cost accounting period, and begin processing.

The following tasks are created when the cost accounting setup is implemented successfully:

- Manage Cost Organization
- Manage Cost Book
- Manage Cost Organization Relationship
- Manage Cost Element
- Manage Cost Component
- Manage Cost Component Mapping
- Manage Valuation Structures
Set Up Planning Cost Organization

Before you can create material cost plans and labor rate plans, you must set up the planning cost organization. For setting up the planning cost organization, you must perform the following two processes:

- Create a planning cost organization
- Associate the planning cost organization with the maintenance organization and cost organization

Create a Planning Cost Organization

The steps to create a planning cost organization are:

1. In the Setup and Maintenance work area, select the Manufacturing and Supply Chain Materials Management offering.
2. Click the Setup button.
3. Select the Cost and Profit Planning functional area.
4. In the Cost and Profit Planning region, from the Show drop-down list, select: All Tasks.
5. Select the Manage Planning Cost Organizations link.
6. In the Create Planning Cost Organization dialog box, select from or enter values for the following fields:
   - Cost Organization
   - Item Validation Organization
   - Set Name
7. Click the Save and Close button.
8. On the Manage Planning Cost Organizations page, click the Done button.

Associate the Planning Cost Organization with the Maintenance Organization and Cost Organization

The steps to associate the planning cost organization with the maintenance organization that is set up for cost accounting are:

1. In the Setup and Maintenance work area, select the Manufacturing and Supply Chain Materials Management offering.
2. Click the Setup button.
3. Select the Cost and Profit Planning functional area.
4. In the Cost and Profit Planning region, from the Show drop-down list, select: All Tasks.
5. Select the Manage Planning Cost Organization Relationships link.
6. On the Manage Planning Cost Organization Relationships page, search for the newly created maintenance organization.
7. In the Cost Organization Relationship region, click the Add icon to add a new row.
8. Select a cost organization to associate with the planning cost organization created earlier.
9. Select Default and then click the Save and Close button.

For detailed information about costing implementation, see Oracle SCM Cloud Implementing Manufacturing and Supply Chain Materials Management guide.
5 Define Maintenance Master Data

How You Define Maintenance Master Data

The process of defining the maintenance master data includes the following:

- **Defining Maintenance Parts List Items:** The maintenance parts list is a list of all the parts and components (items) that constitute an asset. These items may or may not be defined as assets in the maintenance organization. To define the maintenance parts list items, first you must create the parts list items. Then, assign the parts list items to the maintenance organization.

- **Creating Work Areas, Resources, and Work Centers:** A work area is a region allocated for performing maintenance activity. A resource is a labor or equipment required to perform a maintenance activity. A work center is a maintenance unit that consists of people or equipment. Every maintenance organization must have at least one work area and one work center defined.

- **Creating maintenance work definitions:** The maintenance work definition act as a template for the work order execution.

Define Maintenance Parts List Items

The maintenance parts list items are generally created in a master organization and then assigned to a maintenance organization.

Defining Asset Items

When adding an asset, you need to reference an item that represents that asset. The item that is referenced by the asset must be created with the specific attribute values.

The steps to update the item attributes for enabling the item to represent the asset are:

1. On the Home page, click the Product Management icon and then click the Product Information Management icon.
2. On the Product Information Management Overview page, in the Tasks pane, click the Manage Items link.
3. On the Manage Items page, search for the item and then click the item number on the Search Results region to edit the item.
4. On the Edit Item page, on the Specifications tab, click the Service link in Item Organization.
5. In the Item Organization: Service region, select the following values:
   - From the Enable Asset Tracking drop-down list, select Full Lifecycle.
   - From the Allow Maintenance Asset drop-down list, select Yes.
6. On the Edit Item page, on the Specifications tab, click the Inventory link in Item Organization.
7. In the Item Organization: Inventory region, in the Serial region, from the Generation drop-down list, select: Dynamic entry at Inventory Receipt.
8. On the Edit Item page, click Save.
Creating Maintenance Parts List Items Manually

You can create the parts list items manually or by import. Creating parts list items manually may provide you more insight into the items.

The steps to create parts list items manually are:

1. On the Home page, click the Product Management icon and then click the Product Information Management icon.
2. On the Product Information Management Overview page, in the Tasks pane, click the Create Item link.
3. In the Create Item dialog box, select from or enter values for the following fields:
   - Organization
   - Number of Items
   - Item Class
4. Select the appropriate item template from the Available List and click the > (Move) button to move the template to the Selected List.
5. Click OK.
6. In the Create Item page, provide values for the following fields:
   - Item Identifier
   - Item Description
7. Click Save.

Assigning Maintenance Parts List Items to Organization

You can assign the maintenance parts list items either manually or by performing mass changes using a scheduled process. If you are defining multiple inventory organizations, then you may prefer using the scheduled process for assigning parts list items to the organizations.

The steps to assign parts list items to an organization using the scheduled process are:

1. On the Home page, click the Product Management icon and then click the Product Information Management icon.
2. On the Product Information Management Overview page, on the Tasks pane, click the Manage Items link.
3. On the Manage Items page, search for and select an item, but do not click the item number.
4. Click Actions and select Manage Item Mass Changes.
5. Select Assign to Organizations.
6. In the Organizations section of the Assign Items to Organizations window, click the Select and Add icon.
7. In the Select and Add: Organizations window, search for and select an organization.
8. Click Apply and then Done.
9. In the Assign Items to Organizations window, click OK.
10. In the Process Details window, click Submit.
11. View your submission by selecting the Overview tab, and viewing Scheduled Processes.

Create Work Areas, Resources, and Work Centers

The following shows the preferred order in which the work areas, resources, and work centers are to be created:

1. Create the work areas for the maintenance organization.
2. Create the resources.
3. Create the work centers and associate each of the work centers with a work area.
4. Allocate the resources to the work centers. You can also assign shifts and maintain a work center resource calendar for each resource.

You can create, edit, and delete the maintenance work areas on the Manage Work Areas page. In the Tasks pane, click the Manage Maintenance Work Areas link to open the Manage Work Areas page.

You can create, edit, and delete the maintenance resources on the Manage Resources page. In the Tasks pane, click the Manage Maintenance Resources link to open the Manage Resources page.

You can create, edit, and delete the maintenance work centers on the Manage Work Centers page. In the Tasks pane, click the Manage Maintenance Work Centers link to open the Manage Work Centers page.

Create Maintenance Work Definitions

A maintenance work definition describes the material and resources to maintain an asset.

The steps to create a maintenance work definition are:

1. On the Home page, click the Maintenance Management icon.
2. On the Maintenance Overview page, in the Tasks pane, click Manage Maintenance Work Definitions.
3. On the Maintenance Work Definition page, in the Search Results section, click the Add icon.
4. In the Create Maintenance Work Definition dialog box, retain the New work definition option.
5. Enter the code, name, and start date for the work definition.
6. Enter a sequence, name, and work center.
7. Click the Next button.
8. In the Create Maintenance Work Definition: Create Operations dialog box, click the Add icon to create the operations for the work definition.
9. Enter the sequence, name, and work center for the operation. You can add multiple operations for a work definition.
10. Optionally, select the Count Point check box or Automatically Transact check box. The Count Point and Automatically Transact attributes are mutually exclusive.
11. Click the Save and Edit button.
12. On the Edit Maintenance Work Definition page, click the Parts List vertical tab. Add the maintenance parts list items by dragging and dropping the asset card into the work definition region. You can also right-click the asset card and from the Actions menu, select: Assign.
13. Click the Resources vertical tab. Add the resources by dragging and dropping the resource card into the work definition region. You can also right-click the resource card and from the Actions menu, select: Assign.
14. Click the Save and Close button.
15. On the Maintenance Work Definition page, click the Done button.
6 Define Costing Master Data

Create Resource Rate Plans

The steps to create the resource rate plan are:

1. On the Home page, click the Costing icon and then the Cost Accounting icon.
2. In the Tasks pane, click Manage Resource and Overhead Rates.
3. On the Manage Resource and Overhead Rates page, click the Create icon.
4. In the Create Resource and Overhead Rate Plan dialog box, select from or enter values for the following required fields:
   - Planning Cost Organization
   - Inventory Organization
   - Plan Name
   - Currency
   - Purpose
   - Effective Start Date
5. Click the Save and Close button.
7. Click the Add icon to add the resources.
8. Click Create Resource Rates.
9. Click the Resource Rates icon to add rates and click the Save and Close button.
10. Enter the effective start date.
7 Create Assets

Create an Asset

The steps to create an asset are:

1. On the Home page, click the Maintenance Management icon.
2. On the Maintenance Overview page, in the Tasks pane, click Manage Assets.
3. On the Manage Assets page, in the Search Results section, click the Add icon.
4. In the Create Asset dialog box, retain the Create new option.
5. Enter or select values in the following required fields:
   - Number
   - Description
   - Item

   **Note:** The item must have the attributes specified as follows:
   - Edit Item page > Specifications tab > Service link > Enable Asset Tracking drop-down list = Full Lifecycle
   - Edit Item page > Specifications tab > Service link > Allow Maintenance Asset drop-down list = Yes
   - Edit Item page > Specifications tab > Inventory link > Generation drop-down list = Dynamic entry at Inventory Receipt
   - Location Type
   - Organization
   - Work Center
6. Click the Save and Close button.

Related Topics

- Define Maintenance Parts List Items
8 Execute Your First Maintenance Work Order

Execute Maintenance Work Orders

The maintenance work orders help you initiate and manage the maintenance and repair work for the assets. The work order provides information regarding the asset being maintained, priority of the work, and relevant dates for the maintenance work. It also specifies the work definition details, operations, components, and resources required for the maintenance work.

There are two types of maintenance work orders:

- Preventive maintenance work orders: A preventive maintenance work order is a type of maintenance work order that is created to initiate the planned maintenance process for an asset.
- Corrective maintenance work orders: A corrective maintenance work order is a type of maintenance work order that is created to initiate the on-demand repair process for an asset.

You can execute a maintenance work order to report the work order operation status, and material and resource consumption.

Creating a Maintenance Work Order

The steps to create a maintenance work order are:

1. On the Home page, click the Maintenance Management icon.
2. On the Maintenance Overview page, in the Tasks pane, click the Manage Maintenance Work Orders link.
3. On the Maintenance Work Orders page, click the Add icon.
4. In the Create Maintenance Work Order dialog box, select from or enter values for the following required fields:
   - Asset
   - Type
   - Subtype
5. Click Save and Close button.

   **Note:** You can edit the maintenance work order to add operations, operation items, and operation resources.

6. On the Maintenance Work Orders page, search for and select the maintenance work order.
7. Click the Release button.
8. Click the Done button.

Executing a Maintenance Work Order

The steps to execute a maintenance work order are:

1. On the Maintenance Overview page, in the Tasks pane, click the Review Maintenance Dispatch List link.
2. On the Maintenance Dispatch List page, search for and select the maintenance work order.
3. Click the Expand icon.
4. Click the Quick Complete button. For more information, see the Oracle SCM Cloud Using Maintenance guide.
5. Click the Done button.

Running Scheduled Processes for Costing of Maintenance Work Orders

You must run the following scheduled processes for costing of the maintenance work orders:

- **Transfer Transactions from Production to Costing**: This scheduled process can be run on the Transfer Transactions from Production to Costing page. On the Maintenance Overview page, in the Tasks pane, click the Transfer Transaction from Maintenance to Costing link.

- **Transfer Transactions from Inventory to Costing**: This scheduled process can be run from the Scheduled Processes. To access the Scheduled Processes, click Navigation > Scheduled Processes.

- **Create Cost Accounting Distributions**: The scheduled process is available in the Cost Accounting.