Oracle SCM Cloud

SCM Foundation

Activity Guide

Important!

You’ve been assigned a unique, two-digit student number for this course. In the following pages, wherever you see “xx,” substitute your student number.

Note: Your student number is valid only for the duration of the course.

Running Session Warmers

The first time you access the environment each week, you should run session warmers to improve environment performance. Running session warmers prior to starting any of the scripts ensures the best performance. To run the session warmers, do the following steps:

1. In your browser, enter the URL for the training environment for your event.
2. Sign in to the application using your assigned username and password.
3. Open a new browser tab and go to the URL for the training environment.
4. Do one of the following:
    - If you are on the Environment Landing page, then click **Demo Tools**.
    - If you are on the Sign In page, then go the Environment Landing page and click **Demo Tools**. To do this, locate the Environment Landing page by replacing the text after oracledemos.com in your URL with/main.html#!/main. For example, if your Sign In page URL looks like this: https://adc-fap14xx-fa-ext.oracledemos.com/fscmUI/faces/FuseWelcome?fndThemeName=Vision Then your Environment Landing page URL looks like this: https://adc-fap14xx-fa-ext.oracledemos.com/main.html#!/main
5. Click **Session Warmers**, and then click **SCM**.
6. Click **Supply Chain Management - Core**. A dialog box opens; allow the session warmers to run until the dialog box closes on its own. You can ignore any messages in the dialog box.
7. Close the Environment Landing page tab and begin your work in the environment.

Practice 2-1: Navigating Basic Elements in the User Interface

Instructor Note: Demonstrate this practice to the students.

Overview

In this practice, you navigate some basic elements in the user interface. You review the infolets and access the embedded or context-sensitive help as well as the Application Help portal. In addition, you review the tasks available in a work area.

Prerequisites: None

User Login: scmXX.student (replace XX with your student number)

Summary of Tasks:

- Reviewing infolets available on a landing page
- Accessing embedded/context-sensitive help
- Accessing the Application Help portal
- Reviewing tasks available in a work area

Steps:

Let's navigate through the application and understand the basic elements.

Reviewing infolets on a landing page

1. From the **Navigator**, under **Supply Chain Execution**, select **Inventory Management**.
2. You are now on the **Inventory Management** landing page where you see multiple infolets displayed on the page. Review the infolets available.

   Infolets are self-contained, interactive box-shaped containers used to display information using text and charts. Infolets are interactive and use progressive disclosure to display high-level, aggregated, essential information for quick consumption at a glance, and then can be acted upon as needed.

Accessing embedded/context-sensitive help

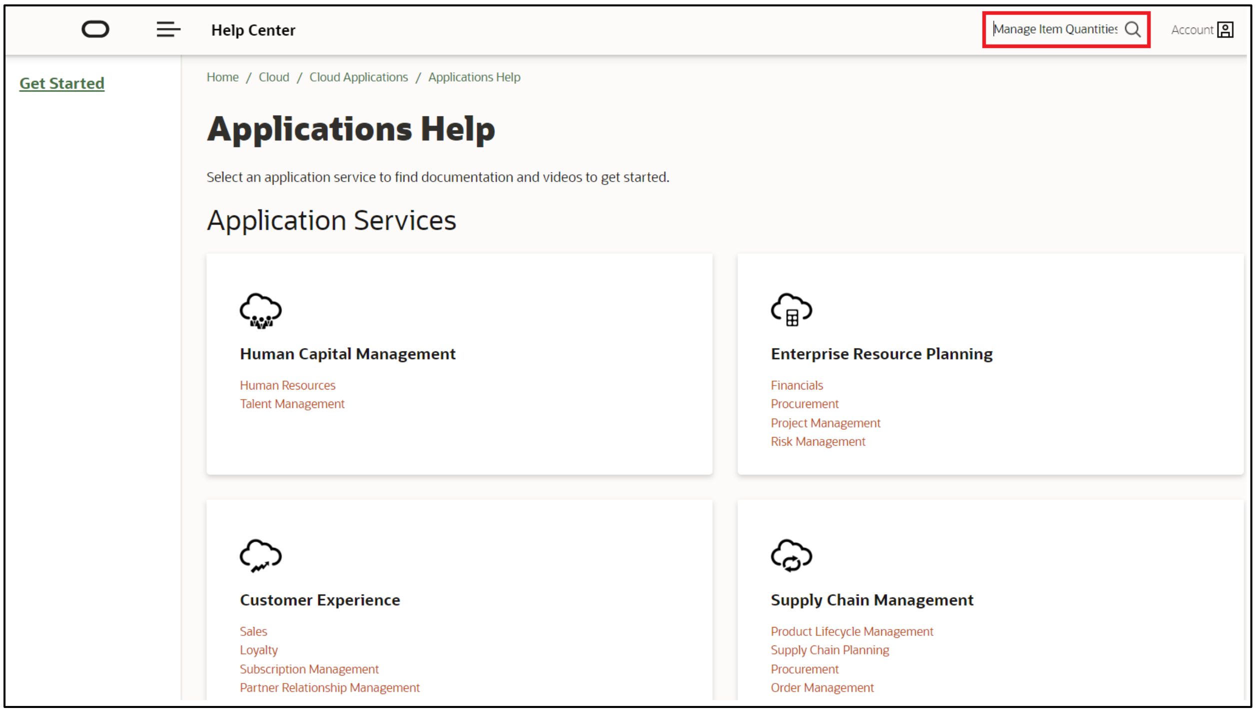
3. Click the **Tasks** panel tab and select the **Manage Item Quantities** task. The Manage Item Quantities page appears.
4. Click your user login name (scmXX.student) in the top-right of the page. Then, in the **Settings and Actions** menu, select **Show Help Icons**.
5. Click the **Help** icon next to the **Manage Item Quantities** heading. All help topics specific to **Manage Item Quantities** are displayed in a pop-up window. You may review any topic for more information.
6. Click the **Home** icon to return to the application home page.

Accessing the Application Help portal

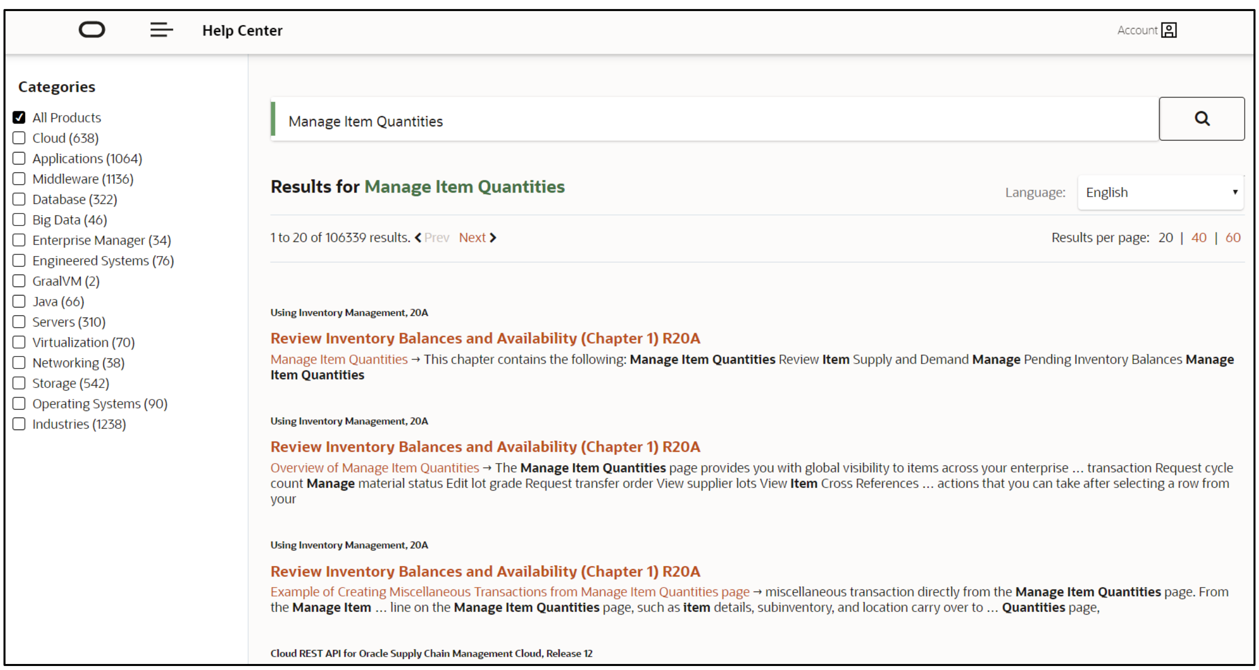
7. Click your user login name (scmXX.student) in the top-right of the application.
8. Click **Applications Help** to review the Applications Help Portal. A new browser tab opens and the Oracle Help Center – Applications Help page is displayed.

Note: Be sure to disable the pop-up blocker in your browser.

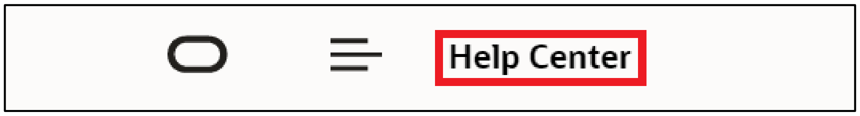
9. In the **Search** field, enter: `Manage Item Quantities`.



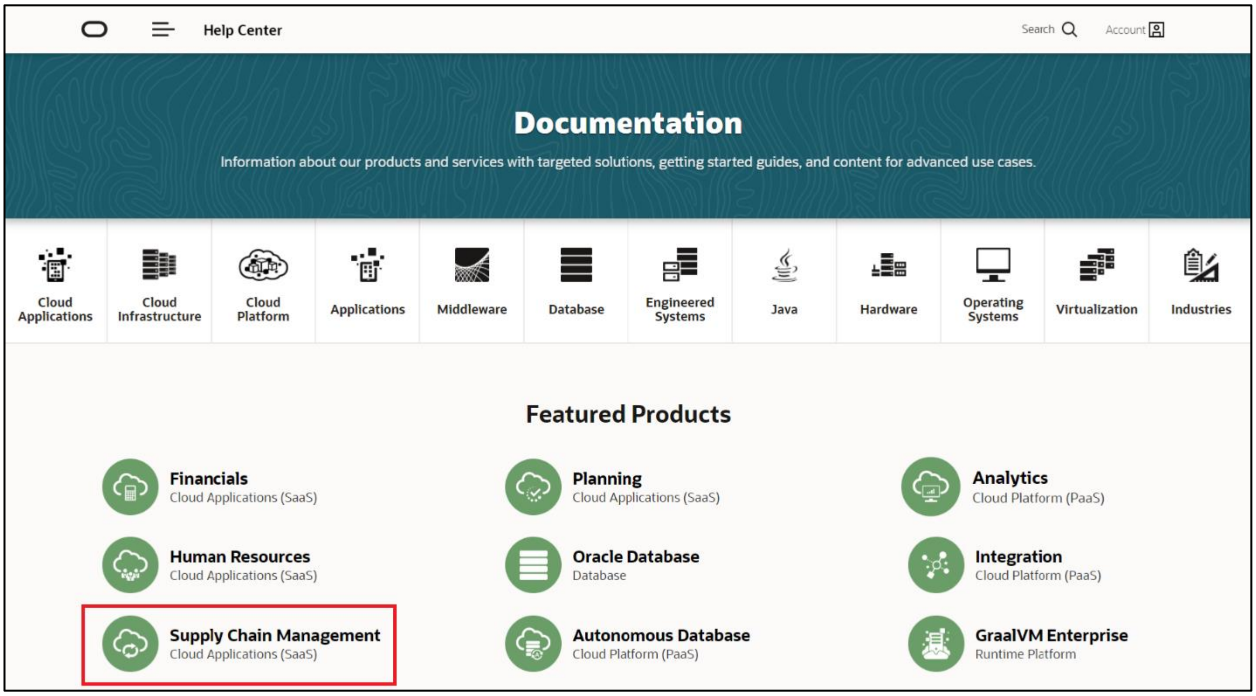
10. Click the **Search**  icon. The results specific to your search are displayed. Click a topic to learn more.



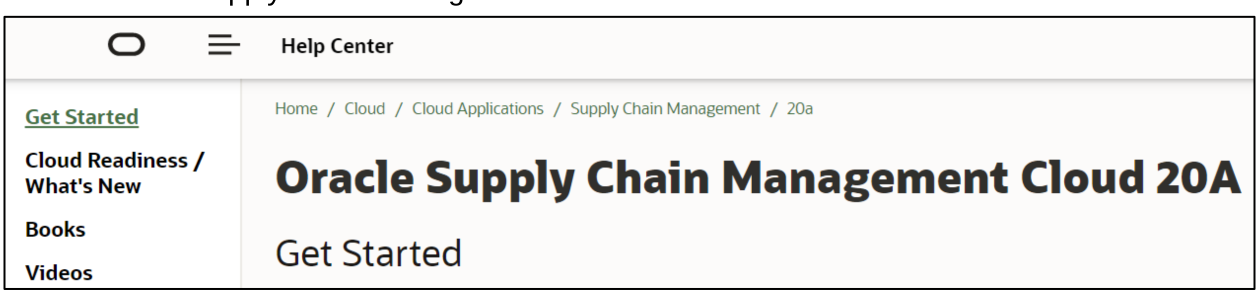
11. Click **Help Center**. The Documentation page is displayed.



12. Click **Supply Chain Management**.



13. The Oracle Supply Chain Management Cloud page is displayed. In the **Get Started** region, explore each of the following:
    - **Cloud Readiness/What's New**: Learn about the latest innovations, what's new in your service by reviewing new features including capability overview, business benefits, setup considerations, and usage tips.
    - **Books**: Find the latest user guides as well as implementation, installation, and administrative guides for your products here.
    - **Videos**: Review training tutorials to ensure successful impementation and use of Oracle Supply Chain Management Cloud.

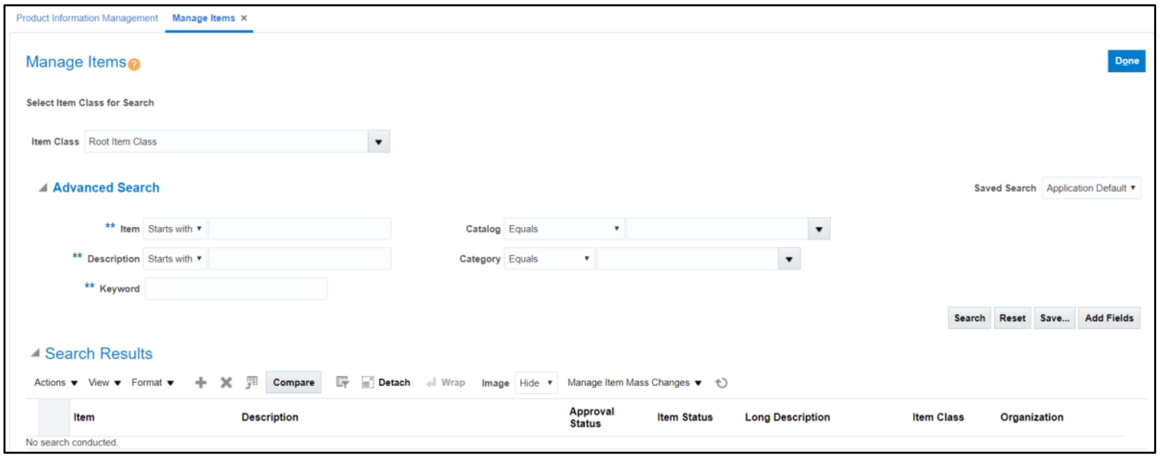


Reviewing tasks available in a work area

Now, let's go back to the application and review the tasks available in a work area (say, the Product Management work area).

14. From the **Navigator**, under **Product Management**, select **Product Information Management**.

15. On the **Product Information Management** page, click the **Tasks** panel tab and review the tasks that are available.
16. Select the **Manage Items** task. The **Manage Items** page appears.



17. In the **Search Results** region, click the **Create** ➕ icon. Alternatively, click the **Actions** menu and then, select **Create**. The **Create Item** dialog box appears.
18. Click **Cancel** to return to the **Manage Items** page.
19. Click **Done** to return to the **Product Information Management** page.

Practice Complete:

In this practice, you navigated basic elements in the user interface. You reviewed the infolets and accessed the embedded or context-sensitive help as well as the Application Help portal. In addition, you reviewed the tasks available in a work area.

Practice 3-1: Viewing a Task List for a Functional Area

Overview

In this practice, you view a task list for a functional area. A functional area is a grouping of functionality within an offering. It may be an optional piece of functionality that you may want to implement as part of an offering. Optional functional areas can be included or excluded from their parent offering. Functional areas may be hierarchical, and therefore may be subordinate to another functional area.

Prerequisites: None

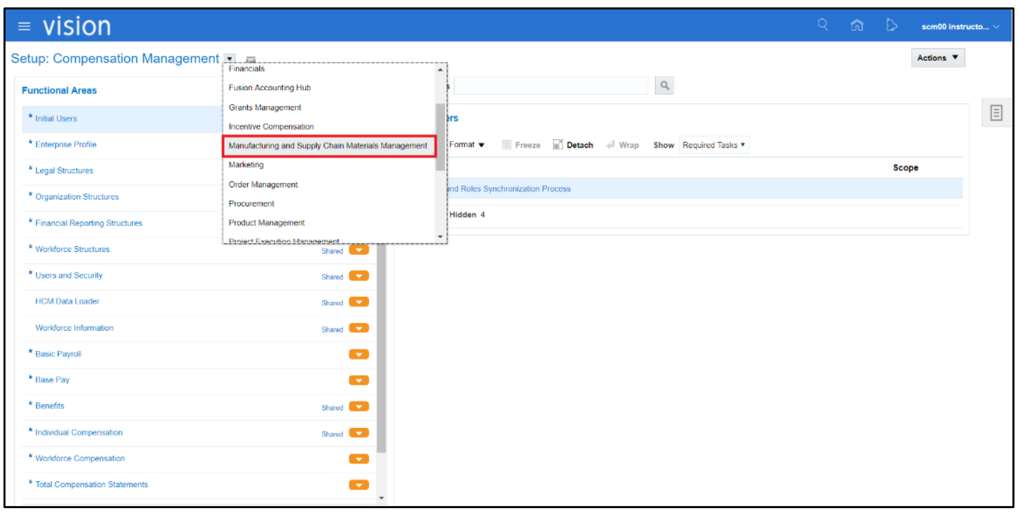
User Login: scmXX.student (replace XX with your student number)

Data Entry Details

Offering Name	Manufacturing and Supply Chain Materials Management

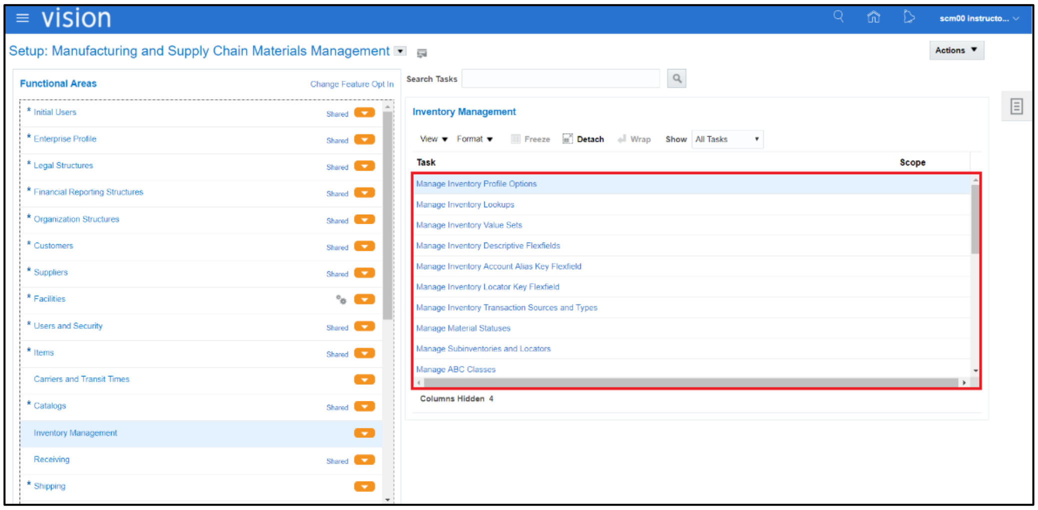
Steps

1. From the **Navigator**, under **Others**, select **Setup and Maintenance**.
2. On the **Setup and Maintenance** page, click the icon and then, select the **Manufacturing and Supply Chain Materials Management** offering from the list.



3. In the **Functional Areas** region, select the **Inventory Management** functional area.

   An offering will have at least one base or core functional area and may have one or more optional functional areas. Base functional areas indicate the core functionality that you need to implement for the offering to be operational. Optional functional areas indicate optional functionality that you may or may not implement for an offering.
4. In the right pane, in the **Inventory Management** region, under **Tasks**, a list of corresponding tasks is displayed.



A setup task list is a logical grouping of setup tasks that are related to the same business processes or activity, and are often performed together. Task lists are hierarchical: a parent task list can include children that are either tasks or other task lists. For example, the task list ‘Define Basic Items’ includes the necessary tasks to define an inventory item

Practice Complete:

In this practice, you viewed a task list for a functional area.

Practice 4-1: Creating a Subinventory

Overview

A subinventory is a physical or logical grouping of inventory such as raw material, finished goods, defective material, or a freezer compartment. A subinventory can be the primary place where items are physically stocked.

An inventory organization can contain one or more subinventories. You must define at least one subinventory for each inventory organization that you want to transact items into, from, or within.

In this practice, you are a warehouse manager and you create your own subinventory to store inventory items.

Prerequisites: None

User Login: scmXX.student (replace XX with your student number)

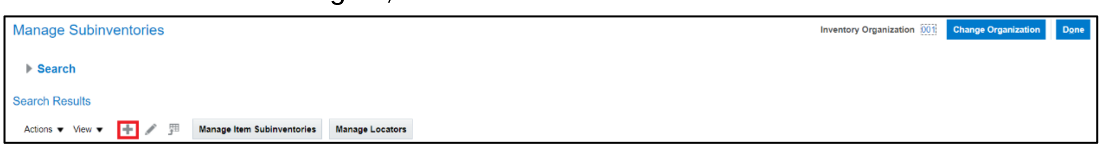
Data Entry Details

Inventory Organization	001
Subinventory Name	XXSUB (Student number followed by SUB) Example: 01SUB
Subinventory Description	Initials followed by Subinventory (Example: MJ Subinventory)

Steps

Navigating to the Setup and Maintenance Work Area

1. From the **Navigator**, under **Others**, select **Setup and Maintenance**.
2. On the **Setup and Maintenance** page, select the **Manufacturing and Supply Chain Materials Management** offering.
3. On the **Setup: Manufacturing and Supply Chain Materials Management** page, click the **Inventory Management** functional area and then, click the **Manage Subinventories and Locators** task. The **Manage Subinventories** page opens.
4. Select Organization **001** and click **OK**.
5. In the **Search Results** region, click the **Create** icon.



6. In the **Subinventory** field, enter your student number followed by SUB. For example, 03SUB.
7. In the **Description** field, enter your initials followed by Subinventory. For example, MJ Subinventory.
8. Click **Save and Close**.

9. Click **OK** to close the confirmation message dialog. You return to the Manage Subinventories page. In the Search Results region, notice that the subinventory you created displays.

10. Click **Done** to return to the Setup and Maintenance work area.

Practice Complete:

In this practice, you created a subinventory to store inventory items.

Practice 5-1: Creating a Basic Item

Instructor Note: Demonstrate this practice to the students.

Practice Overview

An item is an entity that represents products/services that a business manufacturer stocks or sells. Items represent products and services that you sell or transact, resources that you maintain, and components that make up your products or services.

In this practice, you create an item by applying predefined templates that provide all the basic information to help you get started quickly. Each item that you create has several standard operational attributes that determine the behavior of the item with respect to various functions, such as Purchasing and Inventory Management.

Prerequisites: None.

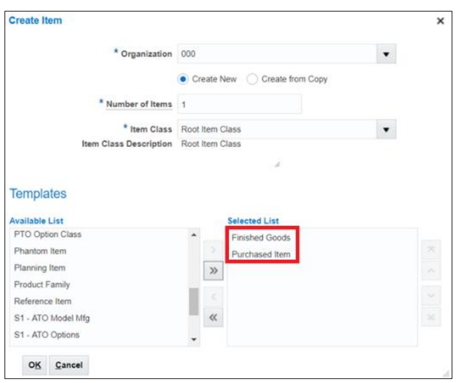
User Login: scmXX.student (Replace XX with your student number)

Steps

1. From the **Navigator**, under **Product Management**, select **Product Information Management**.
2. Click the **Tasks** panel tab and then, select the **Create Item** link. The **Create Item** dialog box appears.
3. In the **Organization** field, select **000**.

   Note: By default, the Create Item dialog is set to Create New. This indicates you are creating a single new item. By selecting the Create from Copy option, you can create an item by copying another item.
4. In the **Item Class** field, select **Root Item Class**.
5. In the **Templates** region, in the **Available List** column, select the **Purchased Item** template.
6. Click the **Single Arrow**  to move it to the **Selected List**.
7. The **Selected List** column now contains the following two templates: **Finished Goods** and **Purchased Item**.

   Note: Finished Goods may appear as **FG – Design Items** or some other name.



8. Click **OK** to close the Create Item dialog box. The **Create Item** page appears.

   Note: Click **Yes** to close the warning message.

9. In the **Item** field, enter: `Item_XX`. Replace XX with your student number. For example, Item _01.
10. In the **Description** field, enter: `Class Item 1`.
11. Click **Save**.
12. Click the **Associations** tab.
13. Click the **Select and Add** icon. The **Select and Add: Organization** dialog box appears. Alternatively, click the **Actions** menu and then, select **Select and Add**.
14. In the **Organization** field, enter `001` and then, click the **Search** icon. Select **Organization 001 Seattle** and then, click **Apply**.
15. In the **Organization** field, enter `002` and then, click the **Search** icon. Select **Organization 002 Atlanta** and then, click **Apply**.
16. Click **Done** to close the **Select and Add: Organization** dialog box.
17. Click **Save and Close**.

    Note that you need to enter only the required information to save the item successfully. By default, many of the values are populated because of the template used when creating the item. There are several additional attributes available to define your items.

Practice Complete:

In this practice, you created an item by applying predefined templates that provide all the basic . Information.

Practice 8-1: Reviewing the Inventory Management Infolets

Overview

In this practice, you review the Inventory Management infolets. Infolets let you view and interact with high-level, essential information generated from different sources so that you can quickly assess where to direct your attention. Infolets have many advantages.

You are a Warehouse Manager and need to review the Receiving, Inventory and Shipping key performance indicators in your organization to understand what the priority work activities are for a given day. You drill into some infolets to get more details and flip or expand others to see the information in different contexts.

Prerequisites: None

User Login: scmXX.student (replace XX with your student number)

Tasks:

- Navigate to the Inventory Management work area
- Review options to view infolets
- Review Task groupings
- Review search options
- Review drill-down capabilities
- Review flip and expand capabilities

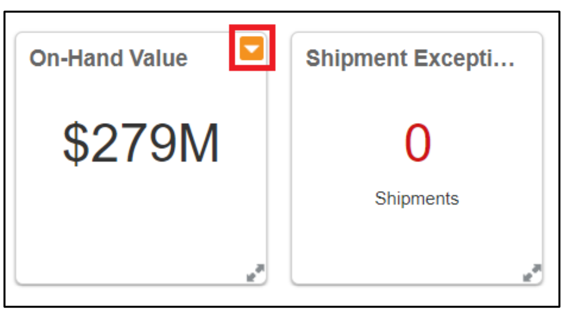
Steps:

Navigate to the Inventory Management work area

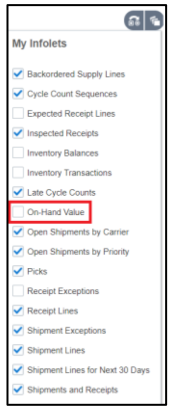
1. From the **Navigator**, under **Supply Chain Execution**, select **Inventory Management**.
2. You are now on the **Inventory Management** landing page where you see multiple infolets.

Review options to view infolets

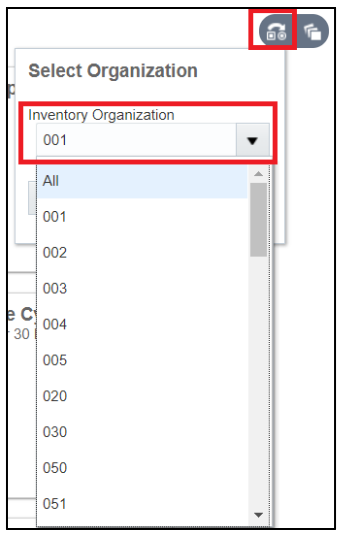
3. Hover over any infolet. Upon hover, an action list appears on the top-right of the infolet. Click the **Actions** icon and then, select **Hide**. The infolet is removed from the page.



4. Select the **My Infolets** icon next to the **Tasks** panel tab.
5. Select the infolet you just hid. The infolet is displayed on the page once again.

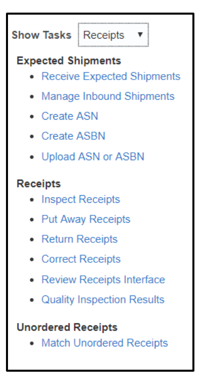


6. Drag an infolet to another location to demonstrate drag and drop capabilities.
7. On the top-right of the Inventory Management page, select the **View By**  icon next to the **My Infolets** icon. Change the view from all organizations to a single organization, or vice-versa (for example: 001). Then, click **Apply**.



Review Task groupings

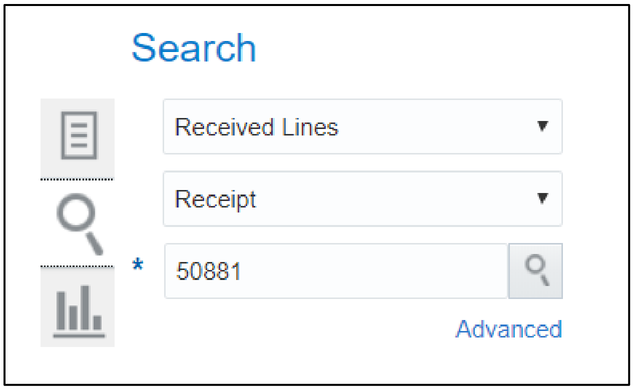
8. Click the **Tasks** panel tab.
9. Notice that the **Show Tasks** list defaults to Inventory and links to all inventory related tasks are shown below.
10. In the **Show Tasks** list, select **Receipts**. Notice that the tasks change to Receipts related tasks.



Review search options

11. On the **Inventory Management** page, click the **Quick Search** icon below the **Tasks** panel tab.
12. Review the different search objects and associated attributes available for search.
13. Select **Received Lines** and **Receipt** as the search objects.
14. Enter the following receipt number: `50881` and then, click the **Search** icon. The Manage All Lines page appears.

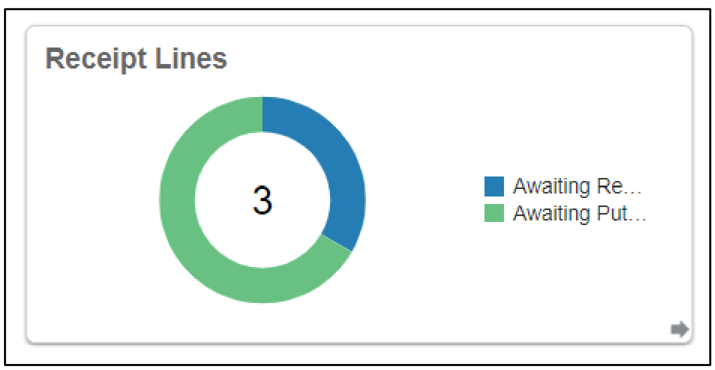
    Note that Quick Search takes you to a search page view if there is an exact match. For example, if you search for an exact Receipt of Purchase Order.



15. Click **Done** to return to the **Inventory Management** landing page.

Review drill-down capabilities

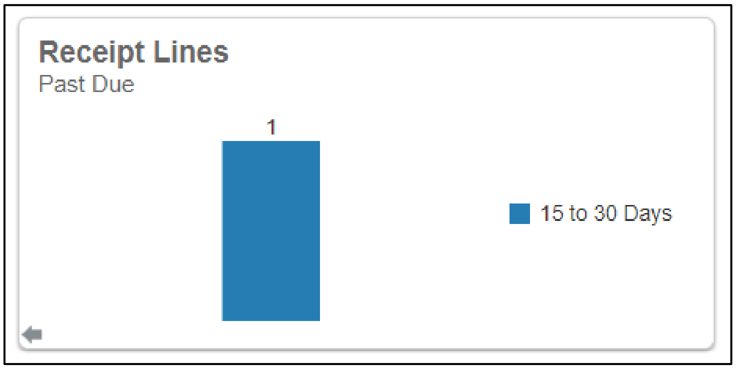
16. On the **Receipt Lines** infolet, click the **Awaiting Put Away** section in the ring. The **Put Away Receipts** page on which the receipts awaiting put away are displayed.



17. On the **Put Away Receipts** page, click **Done** to return to the **Inventory Management** landing page.

Review flip and expand capabilities

18. On the **Receipt Lines** infolet, click the **Back View** icon in the lower right hand corner.
19. The **Receipt Lines** infolet is flipped showing more detailed information.



20. Click the **Front View** icon in the lower left corner of the infolet to flip the infolet back to its original view.
21. On the **Late Cycle Counts** infolet, click the **Expanded View** icon in the lower right corner of the infolet.
22. The **Late Cycle Counts** infolet is expanded containing more detailed information about late cycle counts.
23. Click the **Front View** icon in the lower right of the infolet to collapse the infolet to its original state.

Practice Complete:

In this practice, you reviewed infolets in the Inventory Management work area.

Practice 9-1: Setting Up an Inventory Transaction

Overview

In this practice, the Supply Chain Application Administrator creates a new user-defined inventory transaction source type. The user-defined inventory transaction source type along with a predefined inventory transaction action is used to define a new user-defined inventory transaction type. A transaction type is the combination of a transaction source type and a transaction action. It is used to classify a particular transaction for reporting and querying purposes.

Inventory Management also provides a list of predefined inventory transaction types such as Sales Order Issue, Miscellaneous Issue, and Subinventory Transfer.

Prerequisites: None

User Login: scmXX.student

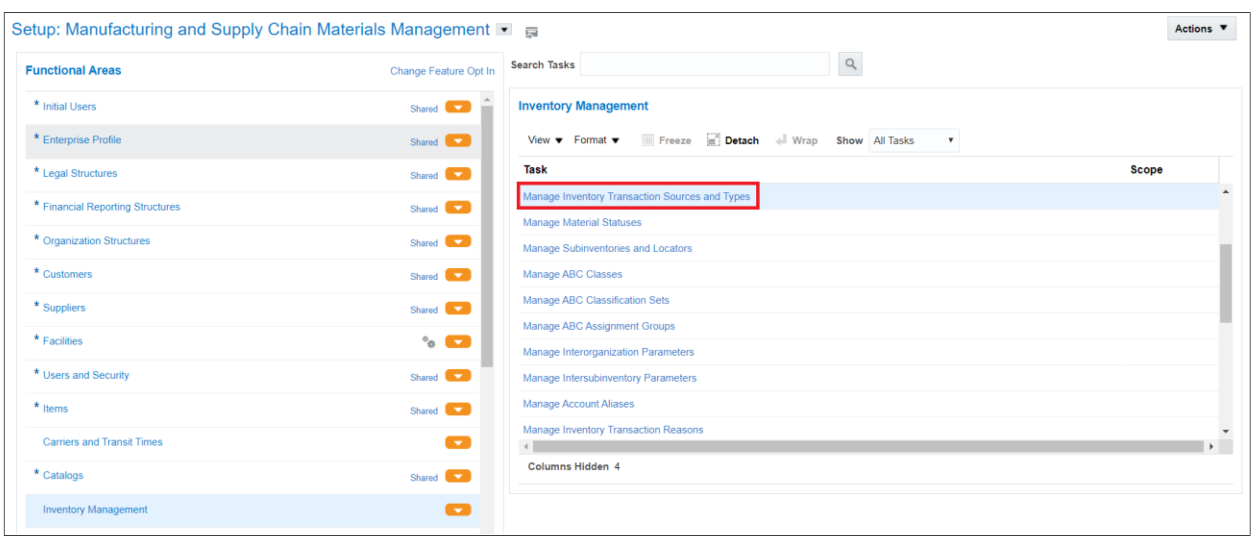
Summary of Tasks

- Navigate to the Setup and Maintenance Work Area
- Create User-Defined Inventory Transaction Source
- Create User-Defined Inventory Transaction Type

Steps

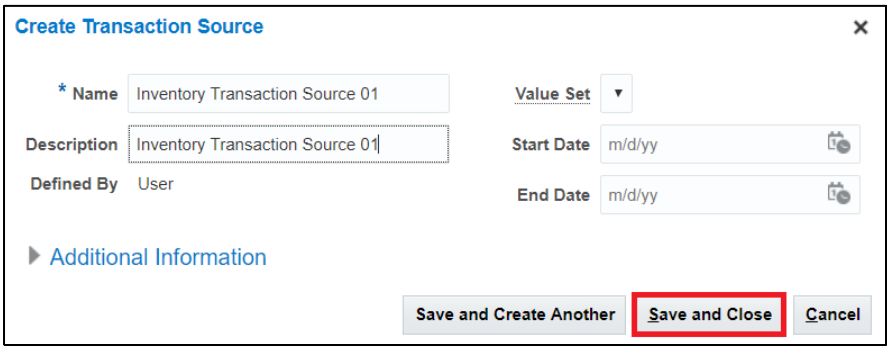
Navigate to the Setup and Maintenance Work Area

1. From the **Navigator**, under **Others**, select **Setup and Maintenance**.
2. On the **Setup and Maintenance** page, select the **Manufacturing and Supply Chain Materials Management** offering in the top-left.
3. In the **Functional Areas** region, select the **Inventory Management** functional area. A list of corresponding tasks appears on the right.
4. In the **Task** region, click the **Manage Inventory Transaction Sources and Types** task. The **Manage Inventory Transaction Sources and Types** page appears.



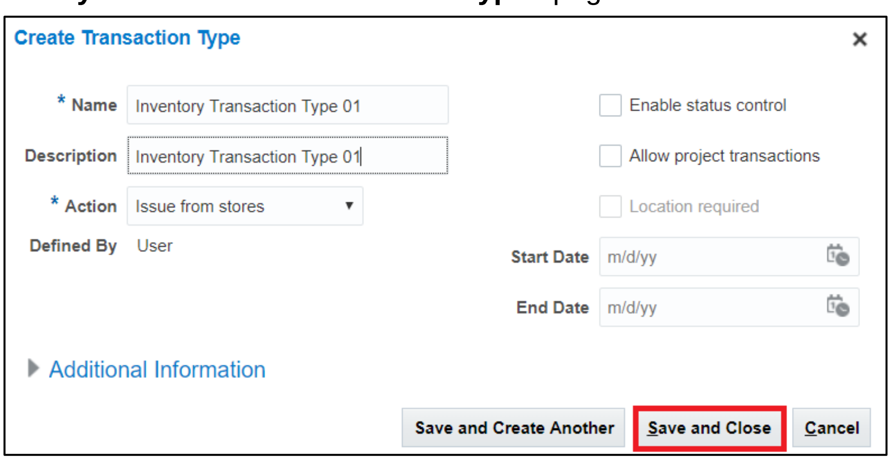
Create User-Defined Inventory Transaction Source

5. On the **Manage Inventory Transaction Sources and Types** page, in the **Search Results: Transaction Sources** area, click the **Create** icon. The **Create Transaction Source** dialog box appears.
6. In the **Name** field, enter: `Inventory Transaction Source XX`. Replace XX with your student number. (For example, Inventory Transaction Source 01, if your student number is 01).
7. In the **Description** field, enter: `Inventory Transaction Source XX`. Replace XX with your student number.
8. Click **Save and Close** to close the **Create Transaction Source** dialog box. The newly created transaction source appears in the first row of the search results.



Create User-Defined Inventory Transaction Type

9. In the **Search Results: Transaction Sources** region, select the newly created transaction source.
10. Scroll down to the **Inventory Transaction Source XX: Transaction Types** region. Notice that the Transaction Source you created above is selected.
11. Click the **Create** icon. The **Create Transaction Type** dialog box appears.
12. In the **Name** field, enter: `Inventory Transaction Type XX`. Replace XX with your student number. (For example, Inventory Transaction Type 01)
13. In the **Description** field, enter: `Inventory Transaction Type XX`. Replace XX with your student number. (For example, Inventory Transaction Type 01)
14. Retain the defaults for the other fields.
15. Click **Save and Close** to close the **Create Transaction Type** dialog box and return to the **Manage Inventory Transaction Sources and Types** page.



16. Click **Save and Close** to return to the **Setup: Manufacturing and Supply Chain Materials Management** page.

Demonstration Complete:

In this practice, you created a user-defined Inventory Transaction Source and Inventory Transaction Type.

Practice 10-1: Reviewing Lot and Serial Number

Overview

Lot and Serial Number Generation attributes can be defined at the Inventory Organization level. You can also define Lot and Serial Number related attributes at the item level. You navigate to the Product Information Management work area to review Lot and Serial Number attributes defined for a given item.

In this practice, you review the Lot and Serial Number Generation attributes for a given inventory organization.

Prerequisites: None

User Login: scmXX.student (Replace XX with your student number)

Summary of Tasks:

- Navigate to the Setup and Maintenance Work Area
- Review Inventory Organization Level Lot and Serial Number Parameters
- Review Item Level Lot and Serial Number Parameters

Steps

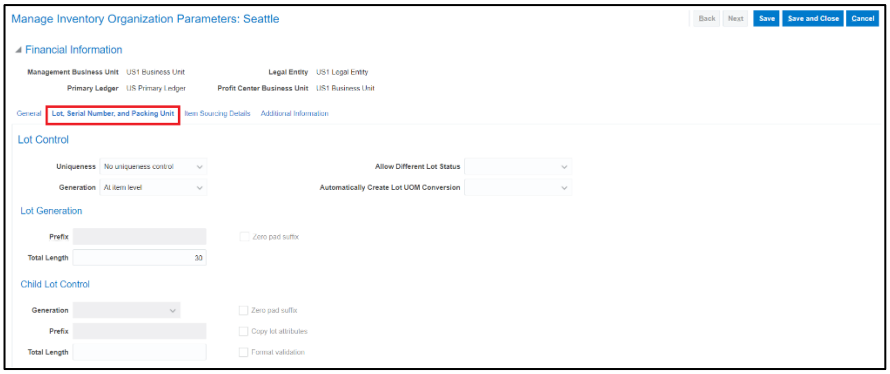
Navigate to the Setup and Maintenance Work Area

1. From the **Navigator**, under **Others**, select **Setup and Maintenance**.
2. On the **Setup and Maintenance** page, select the **Manufacturing and Supply Chain Materials Management** offering in the top-left.
3. In the **Functional Areas** region, select the **Facilities** functional area. A list of corresponding tasks appears on the right.
4. In the **Task** region, click the **Manage Inventory Organizations** task. The **Manage Inventory Organizations** page appears.

Review Inventory Organization Level Lot and Serial Number Parameters

5. In the **Organization** field, enter `001` and then, click **Search**. The search results display.
6. On the **Manage Inventory Organizations** page, select organization 001 Seattle from the search results, and then click the **Manage Organization Parameters** button.

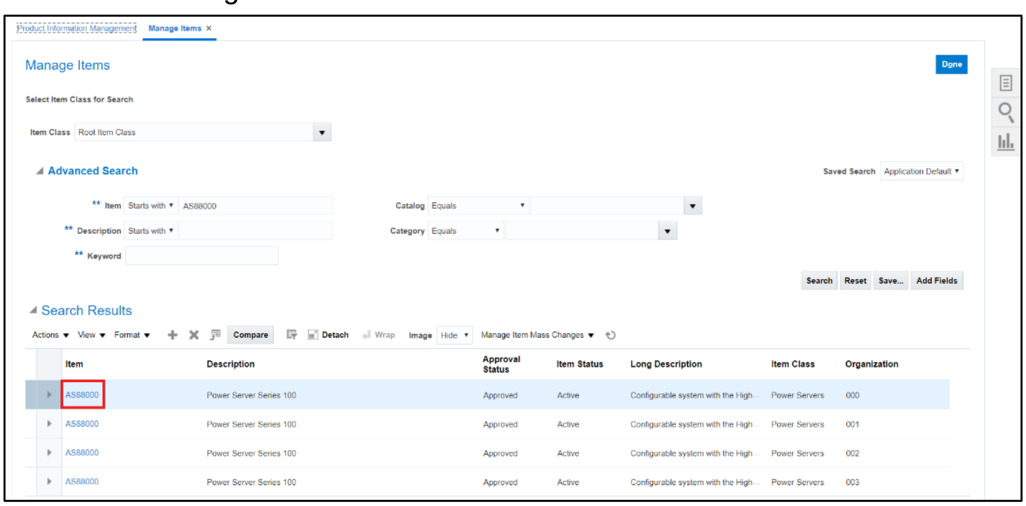
7. On the **Manage Inventory Organization Parameters: Seattle** page, click the **Lot**, **Serial Number**, **and Packing Unit** tab.



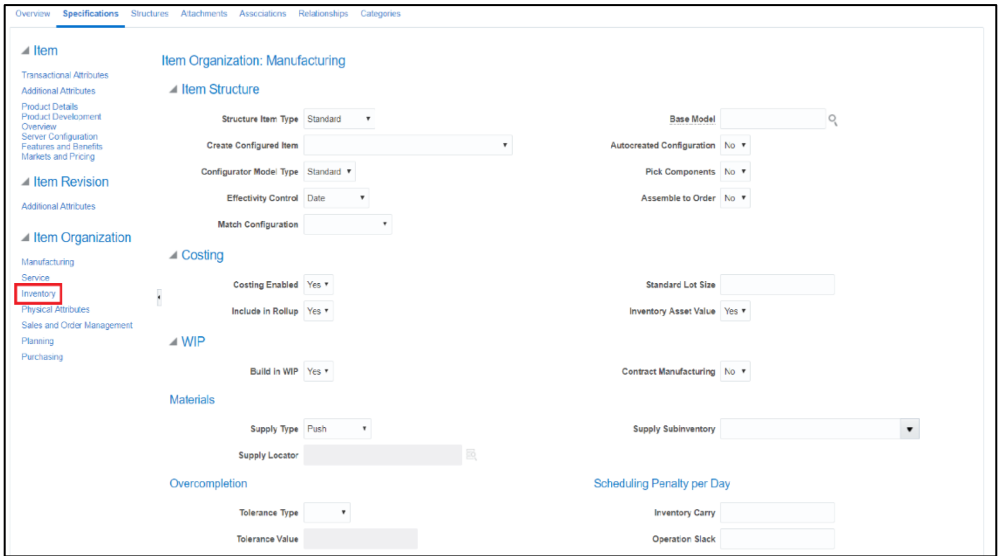
8. Review the **Lot Generation** attributes including **Prefix**, **Total Length**, and **Zero pad suffix**.
9. Review the **Child Lot Control** parameters.
10. Review the **Serial Number Generation** attributes including **Uniqueness**, **Generation**, **Prefix**, and **Starting Serial Number**.
11. Click **Cancel** to return to the **Manage Inventory Organizations** page.
12. Click **Done** to return to the **Setup: Manufacturing and Supply Chain Materials Management** page.

Review Item Level Lot and Serial Number Parameters

13. From the **Navigator**, under **Product Management**, select **Product Information Management**.
14. Click the **Tasks** panel tab and then, select the **Manage Items** task link.
15. In the **Advanced Search** region, in the **Item** field, enter: `AS88000` (this item is serialized). Alternatively, you can search for Item `AS4751200` (this item is not serialized).
16. Click **Search**.
17. Click the item link for Organization 000.



18. Click the **Specifications** tab.
19. Under **Item Organization**, click the **Inventory** link.



20. Review the **Lot** related attributes and fields including **Lot**, **Lot Expiration**, **Child Lot**, **Lot Split or Merge**, and **Grade Control** fields.
21. Review the **Serial** related attributes and fields including **Generation**, **Starting Prefix**, and **Starting Number**.
22. Click **Cancel** to return to the **Manage Items** page.
23. Click **Done** to return to the **Product Information Management** page.

Practice Complete:

In this practice, you reviewed the Lot and Serial Number Generation attributes for a given inventory organization.

Practice 11-1: Viewing Item On-Hand Quantity

Overview

The Manage Item Quantities page allows you to search for On Hand, Inbound, and Receiving item quantities. Additionally, you can review item quantities at various material storage locations such as subinventory and locator. You can use this page to identify the item quantity and storage location for the item.

The Review Item Supply and Demand page allows you to query as well as review the supply and demand picture for an item. The search criterial includes organization, item, cutoff date, and the types of quantities to include.

In this scenario, the Warehouse Manager is concerned about the on-hand quantity levels for a particular item and wants to know in which subinventory within the warehouse the item resides. In addition, the Warehouse Manager wants to review the supply and demand picture for an item using the Review Item Supply and Demand page.

Prerequisites: None

User Login: scmXX.student (replace XX with your student number)

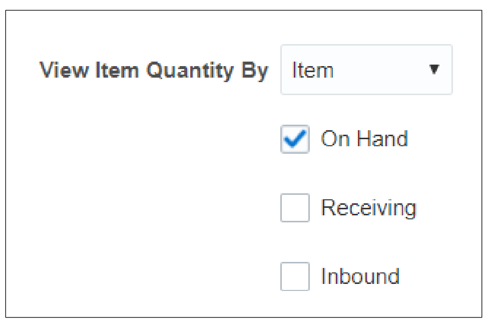
Steps

Navigate to the Inventory Work Area

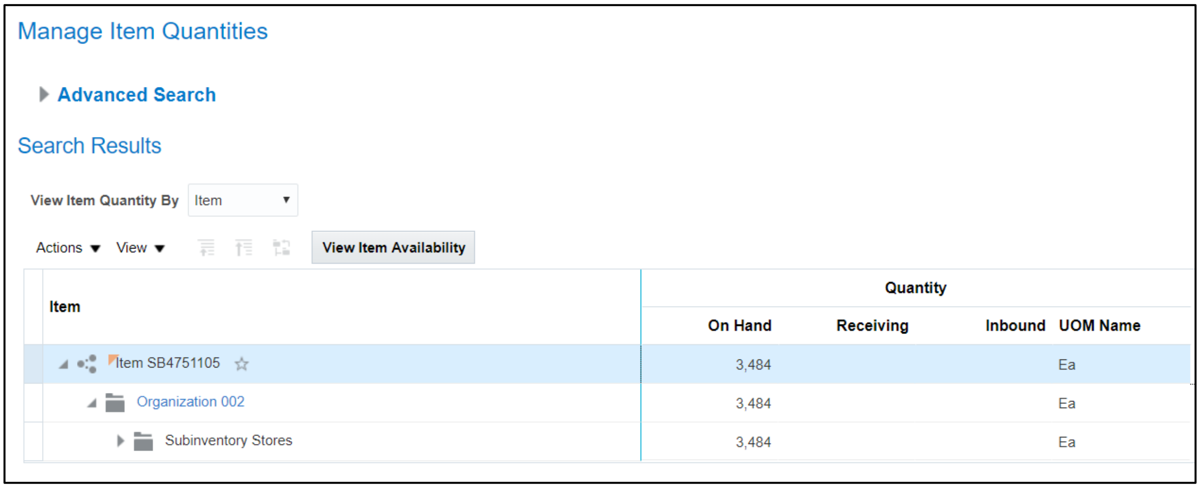
1. From the **Navigator**, under **Supply Chain Execution**, select **Inventory Management**.
2. Click the **Tasks** panel tab, and in the **Show Tasks** list, select **Inventory**.
3. Select the **Manage Item Quantities** link. The **Manage Item Quantities** page appears.
4. Ensure that Inventory Organization 002 is selected in the top-right of the page. If not, click the **Change Organization** button and select 002. Then, click the **OK** button.

   Note: If you have returned to the Inventory Management page, repeat steps 2 and 3.
5. In the **Advanced Search** region, in the **Item** field, enter: `SB4751105`.

   Note: Verify that the On Hand check box is selected.



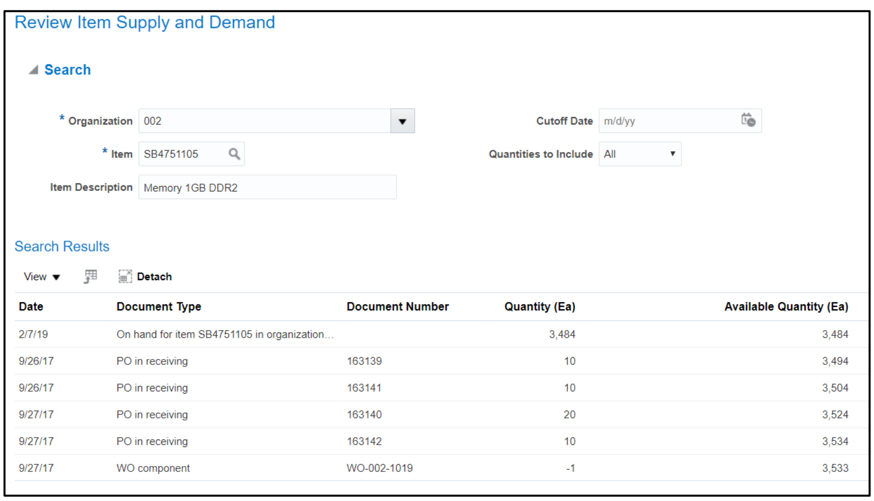
6. Click the **Search** button.
7. Click the **Expand** icon next to the organization to see on-hand quantity in all subinventories.
8. Click the **Expand** icon next to the subinventory.



9. Note the on-hand quantity for your subinventory stores. Click **Done**.

Navigate to the Review Item Supply and Demand Page

10. From the **Navigator**, under **Supply Chain Execution**, click **Inventory Management**.
11. Click the **Tasks** panel tab, and in the **Show Tasks** list, select **Inventory**.
12. Select the **Review Item Supply and Demand** link. The **Review Item Supply and Demand** page appears.
13. Ensure that Inventory Organization 002 is selected in the top-right of the page. If not, click the **Change Organization** button and select 002. Then, click the **OK** button.
14. In the **Advanced Search** region, in the **Item** field, enter `SB4751105`.
15. Click the **Search** button.
16. Notice that the search results include the on-hand supply at the top with the other types of supplies and demands listed in chronological order thereafter (review the PO in receiving and WO component). You can export the results to a spreadsheet for offline review and collaboration. The on-hand supply row mentions the item and the organization to help with offline analysis.



Practice Complete:

In this practice, you viewed item on-hand quantity.

Practice 11-2: Creating an Inventory Reservation

Overview

The Manage Item Quantities page allows you to search for On Hand, Inbound and Receiving item quantities. Additionally, you can review item quantities at various material storage locations such as subinventory and locator. Use this page to identify the quantity available to reserve for the item.

The regional task pane allows you to navigate to the various inventory related tasks. The Manage Reservations and Picks task allows you to create an inventory reservation against demand document type 'user defined' on the Manage Reservations and Picks page.

In this scenario, the Warehouse Manager needs to create an inventory reservation against a user-defined demand document type. The Demand Document Type 'User Defined' is used when there is no official demand document such as a sales order or movement request. For example, the Warehouse Manager may want to create an ad-hoc reservation against material they may need at some future point in time.

The Warehouse Manager begins by first creating a demand document of type 'user defined'. The Warehouse Manager then proceeds to create a reservation against the user-defined demand document type.

Prerequisites: None

User Login: scmXX.student (replace XX with your student number)

Summary of Steps

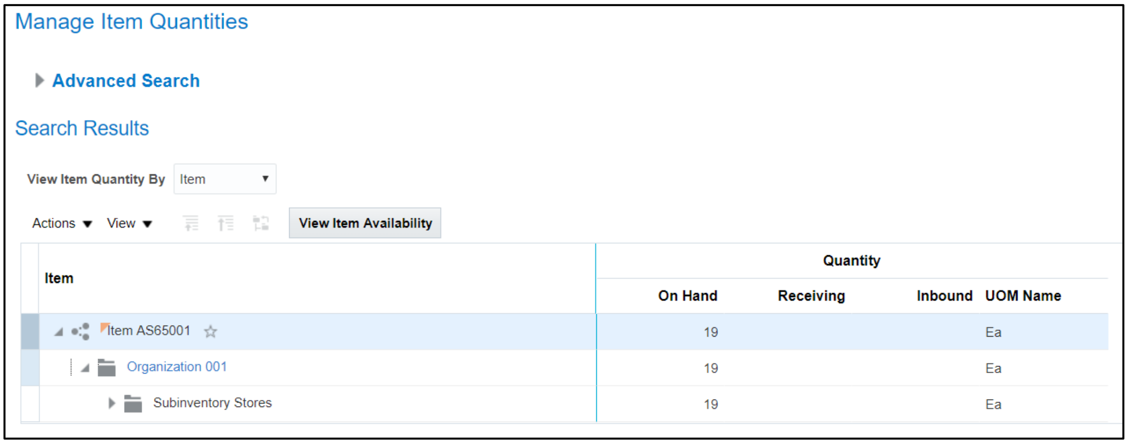
- Navigating to the Inventory Work Area
- Create the Demand Document Type 'User Defined'
- Confirm that the Inventory Reservation was Successfully Created

Steps

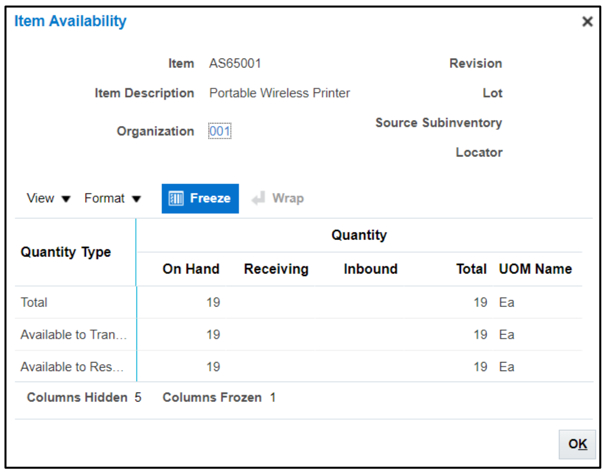
Navigating to the Inventory Work Area

1. From the **Navigator**, under **Supply Chain Execution**, select **Inventory Management**.
2. Click the **Tasks** panel tab, and in the **Show Tasks** list, select **Inventory**.
3. Select the **Manage Item Quantities** link. The **Manage Item Quantities** page appears.
4. Ensure that Inventory Organization 001 is selected in the top-right of the page. If not, click the **Change Organization** button and select 001. Then, click the **OK** button.

   Note: If you have returned to the Inventory Management page, repeat steps 2 and 3.
5. In the **Advanced Search** region, in the **Item** field, enter: `AS65001`.
6. Click **Search**.
7. Click the **Expand** icon next to Organization 001 to see on-hand quantity in all subinventories.



8. Click the **View Item Availability** button and note the available to reserve quantity for the Subinventory Stores.

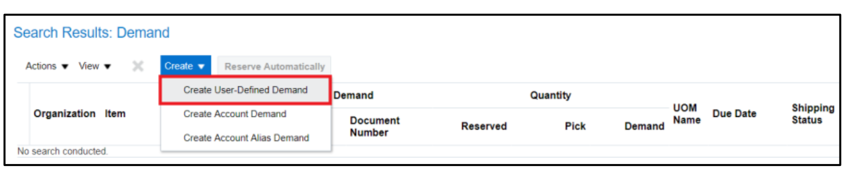


9. Click **OK** to close the **Item Availability** dialog box.
10. Click **Done** to return to the **Inventory Management** page.

Create the Demand Document Type 'User Defined'

11. Click the **Tasks** panel tab and select **Manage Reservations and Picks**.
12. Click the **Create Reservations** button.

13. In the **Search Results: Demand** region, click the **Create** list and then, select **Create User-Defined Demand** from the list.



14. In the **Create User-Defined Demand** dialog box, enter or select values as follows:

Fields	Values

Inventory Organization	001
Supply Document Type	On hand
Demand Document Name	Demand Document 01
Item	AS65001
Subinventory	Stores
Reserved Quantity	1

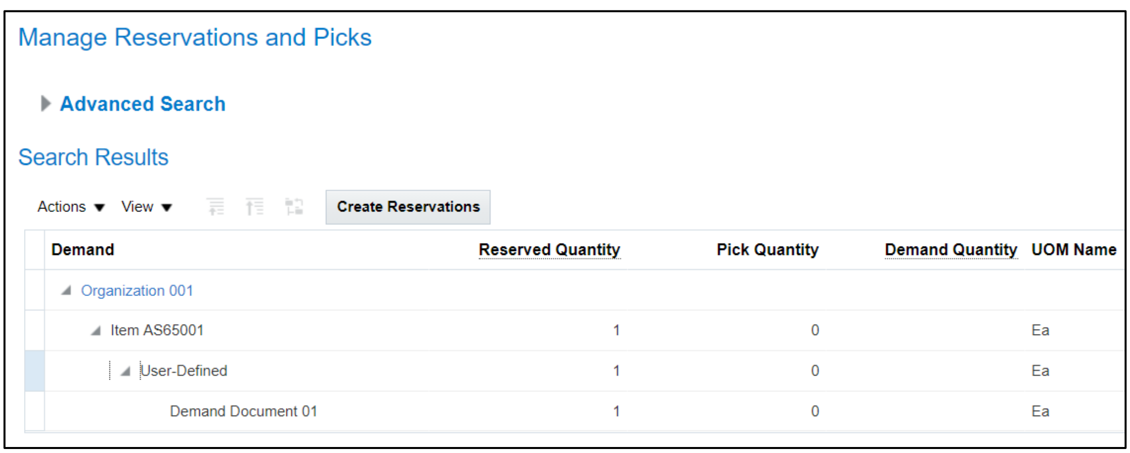
15. Click **OK**.
16. Click **Save and Close** at top right-hand of the page.

Confirm that the Inventory Reservation was Successfully Created

17. On the **Manage Reservations and Picks** page, in the **Advanced Search** region, enter or select values as follows:

Fields	**Values**
Search	Reservations
Inventory Organization	001
Item	AS65001
Demand Document Type	User Defined

18. Click **Search**.
19. Click the **Expand** icon next to **Organization 001** to see the item node.
20. Click the **Expand** icon next to **Item AS65001** to see the user-defined node.
21. Click the **Expand** icon next to the **User-Defined** node to see your demand document.
22. Click **Done**.



Practice Complete:

In this practice, you created an inventory reservation.

Practice 12-1: Creating Miscellaneous Inventory Transaction

Note to instructor: Demonstrate this practice to the students.

Overview

The Manage Item Quantities page allows you to search for items with on-hand quantities as well as items with inbound quantities on known shipments that have not yet been received. Additionally, you can search for items in receiving waiting to be put away into inventory locations. You can also review item quantities at various material storage locations including inventory organization, subinventory, and locator. You can use the Manage Item Quantities page to identify the location where the item exists so that it can be picked and delivered to the Engineering department.

Prerequisites: None

User Login: scmXX.student (Replace XX with your student number)

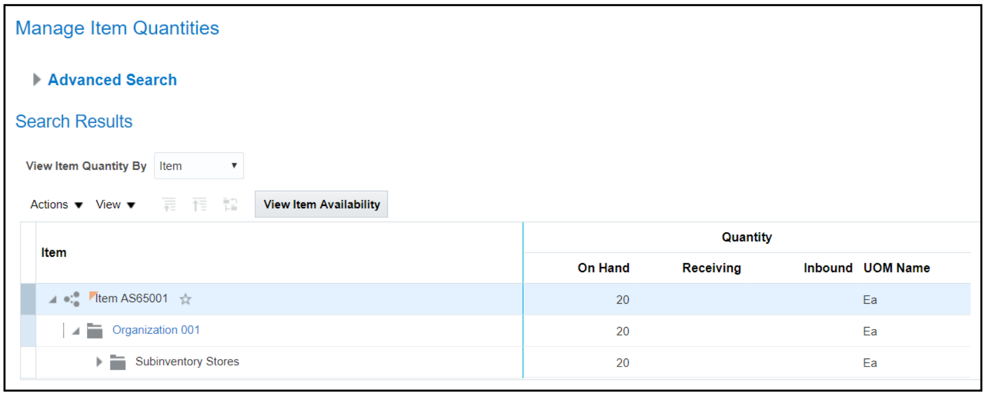
Summary of Tasks

- Review Item On-Hand Quantity
- Create a Miscellaneous Issue Transaction
- Find Location Where Item Exists and Review the Current Balance

Steps

Review Item On-Hand Quantity

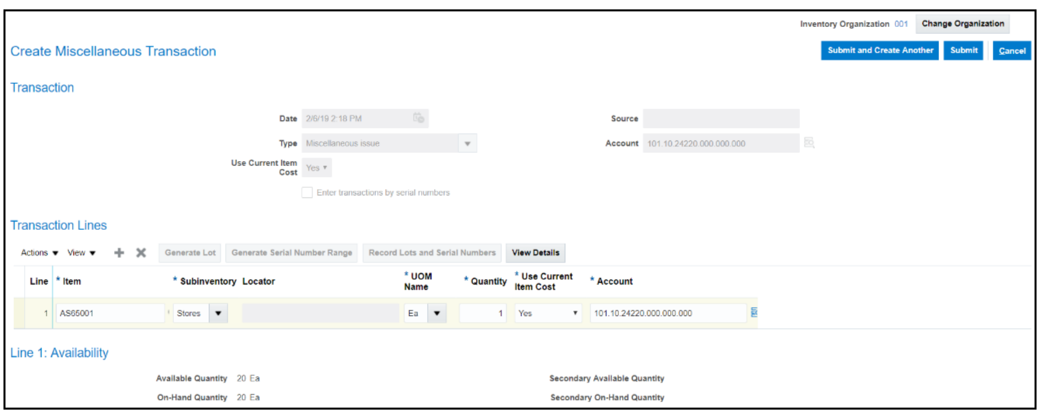
1. From the **Navigator**, under **Supply Chain Execution**, select **Inventory Management**.
2. Click the **Tasks** panel tab, and in the **Show Tasks** list, select **Inventory**.
3. Select the **Manage Item Quantities** link. The **Manage Item Quantities** page appears.
4. Ensure that Inventory Organization 001 is selected in the top-right of the page. If not, click the **Change Organization** button and select 001.
5. Click the **OK** button.
6. On the **Manage Item Quantities** page, in the **Advanced Search** region, in the **Item** field, enter: `AS65001`.
7. Click the **Search** button.
8. Click the **Expand** icon next to **Item AS65001** to view on-hand quantity in the Inventory Organization.
9. Click the **Expand** icon next to the **Organization 001** to view the on-hand quantity in the Subinventory. Note the **On Hand** quantity for **Subinventory Stores**.



10. Click **Done** to return to Inventory Management page.

Create a Miscellaneous Issue Transaction

11. Click the **Tasks** panel tab, and in the **Show Tasks** list, select **Inventory**.
12. Select the **Create Miscellaneous Transaction** link. The Create Miscellaneous **Transaction** page appears.
13. In the **Transaction** region, in the **Type** list, select **Miscellaneous issue**.
14. In the **Use Current Item Cost**, select **Yes**.
15. In the **Account** field, enter: `101.10.24220.000.000.000`.
16. In the **Transaction Lines** region, click the **Actions** menu and select **Add**. Alternatively, click the **Add** icon.
17. In the **Item** field: enter `AS65001`.
18. In the **Quantity** field, enter: `1`.

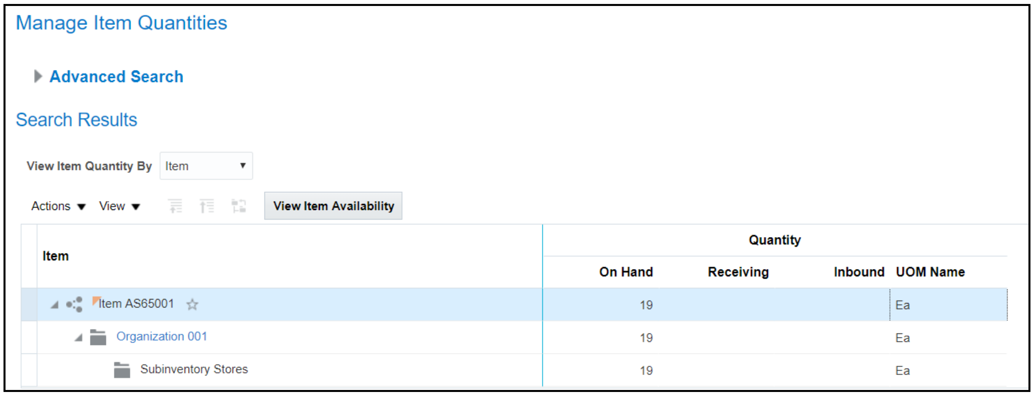


19. Click the **Submit** button.
20. Click the **OK** button to close the confirmation message to return to the Manage Item Quantities page.

Find Location Where Item Exists and Review the Current Balance

21. On the **Manage Item Quantities** page, review the on-hand quantity.
22. Click the **Expand** icon next to **Item AS65001** to view on-hand quantity in the Inventory Organization.

23. Click the **Expand** icon next to **Organization 001** to view the on-hand quantity in Subinventory. Note the **On Hand** quantity for subinventory **Stores**. Notice that the on-hand quantity for Item **AS65001** in subinventory **Stores** is reduced by 1.



Practice Complete:

In this practice, you created a miscellaneous inventory transaction.

Practice 12-2: Creating and Processing Movement Request

Overview

In this practice, you create, pick, and pick confirm a movement request, requesting an item to be moved from one storage location to another.

You are a warehouse manager who wants to move inventory from one subinventory to another. You create a movement request requisition that tells the warehouse operator the “from” and “to” locations to use to transfer the material. The warehouse operator uses the Movement Request Pick Slip Report to print the pick slip. The warehouse operator then physically transfers the material and records this material movement in the system using the Confirm Pick Slips page.

Prerequisites: None

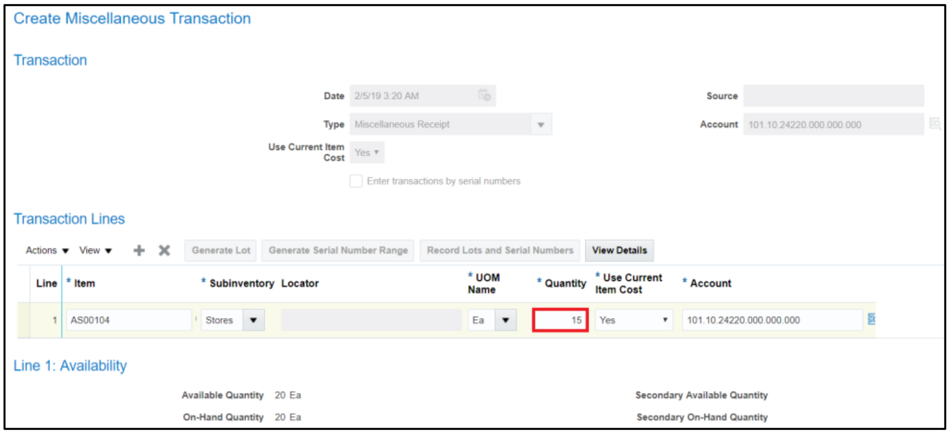
User Login: scmXX.student (Replace XX with your student number)

Summary of Tasks

- Create a Miscellaneous Receipt Transaction
- Review Item On-Hand Quantity
- Create Movement Request
- Pick Movement Request
- Confirm Pick Slip
- Review Item On-Hand Quantity

Create a Miscellaneous Receipt Transaction

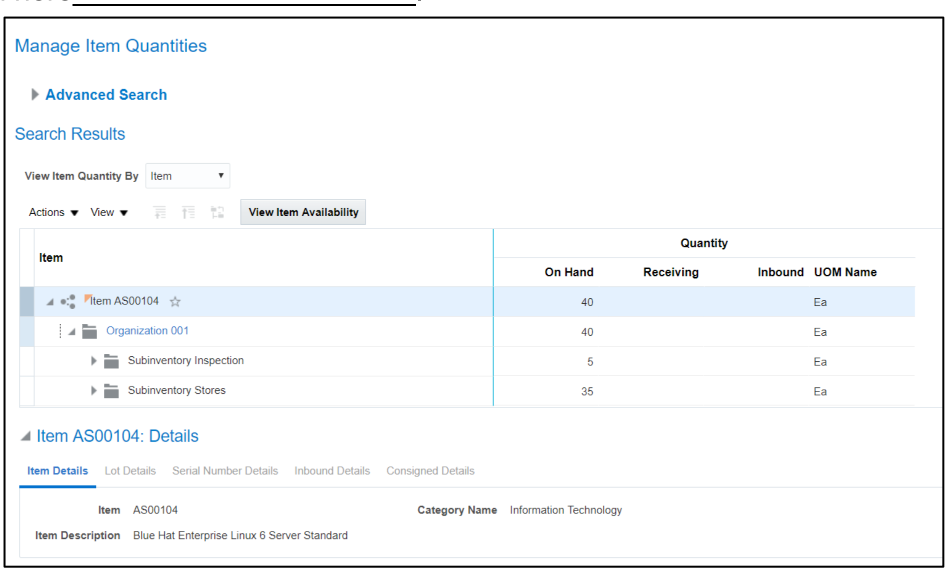
1. From the **Navigator**, under **Supply Chain Execution**, select **Inventory Management**.
2. Click the **Tasks** panel tab and then, select **Create Miscellaneous Transaction**.
   Note: Ensure that Organization 001 is selected. If not, change organization to 001.
3. In the **Type** list, select **Miscellaneous Receipt**.
4. In the **Use Current Item Cost**, select **Yes**.
5. In the **Account** field, enter: `101.10.24220.000.000.000`.
6. In the **Transaction Lines** region, click the **Actions** menu and select **Add**. Alternatively, click the **Add** + icon.
7. In the **Item** field, enter: `AS00104`.
8. In the **Subinventory** field, enter: `Stores`.
9. In the **Quantity** field, enter: `15`.



10. Click **Submit**.
11. Click **OK** to close the confirmation message. You return to the **Inventory Management** page.

Review Item On-Hand Quantity

12. On the **Inventory Management** page, click the **Tasks** panel tab, and in the **Show Tasks** list, select **Inventory**.
13. Select the **Manage Item Quantities** link. The **Manage Item Quantities** page appears.
14. Ensure that Inventory Organization 001 is selected in the top-right of the page. If not, click the **Change Organization** button, select 001, and then click **OK**.
Note: If you returned to the Inventory Management page after selecting organization 001, repeat steps 12 and 13.
15. In the **Advanced Search** region, in the **Item** field, enter: `AS00104`.
16. Click **Search**.
17. Click the **Expand** icon next to Item AS00104 to view on-hand quantity in the Inventory Organization.
18. Click the **Expand** icon next to Organization 001 to view the on-hand quantity in the Subinventory. Note the On-Hand Quantity for subinventory Stores and subinventory Inspection here_____________________.



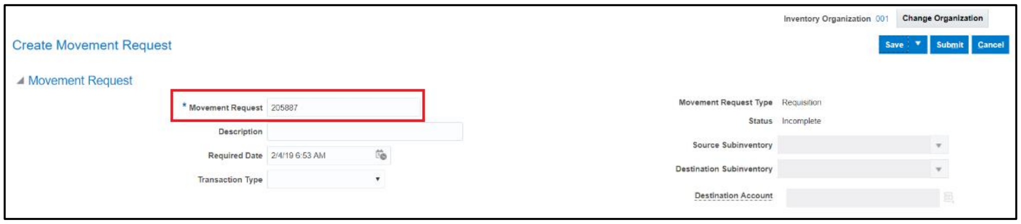
19. Click **Done** to return to the **Inventory Management** page.

Create Movement Request

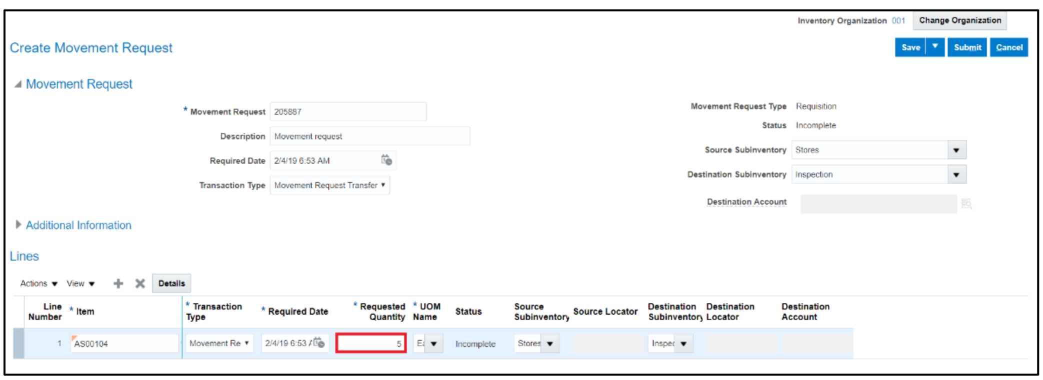
20. Click the **Tasks** panel tab and then, select **Manage Movement Requests**.

    Note: You can create a movement request transfer to move material from a source subinventory to a destination subinventory. This is done using the **Manage Movement Request** page.

21. In the **Search Results** region, click the **Create** icon. The **Create Movement Request** page opens with a pre-numbered movement request. Note down your movement request number here_____________ for use later in the exercise.



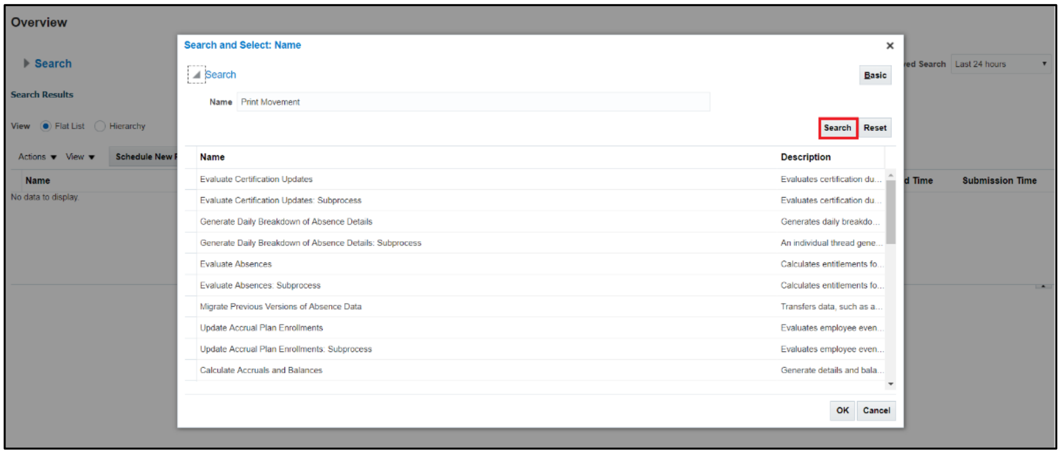
22. In the **Description** field, enter: `Movement request`.
23. In the **Transaction Type** list, select **Movement Request Transfer**.
24. In the **Source Subinventory** field, select **Stores**.
25. In the **Destination Subinventory** field, select **Inspection**.
26. In the **Lines** region, click the **Create** icon.
27. In the **Item** field, enter: `AS00104` and tab out of the field.
28. In the **Requested Quantity** field, enter: `5`.



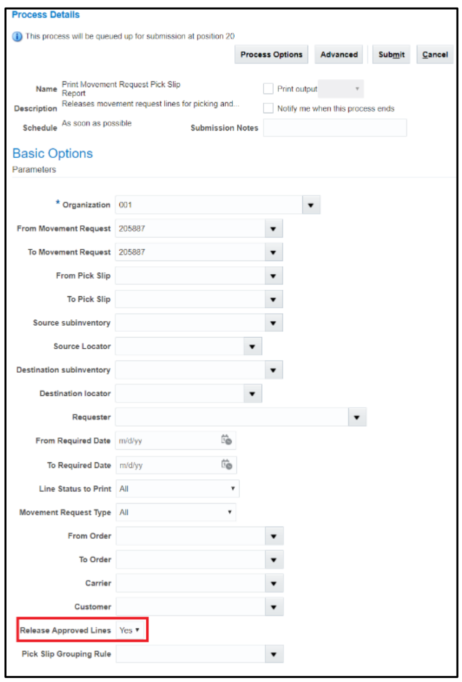
29. Click **Submit**.
30. Click **OK** to close the confirmation message.
31. Click **Done** to return to the **Inventory Management** page.

Run Movement Request Pick Slip Report

32. From the **Navigator**, under **Tools**, click **Scheduled Processes**.
33. Click **Schedule New Process**.
34. In the **Name** field, enter: `Print Movement`, then tab out of the field.
35. Click **Search**.



36. Select **Print Movement Request Pick Slip Report** and then, click **OK**.
37. Click **OK** to close the **Schedule New Process** dialog box.
38. In the **Process Details** dialog box, in the **Organization** field, select **001**.
39. In the **From Movement Request** field, enter the Movement Request number created in the previous section.
40. In the **To Movement Request** field, enter the Movement Request number created in the previous section.
41. Scroll down and in the **Release Approved Lines** field, select **Yes**.

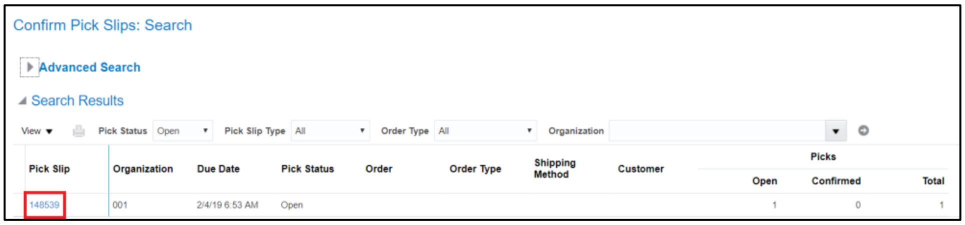


42. Click **Submit**.
43. Click **OK**.
44. Click the **Refresh** icon until your process is **Succeeded**.

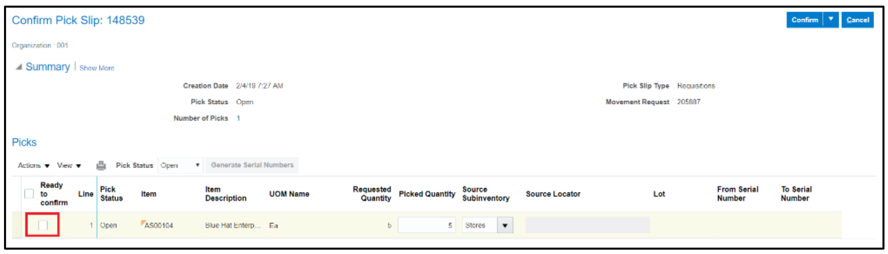
Confirm Pick Slip

45. From the **Navigator**, under **Supply Chain Execution**, select **Inventory Management**.
46. Click the **Tasks** panel tab and in the **Show Tasks** list select **Shipments**.

47. Select the **Confirm Pick Slips** task.
48. In the **Movement Request** field, enter the movement request number you noted in step# 21.
49. Click the **Search** button.
50. Click the **Pick Slip** number for your movement request.



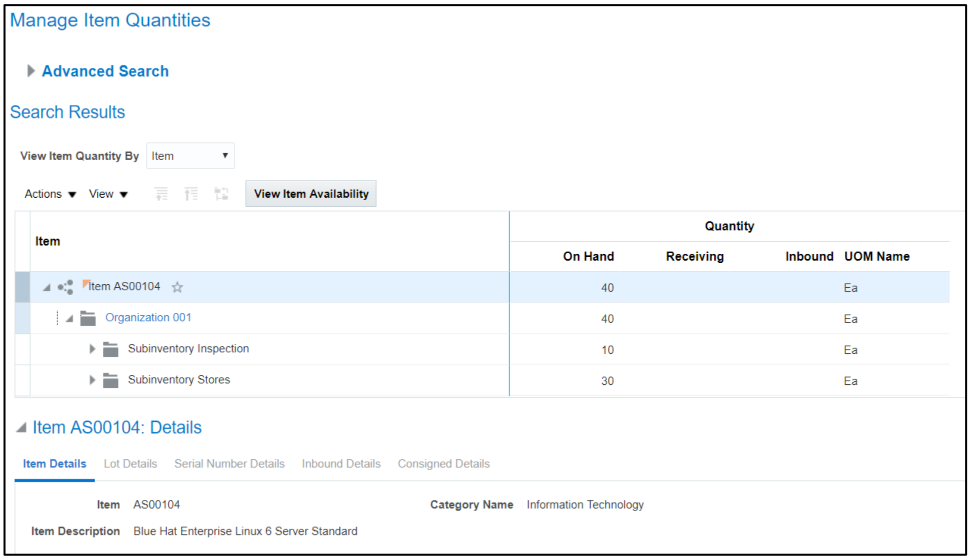
51. Select the **Ready to Confirm** checkbox.



52. In the **Picked Quantity** field, enter: `5`.
53. Click **Confirm**.
54. Click **Cancel** to return to the **Confirm Pick Slips** page.
55. Click **Done** to return to the **Inventory Management** page.

Review Item On-Hand Quantity

56. On the **Inventory Management** page, click the **Tasks** panel tab, and in the **Show Tasks** list, select **Inventory**.
57. Select the **Manage Item Quantities** link. The **Manage Item Quantities** page appears.
58. In the **Manage Item Quantities** page, in the **Advanced Search** region, in the **Item** field, enter: `AS00104`.
59. Click **Search**.
60. Click the **Expand** icon next to Item AS00104 to view on-hand quantity in the Inventory Organization.
61. Click the **Expand** icon next to the Organization 001 to view the on-hand quantity in the Subinventory. Note the On-Hand Quantity for subinventory Stores and subinventory Inspection. Notice that the on-hand quantity in subinventory stores is reduced by 5 and the on-hand quantity in subinventory inspection is increased by 5.



Practice Complete:

In this practice, you learned to create, pick, and pick confirm a movement request, requesting an item to be moved from one storage location to another.

Practice 13-1: Creating and Receiving an In-Transit Interorganization Transfer

Overview

In this practice, you create an Interorganization Transfer transferring material between two different warehouses in separate inventory organizations.

In this scenario, material is being shipped via carrier from the main distribution warehouse to a second warehouse. This requires the use of an “in-transit” interorganization transfer. The “in-transit” interorganization transfer must be created in the source warehouse and then the product must be received and put away in the destination warehouse.

Prerequisites:

Interorganization parameters need to be set up for the “from” and “to” organizations with an “in-transit” transfer type in order to complete this practice. The Receipt Routing should be set to “Standard”.

User Login: scmXX.student (Replace XX with your student number)

Summary of Tasks

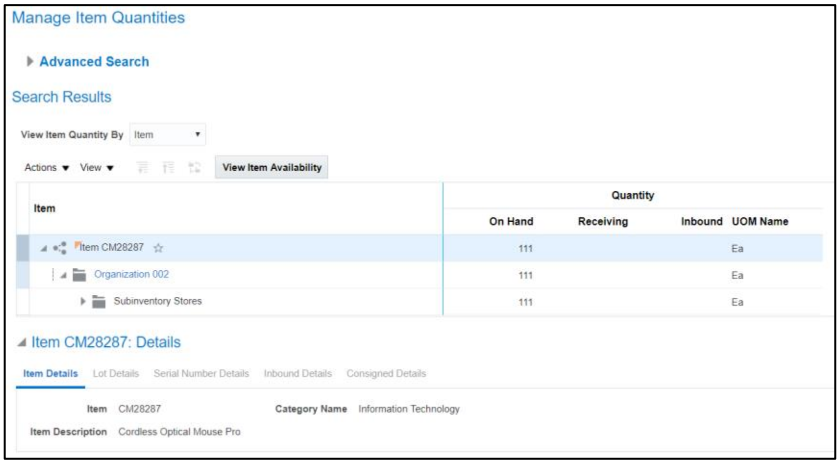
- Review on-hand quantity in destination organization
- Create interorganization transfer transferring a quantity of 5 from the source organization to the destination organization
- Receive the product in the destination organization using “Standard” receipt routing
- Put away the material to Inventory
- Review on-hand quantity in destination organization

Steps

Review On-Hand Quantity in Destination Organization

1. From the **Navigator**, under **Supply Chain Execution**, select **Inventory Management**.
2. Click the **Tasks** panel tab, and in the **Show Tasks** list, select **Inventory**.
3. Click the **Manage Item Quantities** link.
4. On the **Manage Item Quantities** page, ensure that the organization 002 is selected. If not, click **Change Organization** and select 002.

   Note: If you have returned to the Inventory Management page, repeat steps 2 and 3.
5. In the **Advanced Search** region, in the **Item** field, enter: `CM28287`.
6. Click **Search**.
7. Click the **Expand** ▸ icon next to the **Item** to view on-hand quantity in the **Inventory Organization**.
8. Click the **Expand** ▸ icon next to the **Organization** to view the on-hand quantity in the **Subinventory**.

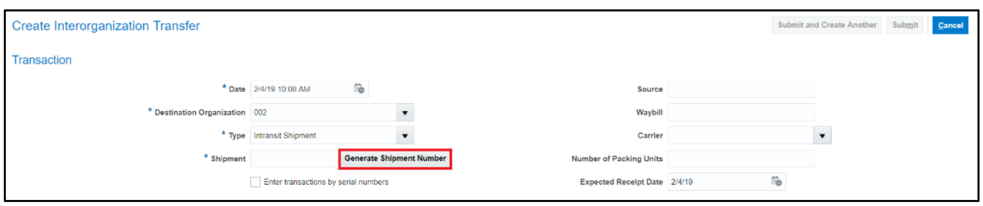


9. Note the **On-Hand Quantity** for Subinventory Stores here___________.
10. Click **Done** to return to the **Inventory Management** page.

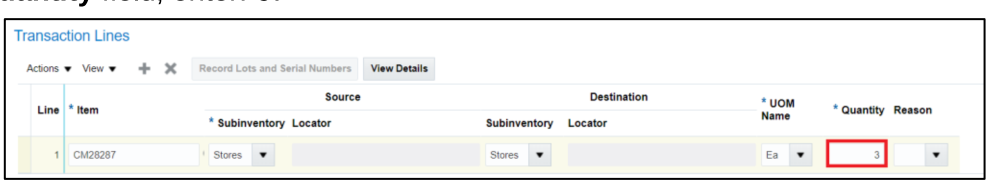
Create Interorganization Transfer

11. Click the **Tasks** panel tab and then, select **Create Interorganization Transfer**.
12. Ensure that Organization 001 is selected. If not, click **Change Organization** and then, select **001** in the **Organization** list.

    Note: If you have returned to the Inventory Management page, repeat step 11.
13. In the **Destination Organization** list, select **002- Atlanta**.
14. In the **Transaction Type** list, select **Intransit Shipment**. This field should automatically populate for you.
15. Click the **Generate Shipment Number** button and record your shipment number_______.



16. In the **Transaction Lines** region, click the **Add** ➕ icon.
17. In the **Item** field, enter: `CM28287`.
18. In the **Source Subinventory** field, select **Stores**.
19. In the **Destination Subinventory** field, select **Stores**.
20. In the **Quantity** field, enter: `3`.

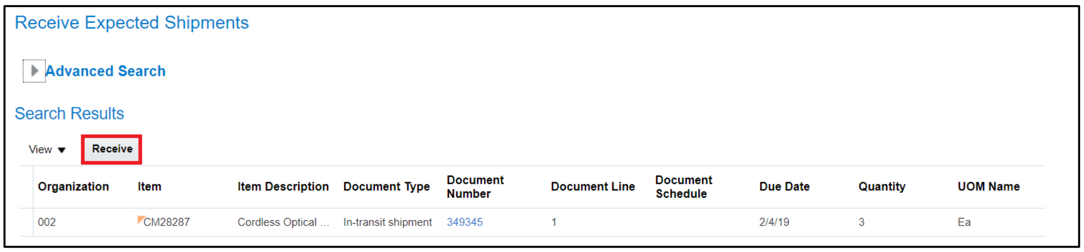


21. Click the **Submit** button. A message that your transactions have been processed appears on the screen. Click **OK**.

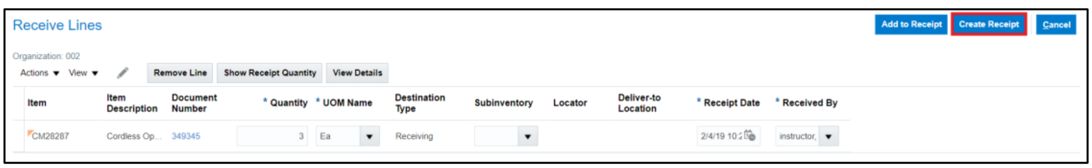
Navigate to Receipts Work Area

22. On the **Inventory Management** page, click the **Tasks** panel tab and then, in the **Show Tasks** list, select **Receipts**.
23. Select **Receive Expected Shipments**.
24. Ensure that Organization 002 is selected. If not, click **Change Organization** and then, select **002** in the Organization field.

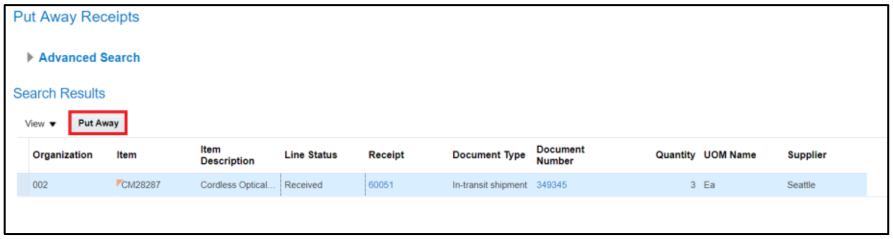
    Note: If you have returned to the Inventory Management page, repeat steps 22 and 23.
25. On the **Receive Expected Shipments**, in the **In-Transit Shipment** field, enter your in-transit shipment number that you recorded in step# 15.
26. Click the **Search** button.
27. Select the record and then, click the **Receive** button.



28. Click the **Show Receipt Quantity** button. This action defaults the quantity entered for Interorganization transfer.
29. Click the **Create Receipt** button.



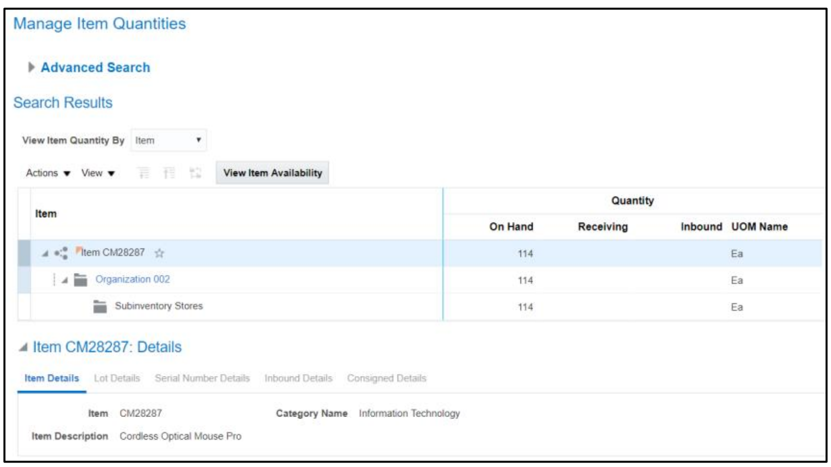
30. On the **Create Receipt** page, click the **Submit** button. Note the receipt number here ____________for use later in the exercise.
31. Click **OK** to confirm.
32. Click **Done** to return to the **Inventory Management** page.
33. Click the **Tasks** panel tab and then, in the **Show Tasks** list, select **Inventory**.
34. Select **Manage Item Quantities**.
35. In the **Item** field, enter `CM28287`.
36. Click **Search**. Review the On Hand Quantity column for Organization 002.
37. Click **Done** to return to the Inventory Management page.
38. Click the **Tasks** panel tab and then, in the **Show Tasks** list, select **Receipts**.
39. Select **Put Away Receipts**.
40. Enter your **Receipt** (that you noted in step# 29) or **In-Transit Shipment** number.
41. Click the **Search** button.
42. Select the record and click the **Put Away** button.



43. Click the **Submit** button.
44. Click the **OK** button to close the confirmation message.
45. Click **Done** to return to the Inventory Management page.

Review the On-hand Quantity in the Destination Organization

46. On the **Inventory Management** page, click the **Tasks** panel tab and show tasks for Inventory.
47. Select the **Manage Item Quantities** task.
48. In the **Advanced Search** region, in the **Item** field, enter: `CM28287`.
49. Click the **Search** button.
50. Click the **Expand** icon next to your organization to see on-hand in all subinventories.
51. Click the **Expand** icon next to the subinventory that was received against.



52. Verify the on-hand quantity is correct based upon the transactions you performed. The on-hand quantity should have increased by 3.

Practice Complete:

In this practice, you created an Interorganization Transfer transferring material between two different warehouses in separate inventory organizations.

Practice 14-1: Setting Up Material Status Control and Creating Subinventory Transfer for Disallowed Transaction

Note to instructor: Demonstrate this practice to the students.

Overview

In this practice, you use the Material Status Control functionality to control subinventory transfer transactions for the given subinventory. In addition, you use material status to disallow a subinventory transfer transaction from being created.

In this scenario, the Supply Chain Application Administrator is creating a new material status. The Supply Chain Application Administrator needs to disallow subinventory transfer transactions for a particular subinventory. You can use this subinventory to store defective material and transfers from this subinventory to other subinventories need to be prohibited.

Prerequisites: None

User Login: scmXX.student

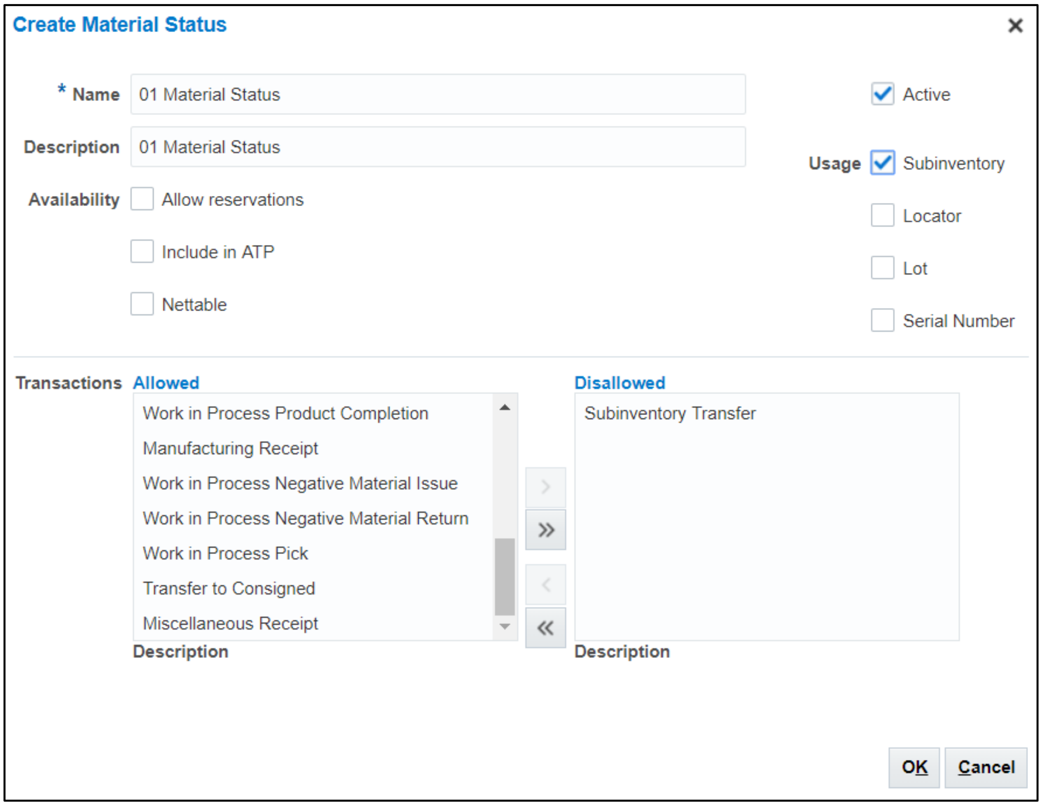
Summary of Tasks

- Create Material Status
- Assign Material Status to Subinventory
- Create Subinventory Transfer Transaction

Steps

Create Material Status

1. From the **Navigator**, under **Others**, select **Setup and Maintenance**.
2. On the **Setup and Maintenance** page, select the **Manufacturing and Supply Chain Materials Management** offering from the top-left.
3. In the **Functional Areas** region, select the **Inventory Management** functional area. A list of corresponding tasks appears on the right.
4. In the **Task** region, click the **Manage Material Statuses** task. The **Manage Material Statuses** page appears.
5. In the **Search Results** region, click the **Create** icon. The **Create Material Status** dialog box appears.
6. In the **Name** field, enter: `XX Material Status`. Replace XX with your student number. For example: 01 Material Status.
7. In the **Description** field, enter: `XX Material Status`. Replace XX with your student number.
8. In the **Allowed** column, select **Subinventory Transfer** and then, click the › icon to move it to the **Disallowed** column. Subinventory Transfer should now appear in the Disallowed column.
9. In the **Usage** region, select the **Subinventory** check box.



10. Click **OK** to close the **Create Material Status** dialog box.
11. Click **Save and Close** on the **Manage Material Statuses** page to return to the **Setup and Maintenance** page.

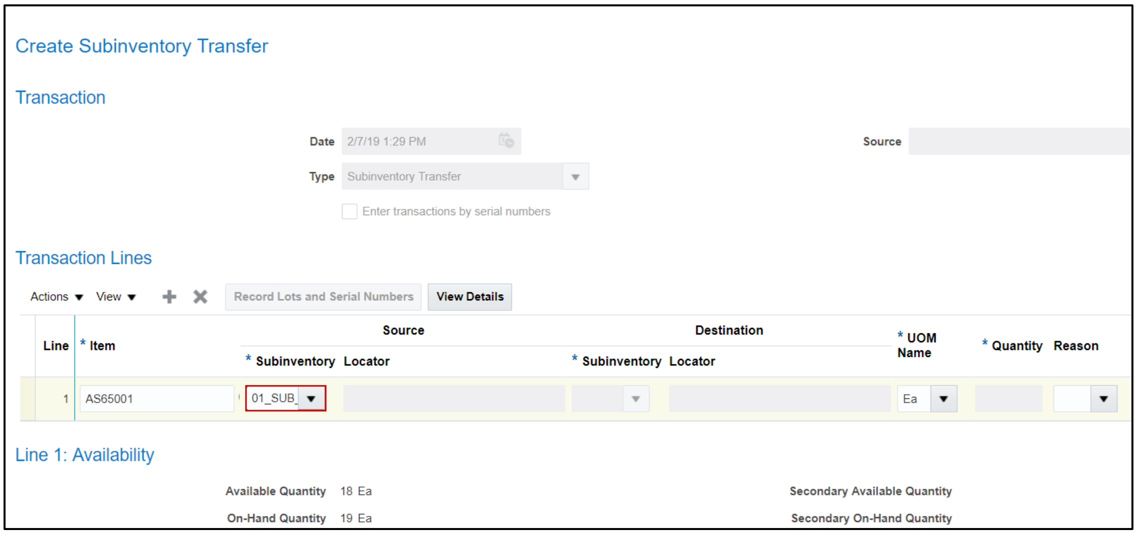
Assign Material Status to Subinventory

12. On the **Setup and Maintenance** page, in the **Task** region, click the **Manage Subinventories and Locators** task. The **Manage Subinventories** page appears.
13. If the **Select Organization** pop-up is not displayed, click the **Change Organization** button to see a list of **Inventory Organizations**.
14. Select Organization **001** and click **OK**.
15. Click the **Create**  icon to create a new **Subinventory**. The **Create Subinventory** page appears.
16. In the **Subinventory** field, enter: `XX_SUB_Initials`. Replace XX with your student number followed by SUB and your initials. For example: 01_SUB_JD if your student number is 01 and your name is John Doe.
17. In the **Description** field, enter: `XX_SUB_Initials`.
18. In the **Material Status** list, select: `XX Material Status` that you created in step# 6. Replace XX with your student number.
19. Click **Save and Close**.
20. Click **OK** to close the confirmation message.

Create Subinventory Transfer Transaction

21. From the **Navigator**, under **Supply Chain Execution**, select **Inventory Management**.
22. Click the **Tasks** panel tab and then, select **Create Subinventory Transfer**.

23. Ensure that Organization 001 is selected. If not, click the **Change Organization** button and select 001. Then, click **OK**.
24. On the **Create Subinventory Transfer** page, in the **Transaction** region, in the **Type** list, **Subinventory Transfer**.
25. In the **Transaction Lines** region, click the **Add** icon.
26. In the **Item** field, enter: `AS65001`.
27. In the **Subinventory Locator** field, enter or select: `XX_SUB_Initials`. Replace XX with your student number. This is the subinventory you created in step# 16.
28. Notice that your **Subinventory XXSUB** is not available for selection. This is because the Material Status associated with your Subinventory prohibits the transaction type Subinventory Transfer.



Practice Complete:

In this practice, you set up Material Status Control using the Manage Material Statuses page and disallowed a subinventory transfer transaction from being created.

Practice 15-1: Running Min-Max Planning at the Organization Level

Instructor Note: Demonstrate this practice to the students.

Overview

In this practice, you set up and execute min max planning at the Organization level. You define the min max parameters for the item and run the min max planning report for the item in an organization.

After an item is configured, you run the min-max planning process for the newly defined item. The report runs and a requisition is generated to replenish the inventory level up to the maximum quantity defined for the item.

Inventory Control personnel periodically run the min-max planning process to generate the min-max planning report and to generate requisitions to buy, transfer or manufacture parts to replenish the warehouse. The report can be run for all min-max planned items in an organization or for individual items, categories of items or items controlled by individual planners or buyers.

In this scenario, you run the min-max process for an individual item.

Prerequisites: None

User Login: scmXX.student (replace XX with your student number)

Summary of Tasks

- Define New Item to use in Min-Max Planning
- Run the Min-Max Scheduled Process
- View the Min-Max Report
- Process Supply Orchestration and View the Transfer Order

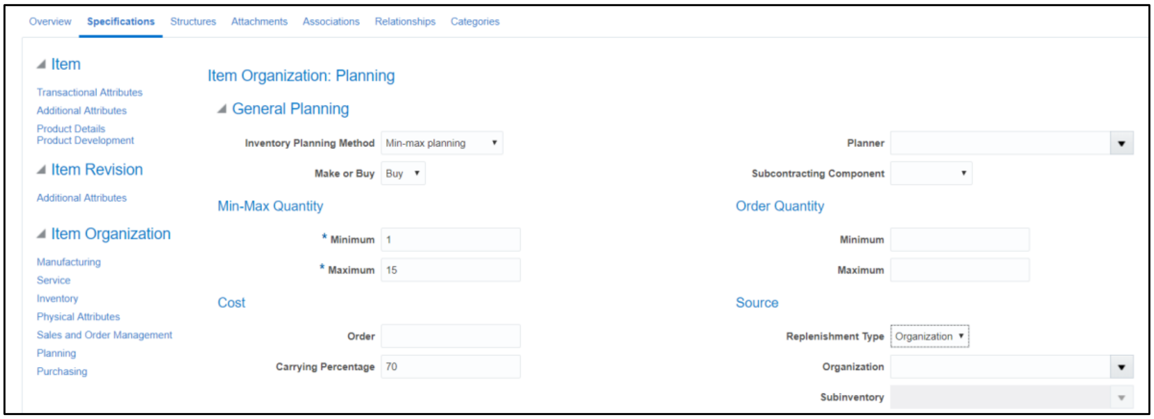
Steps

Define New Item to use in Min-Max Planning

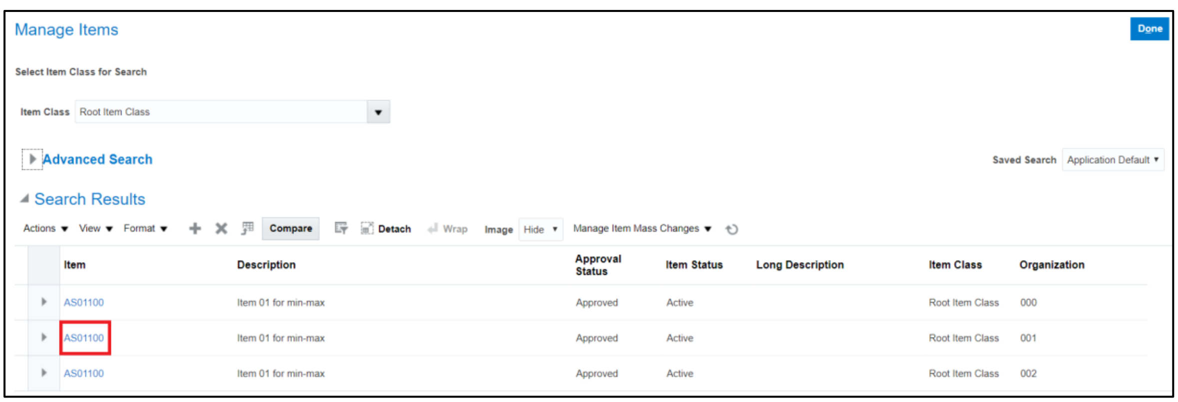
1. From the **Navigator**, under **Product Management**, click **Product Information Management**.
2. Click the **Tasks** panel tab and then, select the **Create Item** task.
3. In the **Create Item** dialog box, in the **Organization** field, enter: `000`.
4. Leave the **Create New** option selected.
5. In the **Item Class** list, select **Root Item Class**.
6. In the **Available List** column, select **Purchased Item**.
7. Click the icon to move it to the **Selected List** column. Notice that the **Selected List** column now has **Finished Goods** and **Purchased Items**.

   Note: Finished Goods may appear as FG – Design Items.
8. Click the **OK** button to close the **Create Item** dialog box. The **Create Item** page appears.
9. In the **Item** field, enter: `ASXX100`. Replace XX with student number.
10. In the **Description** field, enter: `Item XX for min-max`. Replace XX with your student number.
11. Click the **Save** button.

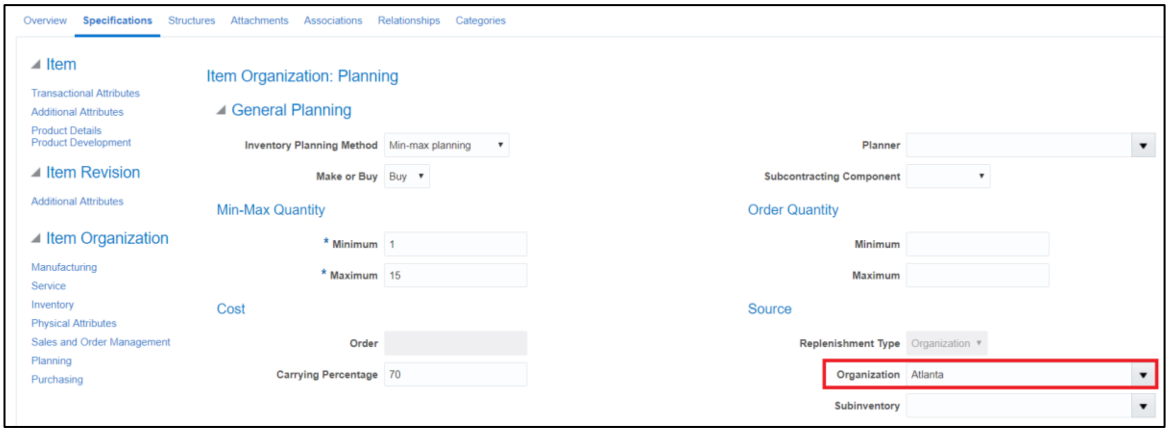
12. Note the item number here: ________________. This item will be used later in this demo.
13. Click the **Specifications** tab.
14. Under **Item Organization**, click the **Planning** link.
15. In the **General Planning** region, in the **Inventory Planning Method** list, select **Min-max planning**.
16. In the **Min-Max Quantity** region, in the **Minimum** field, enter: `1` and in the **Maximum** field, enter: `15`.
17. In the **Source** section, in the **Replenishment Type** list, select **Organization**.



18. Click the **Associations** tab.
19. Click the **Select and Add** icon.
20. Search for **Organization 001** and then, click the **Apply** button.
21. Search for **Organization 002** and then, click the **Apply** button.
22. Click the **Done** button to close the **Select and Add: Organization** dialog box.
23. Click the **Save and Close** button at the top of the page.
24. Click the **Tasks** panel tab and then, select the **Manage Items** task.
25. In the **Advanced Search** region, in the **Item** field, enter: `ASXX100`.
26. Click the **Search** button.
27. Click the item link for the record with Organization 001.



28. Click the **Specifications** tab.
29. Under **Item Organization**, click the **Planning** link.
30. In the **Source** region, in the **Organization** list, select **Atlanta 002**.

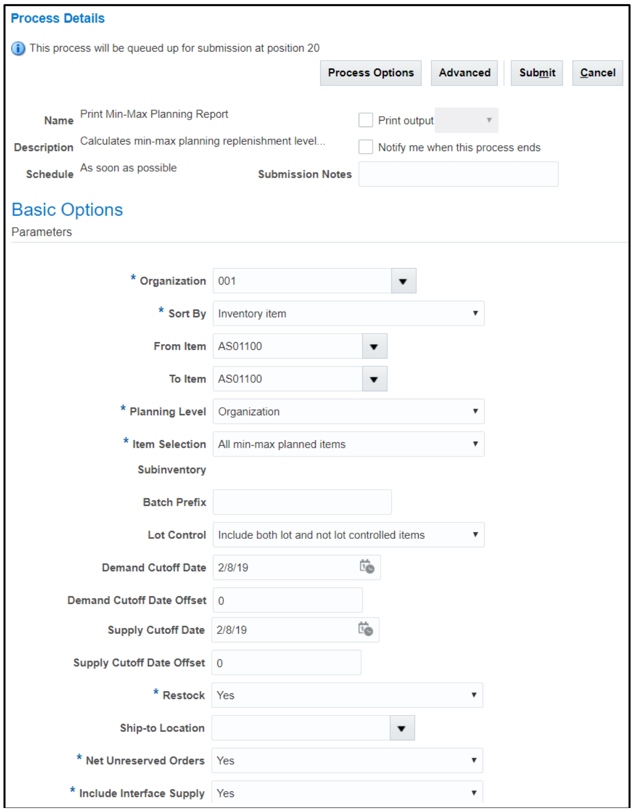


31. Click the **Save and Close** button at the top of the page.

Run the Min-Max Scheduled Process

32. From the **Navigator**, under **Tools**, select **Scheduled Processes**.
33. Click the **Schedule New Process** button. The **Schedule New Process** dialog box appears.
34. In the **Name** field, enter `Print Min-Max` and tab out of the field. Notice that Print Min-Max Planning Report scheduled process appears. Click **OK** to close the dialog box.
35. Click **OK** to close the **Schedule New Process** dialog box.
36. In the **Process Detail** dialog box, in the **Basic Options** region, select or enter values as follows:

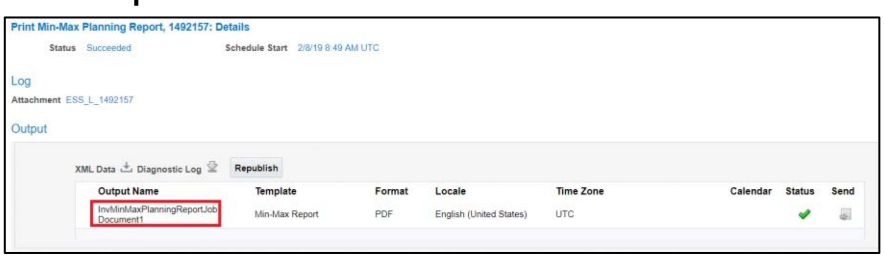
Field	Value
Organization	001
Sort By	Inventory item
From Item	Your New Item
To Item	Your New Item
Planning Level	Organization
Item Selection	All min-max planned items
Lot Control	Include both lot and not lot controlled items.
Demand Cutoff Date	Current Date
Demand Cutoff Date Offset	0
Supply Cutoff Date	Current Date
Supply Cutoff Date Offset	0
Restock	Yes



37. Additionally, perform the following steps:
    a. On the top-right of the Process Details dialog box, click the **Advanced** button.
    b. Click the **Output** tab.
    c. Click the **Add Output Document** icon.
    d. In the **Format** list, select **PDF**.
    e. Click the **Submit** button.
38. Record the Scheduled Process identifier here____________.
39. Click the **OK** button to close the confirmation message.

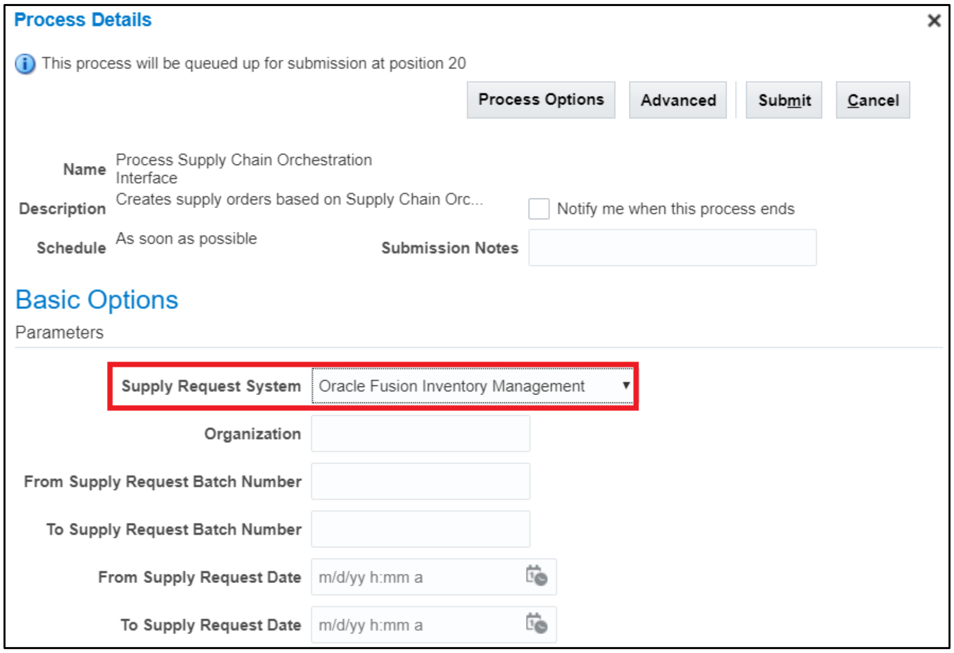
View the Min-Max Report

40. Click the **Refresh** icon. Wait until the status is succeeded.
41. Select the line with the Print Min-Max Planning report process that was just executed.
42. Scroll down to the **Output** section and click the file name link.



43. Review the **Minimum Quantity**, **Maximum Quantity**, and **Reorder Quantity** in the report.
44. Click the **Schedule New Process** button. The **Schedule New Process** dialog box appears.
45. In the **Name** field, enter `Process Supply` and tab out of the field.

46. The **Process Supply Chain Orchestration Interface** scheduled process appears. Click **OK**.
47. In the **Process Details** dialog box, in the **Supply Request System** list, select **Oracle Fusion Inventory Management**.

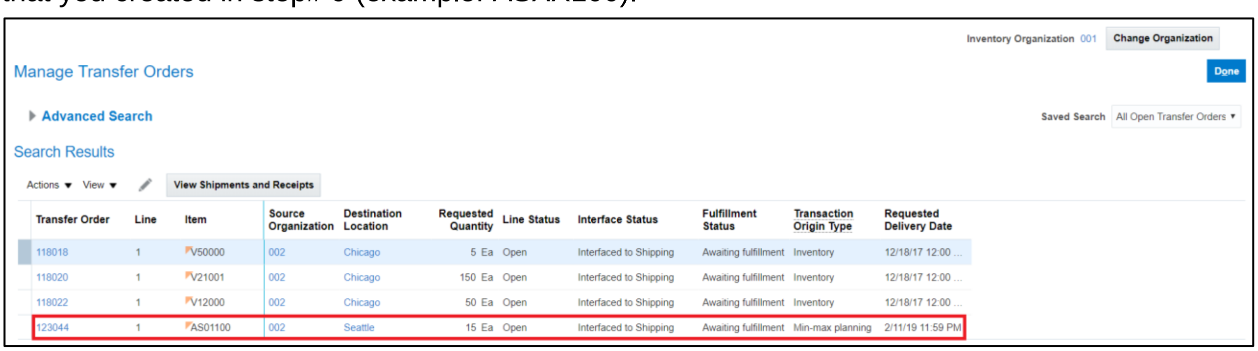


48. Click **Submit** and note down the Scheduled Process identifier here_____________.
49. Click **OK** to close the confirmation message.
50. Click the **Refresh** icon. Wait until the status is Succeeded.

Process Supply Orchestration and View the Transfer Order

51. From the **Navigator**, under **Supply Chain Execution**, select **Inventory Management**.
52. Click the **Tasks** panel tab and show tasks for Inventory.
53. Select the **Manage Transfer Orders** task.
54. On the **Manage Transfer Orders** page, ensure that Organization 001 is selected in the top right. If not, click **Change Organization** and select Organization 001.

    Note: If you have returned to the Inventory Management page, repeat steps 52 and 53.
55. In the **Source Organization** list, select **002 Atlanta**.
56. Click **Search**.
57. In the **Search Results** region, notice that a Transfer Order has been created for the item that you created in step# 9 (example: ASXX100).



Practice Complete

In this practice, you set up and execute min max planning at the Organization level.

Practice 15-2: Running Min-Max Planning at the Subinventory Level

Overview

In this practice, you run the Min-Max Planning report at the subinventory level.

In this scenario you need to replenish one of your subinventories that has been configured to support min-max planning. Min-max planning is performed by running the Min-max planning report. By selecting the subinventory level planning and specifying a subinventory, you run min-max planning for a single subinventory only.

User Login: scmXX.student (XX is the student number assigned to you)

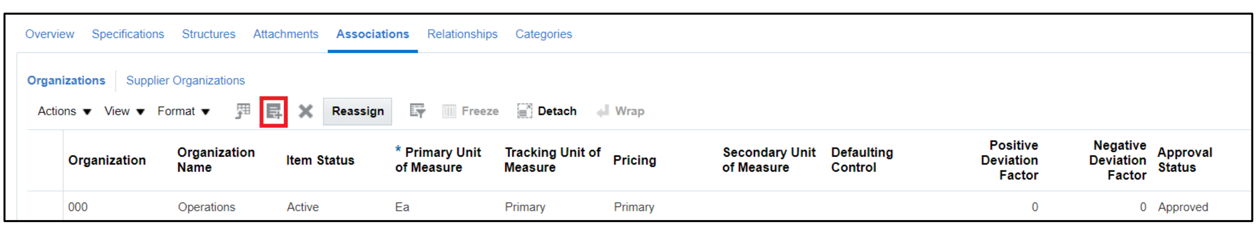
Summary of Tasks

- Create a new item
- Create a subinventory with required min-max parameters
- Run the min-max planning process for the subinventory
- View the Min-Max Report
- View Movement Request Created by Min-max Planning Process

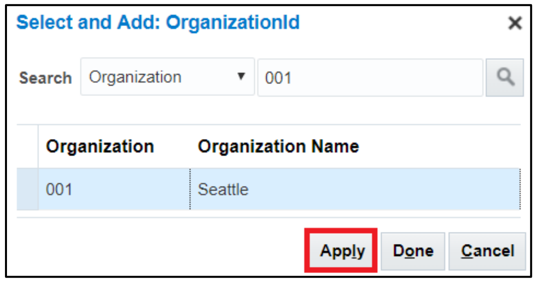
Steps

Define New Item to use in Min-Max Planning

1. From the **Navigator**, under **Product Management**, select **Product Information Management**.
2. Click the **Tasks** panel tab and then, select the **Create Item** task.
3. In the **Create Item** dialog box, in the **Organization** field, enter: `000`.
4. Leave the **Create New** option selected.
5. In the **Item Class** list, select **Root Item Class**.
6. In the **Available List** column, select **Purchased Item**.
7. Click the › icon to move it to the **Selected List** column. Notice 'Finished Goods' (or FG – Design Items) and 'Purchased Item' appear in the Selected List column. Click **OK**.
8. In the **Item** field, enter: `SCM_AB_XX`. Replace XX with your student number.
9. In the **Description** field, enter an appropriate description.
10. Click the **Save** button.
11. Click the **Associations** tab.
12. Click the **Select and Add** icon.



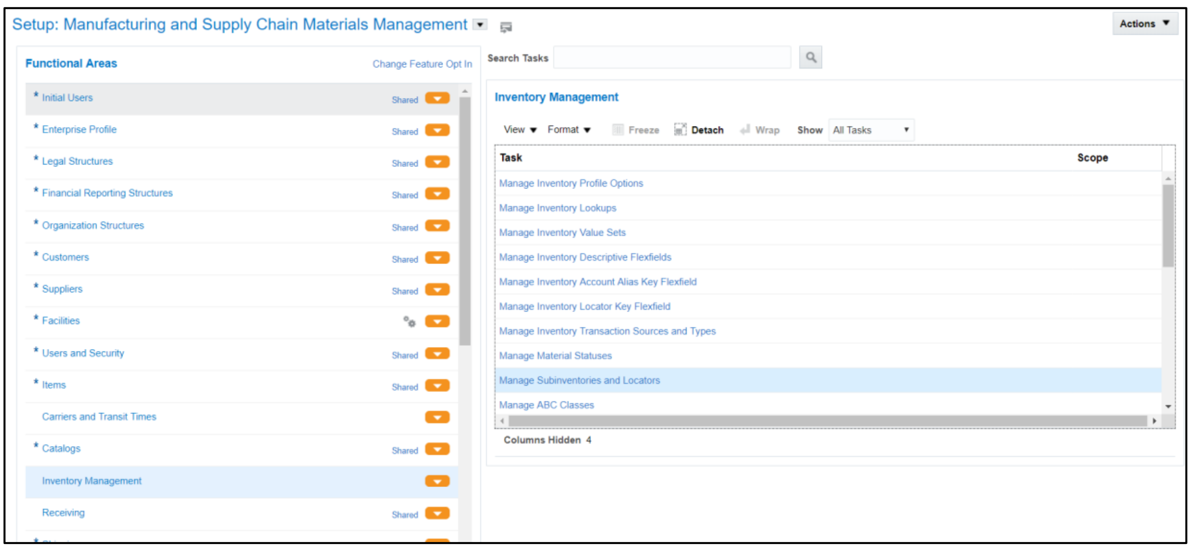
13. Search for **Organization 001** by entering **001** in the **Search** field and click the **Search** icon.
14. Select **Organization 001** and click **Apply**.



15. Click the **Done** button once **Organization 001** has been added.
16. Click the **Save and Close** button in the top-right of the page.

Create New Subinventory to use in Min-Max Process Data Entry Details

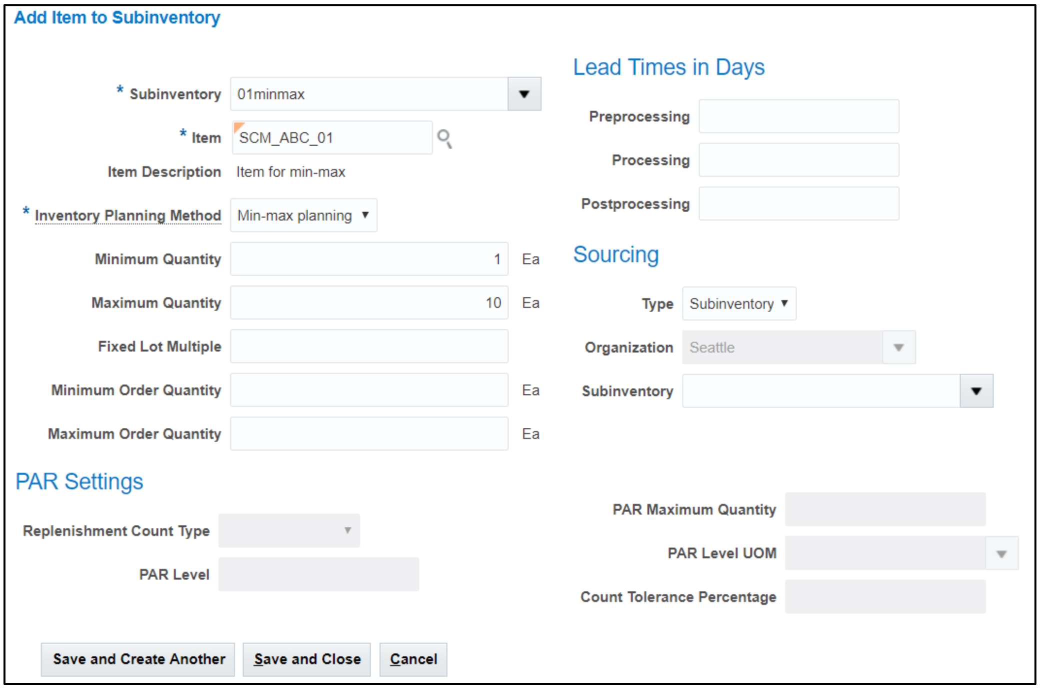
17. From the **Navigator**, under **Others**, select **Setup and Maintenance**.
18. On the **Setup and Maintenance** page, click the **Manufacturing and Supply Chain Materials Management** offering.
19. On the **Setup: Manufacturing and Supply Chain Materials Management** page, click the **Inventory Management** functional area, and then click the **Manage Subinventories and Locators** task.



20. On the **Manage Subinventories** page, select Organization **001** and click **OK**.
21. Click the **Create** + icon.
22. In the **Subinventory Name** field, enter `XXMINMAX`. Replace XX with your initials.
    Note: You will need to remember your subinventory name for later in this practice.
23. In the **Description** field, enter an appropriate description.
24. Click the **Save and Close** button.
25. Click the **OK** button to close the Confirmation dialog window.
26. Click the **Manage Item Subinventories** button.
27. On the **Manage Item Subinventories** page, in the **Search Results** region, click the **Add** + icon.
28. In the **Item** field, enter the item that you recorded earlier in this practice in step# 8.
29. In the **Inventory Planning Method** list, select **Min-max planning**.

30. In the **Minimum Quanity** field, enter: `1` and in the **Maximum Quantity** field, enter: `10`.
31. In the **Sourcing** section, in the **Type** list, select **Subinventory**.

    Note: Selecting Subinventory causes the min-max planning to create a movement request. To create a transfer order that does a subinventory transfer within the same organization, select Organization as the Source Type and enter the same organization you are creating the new subinventory under (001 in this use case).



32. Click the **Save and Close** button.
33. Click the **Done** button.

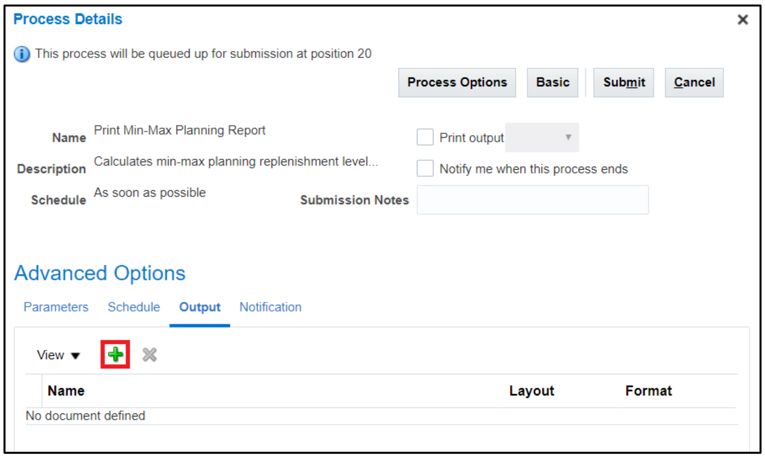
Run the Min-Max Scheduled Process

34. From the **Navigator**, under **Tools**, select **Scheduled Processes**.
35. Click the **Schedule New Process** button.
36. In the **Name** field, enter `Print Min-Max` and tab out of the field. **Print Min-Max Planning Report** appears. Click **OK** to close the Schedule New Process dialog box.
37. In the **Process Detail Parameters** dialog box, enter or select values as follows:

Field	Value
Organization	001
Sort By	Inventory Item
From Item	Item number you recorded in Step 8
To Item	Item number you recorded in Step 8
Planning Level	Subinventory
Item Selection	All min-max planned items
Subinventory	Your Subinventory

Lot Control	Include both lot and not lot controlled items
Demand Cutoff Date	Current Date
Demand Cutoff Date Offset	0
Supply Cutoff Date	Current Date
Supply Cutoff Date Offset	0
Restock	Yes

38. Click the **Advanced** button.
39. Click the **Output** tab.
40. Click the **Add** icon.



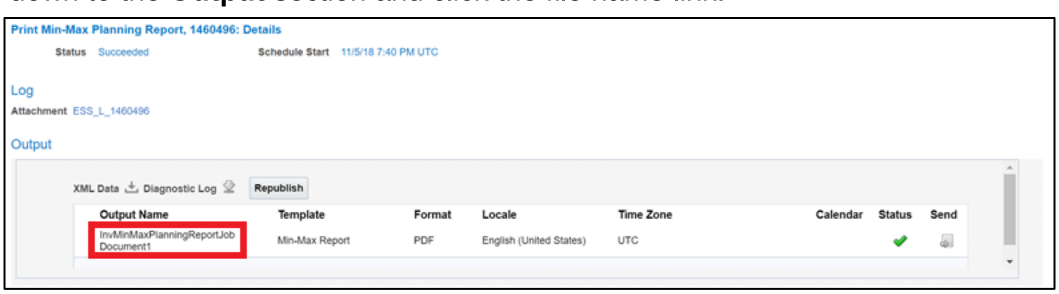
41. In the **Format** list, select **PDF**.
42. Click the **Submit** button.
43. Click the **OK** button to close the confirmation message.

View the Min-Max Report

44. Click the **Refresh** icon and select the line with the Print Min-Max Planning report process that was just executed.

    Note: Click the **Refresh** icon until the status changes to “Succeeded”.
45. Select the row with Print Min-Max Planning Report.

46. Scroll down to the **Output** section and click the file name link.



47. View the report details. Confirm the Minimum Quantity, Maximum Quantity, and Reorder Quantity.
48. Close the Oracle BI Publisher Window by clicking the “X” in the upper right hand corner.

View Movement Request Created by Min-max Planning Process

49. From the **Navigator**, under **Supply Chain Execution**, select **Inventory Management**.
50. Click the **Tasks** panel tab and then, select **Manage Movement Requests**.
51. Ensure that Inventory Organization **001** is selected. If not, click **Change Organization** and then, select 001.
52. In the **Movement Request** field, enter your movement request in both fields. Alternatively, you can search using the item you recorded in step 8.
53. Click **Search**.
54. Click the Movement Request number to view the movement request that was created by min-max processing.

Movement Request	Line Number	Movement Request Type	Required Date	Transaction Type	Item	Requested Quantity	Delivered Quantity	UOM Name	Line Status	Created By
205891	1	Replenishment	2/20/19 12:00 AM	Movement Requ...	SCM_ABC_01	10		Ea	Preapproved	SCM00.INSTR...

Practice Complete:

In this practice, you ran the Min-Max Planning report at the subinventory level.

Practice 16-1: Creating Cycle Count, Recording Count Sequences, and Approving Count Sequences

Instructor Note: Demonstrate this practice to the students.

Overview

The Counts work area shows count sequences that need to be recorded as well as count sequences that have been recorded but have discrepant quantities from the current system quantity and need to be approved based on the approval settings of the cycle count.

In this scenario, the warehouse manager performs a miscellaneous receipt into a subinventory, defines a cycle count, generates count sequences, records count sequences and approves count sequences. This process shows adjusting inventory with the correct item quantity.

Prerequisites: None

User Login: scmXX.student (Replace XX with your student number)

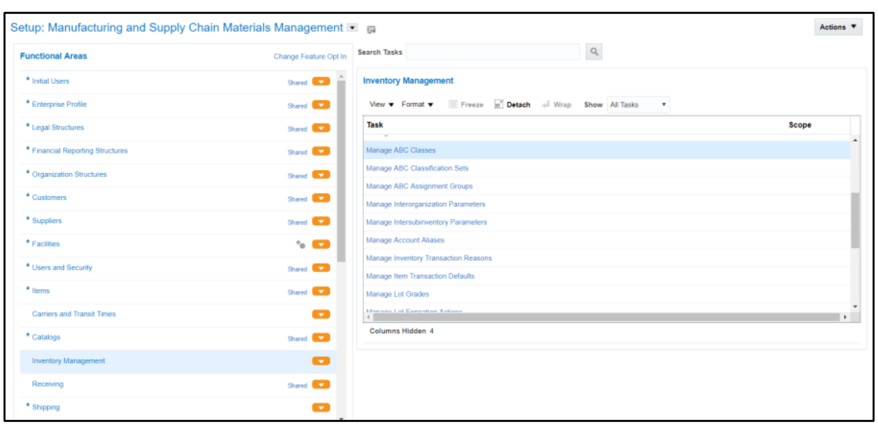
Summary of Tasks

- Review the ABC Setups
- Create a Subinventory
- Perform a Miscellaneous Receipt
- Create a Cycle Count
- Generate Count Schedules and Count Sequences
- Record and Approve the Count

Steps:

Review the ABC Setups

1. From the **Navigator**, under **Others**, select **Setup and Maintenance**.
2. On the **Setup and Maintenance** page, select the **Manufacturing and Supply Chain Materials Management** offering.
3. Select the **Inventory Management** functional area and then, select the **Manage ABC Classes** task.



4. On the **Manage ABC Classes** page, ensure that Org 001 is selected. If not, click the **Change Organization** button and select it. Then, review the following:

ABC Class	Description
Class A	Most Important Items
Class B	Medium Important Items
Class C	Less Important Items

5. Click **Cancel** to return to the **Setup and Maintenance** page.
6. Select the **Manage ABC Classification Sets** task.
7. On the **Manage ABC Classification Sets** page, review the following:

Field	Value
Name	ABC_OnHandValue_Set
Criteria	Current on-hand value
Content Scope	Subinventory
Subinventory	Stores
Valuation Scope	Subinventory
Status	Complete

8. Click **Done** to return to the **Setup and Maintenance** page.
9. Select the **Manage ABC Assignment Groups** task.
10. On the **Manage ABC Assignment Groups** page, review the following:

Field	Value
Assignment Group Name	ABC_OnHandValue_GRP
ABC Classification Set	ABC_OnHandValue_Set
Criteria	Current on-hand value
Subinventory	Stores
Valuation Scope	Subinventory
Number of ABC Assignments	All

Create an Item

11. From the **Navigator**, under **Product Management**, select **Product Information Management**.
12. Click the **Tasks** panel tab and then, select the **Create Item** link.
13. In the **Organization** field, select **000**.
14. In the **Item Class** field, select **Root Item Class**.
15. Click **OK**. The **Create Item** page appears.
16. In the **Item** field, enter `Item_XX_AB`. Replace XX with your student number. Record this item here ____________for use later in this practice.
17. In the **Description** field, enter `Item for Cycle Counts`.

18. Accept the default for the **Item Status** list and the **Lifecycle Phase** list.
19. Click **Save**.
20. Click the **Associations** tab and then, click the **Select and Add** icon.
21. In the **Select and Add: Organization** dialog box, enter `001` and then, click the **Search** icon.
22. Select Organization **001-Seattle** and then, click **Apply**.
23. Click **Done** to close the dialog box and return to the **Create Item** page.
24. Select **Save and Close** on the top-right of the Create Item page.

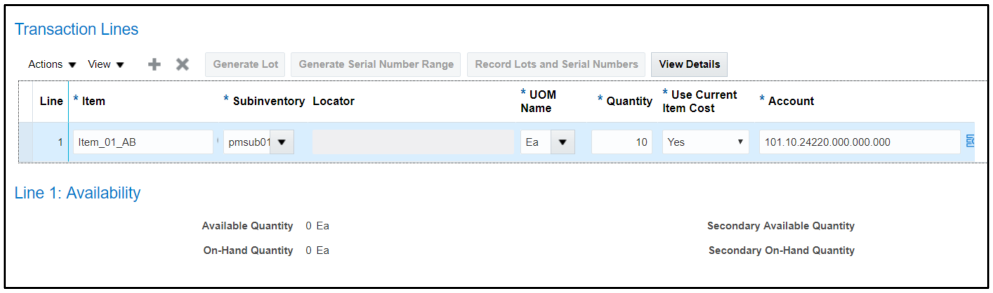
Create a Subinventory

25. From the **Navigator**, under **Others**, select **Setup and Maintenance**.
26. On the **Setup and Maintenance** page, select the **Manufacturing and Supply Chain Materials Management** offering.
27. Select the **Inventory Management** functional area and then, select the **Manage Subinventories and Locators** task.
28. On the **Manage Subinventories** page, in the **Select Organization** dialog box, select Organization 001.

    Note: If the **Select Organization** dialog does not appear, ensure that organization 001 is selected in the top right of the page.
29. Click the **Create** icon.
30. In the **Subinventory** field, enter your initials followed by SUB and your student number. For example, MJSUB01.
31. In the **Description** field, enter an appropriate description for your subinventory.
32. Click **Save and Close**.
33. Click **OK** to close the confirmation message and return to the **Manage Subinventories** page.

Perform a Miscellaneous Receipt

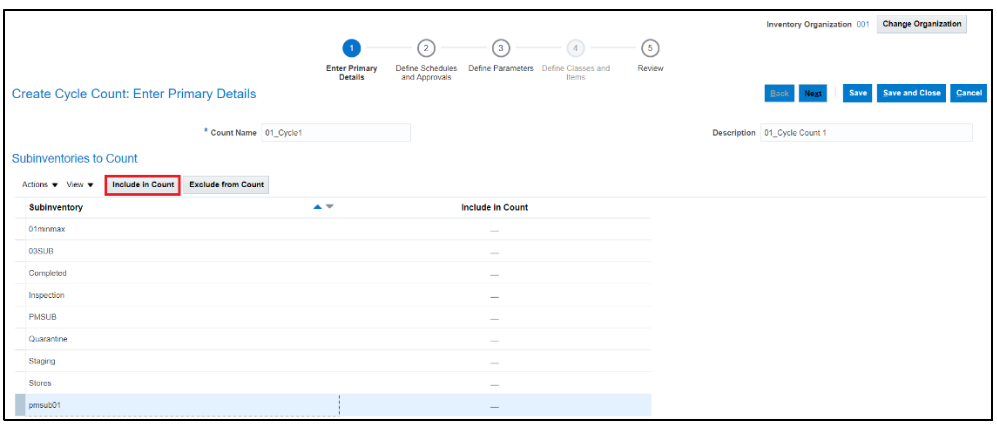
34. From the **Navigator**, under **Supply Chain Execution**, select **Inventory Management**.
35. Click the **Tasks** panel tab and show the tasks for **Inventory**.
36. Select the **Create Miscellaneous Transaction** link. The **Create Miscellaneous Transaction** page appears.
37. Ensure the 001 organization is selected. If not, click **Change Organization** and select 001.
38. In the **Type** field, select **Miscellaneous Receipt**.
39. In the **Use Current Item Cost** list, select **Yes**.
40. In the **Transaction Lines** region, click the **Add** icon.
41. In the **Item** field, enter the item (i.e., Item_XX_AB where XX is your student number) you created earlier in this practice. Then, tab out.
42. In the **Subinventory** field, enter the subinventory you created the previous section of this practice.
43. In the **Quantity** field, enter: `10`.
44. In the **Account** field, enter `101.10.24220.000.000.000`.



45. Click **Submit**. A message stating your transaction processed with no issues appears. Click **OK** to close the message.

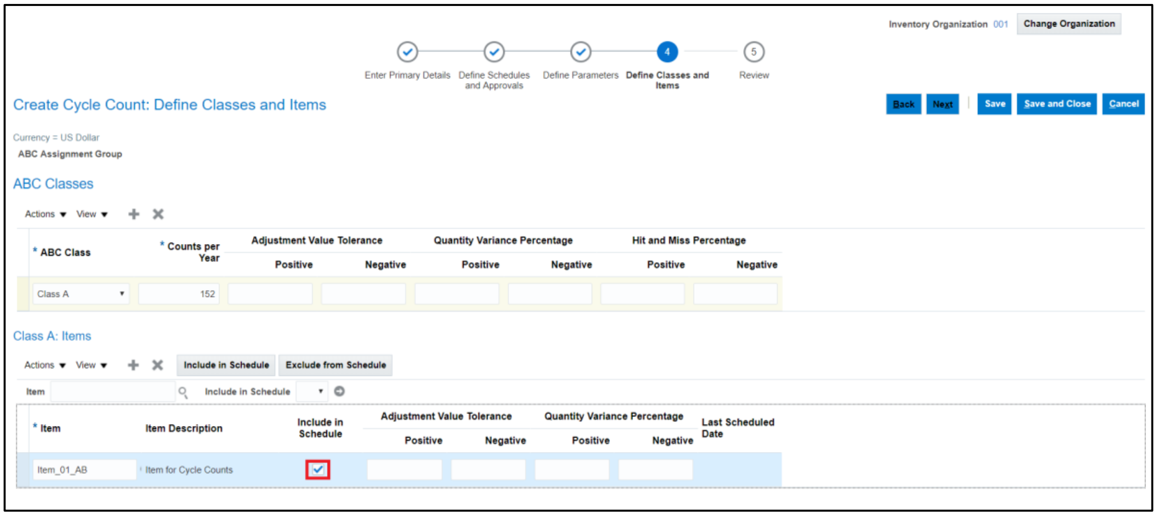
Create a Cycle Count

46. On the **Inventory Management** page, click the **Tasks** panel tab and show tasks for **Counts**.
47. Click the **Create Cycle Count** task link. The **Create Cycle Count: Enter Primary Details** train stop appears.
48. In the **Count Name** field, enter: `Your Student Number_CYCLE1` (For example: 01_CYCLE1).
49. In the **Description** field, enter: `Your Student Number_Cycle Count 1` (For example: 01_Cycle Count 1).
50. In the **Subinventories to Count** region, select your subinventory (subinventory you created in step# 30) and click the **Include in Count** button.



51. Click the **Next** button. The **Define Schedules and Approvals** train stop appears.
52. In the **Schedules** section, select the **Automatically Schedule** checkbox.
53. In the **Frequency** field, select **Daily**.
54. In the **Workday Schedule** field, select **Operations**.
55. In the **Approvals** section, click the **Approval Required** check box.
56. In the **Approval Type** option, select **Always**.
57. Click the **Next** button. The **Define Parameters** train stop appears.
58. In the **Starting Count Sequence** field, enter: `10000`.
59. In the **Maximum Days Before Late** field, enter: `1` .
60. Accept the default settings under the **Serial Number Options** section.
61. Click the **Next** button. The **Define Items and Classes** train stop page appears.
62. In the **ABC Classes** region, click the **Add Row** icon.

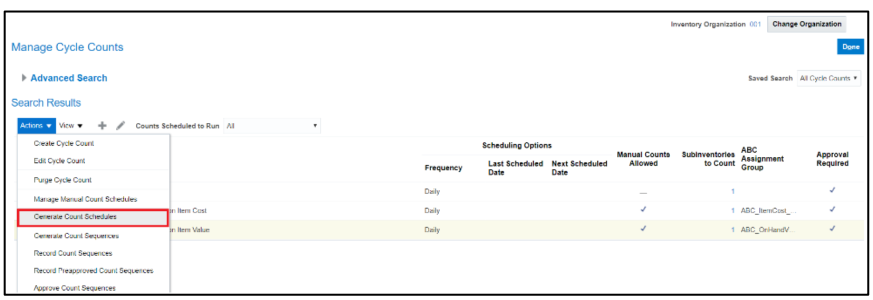
63. In the **ABC Class** list, select **Class A**.
64. In the **Counts per Year** field, enter: `152` and then, tab out of field.
65. In the **Class A: Items** region, click the **Add Row** icon.
66. Enter your item in the item field and tab out.
67. Select the **Include in Schedule** check box.



68. Click the **Next** button. The **Review** train stop appears.
69. Review all Cycle Count settings on this train stop.
70. Click the **Define Classes and Items** train stop in the Cycle Count Definition train and verify the counts per year is **152**. Click **Save and Close**. The **Manage Cycle Counts** page appears with the cycle count just created listed in the search results.

Generate Count Schedules and Count Sequences

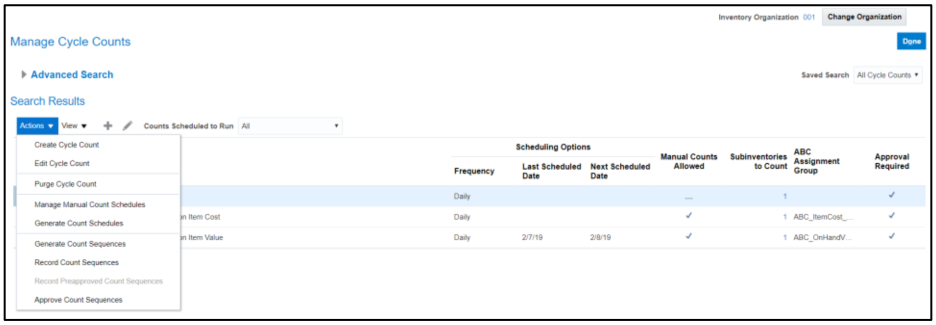
71. On the **Manage Cycle Counts** page, select the row with "**Your Student Number_CYCLE1**".
72. Click the **Actions** menu and then, select **Generate Count Schedules**.



73. Click the **OK** button to close the confirmation message.
74. Now, let's review the concurrent process from this action. From the **Navigator**, under **Tools**, select **Scheduled Processes**.
75. The **Scheduled Processes** page appears. Click the **Refresh** icon and verify that the **Generate Count Schedules** process has a status of **Succeeded**.

    Note: Do NOT attempt the next action until the **Generate Count Schedules** process has succeeded.
76. From the **Navigator**, under **Supply Chain Execution**, select **Inventory Management**.

77. Click the **Tasks** panel tab and show tasks for **Counts**.
78. Select the **Manage Cycle Counts** link.
79. On the **Manage Cycle Counts** page, select **Your Cycle Count** (for example: 01_Cycle1 where 01 is your student number), and then click the **Actions** menu. Select **Generate Count Sequences**. A confirmation message appears. Click **OK**.

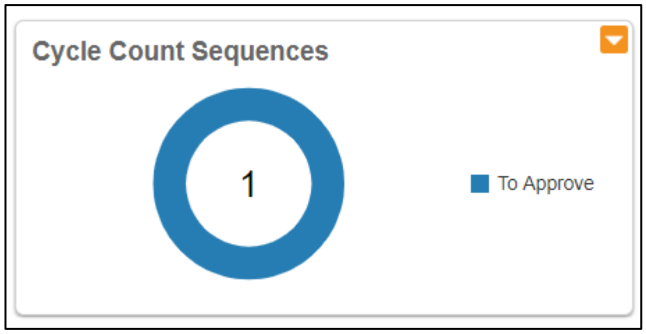


80. Review the concurrent process from this action. From the **Navigator**, under **Tools**, select **Scheduled Processes**.
81. The **Scheduled Processes** page appears. Click the **Refresh** icon and verify the **Generate Count Sequences** process has a status of **Succeeded**.

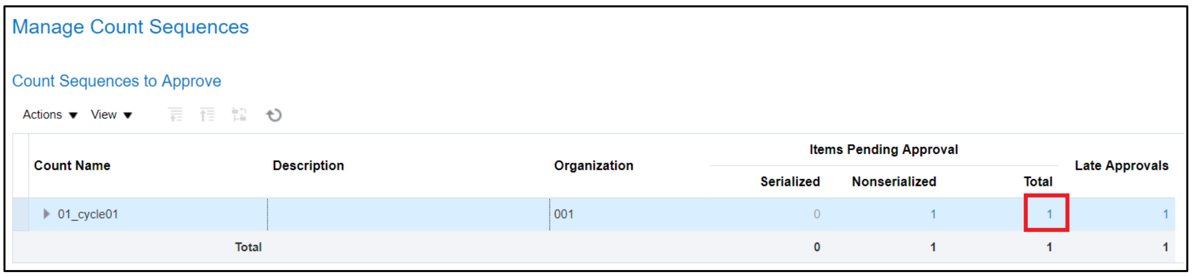
Record and Approve the Count

82. Next, let's navigate back to the **Counts** work area. From the **Navigator**, under **Supply Chain Execution**, select **Inventory Management**.
83. Click the **Tasks** panel tab and select the **Record Count Sequences** link. The **Record Count Sequence** page appears.
84. In the **Advanced Search** region, in the **Count Name** field, enter: `Your Student Number_Cycle1` (for example: 01_Cycle1, where 01 is your student number).
85. Click the **Search** button. The Count Sequence is shown in the Search Results region.
86. Select the Count Sequence. In the **Count Quantity** field, enter `5`.

87. Accept the default, or select a name in the **Counted By** list.
88. Click **Submit**. A confirmation message indicating the number of count sequences processed appears.
89. Click the **OK** button to return to the **Inventory Management** work area.
90. On the **Cycle Count Sequences** infolet, count sequences needing approval are displayed.



91. Click the appropriate section of the ring on the infolet that displays count sequences to approve.
92. In the **Total** column for your count, click the number link. The **Approve Count Sequences** page displays with the count sequence populated in the Search Results table.


Manage Count Sequences

Count Sequences to Approve

Actions View

Count Name	Description	Organization	Items Pending Approval			Late Approvals
			Serialized	Nonserialized	Total	
01_cycle01		001	0	1	1	1
Total			0	1	1	1

93. Accept the default, or select from the list of values a **Reviewed By** name, select the row and click the **Approve** button.
94. Notice that the **Count Sequence Status** changes from **Pending approval** to **Approved, not submitted**.
95. Click the **Submit** button. A confirmation message indicating the approval process was completed and the adjustments were processed appears.
96. On the **Inventory Management** page, click the **Tasks** panel tab and show tasks for Inventory. Then, select the **Manage Item Quantities** task. Ensure that Org 001 is selected.
97. In the **Item** field, enter your item (e.g., Item_XX_AB). Ensure the **On Hand** check box is selected. Click **Search**. Review and notice the change in the on-hand quantity.

Practice Complete:

In this practice, you created cycle count, recorded count sequences, and approved count sequences.