

ORACLE



# Inventory Management

## Use Case Activity Guide

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SCM Cloud Implementation Workshop



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# Introduction

This document provides high-level steps to execute the setups and process flows for the use cases discussed in the Inventory Management implementation workshop. It is intended for the workshop participants only and is not meant to be consumed independently.

## 1. SCM Cloud and Inventory Overview

### Security Overview

Creating a new user, assigning roles and provisioning data access.

#### Process/Transaction Flow:

1. Navigate to Setup and Maintenance > Search > Manage Job
2. Click the Create icon to create a new job. Enter Basic Details:

The screenshot shows the 'Create Job: Basic Details' screen. At the top, there is a navigation bar with five numbered steps: 1 (Basic Details), 2 (Details), 3 (Evaluation Criteria), 4 (Profiles), and 5 (Review). Step 1 is highlighted with a green circle. Below the navigation bar, the title 'Create Job: Basic Details' is displayed. On the left, there is a section titled 'Basic Details' with a help icon. The form contains the following fields:

- \*Effective Start Date: 1/1/51
- \*Job Set: Common Set
- Action Reason: (dropdown menu)
- \*Name: SCM Workshop Participant 001
- \*Code: SCMWP001

At the bottom of the screen, there are buttons for Back, Next, Save, Submit, and Cancel.

3. Click on Next. The Job Details page is displayed.
4. Click on Submit. Click on Done.
5. Navigate to Setup and Maintenance > Search > Manage HCM Role Provisioning Rules
6. Click the '+' icon to create a new Role Mapping:



≡ vision

## Create Role Mapping ②

Save Save and Close Cancel

\*Mapping Name SCM Workshop Participant 001

\*From Date 5/21/21

To Date m/d/yy

Conditions ②

|                    |                      |
|--------------------|----------------------|
| Legal Employer     | User Person Type     |
| Business Unit      | HR Assignment Status |
| Department         | Assignment Status    |
| Job                | Resource Role        |
| Position           | Party Type Usage     |
| Grade              | Contact Role         |
| Location           | Manager with Reports |
| Assignment Type    | Manager Type         |
| System Person Type | Responsibility Type  |

7. Add the Associated Roles:

Associated Roles ②

View ▾ Format ▾

| Role Name         | Delegation Allowed       | Requestable              | Self-requestable                    | Autoprovision |
|-------------------|--------------------------|--------------------------|-------------------------------------|---------------|
| Cost Accountant   | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |               |
| Warehouse Manager | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |               |
| Order Manager     | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |               |
| Inventory Manager | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |               |

8. Click on Save and Close. Click on Done.

9. Navigate to Setup and Maintenance > Search > Manage Users

10. Click on the '+' icon to create a new user:



## Create User

### Personal Details

|              |                                  |            |                                                                                             |
|--------------|----------------------------------|------------|---------------------------------------------------------------------------------------------|
| *Last Name   | User 001                         | *Email     | scmpartuser@invalid.com                                                                     |
| First Name   | SCM Participant                  | *Hire Date | 5/21/21  |
| Middle Names |                                  | Phone      |                                                                                             |
| Title        | <input type="button" value="▼"/> | Work Fax   |                                                                                             |

### User Details

Enter user name  Link user account  
  No user account selected.

### User Notification Preferences

Send user name and password

### Employment Information

|                 |                                                                                                                  |            |                      |
|-----------------|------------------------------------------------------------------------------------------------------------------|------------|----------------------|
| *Person Type    | Employee                        | Department | <input type="text"/> |
| *Legal Employer | US1 Legal Entity                | Location   | <input type="text"/> |
| *Business Unit  | US1 Business Unit              | Mail Stop  | <input type="text"/> |
| Job             | SCM Workshop Participant 001  | Manager    | <input type="text"/> |
| Grade           | <input type="text"/>                                                                                             |            |                      |

11. Click on Autoprovision Roles. Note that the roles associated with the Job are automatically added:



| Role Name         | Status        | From Date | Provisioning Method |
|-------------------|---------------|-----------|---------------------|
| Employee          | Add Requested | 5/21/21   | Automatic           |
| Warehouse Manager | Add Requested | 5/21/21   | Automatic           |
| Cost Accountant   | Add Requested | 5/21/21   | Automatic           |
| Inventory Manager | Add Requested | 5/21/21   | Automatic           |
| Order Manager     | Add Requested | 5/21/21   | Automatic           |

12. Click on Save and Close. Click on Done.

13. Click on the Navigator and go to Tools > Security Console > Users > Search for the user



The screenshot shows the 'User Accounts' page in the vision application. On the left sidebar, there are icons for Roles, Users (selected), and Analytics. The main area has a search bar with 'scmpartuser' entered, a sort by dropdown set to 'Display Name', and two buttons: 'Add User Account' and 'Compare Users'. The search results table has columns for Display Name, User, Status, and Action. One row is shown: 'SCM Participant User 001' with User Name 'SCM Participant.User 001', Email 'scmpartuser@invalid.com', Status 'Active', and Locked 'No'.

14. Click on the user to open the User Account Details page. Click on Reset Password:

The screenshot shows the 'User Account Details' page for 'SC...'. The sidebar includes icons for Roles, Users (selected), Analytics, Certificates, User Categories, Single Sign-On, API Authentication, and Administration. The main area has tabs for 'User Information' and 'Account Information'. Under 'User Information', details are shown: User Category 'DEFAULT', User Name 'SCM Participant.User 001', First Name 'SCM Participant', and Last Name 'User 001'. Under 'Account Information', the Password Expiration Date is '6/6/33', and checkboxes for 'Active' (checked) and 'Locked' (unchecked) are present. A 'Associated Worker Information' section shows 'Worker Name' 'SCM Participant User 001'. A modal dialog titled 'Reset Password' is open, containing options to 'Automatically generate password' (radio button) or 'Manually change the password' (radio button, selected). It also displays a 'Password Policy' message: 'Simple: At least 8 characters, 1 number'. Below the policy are fields for 'New Password' and 'Confirm New Password', both containing masked text. Buttons for 'Reset Password' and 'Cancel' are at the bottom of the dialog. At the bottom of the page, there are sections for Order Manager, ORA\_DOO\_ORDER\_MANAGER\_JOB, and other status indicators.

15. Once the password has been reset, click on the Edit button. The Edit User Account page is displayed.

16. Click on Add Role and select the Order Entry Specialist role:



The screenshot shows the Oracle vision user interface. On the left, there's a sidebar with icons for Roles, Users, Analytics, Certificates, User Categories, Single Sign-On, API Authentication, and Administration. The main area has tabs for 'User Information' and 'Account Information'. In 'User Information', the 'User Category' is set to 'DEFAULT' and the 'User Name' is 'SCM Participant.User 001'. In 'Account Information', the 'Password Expiration Date' is '8/22/21', and there are checkboxes for 'Active' (checked) and 'Locked' (unchecked). A modal window titled 'Add Role Membership' is open, showing a search bar with 'Order Entry Specialist' and a search result count of 1. The result shows 'Name: Order Entry Specialist' and 'Code: ORA\_FOM\_ORDER\_ENTRY\_SPECIALIST\_JOB'. At the bottom of the modal are buttons for 'Add Role Membership', 'Done', 'Assigned Roles', and 'Remove All Roles'. Below the modal, a table lists roles assigned to the user, including 'Cost Accountant' with code 'ORA\_CST\_COST\_ACCOUNTAN...' and an 'Assignable' checkbox checked.

17. Click on Add Role Membership. Click on Save and Close. Click on Done.
18. Navigate to Setup and Maintenance > Search > Manage Data Access for Users
19. Click the '+' icon to Create Data Access for the newly created user:



Manage Data Access for Users [?](#)

Users without Data Access  Users with Data Access

Security Context All

Search

User Name SCM Participant.User

Role

Create Data Access for Users

| User Name            | Role                   | Security Context       | Security Context Value |
|----------------------|------------------------|------------------------|------------------------|
| SCM Participant.User | Inventory Manager      | Inventory organization | p01                    |
| SCM Participant.User | Order Entry Specialist | Business unit          | US1 Business Unit      |
| SCM Participant.User | Order Manager          | Business unit          | US1 Business Unit      |

Save and Close Cancel

20. Click on Save and Close. Click on Done.

21. Logout and login. Verify that the newly created user has access to the assigned Business Unit and Inventory Organization.



## 2. Building Blocks of Supply Chain Management

### Review Item Organization

Review the existing Item Organization and verify the parameters set.

#### Process/Transaction Flow:

1. Navigate to Setup and Maintenance > Product Management > Item Organizations > Manage Item Organizations

(Note that the Task can also be accessed through other Functional areas)

2. Do a generic search and click on “000”. Click the Edit icon.

The screenshot shows a table titled 'Search Results' under the heading 'Manage Item Organizations'. The table has two columns: 'Organization' and 'Organization Name'. The data rows are as follows:

| Organization | Organization Name                    |
|--------------|--------------------------------------|
| 000          | Operations                           |
| 996          | External Item Organization for PSFT1 |
| 997          | External Item Organization for SAP1  |
| 998          | External Item Organization for EBS1  |
| 999          | External Item Organization for LEG2  |

3. Review the Basic Information:

Note that the Management BU and LE are optional for Item Organizations.

The screenshot shows the 'Edit Item Organization: Operations' form. It is divided into two main sections: 'Basic Information' and 'Location Address'.

**Basic Information:**

|                          |                                      |
|--------------------------|--------------------------------------|
| * Name: Operations       | Management Business Unit: [dropdown] |
| Organization: 000        | Primary Ledger: [dropdown]           |
| * Usage: Item management | Legal Entity: [dropdown]             |
|                          | Status: Active                       |

**Location Address:**

|                                                                                  |                                   |
|----------------------------------------------------------------------------------|-----------------------------------|
| Name: Headquarters                                                               | Internal or External: Internal    |
| Address: 500 Oracle Parkway<br>REDWOOD CITY, CA 94065 San Mateo<br>UNITED STATES | Internal Address Line: [dropdown] |

4. Click Next.

Review the Item Master Organization and the Item Grouping behavior. Click Cancel and come out of the form.



Manage Item Organization Parameters: Operations

|                              |                         |
|------------------------------|-------------------------|
| * Item Master Organization   | Operations              |
| Item Grouping Behavior       | Definition Organization |
| Item Definition Organization | Operations              |
| * Starting Revision          | A                       |
| Additional Information       |                         |
| Context                      |                         |

## Review the Inventory Organization

Review the existing Inventory organization and verify the parameters set.

### Process/Transaction Flow:

1. Navigate to Setup and Maintenance > Product Management > Inventory Organizations > Manage Inventory Organizations

(Note that the Task can also be accessed through other Functional areas)

2. Do a generic search and click on any organization like “001”/“002” etc. Click the Edit icon.
5. Review the Basic Information:

Note that the Management BU and LE are mandatory for Inventory Organizations.

Edit Inventory Organization: Atlanta

|                             |                                                                   |
|-----------------------------|-------------------------------------------------------------------|
| Basic Information           |                                                                   |
| * Name                      | Atlanta                                                           |
| Organization                | 002                                                               |
| Usage                       | Inventory management                                              |
| * Management Business Unit  | US1 Business Unit                                                 |
| Primary Ledger              | US Primary Ledger                                                 |
| * Legal Entity              | US1 Legal Entity                                                  |
| Profit Center Business Unit | US1 Business Unit                                                 |
| Status                      | Active                                                            |
| Location Address            |                                                                   |
| * Name                      | Atlanta                                                           |
| Address                     | 3353 Peachtree Rd NE<br>ATLANTA, GA 30326 Fulton<br>UNITED STATES |
| Internal or External        | Internal                                                          |
| Internal Address Line       |                                                                   |

3. Click Next. Review the other parameters:



## Manage Inventory Organization Parameters: Atlanta

### Financial Information

Management Business Unit US1 Business Unit      Legal Entity US1 Legal Entity  
 Primary Ledger US Primary Ledger      Profit Center Business Unit US1 Business Unit

[General](#) [Lot, Serial Number, and Packing Unit](#) [Item Sourcing Details](#) [Additional Information](#)

### General Information

#### Item Definition Settings

\* Item Master Organization Operations  
 Item Grouping Behavior Definition Organization  
 Item Definition Organization Atlanta  
 \* Starting Revision A

#### Inventory Settings

\* Schedule Operations  
 Time Zone (UTC+00:00) Coordinated Universal Time  
 Locator Control No locator control  
 Enable inventory tracking by project  
 Enable inventory tracking by country of origin  
 Allow negative balances  
 Allow negative on-hand transactions  
 Use original receipt date  
 Round reorder quantity  
 Automatically cancel transfer order backorders  
 Use current item cost

#### Additional Usages

Organization is a manufacturing plant  
 Organization performs maintenance activities  
 Integrated System Type  
 Organization represents a contract manufacturer  
 Supplier  
 Supplier Site  
 Organization is associated with an internal customer

#### Movement Request

Pick Slip Batch Size  
 Replenishment Movement Request Grouping  
 Automatically delete picks when movement requests are canceled  
 Close movement request lines at pick confirmation

## Create Shift

Create a 10 hour shift starting 9 AM. This can be used in the Schedule created subsequently.

### Process/Transaction Flow:

1. Navigate to Setup and Maintenance > Manufacturing and Supply Chain Materials Management > Facilities > Manage Facility Shifts
2. Create a Time Shift:

### Manage Shifts

#### ▶ Search

#### ▲ Search Results

| Name                      | Type | Start Time | End Time | Duration | Code | Category         | Description                        |
|---------------------------|------|------------|----------|----------|------|------------------|------------------------------------|
| 12 Hour Shift             | Time | 7:00 AM    | 7:00 PM  | 12 Hours |      |                  | 12 Hour - 7:00 AM to 7:00 PM       |
| 3 hour 2:00 PM - 05:00 PM | Time | 2:00 PM    | 5:00 PM  | 3 Hours  | 3H   |                  | UK Part Time                       |
| 5 hour 8:30AM-01:30PM     | Time | 8:30 AM    | 1:30 PM  | 5 Hours  | 5H   |                  | UK Part time                       |
| 6 hour 8:30 AM - 2:30 PM  | Time | 8:30 AM    | 2:30 PM  | 6 Hours  | 6H   |                  | UK Part Time                       |
| 8 Hour Shift              | Time | 9:00 AM    | 5:00 PM  | 8 Hours  |      |                  | 8 Hour Work Day Shift              |
| 8 Hour Shift - Facility   | Time | 8:00 AM    | 4:00 PM  | 8 Hours  |      |                  | 8 Hour Shift - Facility            |
| 8 Hour Shift - Night      | Time | 4:00 AM    | 12:00 AM | 8 Hours  |      |                  | 8 Hour Shift - Night               |
| 8 Hour Shift - Office     | Time | 9:00 AM    | 5:00 PM  | 8 Hours  |      | Work from office | 8 Hour Shift - Office              |
| AU Day Shift              | Time | 9:00 AM    | 5:00 PM  | 8 Hours  | DAY  |                  | Australia Day Shift - 9 am to 5 pm |
| Afternoon Shift           | Time | 12:00 PM   | 9:00 PM  | 9 Hours  |      |                  | Afternoon Shift - 12 PM to 9 PM    |



- Provide the details as below:

**Create Time Shift**

|                                                                                     |                      |
|-------------------------------------------------------------------------------------|----------------------|
| * Name                                                                              | 10 Hour Shift        |
| Description                                                                         | 10 Hour Shift - Demo |
| Code                                                                                |                      |
| Category                                                                            |                      |
| * Start Time                                                                        | 9:00 AM              |
| * Shift Detail Type                                                                 | None                 |
| * Duration                                                                          | 10 Hours             |
| <input type="button" value="Save and Close"/> <input type="button" value="Cancel"/> |                      |

## Create Workday Pattern

Create a Workday Pattern for Monday to Friday working.

### Process/Transaction Flow:

- Navigate to Setup and Maintenance > Manufacturing and Supply Chain Materials Management > Facilities > Manage Facility Shifts
- Create a Time Workday Pattern:

Manage Workday Patterns [?](#)

► Search

▲ Search Results

| Name                         | Type | Time     | Days   | Pattern                                                        |
|------------------------------|------|----------|--------|----------------------------------------------------------------|
| AU Day Pattern               | Time | 12:00 PM | Monday | Shift Pattern - Time<br>- 12 PM to 9 PM, Monday to Friday      |
| Afternoon Shift Monday Start | Time | 12:00 PM | Monday | Shift Pattern - Duration<br>- 8:30 am to 5:00 pm               |
| CA Day Pattern               | Time | 7:00 AM  | Monday | Shift Pattern - Elapsed<br>- CA night shift 8:00 PM to 8:00 AM |
| CA Night Shift Pattern       | Time | 7:00 AM  | Monday | Shift Pattern - Elapsed<br>- CA night shift 8:00 PM to 8:00 AM |

- Provide the details as below. Indicate the Length in days, and select the shift created earlier.



Create Time Workday Pattern

| * Name                                                                              | Demo - Monday to Friday |               |            |                   |             |
|-------------------------------------------------------------------------------------|-------------------------|---------------|------------|-------------------|-------------|
| Description                                                                         |                         |               |            |                   |             |
| * Length in Days                                                                    | 5                       |               |            |                   |             |
| <b>Workday Pattern Details</b>                                                      |                         |               |            |                   |             |
| Actions ▾ View ▾ + X Detach                                                         |                         |               |            |                   |             |
| Start Day                                                                           | End Day                 | Shift Name    | Shift Type | Shift Period Type | Shift       |
| 1                                                                                   | 5                       | 10 Hour Shift | ▼          | Time              | Work period |
| < >                                                                                 |                         |               |            |                   |             |
| <input type="button" value="Save and Close"/> <input type="button" value="Cancel"/> |                         |               |            |                   |             |

## Create Schedule

Create a new Inventory Organization to allow material handling like a distribution center.

### Process/Transaction Flow:

1. Navigate to Setup and Maintenance > Manufacturing and Supply Chain Materials Management > Facilities > Manage Schedules
2. Create a new Time Schedule

#### Manage Schedules ?

► Search

#### ▲ Search Results

Actions ▾ View ▾ Format ▾ + ▾ □ Freeze □ Detach □ Wrap

| Name                | Type    | From     | To       | Quarterly Type | Category | Description                                       |
|---------------------|---------|----------|----------|----------------|----------|---------------------------------------------------|
| 12 Hour Monday...   | Time    | 0        | 0        |                |          | 12 Hour - Monday to Friday                        |
| AU Salaried Sc...   | Elapsed | 5        | 5        |                | Work     |                                                   |
| Afternoon Shift ... | Time    | 12:00:00 | 12:00:00 |                |          | Afternoon Shift - 12 PM to 9 PM, Monday to Friday |
| CA Dav Schedule     | Time    | 1/1/13   | 12/31/33 |                |          | Canada Dav Schedule - 8:30 am to 5:00 pm          |

3. Provide the details like Name, Effective dates and the First day of the Week.



**Create Time Schedule**

|                       |                                     |
|-----------------------|-------------------------------------|
| * Name                | Demo Schedule                       |
| Description           | Demo Schedule                       |
| Category              |                                     |
| Quarterly Type        |                                     |
| * Effective from Date | 5/24/21                             |
| Active                | <input checked="" type="checkbox"/> |
| * Effective to Date   | 5/1/26                              |
| First Day of Week     | Monday                              |

**Schedule Details**

**Workday Patterns**   **Schedule Exceptions**

| Actions             | View         | +    | X              | Detach      |
|---------------------|--------------|------|----------------|-------------|
| Sequence            | Pattern Name | Type | Length in Days | Description |
| No data to display. |              |      |                |             |

**Save and Close**   **Cancel**

4. Add the workday pattern created earlier.

**Create Time Schedule**

|                       |                                     |
|-----------------------|-------------------------------------|
| * Name                | Demo Schedule                       |
| Description           | Demo Schedule                       |
| Category              |                                     |
| Quarterly Type        |                                     |
| * Effective from Date | 5/24/21                             |
| Active                | <input checked="" type="checkbox"/> |
| * Effective to Date   | 5/1/26                              |
| First Day of Week     | Monday                              |

**Schedule Details**

**Workday Patterns**   **Schedule Exceptions**

| Actions  | View                    | +    | X              | Detach      |
|----------|-------------------------|------|----------------|-------------|
| Sequence | Pattern Name            | Type | Length in Days | Description |
| 1        | Demo - Monday to Friday | Time | 5              |             |

**Save and Close**   **Cancel**



## Create Inventory Organization

Create a new Inventory Organization to allow material handling like a distribution center.

### Process/Transaction Flow:

1. Navigate to Setup and Maintenance > Product Management > Inventory Organizations > Manage Inventory Organizations
2. Click the + icon
3. Provide the Basic information as below, which includes the mandatory fields of BU and LE and then click Next.

Edit Inventory Organization: KH Distrib Org 1 ⓘ

Basic Information

|                            |                      |                             |                   |
|----------------------------|----------------------|-----------------------------|-------------------|
| * Name                     | KH Distrib Org 1     | Primary Ledger              | US Primary Ledger |
| Organization               | KHINVORG             | * Legal Entity              | US1 Legal Entity  |
| Usage                      | Inventory management | Profit Center Business Unit | US1 Business Unit |
| * Management Business Unit | US1 Business Unit    | Status                      | Active            |

Location Address

|         |                                                                         |                       |          |
|---------|-------------------------------------------------------------------------|-----------------------|----------|
| * Name  | Redwood City                                                            | Internal or External  | Internal |
| Address | 500 Oracle Parkway<br>REDWOOD CITY, CA 94065 San Mateo<br>UNITED STATES | Internal Address Line |          |

4. Enter the other details under “General”, “Lot, Serial, Number and Packing Unit”, “Item Sourcing Details” tabs as shown below. Select the Schedule that was created earlier.



## Manage Inventory Organization Parameters: KH Distrib Org 1

### Financial Information

Management Business Unit US1 Business Unit

Legal Entity US1 Legal Entity

Primary Ledger US Primary Ledger

Profit Center Business Unit US1 Business Unit

General Lot, Serial Number, and Packing Unit Item Sourcing Details Additional Information

#### General Information

##### Item Definition Settings

\* Item Master Organization Operations

Item Grouping Behavior Reference Organization

Item Definition Organization Atlanta

\* Starting Revision 0

##### Inventory Settings

\* Schedule Demo Schedule

Allow negative balances

Time Zone (UTC+00:00) Coordinated Universal Time

Allow negative on-hand transactions

Locator Control Locator control determined by system

Use original receipt date

Enable inventory tracking by project

Round reorder quantity

Enable inventory tracking by country of origin

Automatically cancel transfer order backorders

Use current item cost

##### Additional Usages

Organization is a manufacturing plant

Pick Slip Batch Size

Organization performs maintenance activities

Replenishment Movement Request Grouping

Integrated System Type

Automatically delete picks when movement requests are canceled

Organization represents a contract manufacturer

Close movement request lines at pick confirmation

Supplier

##### Movement Request

## Manage Inventory Organization Parameters: KH Distrib Org 1

### Financial Information

Management Business Unit US1 Business Unit

Legal Entity US1 Legal Entity

Primary Ledger US Primary Ledger

Profit Center Business Unit US1 Business Unit

General Lot, Serial Number, and Packing Unit Item Sourcing Details Additional Information

#### Lot Control

Uniqueness No uniqueness control

Allow Different Lot Status

Generation At item level

Automatically Create Lot UOM Conversion

#### Lot Generation

Prefix

Zero pad suffix

Total Length 30

#### Child Lot Control

Generation

Zero pad suffix

Prefix

Copy lot attributes

Total Length

Format validation

#### Serial Number Generation

Uniqueness Unique within model and inv

\* Starting Serial Number 1

Generation At organization level

System Selects Serial Numbers

Prefix



## Manage Inventory Organization Parameters: KH Distrib Org 1

### Financial Information

Management Business Unit US1 Business Unit      Legal Entity US1 Legal Entity  
Primary Ledger US Primary Ledger      Profit Center Business Unit US1 Business Unit

General Lot, Serial Number, and Packing Unit **Item Sourcing Details** Additional Information

#### Picking Defaults

|                           |                                                                                                        |                                                                                     |
|---------------------------|--------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| Picking Rule              | <input type="text"/>  | <input type="checkbox"/> Pick confirmation required                                 |
| Subinventory Order        | <input type="text"/>                                                                                   | <input type="checkbox"/> Overpicking for movement requests enabled                  |
| Locator Order             | <input type="text"/>                                                                                   | <input type="checkbox"/> Allow overpicking for special handling                     |
| Quantity Exception Reason | <input type="text"/>  | <input type="checkbox"/> Automatically populate picked quantity during pick confirm |
|                           |                                                                                                        | <input checked="" type="checkbox"/> Capture picking exceptions                      |

#### Item Sourcing Details

|              |                                                                                                        |                                                 |
|--------------|--------------------------------------------------------------------------------------------------------|-------------------------------------------------|
| Type         | <input type="text"/>  | <input type="checkbox"/> Purchasing by revision |
| Organization | <input type="text"/>  |                                                 |
| Subinventory | <input type="text"/>  |                                                 |

#### Distribution Parameters

Logistics services organization

5. Save and Close

6. Provide access to this organization to required users and roles. (Refer to the Security use cases)

## Create Subinventory

Create a new Subinventory in the new organization.

### Process/Transaction Flow:

1. Navigate to Setup and Maintenance > Manufacturing and Supply Chain Materials Management > Inventory Organizations > Manage Subinventories and Locators
2. Choose the Inventory Organization
3. Create a new subinventory



Create Subinventory ②

**Summary**

|                        |                                            |                                                        |       |
|------------------------|--------------------------------------------|--------------------------------------------------------|-------|
| * Subinventory         | DEO FG                                     | Picking Order                                          |       |
| Description            |                                            |                                                        |       |
| End Date               | m/d/y                                      | <input checked="" type="checkbox"/> Asset subinventory |       |
| * Material Status      | Active                                     | <input type="checkbox"/> Depreciable                   |       |
| Subinventory Type      | Storage                                    | <input checked="" type="checkbox"/> Quantity tracked   |       |
| Locator Control        | None                                       | <input type="checkbox"/> PAR location                  |       |
| Location               |                                            |                                                        |       |
| Locator Structure      | Four-Segment Locator Structure Instance    | Replenishment Count Method                             | Count |
| Default Locator Status | Default Replenishment Count Type Order par |                                                        |       |
| Source Type            |                                            |                                                        |       |

**Lead Times in Days**

|               |                |
|---------------|----------------|
| Preprocessing | Postprocessing |
| Processing    |                |

**Sourcing**

|              |                                                      |
|--------------|------------------------------------------------------|
| Type         | Subinventory                                         |
| Organization | Cancel Backorders Default to next level in hierarchy |

## Create Unit of Measure

Create a new Unit of Measure under the Quantity class.

### Process/Transaction Flow:

1. Navigate to Setup and Maintenance > Product Management > Items > Manage Units of Measure
2. Create a new UOM:

Manage Units of Measure ②

**Search**

**Search Results**

| Actions ▾ View ▾ Format ▾ + X ⏪ Freeze ⏪ Wrap Manage UOM Classes Manage UOM Standard Conversions |            |             |              |               |          |                        |                    |
|--------------------------------------------------------------------------------------------------|------------|-------------|--------------|---------------|----------|------------------------|--------------------|
| * UOM Code                                                                                       | * UOM Name | Description | * Class Name | Base UOM Name | End Date | Reciprocal Description | Plural Description |
| BX6                                                                                              | BX6        | Box of 6    | Quantity     | Ea            | m/d/y    |                        |                    |

3. Click on Manage UOM Standard Conversion. Set up the conversion units for the new UOM with the Base UOM.



| Actions ▾ View ▾ Format ▾ |             | +            | X             | Freeze     | Wrap     |
|---------------------------|-------------|--------------|---------------|------------|----------|
| * UOM Name ▲▼             | Description | * Conversion | Base UOM Name | Class Name | End Date |
| BX6                       | Box of 6    | 6            | Ea            | Quantity   | m/d/yy   |

## Manage Extensibility: Create Item Class

Create a new Item Class, so subsequently this can be used to create an EFF. Optionally EFF can also be created under an existing Item class.

### Process/Transaction Flow:

1. Navigate to Setup and Maintenance > Product Management > Items > Manage Item Classes
2. Click the + icon and add a new record. Provide the details as below and click Save and Close

The screenshot shows the 'Manage Item Classes' screen. On the left, there is a search bar with filters for 'Item Class Starts with' and 'Description Starts with'. Below the search is a table titled 'Search Results' with columns 'Name' and 'Description'. The table contains entries for 'Root Item Class', 'Automotive', and 'Commerce Cloud'. On the right, a modal dialog titled 'Create Item Class' is open. It has fields for 'Parent Item Class' (set to 'Root Item Class'), 'Item Class' (set to 'DEMO Computers'), 'Internal Name' (set to 'DEMO\_Computers'), and 'Description' (set to 'Computers'). There is also a 'Public' checkbox which is unchecked. At the bottom of the modal are three buttons: 'Save and Add Details', 'Save and Close', and 'Cancel'.

## Manage Extensibility: Create Item EFF

Create a new EFF to capture the Processor Speed under the Item Class created earlier.

### Process/Transaction Flow:

1. Navigate to Setup and Maintenance > Product Management > Items > Manage Item Attribute Groups and Attributes
2. Click the + icon



## Manage Attribute Groups

Flexfield Name Item Extended Attributes Flexfield Code EGO\_ITEM\_EFF

**Search**

|               |              |
|---------------|--------------|
| Display Name  | Enabled      |
| Description   | Translatable |
| Internal Name | Data Level   |
| Behavior      |              |

Search Results

| Display Name         | Internal Name | Enabled | Protected | Behavior | Translatable | Description |
|----------------------|---------------|---------|-----------|----------|--------------|-------------|
| No search conducted. |               |         |           |          |              |             |

- Provide the Attribute Group Display Name/Description/Behavior. Then click the + icon in Context usages.

## Create Attribute Group

Flexfield Name Item Extended Attributes Flexfield Code EGO\_ITEM\_EFF

|                                        |                                             |
|----------------------------------------|---------------------------------------------|
| * Display Name DEMO Processor          | <input checked="" type="checkbox"/> Enabled |
| * Internal Name DEMO Processor         | <input type="checkbox"/> Translatable       |
| * API name DemoProcessor               | * Behavior Single Row                       |
| Description                            | <input type="checkbox"/> Variant            |
| * Database View Name Prefix DEMOPROCES |                                             |
| Instruction Help Text                  |                                             |

Attributes

| Sequence            | Display Name | Internal Name | Data Type | Display As | Value Set | Default Type | Defau |
|---------------------|--------------|---------------|-----------|------------|-----------|--------------|-------|
| No data to display. |              |               |           |            |           |              |       |

- Enter the details as below:

| Context Usages            |              | Associated Categories        | Associated Pages |                 |
|---------------------------|--------------|------------------------------|------------------|-----------------|
| Actions ▾ View ▾ Format ▾ |              | Freeze                       | Detach           |                 |
| Name                      | Style to SKU | Master to Child Organization | View Privileges  | Edit Privileges |
| Item                      | None         | Defaulted                    | None             | None            |

- Now add attributes using the + icon.
- Provide the details for the Attribute name, Description, Column assignments. Optionally choose an existing Value Set or you can also create a new one if required.



Create Attribute [?](#)

|                 |                          |                                             |                |
|-----------------|--------------------------|---------------------------------------------|----------------|
| Flexfield Name  | Item Extended Attributes | Attribute Group Internal Name               | DEMO Processor |
| Flexfield Code  | EGO_ITEM_EFF             |                                             |                |
| * Name          | Demo Processor           | <input checked="" type="checkbox"/> Enabled |                |
| * Internal Name | Demo Processor           |                                             |                |
| * API Name      | demoProcessor            |                                             |                |
| Description     |                          |                                             |                |

**Column Assignment**

|                |                 |                                  |
|----------------|-----------------|----------------------------------|
| * Data Type    | Character       | <input type="checkbox"/> Indexed |
| * Table Column | ATTRIBUTE_CHAR1 |                                  |

**Validation**

|                       |               |                                   |                          |
|-----------------------|---------------|-----------------------------------|--------------------------|
| * Value Set           | 30 Characters | Range Type                        | <input type="checkbox"/> |
| Value Set Description |               | 30 Characters, no validation      |                          |
|                       |               | <input type="checkbox"/> Required |                          |

**Initial Default**

|              |  |
|--------------|--|
| Default Type |  |
|--------------|--|

7. Click Save and Close
  8. Now query the item class created earlier. Navigate to Setup and Maintenance > Product Management > Items > Manage Item Classes
  9. Click the Pages and Attribute Groups

## Edit Item Class: DEMO Computers

[?](#)

\* Item Class

Internal Name

\* Description

Enabled

Parent Item Class
Root Item Class

Parent Item Class Description

Root Item Class

Item creation allowed
 Default Item Class

Public
— Public

---

Basic   Item Management   Security   Transactional Attributes   **Pages and Attribute Groups**   Lifecycle Phases   Templates and Formats

---

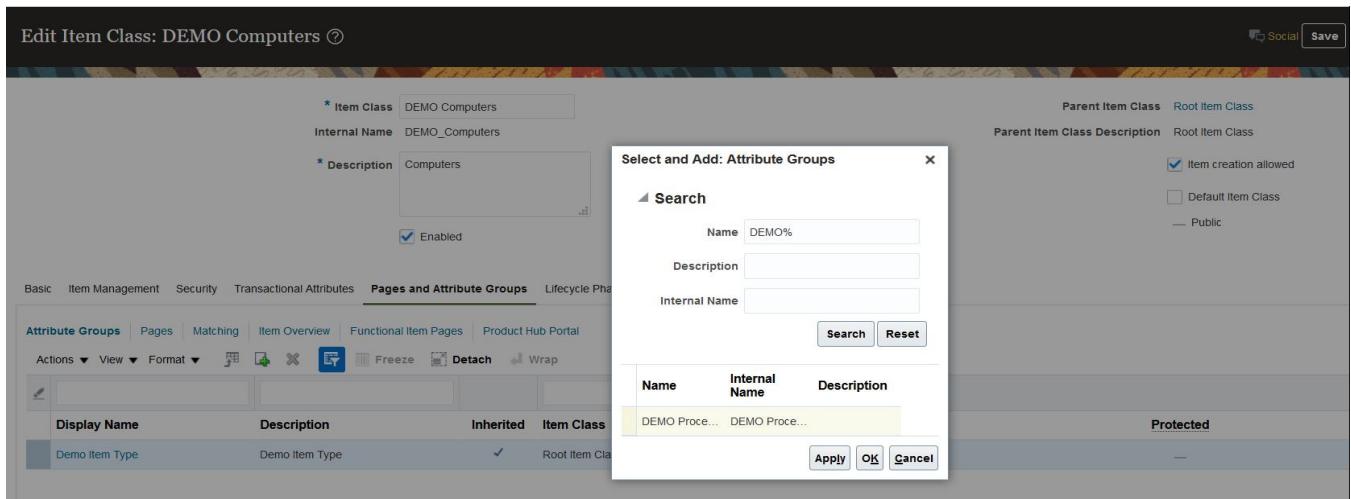
Attribute Groups   Pages   Matching   Item Overview   Functional Item Pages   Product Hub Portal

Actions ▾ View ▾ Format ▾

| Display Name   | Description    | Inherited                           | Item Class      | Behavior   | Protected |
|----------------|----------------|-------------------------------------|-----------------|------------|-----------|
| Demo Item Type | Demo Item Type | <input checked="" type="checkbox"/> | Root Item Class | Single Row |           |

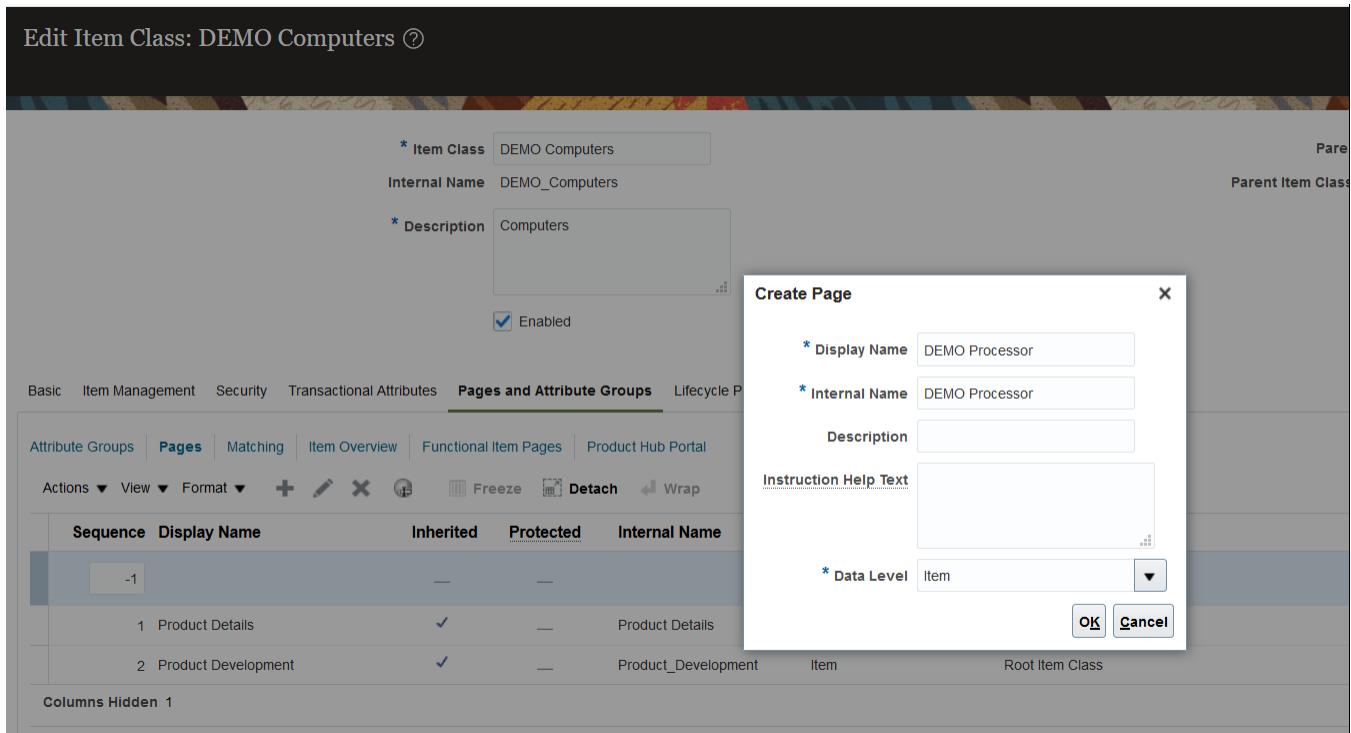
10. Use the Select and Add button to query for the Attribute Group. Click Apply and Ok.





11. Click Save.

12. Click Pages subtab. Enter the details as below and click Ok:



13. Keep the cursor on the newly added page sequence 20. In the bottom section – Attribute Groups section use the Select and Add button. Query for the attribute group.



Edit Item Class: DEMO Computers ?

\* Item Class DEMO Computers  
Internal Name DEMO\_Computers  
\* Description Computers  
 Enabled

Basic Item Management Security Transactional Attributes Pages and Attribute Groups Lifecycle Phases

Attribute Groups Pages Matching Item Overview Functional Item Pages Product Hub Portal

Actions View Format + Edit Detach Freeze Wrap

| Sequence | Display Name        | Inherited | Protected | Internal Name       |
|----------|---------------------|-----------|-----------|---------------------|
| 20       | DEMO Processor      | —         | —         | DEMO Processor      |
| 1        | Product Details     | ✓         | —         | Product Details     |
| 2        | Product Development | ✓         | —         | Product_Development |

Columns Hidden 1

Attribute Groups: DEMO Processor

Actions View Format + Detach Freeze Wrap

| Sequence            | Attribute Group | Behavior | Item Class | Description |
|---------------------|-----------------|----------|------------|-------------|
| No data to display. |                 |          |            |             |

14. Select the record - Apply and click Ok.

Basic Item Management Security Transactional Attributes Pages and Attribute Groups Lifecycle Phases Templates and Formats

Attribute Groups Pages Matching Item Overview Functional Item Pages Product Hub Portal

Actions View Format + Edit Detach Freeze Wrap

| Sequence | Display Name        | Inherited | Protected | Internal Name       | Data Level | Item Class      |
|----------|---------------------|-----------|-----------|---------------------|------------|-----------------|
| 1        | Product Details     | ✓         | —         | Product Details     | Item       | Root Item Class |
| 2        | Product Development | ✓         | —         | Product_Development | Item       | Root Item Class |
| 20       | DEMO Processor      | —         | —         | DEMO Processor      | Item       | DEMO Computers  |

Columns Hidden 1

Attribute Groups: DEMO Processor

Actions View Format + Detach Freeze Wrap

| Sequence | Attribute Group | Behavior   | Item Class     | Description |
|----------|-----------------|------------|----------------|-------------|
| 10       | DEMO Processor  | Single Row | DEMO Computers |             |

15. Save and Close

16. Deploy the flexfield - Navigate to Setup and Maintenance > Product Management > Items > Deploy Item Extensible Flexfields



Deploy Item Extensible Flexfields [?](#)

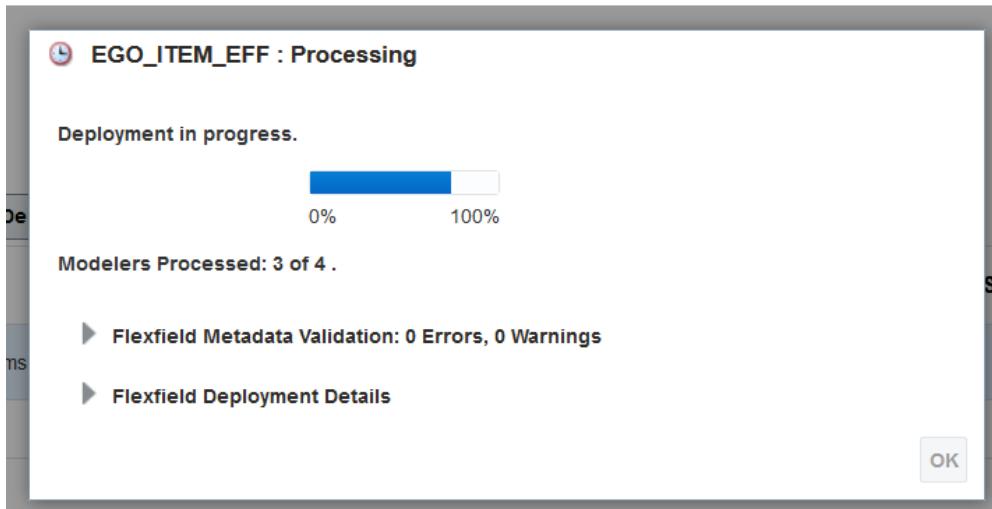
Search

|                |                                  |
|----------------|----------------------------------|
| Name           | Item Extended Attributes         |
| Flexfield Code |                                  |
| Module         | <input type="button" value="▼"/> |

Search Results

| Name                     | Type                 | Module         | Flexfield Code | Entity Usages | Description                    | Deployment Status | Offline Status | Deployment Error Message | Deployment Date  |
|--------------------------|----------------------|----------------|----------------|---------------|--------------------------------|-------------------|----------------|--------------------------|------------------|
| Item Extended Attributes | Extensible Flexfield | Advanced Items | EGO_ITEM_EFF   |               | Extended fields for item pr... |                   |                |                          | 3/12/21 12:49 PM |

17. Click Deploy Flexfield and wait until completion.



## Manage Extensibility: Create DFF

Create a DFF on the UOM to capture Department that requested the UOM.

### Process/Transaction Flow:

1. Navigate to Setup and Maintenance > Product Management > Items > Manage Units of Measure Descriptive Flexfields
2. Query for “Define Unit of Measure”



## Manage Units of Measure Descriptive Flexfields ②

▲ Search

|                |                        |  |
|----------------|------------------------|--|
| Name           | Define Unit of Measure |  |
| Flexfield Code |                        |  |
| Module         |                        |  |

### Search Results

| Actions ▾ View ▾ Format ▾     Deploy Flexfield |                       |        |                      |               |             |                   |                          |                  |
|------------------------------------------------|-----------------------|--------|----------------------|---------------|-------------|-------------------|--------------------------|------------------|
| Name                                           | Type                  | Module | Flexfield Code       | Entity Usages | Description | Deployment Status | Deployment Error Message | Deployment Date  |
| Define Unit of Measure                         | Descriptive Flexfield | UOM    | INV_UNITS_OF_MEAS... |               |             |                   |                          | 4/19/21 10:33 AM |

3. Click the Edit icon

4. Add a new segment for the Department. You can also create a new Value set and add the list of values.

Edit Segment ②

|                                                                                                                                                                                                                                         |                        |                                                                               |                      |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|-------------------------------------------------------------------------------|----------------------|
| Flexfield Name                                                                                                                                                                                                                          | Define Unit of Measure | Flexfield Code                                                                | INV_UNITS_OF_MEASURE |
| * Name                                                                                                                                                                                                                                  | 194 DEPT               | Description                                                                   |                      |
| Code                                                                                                                                                                                                                                    | 194 DEPT               | <input checked="" type="checkbox"/> Enabled                                   |                      |
| * API Name                                                                                                                                                                                                                              | a194Dept               |                                                                               |                      |
| Column Assignment                                                                                                                                                                                                                       |                        | Table Column ATTRIBUTE1                                                       |                      |
| Data Type Character                                                                                                                                                                                                                     |                        | Range Type                                                                    |                      |
| Validation                                                                                                                                                                                                                              |                        | <input type="checkbox"/> Required                                             |                      |
| * Value Set DEPARTMENT_VS                                                                                                                                                                                                               |                        | View Value Set <input type="button"/> Create Value Set <input type="button"/> |                      |
| Value Set Description DEPARTMENT                                                                                                                                                                                                        |                        |                                                                               |                      |
| Initial Default                                                                                                                                                                                                                         |                        |                                                                               |                      |
| Default Type                                                                                                                                                                                                                            |                        | <input type="checkbox"/> Required                                             |                      |
| Display Properties                                                                                                                                                                                                                      |                        | Definition Help Text                                                          |                      |
| * Prompt 194 DEPT                                                                                                                                                                                                                       |                        |                                                                               |                      |
| * Display Type List of Values                                                                                                                                                                                                           |                        |                                                                               |                      |
| Display Size                                                                                                                                                                                                                            |                        |                                                                               |                      |
| <a href="https://adrc2-rtfi-fa-ott.oracledemos.com/fscm111/faces/FuseTaskListManagerTop?_adf.ctrl.state=thru66ff_106#">https://adrc2-rtfi-fa-ott.oracledemos.com/fscm111/faces/FuseTaskListManagerTop?_adf.ctrl.state=thru66ff_106#</a> |                        |                                                                               |                      |

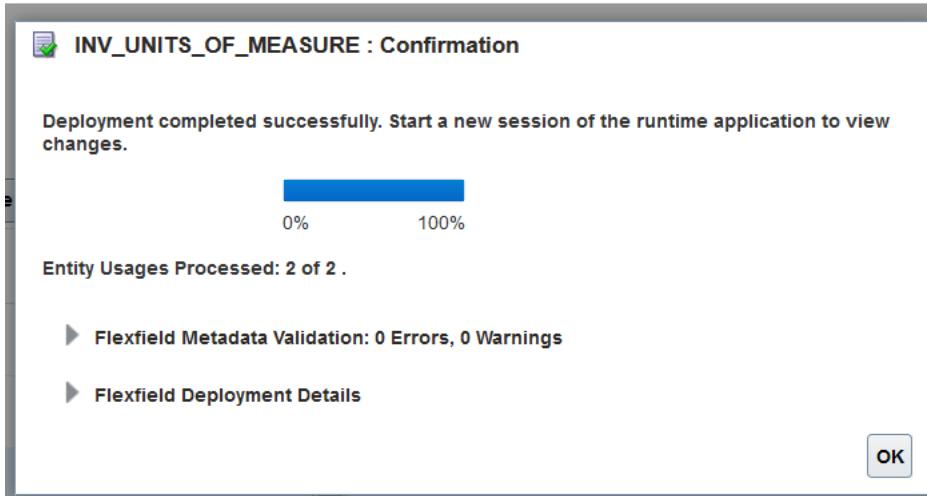
### Edit Value Set: DEPARTMENT\_VS ③

|                                           |                                         |
|-------------------------------------------|-----------------------------------------|
| Value Set Code                            | DEPARTMENT_VS                           |
| Description                               | DEPARTMENT                              |
| * Module                                  | Inventory Management                    |
| Validation Type                           | Independent                             |
| Value Data Type                           | Character                               |
| <input type="checkbox"/> Security enabled |                                         |
| Data Security Resource Name               | <input type="text"/> Edit Data Security |
| Definition                                |                                         |
| Value Subtype                             | Text                                    |
| * Maximum Length                          | 5 <input type="button"/>                |
| Minimum Value                             | <input type="text"/>                    |
| Maximum Value                             | <input type="text"/>                    |
| <input type="checkbox"/> Uppercase only   |                                         |
| <input type="checkbox"/> Zero fill        |                                         |

5. Save and close



- Click the Deploy flexfield and wait for completion.



- Verify the DFF on the UOM UI. Navigate to Setup and Maintenance > Product Management > Items > Manage Units of Measure
- Query for any UOM and Click the Additional Information. Review the DFF and add values as required.

Manage Units of Measure

Search Results

| * UOM Code | * UOM Name | Description    | * Class | Base UOM | End Date | Reciprocal Description | Plural | Additional Information      |
|------------|------------|----------------|---------|----------|----------|------------------------|--------|-----------------------------|
| ALB        | ALB        | Active LBS     |         |          |          |                        |        | Additional Information: ALB |
| CM2        | CM2        | Square Centime |         |          |          |                        |        |                             |
| FT2        | FT2        | Square Foot    |         |          |          |                        |        |                             |
| HA         | HA         | Hectare        |         |          |          |                        |        |                             |

194 DEPT

Context Information

Regions: MFG1 Manufacturing Facility East  
WHSE1 Warehouse 1  
WHSE2 Warehouse 2

Search...

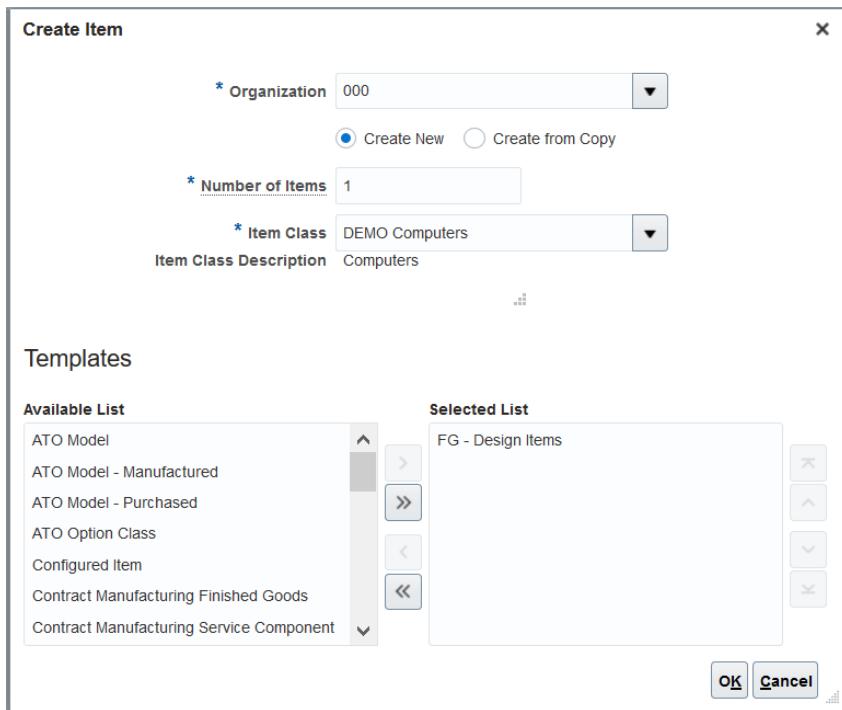
## Create Item

Create a new item and verify the EFF created earlier.

### Process/Transaction Flow:

- Navigate to Product Management > Product Information Management
- Select Create Item from the task drawer on the right
- Select the organization, and Item Class, that was created earlier or retain Root Item Class. Optionally choose other Templates as required.





4. Provide the item name and description and Save

|                   |                  |                 |                 |
|-------------------|------------------|-----------------|-----------------|
| Item              | DEMO Item        | Item Status     | Active          |
| Description       | Demo Item        | Lifecycle Phase | Design          |
| Item Class        | DEMO Computers   | User Item Type  | Finished Good   |
| Approval Status   | Approved         | Pack Type       | Mixed Module    |
| Completions Score |                  | Revision        | A               |
| Created By        | SCM00.INSTRUCTOR | Creation Date   | 5/25/21 1:33 PM |

5. Click the Specifications Tab and review the various attributes like Manufacturing, OM etc  
 6. Click on the EFF created earlier and add values.



7. Click Associations and assign the item to 001, 002, 003 organizations.

## Create Catalog

Create a new Catalog and assign an item.

### Process/Transaction Flow:

1. Navigate to Setup and Maintenance > Product Management > Catalogs > Manage Functional Area Catalogs

| Manage Catalogs |                        |                        |                           |                 |            |          | <a href="#">Create</a> | <a href="#">Done</a> |
|-----------------|------------------------|------------------------|---------------------------|-----------------|------------|----------|------------------------|----------------------|
| View            | <a href="#">Assign</a> | Catalog Name           | Description               | Functional Area | Start Date | End Date | Controlled At          | Default Category     |
|                 |                        | AT2010_CLIC ★          | VAT Package 2010 Services |                 | 1/14/14    |          | Master Level           |                      |
|                 |                        | AT_PROD_CLASS_CLIC ★   | AT Product Classification |                 | 1/14/14    |          | Master Level           |                      |
|                 |                        | AT_VAT_RECOVERY_CLIC ★ | AT VAT Recovery           |                 | 1/14/14    |          | Master Level           |                      |
|                 |                        | BE2010_CLIC ★          | VAT Package 2010 Services |                 | 1/14/14    |          | Master Level           |                      |
|                 |                        | RF_PROD_CLASS_CLIC ★   | RF Product Classification |                 | 1/14/14    |          | Master Level           |                      |

2. Sort by the Functional Area to review the catalogs assigned to each functional area

| Manage Catalogs |                        |                    |                                                                                          |                                            |            |          | <a href="#">Create</a> | <a href="#">Done</a> |
|-----------------|------------------------|--------------------|------------------------------------------------------------------------------------------|--------------------------------------------|------------|----------|------------------------|----------------------|
| View            | <a href="#">Assign</a> | Catalog Name       | Description                                                                              | Functional Area                            | Start Date | End Date | Controlled At          | Default Category     |
|                 |                        | Inv_Items ★        | Inventory Category Set                                                                   | Cost, Distributed Order Orchestration, ... | 10/30/13   |          | Master Level           | Non-categorized      |
|                 |                        | Planning Catalog ★ | Main Planning Catalog - Also Default Planning Catalog                                    | Planning                                   | 12/10/15   |          | Master Level           | Miscellaneous Pl...  |
|                 |                        | Product Lines ★    | Product Development Catalog - used for the Product Line field on items in PD. Can sel... | Product Development                        | 3/31/20    |          | Master Level           |                      |
|                 |                        | Product_Reportng ★ | Product Reporting Category Set                                                           | Product Reporting                          | 10/30/13   |          | Master Level           | Product Reporting    |
|                 |                        | Purchasing ★       | Purchasing Category Set                                                                  | Purchasing                                 | 10/30/13   |          | Master Level           | Miscellaneous        |

3. Click on Create



**4. Click Save and Continue**

**5. Click on the + icon to add Categories. Click OK.**

**6. Click on the Items tab and Select and Add items as required.**



Edit Catalog: Demo Catalog \*

Social Save and Close Cancel

Search Category Name Advanced

View Categories Active

Category Name

- Demo Catalog
  - Level 1

Columns Hidden 2

Level 1: Details

Items Details Attachments

Search Keyword

Compare Show Active Image Show

DEMO Item DEMO Computers Demo Item 000 Start Date 5/25/21 End Date

## 7. Click Save



### 3. Manage and View Inventory

#### Manage Item Quantities

Check the current stock situation for a particular item.

##### Process/Transaction Flow:

1. Navigate to Supply Chain Execution > Inventory Management > Tasks > Manage Item Quantities
2. Clear the Organization field, select the flags for On Hand, Receiving and Inbound, enter the item = V21001, and click Search:

The screenshot shows the Oracle SCM Cloud interface with the title 'Manage Item Quantities'. The search bar contains 'V21001'. Under 'View Item Quantity By', 'Item' is selected. The 'On Hand' checkbox is checked. The search results table shows three organizations with their respective quantities: Organization 002 has 998 units, Organization 001 has 999 units, and Organization 003 has 3 units.

| Organization     | Quantity | UOM Name |
|------------------|----------|----------|
| Organization 002 | 998      | Ea       |
| Organization 001 | 999      | Ea       |
| Organization 003 | 3        | 1 Ea     |



3. Click on 'View Item Availability' to view the Available to Transact and Available to Reserve quantities:

The screenshot shows the vision software interface with the title 'Manage Item Quantities'. A modal dialog box is open, titled 'Item Availability'. The search criteria on the left include 'Item' set to 'V21001', 'Item Description' set to 'Starts with', 'Organization' set to '001', and 'Subinventory' left empty. The main area displays the 'Item Availability' details for item V21001, which is a 'Photo Paper Pack, 50 count'. The details shown are Revision, Lot, Source Subinventory, Locator, Inventory Project, and Inventory Task. Below this is a table with columns: Quantity Type, On Hand, Receiving, Inbound, Total, and UOM Name. The table data is as follows:

| Quantity Type        | On Hand | Receiving | Inbound | Total | UOM Name |
|----------------------|---------|-----------|---------|-------|----------|
| Total                | 999     |           |         | 999   | Ea       |
| Available to Tran... | 999     |           |         | 999   | Ea       |
| Available to Res...  | 999     |           |         | 999   | Ea       |

At the bottom right of the dialog box is an 'OK' button.



## Manual Reservations

Create a manual reservation to block quantity for a critical customer.

### Process/Transaction Flow:

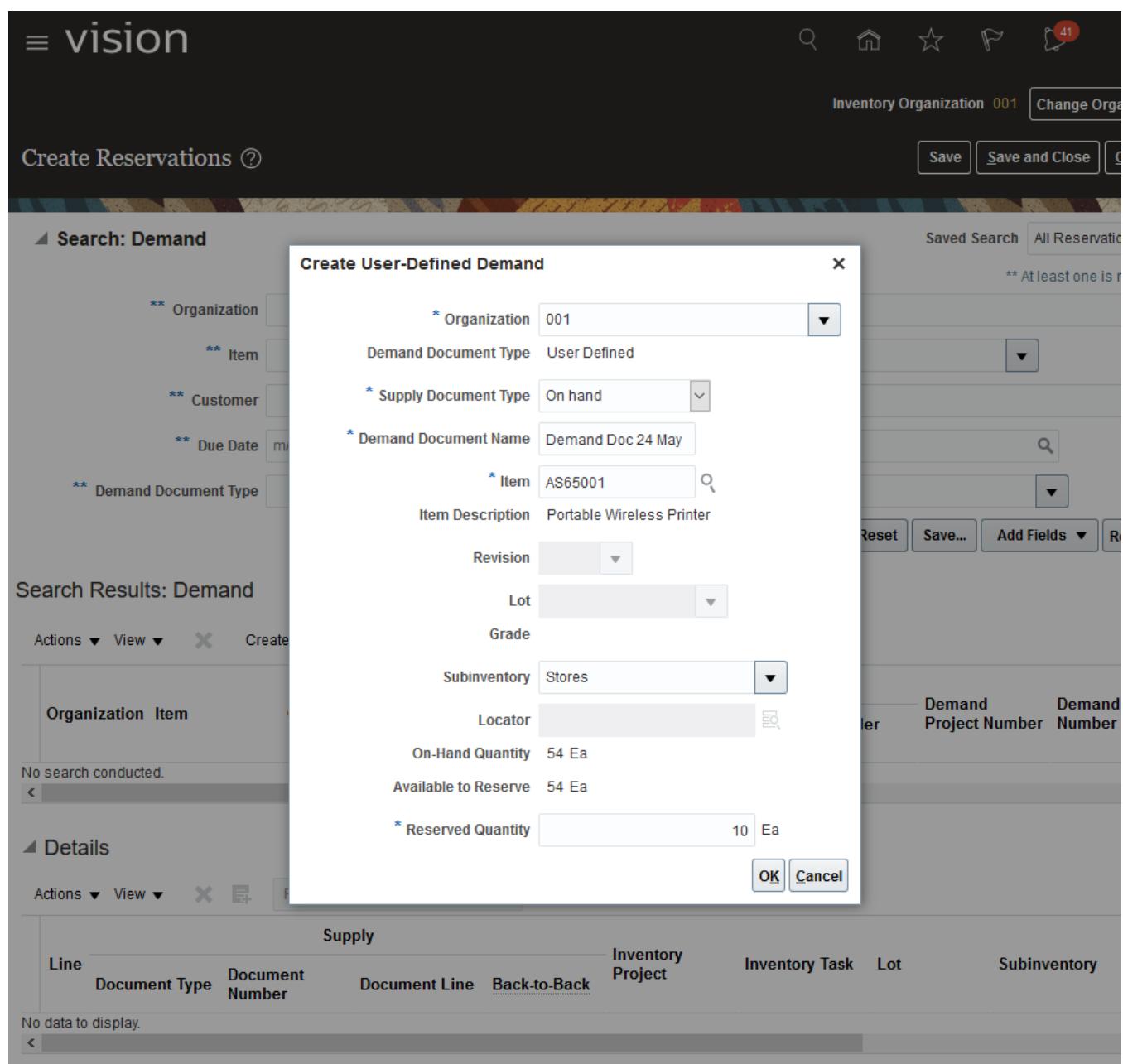
1. Navigate to Supply Chain Execution > Inventory Management > Tasks > Manage Item Quantities
2. Review on hand situation of item AS65001 in the 001 Inventory Org:

The screenshot shows the 'Manage Item Quantities' interface. In the search bar, 'AS65001' is entered under 'Item'. The search results table shows one row for 'Item AS65001' with a quantity of 54. A modal window titled 'Item Availability' displays detailed information about this item, including its description as 'Portable Wireless Printer' and its location in 'Organization 001'. The modal also shows other fields like Revision, Lot, Source Subinventory, Locator, Inventory Project, and Inventory Task, all of which are currently empty or not applicable. The 'Quantity' section of the modal shows the same 54 quantity across five categories: On Hand, Receiving, Inbound, Total, and UOM (Ea). The 'OK' button at the bottom right of the modal is highlighted in red.

3. Navigate to Supply Chain Execution > Inventory Management > Tasks > Manage Reservations and Picks



4. Click on Create Reservations. Under the Demand section, click on Create > Create User-Defined Demand



5. Click OK. Click on Save and Close.



6. Confirm that the reservation was created by querying for the below attributes from the Manage Reservations and Picks screen:

The screenshot shows the Oracle SCM vision interface with the title "Manage Reservations and Picks". The search bar at the top has "Reservations" selected. The search criteria include "Organization: 001", "Item: AS65001", and "Demand Document Type: User Defined". The search results table has the following data:

| Demand           | Reserved Quantity | Pick Quantity | Demand Quantity | UOM Name |
|------------------|-------------------|---------------|-----------------|----------|
| Organization 001 |                   |               | 10              | Ea       |
| Item AS65001     | 10                | 0             | 10              | Ea       |

Actions available: Create Reservations, Search, Reset, Save..., Add Fields, Reorder.

7. Review the on-hand situation again and validate the Available to Reserve quantity:



Inventory Organization 001 [Change Organization](#)

Manage Item Quantities [?](#)

[Done](#)

**Advanced Search**

Saved Search [All Item Quantities](#)

Search Results [?](#)

View Item Quantity By [Item](#)

Actions [▼](#) View [▼](#)

Item AS65001

Item Description Portable Wireless Printer

Revision

Organization 001

Lot

Source Subinventory

Locator

Inventory Project

Inventory Task

Second Quantity

UOM Name

Ea

**Item Availability**

View [▼](#) Format [▼](#) [Freeze](#) [Wrap](#)

| Quantity Type        | Quantity |           |         |       |
|----------------------|----------|-----------|---------|-------|
|                      | On Hand  | Receiving | Inbound | Total |
| Total                | 54       |           | 54      | Ea    |
| Available to Tran... | 44       |           | 44      | Ea    |
| Available to Res...  | 44       |           | 44      | Ea    |

Columns Hidden 5 Columns Frozen 1

[OK](#)

- To unreserve the quantity, query the reservation and click on Transfer Supply.



≡ vision

Inventory Organization 001 [Change Organization](#)

Manage Reservations and Picks [?](#)

[Done](#)

### Advanced Search

Saved Search [All Reservations and Picks](#) [▼](#)  
\*\* At least one is required

|                                                                                    |                                                                |
|------------------------------------------------------------------------------------|----------------------------------------------------------------|
| Search <input type="text" value="Reservations"/>                                   | Demand Document Type <input type="text" value="User Defined"/> |
| ** Organization <input type="text" value="001"/>                                   | Demand Document Number <input type="text"/>                    |
| ** Item <input type="text" value="AS65001"/> <input type="button" value="Search"/> | Supply Document Type <input type="text"/>                      |
| Customer <input type="text"/>                                                      | Supply Document Number <input type="text"/>                    |

[Search](#) [Reset](#) [Save...](#) [Add Fields ▾](#) [Reorder](#)

### Search Results

Actions [▼](#) View [▼](#) [Create Reservations](#)

| Demand             | Reserved Quantity | Pick Quantity | Demand Quantity | UOM Name |
|--------------------|-------------------|---------------|-----------------|----------|
| ▲ Organization 001 |                   |               |                 |          |
| ▶ Item AS65001     | 10                | 0             | 10              | Ea       |

Rows Selected 1

### Organization (001), Item (AS65001): Details

Reservations [Picks](#) [Demand](#) [Item](#)

Actions [▼](#) View [▼](#) [Transfer Supply](#) [View Serial Number Information](#)

| Supply        |                 |              |                |             | Reserved     |         |          |
|---------------|-----------------|--------------|----------------|-------------|--------------|---------|----------|
| Document Type | Document Number | Back-to-Back | Project Number | Task Number | Subinventory | Locator | Quantity |
| On hand       | —               |              |                |             | Stores       |         | 10       |



9. Enter the Transfer Reservations from Supply and Transfer Reservations to Supply information:

The screenshot shows the vision software interface with the title "Transfer Supply: Item AS65001".

**Transfer Reservations from Supply:**

| Document Type | Document Number | Document Line | Project Number | Task Number | Lot | Revision | SubInventory | Locator | Quantity |          |          | Document Type | Document Number | Document Line | Document Name   |  |
|---------------|-----------------|---------------|----------------|-------------|-----|----------|--------------|---------|----------|----------|----------|---------------|-----------------|---------------|-----------------|--|
|               |                 |               |                |             |     |          |              |         | Demand   | Reserved | Transfer |               |                 |               |                 |  |
| On hand       |                 |               |                |             |     |          | Stores       |         | 10       | 10       | 10       | Ea            | User Defined    |               | Demand Doc 2... |  |
| <b>Total</b>  |                 |               |                |             |     |          |              |         |          |          |          |               | 10              | 10            |                 |  |

**Transfer Reservations to Supply:**

| Document Type | Document Number | Document Line | Inventory Project | Inventory Task | Lot | Revision | SubInventory | Locator | Quantity |                      |          | UOM Name |    |  |  |
|---------------|-----------------|---------------|-------------------|----------------|-----|----------|--------------|---------|----------|----------------------|----------|----------|----|--|--|
|               |                 |               |                   |                |     |          |              |         | On Hand  | Available to Reserve | Transfer |          |    |  |  |
| Onhand        |                 |               |                   |                |     |          | Stores       |         | 54       | 44                   | 10       | Ea       |    |  |  |
| <b>Total</b>  |                 |               |                   |                |     |          |              |         |          |                      |          |          | 10 |  |  |

10. Click on Save and Close



# 4. Material Request to Delivery

## Miscellaneous Transaction

Performing a Miscellaneous Issue of quantity out of an inventory organization.

### Process/Transaction Flow:

1. Review the on-hand quantity of item AS65001 in inventory org 001:

The screenshot shows the Oracle Inventory Management interface. At the top, there's a header bar with "Inventory Organization 001" and a "Change Organization" button. Below the header is a search bar with "Manage Item Quantities" and a "Done" button. On the left, there's an "Advanced Search" panel with fields for "Item" (set to "AS65001"), "Item Description" (set to "Starts with"), "Organization" (set to "001"), and "Subinventory". To the right of the search panel is a "Saved Search" dropdown set to "All Item Quantities". A note says "At least one is required". An "Item Availability" dialog is open in the center. It displays item details: "Item" AS65001, "Item Description" Portable Wireless Printer, "Organization" 001, "Revision", "Lot", "Source Subinventory", "Locator", "Inventory Project", and "Inventory Task". Below the details is a table titled "Quantity Type" with columns "On Hand", "Receiving", "Inbound", "Total", and "UOM Name". The table shows three rows: "Total" (54 Ea), "Available to Tran..." (54 Ea), and "Available to Res..." (54 Ea). At the bottom of the table are buttons for "OK", "Add Fields ▾", and "Reorder". At the very bottom of the interface, there are tabs for "Item Details", "Lot Details", "Serial Number Details", "Inbound Details", "Consigned Details", and "Inventory Attribute Details".

2. Navigate to Supply Chain Execution > Inventory Management > Tasks > Create Miscellaneous Transaction



3. Select the type = Miscellaneous Issue, Account = 101.10.24220.000.000.000 and enter other details as illustrated in the screenshot below:

The screenshot shows the Oracle Vision software interface for creating a Miscellaneous Transaction. The top navigation bar includes icons for search, home, favorite, and navigation, along with the text "Inventory Organization 001" and "scm00 in". Below the header, there are buttons for "Submit and Create Another", "Submit", and "Cancel". The main title is "Create Miscellaneous Transaction ?".

**Transaction**

|                       |                     |                                                               |                          |
|-----------------------|---------------------|---------------------------------------------------------------|--------------------------|
| Date                  | 5/24/21 4:00 PM     | Source                                                        |                          |
| Type                  | Miscellaneous issue | Account                                                       | 101.10.24220.000.000.000 |
| Use Current Item Cost | Yes                 | <input type="checkbox"/> Enter transactions by serial numbers |                          |

**Transaction Lines ?**

| Actions ▾ | View ▾  | +                      | X                                     | Generate Lot                     | Generate Serial Number Range    | Record Lots and Serial Numbers | Edit Details            |           |                          |
|-----------|---------|------------------------|---------------------------------------|----------------------------------|---------------------------------|--------------------------------|-------------------------|-----------|--------------------------|
| Line      | * Item  | * Subinventory Locator |                                       |                                  | * UOM Name                      | * Quantity                     | * Use Current Item Cost | * Account |                          |
| 1         | AS65001 | <input type="text"/>   | <input type="button" value="Stores"/> | <input type="button" value="▼"/> | <input type="button" value=""/> | Ea                             | 5                       | Yes       | 101.10.24220.000.000.000 |

**Line 1: Availability ?**

|                    |       |                              |
|--------------------|-------|------------------------------|
| Available Quantity | 54 Ea | Secondary Available Quantity |
| On-Hand Quantity   | 54 Ea | Secondary On-Hand Quantity   |

4. Click on Submit. A confirmation message is displayed.



- Review the on-hand quantity again to verify that the quantity has been issued out:

The screenshot shows the Oracle Inventory Management system's "Manage Item Quantities" page. A modal window titled "Item Availability" is open, displaying details for item AS65001. The modal includes fields for Item Description (Portable Wireless Printer), Revision (Lot), Organization (001), Source Subinventory, Locator, Inventory Project, and Inventory Task. Below the modal is a table showing item quantities by type: On Hand (49), Receiving (49), Inbound (49), and Total (49). The UOM Name is listed as Ea. The main search results table on the left shows a single row for item AS65001.

| Quantity Type        | On Hand | Receiving | Inbound | Total | UOM Name |
|----------------------|---------|-----------|---------|-------|----------|
| Total                | 49      |           |         | 49    | Ea       |
| Available to Tran... | 49      |           |         | 49    | Ea       |
| Available to Res...  | 49      |           |         | 49    | Ea       |

## Subinventory Transfer

Move material from one subinventory to another without documentation.

### Process/Transaction Flow:

- Review the on-hand quantity of item AS65001 in inventory org 001:

The screenshot shows the "Manage Item Quantities" page with "Inventory Organization 001" selected. A modal window titled "Item Availability" is open, displaying details for item AS65001. The modal includes fields for Item Description (Portable Wireless Printer), Revision (Lot), Organization (001), Source Subinventory, Locator, Inventory Project, and Inventory Task. Below the modal is a table showing item quantities by type: On Hand (49), Receiving (49), Inbound (49), and Total (49). The UOM Name is listed as Ea. The main search results table on the left shows a single row for item AS65001 under organization 001.

| Quantity Type        | On Hand | Receiving | Inbound | Total | UOM Name |
|----------------------|---------|-----------|---------|-------|----------|
| Total                | 49      |           |         | 49    | Ea       |
| Available to Tran... | 49      |           |         | 49    | Ea       |
| Available to Res...  | 49      |           |         | 49    | Ea       |



2. Navigate to Supply Chain Execution > Inventory Management > Tasks > Create Subinventory Transfer
3. Select the Type = Subinventory Transfer and enter the Transaction Line information with the Source Subinventory = Stores and Destination Subinventory = Completed:

**Create Subinventory Transfer**

Inventory Organization 001 | Change Organization

Submit and Create Another | Submit | Cancel

**Transaction**

Date: 5/24/21 4:24 PM |

Type: Subinventory Transfer |

Enter transactions by serial numbers

**Transaction Lines**

Actions ▾ View ▾ + × Record Lots and Serial Numbers |

| Line | * Item  | Source<br>* Subinventory Locator | Destination<br>* Subinventory Locator | * UOM Name | * Quantity | Reason |
|------|---------|----------------------------------|---------------------------------------|------------|------------|--------|
| 1    | AS65001 | Stores                           | Complete                              | Ea         | 5          |        |

**Line 1: Availability**

|                    |       |                              |
|--------------------|-------|------------------------------|
| Available Quantity | 49 Ea | Secondary Available Quantity |
| On-Hand Quantity   | 49 Ea | Secondary On-Hand Quantity   |

4. Click on Submit. A confirmation message is displayed.
5. Review the on-hand quantity again to validate that the quantity has been transferred successfully:

**Manage Item Quantities**

Inventory Organization 001 | Change Organization

Done

Advanced Search |

Search Results

View Item Quantity By: Item |

Actions ▾ View ▾

| Item                   | Quantity |           |         |          | Secondary Quantity |
|------------------------|----------|-----------|---------|----------|--------------------|
|                        | On Hand  | Receiving | Inbound | UOM Name | On Hand            |
| Item AS65001           | 49       |           |         | Ea       |                    |
| Organization 001       | 49       |           |         | Ea       |                    |
| Subinventory Completed | 5        |           |         | Ea       |                    |
| Subinventory Stores    | 44       |           |         | Ea       |                    |



## Movement Request

Move material from one subinventory to another with documentation.

### Process/Transaction Flow:

- Review the on-hand quantity of item AS00104 in inventory org 001:

The screenshot shows the 'Manage Item Quantities' interface. The search results table has the following data:

| Item                    | Quantity |           |         |          | Secondary Quantity |
|-------------------------|----------|-----------|---------|----------|--------------------|
|                         | On Hand  | Receiving | Inbound | UOM Name |                    |
| Item AS00104            | 10       |           |         | Ea       |                    |
| Organization 001        | 10       |           |         | Ea       |                    |
| Subinventory Inspection | 1        |           |         | Ea       |                    |
| Subinventory Stores     | 9        |           |         | Ea       |                    |

- Navigate to Supply Chain Execution > Inventory Management > Tasks > Manage Movement Requests
- Click on the '+' icon to Create Movement Request. Select the Transaction Type = Movement Request Transfer, Source Subinventory = Inspection and Destination Subinventory = Stores and enter the Line information with item AS00104:

The screenshot shows the 'Create Movement Request' screen. The movement request details are as follows:

|                     |                           |                          |             |
|---------------------|---------------------------|--------------------------|-------------|
| * Movement Request  | 241920                    | Movement Request Type    | Requisition |
| Description         |                           | Status                   | Incomplete  |
| Required Date       | 5/25/21 9:06 AM           | Source Subinventory      | Inspection  |
| Transaction Type    | Movement Request Transfer | Destination Subinventory | Stores      |
| Destination Account |                           |                          |             |

The 'Lines' section contains one line item:

| Line Number | Item    | Transaction Type | Required Date | Requested Quantity | UOM Name | Status     | Source Subinventory | Source Locator | Destination Subinventory | Destination Locator |
|-------------|---------|------------------|---------------|--------------------|----------|------------|---------------------|----------------|--------------------------|---------------------|
| 1           | AS00104 | Movement Re      | 5/25/21 9:08  | 1                  | Ea       | Incomplete | Inspect             |                | Stores                   |                     |





- Click on Submit. A confirmation message is displayed. Note down the Movement Request Number.
- Skip these steps (**Step 6 to 9**) if Approval is not enabled for Movement Request.
- Re-Query the Movement Request and check the Line Status. It is showing as Pending approval.

| Item    | Item Description   | Requested Quantity | Delivered Quantity | UOM Name | UOM Conversions | Line Status      | Created By      | Source Subinvent |
|---------|--------------------|--------------------|--------------------|----------|-----------------|------------------|-----------------|------------------|
| AS00104 | Blue Hat Enterp... | 1                  |                    | Ea       |                 | Pending approval | SCM00.INSTRU... | Stores           |

- Approval Process: Navigate to Tools > Transaction Console > Transaction Summary Click on the Movement request - to view the approval details.

Process Name: Movement Request Approval  
Submitted By: scm00 in  
Movement Request 241920  
Transaction ID: Diagnostic Log Down

Approval History

Approvals

Applications Development Framework Application Identity for Procurement

Assigned to **scm00 instructor**

Submitted by **scm00 instructor**

- To Approval: Login as approver, In the Home Page Click on the Notification



- Navigate to Notification > Check and Click the Approve Button

## Notifications

Show All

- ACTION REQUIRED** 1 hour ago
- Movement Request 241920 Requires Approval  
scm00 instructor
- Approve** **Reject**
- 

- Navigate to Tools > Scheduled Processes > Execute the ESS Job 'Print Movement Request Pick Slip Report' for the movement request created above. Ensure to set Release Approved Lines = Yes so that the lines get pick released automatically:



**Process Details**

This process will be queued up for submission at position 1

**Name:** Print Movement Request Pick Slip Report  Print output

**Description:** Releases movement request lines for picking and...

**Schedule:** As soon as possible **Submission Notes:**

**Basic Options**

**Parameters:**

- \* Organization: 001
- From Movement Request: 241920
- To Movement Request: 241920
- From Pick Slip:
- To Pick Slip:
- Source subinventory:
- Source Locator:
- Destination subinventory:

**Submission Time:**

- 5/25/21 9:00 AM UTC
- 5/25/21 8:49 AM UTC
- 5/25/21 8:49 AM UTC
- 5/25/21 8:49 AM UTC

11. Click on Submit. Once the job completes successfully, validate the report output:

| Actions ▾ View ▾                             |  | Schedule New Process | Resubmit  | Put On Hold         | Cancel Process      | Release Process | View Log | ↻ |
|----------------------------------------------|--|----------------------|-----------|---------------------|---------------------|-----------------|----------|---|
| Name                                         |  | Process ID           | Status    | Scheduled Time      | Submission Time     |                 |          |   |
| Print Movement Request Pick Slip Report      |  | 2732708              | Succeeded | 5/25/21 9:18 AM UTC | 5/25/21 9:18 AM UTC |                 |          |   |
| Cache Application Usage Insights Report Data |  | 2732686              | Wait      | 5/26/21 9:00 AM UTC | 5/25/21 9:00 AM UTC |                 |          |   |
| Index Active Meta Model Version              |  | 2732676              | Wait      | 5/25/21 9:48 AM UTC | 5/25/21 8:49 AM UTC |                 |          |   |
| Execute Entity Batch                         |  | 2732675              | Error     | 5/25/21 8:49 AM UTC | 5/25/21 8:49 AM UTC |                 |          |   |

#### Print Movement Request Pick Slip Report, 2732708: Details

Status: Succeeded      Schedule Start: 5/25/21 9:18 AM UTC



| Input Parameters         |         |
|--------------------------|---------|
| Organization Name        | Seattle |
| From Movement Request    | 241920  |
| To Movement Request      | 241920  |
| From Pick Slip           |         |
| To Pick Slip             |         |
| Source Subinventory      |         |
| Source Locator           |         |
| Destination Subinventory |         |
| Destination Locator      |         |
| Requester                |         |
| From Required Date       |         |
| To Required Date         |         |
| Line Status to Print     | All     |
| Movement Request Type    | All     |
| From Order               |         |
| To Order                 |         |
| Carrier                  |         |
| Customer                 |         |
| Release Approved Lines   | Yes     |
| Pick Slip Grouping Rule  |         |
| Project Number           |         |
| Task Number              |         |

12. Navigate to Supply Chain Execution > Inventory Management > Tasks > Shipments > Confirm Pick Slips



13. Enter the Movement Request Number and click Search:

The screenshot shows the 'Confirm Pick Slips: Search' interface. At the top right, there are buttons for 'Inventory Organization 001' and 'Change Organization'. Below that is a 'Done' button. The main area has a heading 'Advanced Search' and a note '\*\* At least one is required'. There are six search criteria fields: 'Pick Slip' (Equals), 'Shipment' (Equals), 'Order' (Equals), 'Movement Request' (Equals, value: 241920), 'Pick Wave' (Equals), 'Customer' (Equals). To the right of these are buttons for 'Saved Search' (set to 'Pick Slips Due Today'), 'Search', 'Reset', 'Save...', 'Add Fields', and 'Reorder'. Below the search area is a section titled 'Search Results' with a table header: 'View', 'Pick Status', 'Pick Slip Type', 'Organization', 'Due Date', 'Pick Status', 'Order', 'Order Type', 'Shipping Method', 'Customer'. The table body shows one row: '188542', '001', '5/25/21 9:08 AM', 'Open', '1'. At the bottom right of the table is a page number '1'.

14. Click on the Pick Slip to view the details. Select Ready to Confirm, enter the Picked Quantity and click Confirm:

The screenshot shows the 'Confirm Pick Slip: 188542' interface. At the top right, there are buttons for 'Inventory Organization 001', 'Change Organization', 'Confirm', and 'Cancel'. Below that is a note 'Organization : 001'. The main area has a 'Summary' section with details: Creation Date (5/25/21 9:18 AM), Pick Slip Type (Requisitions), Pick Status (Open), Movement Request (241920), and Number of Picks (1). Below this is a 'Picks' section with a grid. The grid has columns: Actions, View, Pick Status (Open), Generate Serial Numbers, Ready to confirm, Overpick and Move, Line, Pick Status, Item, Item Description, UOM Name, Requested Quantity, Picked Quantity, Source Subinventory, and Source. One row is visible in the grid: Line 1, Pick Status Open, Item AS00104, Item Description Blue Hat Enterp..., UOM Name Ea, Requested Quantity 1, Picked Quantity 1, Source Subinventory Inspection.



15. Review the on-hand quantities again to validate that the quantity has been transferred successfully:

The screenshot shows the 'Manage Item Quantities' page. At the top right, it says 'Inventory Organization 001' and 'Change Organization'. On the right, there are 'Done' and 'Saved Search' buttons. Below that is a dropdown menu for 'All Item Quantities'. The main area is titled 'Search Results' with a 'View Item Quantity By' dropdown set to 'Item'. There are 'Actions' and 'View' buttons, and a 'View Item Availability' button. The table below lists items under 'Item'. The first item is 'Item AS00104' with a quantity of 10, UOM Name 'Ea', and On Hand quantity of 10. It also shows 'Receiving' and 'Inbound' columns. The second row is 'Organization 001' with a quantity of 10, UOM Name 'Ea', and On Hand quantity of 10. The third row is 'Subinventory Stores' with a quantity of 10, UOM Name 'Ea', and On Hand quantity of 10.

| Item                | Quantity |           |         | Secondary Quantity |         |
|---------------------|----------|-----------|---------|--------------------|---------|
|                     | On Hand  | Receiving | Inbound |                    |         |
| Item AS00104        | 10       |           |         | Ea                 | On Hand |
| Organization 001    | 10       |           |         | Ea                 | On Hand |
| Subinventory Stores | 10       |           |         | Ea                 | On Hand |

## Movement Request Approval Setup

### Enable Feature Opt in:

1. Navigate to Setup and Maintenance > Setup > Manufacturing and Supply Chain Material Management > Change Feature Opt In > Select **Inventory Management** and Click on Edit
2. Select **Use Approvals for Movement Requests** > Enable and Save

### Configure Approval Task:

1. Navigate to Setup and Maintenance > Setup > Manufacturing and Supply Chain Material Management > Inventory Management > Click on Manage Movement Request Approvals
2. Select the Stage you want to setup. For this Lab activity , let us go with Serial Routing
3. Select the Serial Routing Line and Click on Enable button on the Top and then click on Edit Rules

The screenshot shows the 'Manage Movement Request Approvals' page. At the top right, there are 'Deploy', 'Discard', and 'Done' buttons. Below that is a dropdown for 'All Movement Request Approvals'. The main area has 'Actions', 'View', 'Format', 'Edit Rules', and 'Enable' buttons. The table lists stages and participants. The 'Movement Request Appr...' stage has a 'Serial' routing and is marked as 'Enabled' with a green checkmark.

| Stage                    | Participant                                                | Routing  | Voting Regime        | Enabled                             |
|--------------------------|------------------------------------------------------------|----------|----------------------|-------------------------------------|
| Movement Request Appr... | Movement Request Parallel Consensus Participant            | Parallel | Consensus            |                                     |
| Movement Request Appr... | Movement Request Serial Participant                        | Serial   |                      | <input checked="" type="checkbox"/> |
| Movement Request Appr... | Movement Request FYI Participant                           | FYI      |                      |                                     |
| Movement Request Appr... | Movement Request Parallel First Responder Wins Participant | Parallel | First Responder Wins |                                     |



4. In Rules, Click Create
5. Provide the Rule name, Priority and Description. Once done click Ok

**Edit Rule**

|                                                                         |                                                  |
|-------------------------------------------------------------------------|--------------------------------------------------|
| * Rule                                                                  | Demo Self Approval for Movement Request          |
| * Priority                                                              | Medium ▾                                         |
| Description                                                             | Demo Approval - Self approval - Movement Request |
| <input type="checkbox"/> Rule always applies                            |                                                  |
| <input type="button" value="OK"/> <input type="button" value="Cancel"/> |                                                  |

6. Under Details add a Rule and Action as below

Demo Self Approval for Movement Request: Details

Conditions

Actions ▾ View ▾ Format ▾    Freeze  Detach     Wrap  Add Condition ▾  Add Operator ▾

| Condition                         |
|-----------------------------------|
| AND                               |
| Item Equals AS00104               |
| Source Subinventory Equals Stores |
| Organization Equals 001           |

---

Actions

Action 1

Action Type Approval required  
 Route Using Single Approver  
 User Type Worker  
 Worker instructor, scm00

7. Add another Rule and action as below

**Edit Rule**

|                                                                         |                      |
|-------------------------------------------------------------------------|----------------------|
| * Rule                                                                  | Rule Always applies  |
| * Priority                                                              | Medium ▾             |
| Description                                                             | Rules always applies |
| <input checked="" type="checkbox"/> Rule always applies                 |                      |
| <input type="button" value="OK"/> <input type="button" value="Cancel"/> |                      |



Rules [?](#)

| Actions           | View     | Format                                                                                | + |  |  |  |  |  | Disable | Enabled |
|-------------------|----------|---------------------------------------------------------------------------------------|---|--|--|--|--|--|---------|---------|
| Rule              | Priority | Conditions                                                                            |   |  |  |  |  |  |         |         |
| Demo Self Appr... | Medium   | Item Equals AS00104 AND Source SubInventory Equals Stores AND Organization Equals 001 |   |  |  |  |  |  |         |         |
| Rule Always ap... | Medium   | Rule always applies                                                                   |   |  |  |  |  |  |         |         |
| Columns Hidden 1  |          |                                                                                       |   |  |  |  |  |  |         |         |

Rule Always applies: Details

Conditions  
Rule always applies

Actions

Action 1

Action Type: Automatic  
Set Outcome To: Approved

[Add Action](#) [Edit](#) [X](#)

## 8. Save, Deploy and Close.

## Interorganization Transfer

Move material from one organization to another via an In-transit Shipment.

### Process/Transaction Flow:

- Review the on-hand quantity of item CM28287 in Inventory Org 001:

Manage Item Quantities [?](#)

[Advanced Search](#) [Saved Search](#) [All Item Quantities](#)

Search Results [?](#)

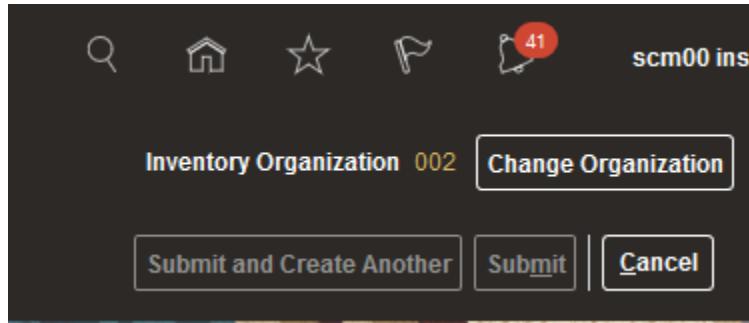
View Item Quantity By: [Item](#)

Actions [View](#) [Print](#) [Email](#) [Copy](#) [View Item Availability](#)

| Item             | Quantity |           |         |          | Secondary Quantity |
|------------------|----------|-----------|---------|----------|--------------------|
|                  | On Hand  | Receiving | Inbound | UOM Name | On Hand            |
| Item CM28287     | 45       |           |         | Ea       |                    |
| Organization 001 |          |           |         | Ea       |                    |



2. Change Organization to 002 – this will be the Source Organization for the transaction:



3. Navigate to Supply Chain Execution > Inventory Management > Tasks > Create Interorganization Transfer
4. Select the Type = Intransit Shipment, click on Generate Shipment Number and enter the other details as illustrated in the screenshot below:

| Line | * Item  | Source                 | Destination          | * UOM Name | * Quantity | Reason |
|------|---------|------------------------|----------------------|------------|------------|--------|
|      |         | * Subinventory Locator | Subinventory Locator |            |            |        |
| 1    | CM28287 | Stores                 | Stores               | Ea         | 3          |        |

5. Click on Submit. A confirmation message is displayed.



6. Change Organization to the Destination Organization 001

7. Navigate to Supply Chain Execution > Inventory Management > Tasks > Receipts > Receive Expected Shipments

8. Enter the In-Transit Shipment number and click Search:

9. Select the row and click Receive:

| Organization | Item    | Item Description    | Document Type       | Document Number | Document Line | Document Schedule | Manufacturer Part Number | Manufacturer |
|--------------|---------|---------------------|---------------------|-----------------|---------------|-------------------|--------------------------|--------------|
| 001          | CM28287 | Cordless Optical... | In-transit shipment | 490630          | 1             |                   |                          |              |



10. Enter the Receipt Quantity and click on Create Receipt:

Receive Lines ②

Organization: 001

Actions ▾ View ▾

| Item    | Item Description | Document Number | * Quantity | * UOM Name | Destination Type | Subinventory | Locator | Deliver-to Location | * Receipt Date   |
|---------|------------------|-----------------|------------|------------|------------------|--------------|---------|---------------------|------------------|
| CM28287 | Cordless O...    | 490630          | 3          | Ea         | Receiving        |              |         |                     | 5/25/21 12:12 PM |

11. Validate the details and click Submit:

Create Receipt ②

Organization: 001

Actions ▾

**Receipt**

|                                  |                  |                |                   |
|----------------------------------|------------------|----------------|-------------------|
| Supplier                         | Atlanta          | GL Date        | 5/25/21 12:41 PM  |
| Customer                         |                  | Shipped Date   | 5/25/21 12:32 PM  |
| Shipment                         | 490630           | Waybill        |                   |
| Packing Slip                     |                  | Bill of Lading |                   |
| Shipping Method                  |                  | * Received By  | instructor, scm00 |
| Number of Supplier Packing Units |                  | Notes          |                   |
| * Receipt Date                   | 5/25/21 12:41 PM | Attachments    | None +            |

► Additional Information

**Receipt Lines**

View ▾

| Item    | Item Description  | Revision | Document Number | Quantity | UOM Name | Subinventory | Locator | Receiving Location | De Ty |
|---------|-------------------|----------|-----------------|----------|----------|--------------|---------|--------------------|-------|
| CM28287 | Cordless Optic... |          | 490630          | 3        | Ea       |              |         | Seattle            | Re    |

12. Navigate to Supply Chain Execution > Inventory Management > Tasks > Receipts > Put Away Receipts

13. Enter the In-Transit Shipment Number and click Search



14. Select the row and click Put Away:

The screenshot shows the 'Put Away Receipts' screen. At the top right, there are buttons for 'Inventory Organization 001' and 'Change Organization'. Below that is a 'Done' button. The main area is titled 'Put Away Receipts' with a help icon. A 'Saved Search' dropdown is set to 'All Lines to Put Away'. Below this is a search bar labeled 'Search Results'. A 'View' dropdown is set to 'Put Away'. The table has columns: Organization, Item, Item Description, Line Status, Receipt, Document Type, Document Number, Quantity, UOM Name, and S. A single row is selected, showing: Organization 001, Item CM28287, Item Description 'Cordless Optic...', Line Status 'Received', Receipt '51677', Document Type 'In-transit shipm...', Document Number '490630', Quantity '3', UOM Name 'Ea', and S. Navigation arrows are at the bottom of the table.

15. Validate the details and click Submit:

The screenshot shows the 'Put Away Lines' screen. At the top right, there are buttons for 'Inventory Organization 001' and 'Change Organization'. Below that are 'Submit' and 'Cancel' buttons. The main area is titled 'Put Away Lines' with a help icon. It shows 'Organization: 001'. A 'View Details' button is visible. The table has columns: Item, Item Description, Receipt, Document Type, Document Number, \* Quantity, \* UOM Name, Destination Type, and Subinventory. A single row is selected, showing: Item CM28287, Item Description 'Cordless Optical...', Receipt '51677', Document Type 'In-transit shipm...', Document Number '490630', Quantity '3', UOM Name 'Ea', Destination Type 'Inventory', and Subinventory 'Stores'. Navigation arrows are at the bottom of the table.

16. A confirmation message is displayed.

17. Review the on-hand quantity of item CM28287 in Inventory Org 001 from the Item Quantities screen to validate that the quantity has been transferred successfully:

The screenshot shows the 'Manage Item Quantities' screen. At the top right, there are buttons for 'Inventory Organization 001' and 'Change Organization'. Below that is a 'Done' button. The main area is titled 'Manage Item Quantities' with a help icon. A 'View Item Availability' button is visible. The table has columns: Item, Quantity, and Secondary Quantity. The first row is collapsed. The second row, for item CM28287, is expanded, showing: On Hand '48', Receiving '0', Inbound '0', UOM Name 'Ea', and On Hand '48'. The third row, for Organization 001, is collapsed.



## Internal Material Transfer, Overpick and Move

Transferring material from Inventory Org 001 to 003 and demonstrating Overpick and Move functionality.

### Process/Transaction Flow:

1. Navigate to Inventory Management > Manage Item Quantities Screen. Change Organization to the destination organization 003
2. Check the current on-hand quantity of item V21001:

The screenshot shows the 'Manage Item Quantities' screen. At the top, there are 'Actions' and 'View' dropdowns, and a 'View Item Availability' button. Below is a table with columns: Item, Quantity, On Hand, Receiving, Inbound, and UOM Name. A single row is selected for 'Item V21001', showing a quantity of 3, UOM as 'Ea', and status indicators for On Hand, Receiving, and Inbound.

| Item              | Quantity |           |         |    | UOM Name |
|-------------------|----------|-----------|---------|----|----------|
|                   | On Hand  | Receiving | Inbound |    |          |
| ► ⚡ Item V21001 ☆ | 3        |           |         | Ea |          |

3. In the Search Results section, navigate to Actions > Request Transfer Order

The screenshot shows the 'Manage Item Quantities' screen with the search results for item V21001. The search criteria include 'Item' (V21001), 'Organization' (003), and 'View Item Quantity By' set to 'Item'. The search results table has columns: View Item Availability, Quantity, Secondary Quantity, On Hand, Receiving, Inbound, and UOM Name. One row is selected for 'Item V21001', showing a quantity of 3, UOM as 'Ea', and status indicators for On Hand, Receiving, and Inbound. The left sidebar lists various actions: View Item Availability, Request Movement Request Transfer, Request Movement Request Issue, Request Miscellaneous Transaction, Request Cycle Count, Manage Material Status, Edit Lot Grade, Request Transfer Order, View Supplier Lots, and View Item Cross References.



4. The ‘Create Supply Request’ screen is displayed. Enter the following details: Item = V21001, Requested Quantity = 1, Requested Delivery Date = TODAY() + 1

The screenshot shows the 'Create Supply Request' screen. At the top right, there are buttons for 'Inventory Organization 003' and 'Change Organization'. Below that are 'Submit' and 'Cancel' buttons. The main area has fields for 'Destination Organization' (Chicago) and 'Supply Request Reference Number' (INV\_85114). A toolbar below these fields includes 'View ▾', '+', 'X', and a 'Select Supply Source' button. The data entry table has columns for \* Item, \* Requested Quantity, \* UOM, \* Supply Source, \* Requested Delivery Date, and \* Supply Details. The row for item V21001 shows a quantity of 1, UOM of Ea, and a delivery date of 5/26/21 1:16.

| * Item | * Requested Quantity | * UOM | * Supply Source | * Requested Delivery Date | * Supply Details |
|--------|----------------------|-------|-----------------|---------------------------|------------------|
| V21001 | 1                    | Ea    |                 | 5/26/21 1:16              |                  |

5. Click on the Select Supply Source button on the top of the screen. Select the Supply Source as 001 Seattle and click OK

The screenshot shows the 'Select Supply Source' screen. At the top right, there are buttons for 'Inventory Organization 003' and 'Change Organization'. Below that are 'OK' and 'Cancel' buttons. The main area displays the requested item (V21001), delivery date (5/26/21), and destination organization (Chicago). It also shows the requested quantity (1) and UOM (Ea). A table lists supply sources based on ranking, with Atlanta at rank 0 and Seattle at rank 1. The Seattle row is highlighted.

| Ranking | Supply Type | Supply Source | Total Available Quantity | UOM |
|---------|-------------|---------------|--------------------------|-----|
| 0       | Transfer    | Atlanta       | 998                      | Ea  |
| 1       | Transfer    | Seattle       | 999                      | Ea  |

6. Click on Submit. Note down the Supply Request Reference Number.

The screenshot shows the 'Create Supply Request' screen again. The data entry table now shows the supply source as Seattle. A modal dialog box titled 'Supply Details' appears in the bottom right, containing a 'Confirmation' section with the message: 'Supply request was created and submitted for processing. The supply request reference number is: INV\_85114.' There is an 'OK' button at the bottom of the dialog.



7. Navigate to Supply Chain Execution > Supply Orchestration > Tasks > Manage Supply Lines. Enter the Supply Request Reference Number and click Search

| Message Type | Message | Supply Order Number | Line | Document Number | Supply Type | Movement Request | Request Source                     | Line Status |
|--------------|---------|---------------------|------|-----------------|-------------|------------------|------------------------------------|-------------|
|              |         | 300000212895448     | 1.1  |                 | Transfer    | No               | Oracle Fusion Inventory Management | Not Started |

8. Click on the Supply Order Number and navigate to the Execution Documents tab. The Transfer Order Number is displayed.

| Line | Supply Type | Item    | Item Category | Description                | Requested Quantity | Fulfilled Quantity | UOM | Status      | Supp    |
|------|-------------|---------|---------------|----------------------------|--------------------|--------------------|-----|-------------|---------|
| 1    | Transfer    | PV21001 |               | Photo Paper Pack, 50 count | 1                  |                    | Ea  | In process  |         |
| 1.1  | Transfer    | PV21001 |               | Photo Paper Pack, 50 count | 1                  |                    | Ea  | Not Started | Seattle |

**1.1: Line Details**

| Orchestration Plan |                |                      |          |     | Execution Documents       | Buy    | Make | Transfer |
|--------------------|----------------|----------------------|----------|-----|---------------------------|--------|------|----------|
|                    |                |                      |          |     | Actions ▾ View ▾ Format ▾ | Detach | Wrap |          |
| Document Number    | Document Type  | Document Line Number | Quantity | UOM | Status                    |        |      |          |
| 143050             | Transfer order | 1                    | 1        | Ea  | Created                   |        |      |          |



9. Click on the Transfer Order to view the details. Note that the Interface Status = Interfaced to Shipping

Transfer Order: 143050

Transaction Origin Type: Inventory  
— Back-to-back

Description: **Interface Status:** Interfaced to Shipping

Requisitioning BU: US1 Business Unit  
Creation Date: 5/25/21 1:23 PM

Status: Open  
Transfer Price: 10.00 USD

Total Tax: 0.00 USD  
Total Transfer Price: 10.00 USD

Actions ▾ View ▾ Source Organization All ▾ Destination Organization All ▾

**Lines**

| Line | Item   | Line Status | Fulfillment Status   | * Source Organization | Source Subinventory | Destination Organization | Destination Subinventory | Destination Location | Destination Type | * Re Deli |
|------|--------|-------------|----------------------|-----------------------|---------------------|--------------------------|--------------------------|----------------------|------------------|-----------|
| 1    | V21001 | Open        | Awaiting fulfillment | 001                   | 003                 | Chicago                  | Inventory                | 5/26                 |                  |           |

10. Navigate to Inventory Management > Shipments > Create Pick Wave. Ensure that the Organization selected is the Supply Source. Select a Manual Pick Confirmation Rule, enter the other details and click on Release Now.

Create Pick Wave ⓘ

Select a release rule or enter selection criteria to create a pick wave.

Inventory Organization 001 Change Organization

Release Rule: 001-Man. Pick Conf

Selection Criteria | Show More

|                             |                                        |
|-----------------------------|----------------------------------------|
| Ship-from Organization: 001 | Shipping Method                        |
| Order Type: Transfer order  | Release Status: Unreleased             |
| Order: 143050               | From Scheduled Ship Date: m/d/y h:mm a |
| Customer: scm00 instructor  | To Scheduled Ship Date: m/d/y h:mm a   |

11. A confirmation message is displayed.

12. Navigate to Inventory Management > Tasks > Confirm Pick Slips

13. Enter the Pick Wave number and click Search:



Inventory Organization 001 [Change Organization](#)

### Confirm Pick Slips: Search

[Done](#)

**Advanced Search**

Saved Search [Pick Slips Due Today](#)

\*\* At least one is required

|                            |        |
|----------------------------|--------|
| ** Pick Slip Equals        | 241921 |
| ** Shipment Equals         |        |
| ** Order Equals            |        |
| ** Movement Request Equals |        |
| ** Pick Wave Equals        | 241921 |
| ** Customer Equals         |        |
| ** Due Date Equals         | m/d/y  |
| ** Carrier Equals          |        |

Example: 5/25/21

[Search](#) [Reset](#) [Save...](#) [Add Fields](#) [Reorder](#)

**Search Results**

| Pick Slip | Organization | Due Date        | Pick Status | Order  | Order Type     | Shipping Method   | Customer         | Open |
|-----------|--------------|-----------------|-------------|--------|----------------|-------------------|------------------|------|
| 188543    | 001          | 5/25/21 1:16 PM | Open        | 143050 | Transfer order | DHL-Air-Next d... | scm00 instructor | 1    |

14. Click on the Pick Slip Number

15. Select the Ready to Confirm checkbox:

Inventory Organization 001 [Change Organization](#)

### Confirm Pick Slip: 188543 [?](#)

Organization : 001

[Confirm](#) [Cancel](#)

**Summary** | [Show More](#)

|               |                 |                 |        |
|---------------|-----------------|-----------------|--------|
| Creation Date | 5/25/21 1:52 PM | Number of Picks | 1      |
| Pick Status   | Open            | Order           | 143050 |

**Picks** [?](#)

| Actions | View | Pick Status | Generate Serial Numbers | Ready to confirm                    | Overpick and Move | Line | Pick Status | Item   | Item Description  | UOM Name | Requested Quantity | Picked Quantity | Source Subinventory | Source |
|---------|------|-------------|-------------------------|-------------------------------------|-------------------|------|-------------|--------|-------------------|----------|--------------------|-----------------|---------------------|--------|
|         |      |             |                         | <input checked="" type="checkbox"/> |                   | 1    | Open        | V21001 | Photo Paper Pa... | Ea       | 1                  | 1               | Stores              |        |

16. Update the Picked Quantity to 5 and click on Overpick and Move. Select the Subinventory = Completed and click Submit:



Inventory Organization 001 [Change Organization](#)

## Confirm Pick Slip: 188543 [?](#)

Organization : 001

[Confirm](#) [Cancel](#)

**Summary** | [Show More](#)

|               |                 |                 |        |
|---------------|-----------------|-----------------|--------|
| Creation Date | 5/25/21 1:52 PM | Number of Picks | 1      |
| Pick Status   | Open            | Order           | 143050 |

**Overpick and Move: Pick Slip 188543, Line 1**

| Line | Requested Quantity | Item   | Picked Quantity | Item Description           | UOM Name | Quantity | Source Subinventory | Source |
|------|--------------------|--------|-----------------|----------------------------|----------|----------|---------------------|--------|
| 1    | 1                  | V21001 | 5               | Photo Paper Pack, 50 count | Ea       | 5        | Stores              |        |

**Picks** [?](#)

**Actions** ▾ **View** ▾ [Print](#) **Pick Status**

| Ready to confirm                    | Overpick and Move                   | Line |
|-------------------------------------|-------------------------------------|------|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |      |

**Source Details**

Subinventory: Stores

Locator:

**Destination Details**

\* Subinventory: Completed [▼](#) Locator: [EO](#)

[Submit](#) [Cancel](#)

17. Note that 5 Qty has been transferred to the Completed subinventory:

Inventory Organization 001 [Change Organization](#)

## Manage Item Quantities [?](#)

[Advanced Search](#) [Saved Search](#) [All Item Quantities](#) [Done](#)

### Search Results [?](#)

View Item Quantity By [Item](#)

Actions [▼](#) View [▼](#) [View Item Availability](#)

| Item                    | Quantity |           |         |          | Secondary Quantity |
|-------------------------|----------|-----------|---------|----------|--------------------|
|                         | On Hand  | Receiving | Inbound | UOM Name | On Hand            |
| Item V21001             | 999      |           |         | Ea       |                    |
| Organization 001        | 999      |           |         | Ea       |                    |
| Subinventory Stores     | 991      |           |         | Ea       |                    |
| Subinventory Inspection | 3        |           |         | Ea       |                    |
| Subinventory Completed  | 5        |           |         | Ea       |                    |



18. Once the pre-processing has been completed, continue the Pick Confirm process from the Completed subinventory:

The screenshot shows the 'Confirm Pick Slip' screen for pick slip 188543. At the top, it displays 'Organization : 001' and buttons for 'Change Organization', 'Confirm', and 'Cancel'. Below this, the title 'Confirm Pick Slip: 188543' is shown along with a help icon. The main area contains a summary table with details like Creation Date (5/25/21 1:52 PM), Pick Status (Open), Number of Picks (1), and Order (143050). A 'Picks' section follows, featuring a grid of pick lines. One line is selected, showing its status as 'Ready to confirm'. The 'Overpick and Move' checkbox is checked. The grid columns include Line, Pick Status, Item, Item Description, UOM Name, Requested Quantity, Picked Quantity, Source Subinventory, and Source. The 'Picked Quantity' field for this line is set to 1, and the 'Source Subinventory' is listed as 'Completed'.

19. Click on Confirm and Go to Ship Confirm. Validate the details and click on Ship Confirm:

The screenshot shows the 'Edit Shipment' screen for shipment 80198. At the top, it displays 'Inventory Organization 001' and buttons for 'Change Organization', 'Ship Confirm', 'Actions', 'Save', and 'Cancel'. Below this, the title 'Edit Shipment: 80198' is shown along with a help icon. The main area contains a 'Shipment' section with fields for Shipment (80198), Shipping Method (DHL-Air-Next day air), Waybill, Initial Ship Date (5/25/21 1:16 PM), Gross Weight (10), Weight UOM (lb), Volume (50), and Volume UOM (cu in). To the right, Shipment Status is listed as Open, Exceptions in Shipment (0), Ship-from Organization (001), Customer (scm00 instructor), Ship-to Location (Chicago), Total Shipping Cost Recorded (0.00 USD), Number of Items (1), and Number of Outer Packing Units (0). A 'Show Details' button is present. Below this is a 'Lines' section with a grid of shipment lines. One line is selected, showing its details. The grid columns include Item, Order, Order Type, Line Status, Quick Ship Status, Quantity UOM, Requested Quantity, Maximum Undershipment Percentage, and Maximum Overshipment Percentage. The selected line corresponds to item V21001, order 143050, transfer order type, staged status, and quantity 1.



20. Note that the Transfer Order indicates that the quantity is successfully shipped from the source organization:

| Line | Item   | Source Organization | Destination Location | Line Status | Fulfillment Status | UOM Name | Quantity | Requested | Shipped | Received | Delivered | Requested Delivery Date | Scheduled Shipment Date |
|------|--------|---------------------|----------------------|-------------|--------------------|----------|----------|-----------|---------|----------|-----------|-------------------------|-------------------------|
| 1    | V21001 | 001                 | Chicago              | Open        | Shipped            | Ea       |          | 1         | 1       | 1        | 1         | 5/26/21 1:16:00 AM      | 5/26/21 1:16:00 AM      |

1, V21001: Shipments and Receipts

| Shipment | Ship-from Organization | Shipment Status | Bill of Lading | Shipping Method      | Actual Ship Date | Receipt | Received Date | Received By | Gross Wt |
|----------|------------------------|-----------------|----------------|----------------------|------------------|---------|---------------|-------------|----------|
| 80198    | 001                    | Closed          | 194676         | DHL-Air-Next day air | 5/25/21 2:03 PM  |         |               |             |          |

21. Navigate to the Destination Organization in Inventory Management.

22. Navigate to Tasks > Receipts > Receive Expected Shipments. Enter the Transfer Order number and click on Search.

| Organization         | Item | Item Description | Document Type | Document Number | Document Line | Document Schedule | Manufacturer Part Number | Manufacturer |
|----------------------|------|------------------|---------------|-----------------|---------------|-------------------|--------------------------|--------------|
| No search conducted. |      |                  |               |                 |               |                   |                          |              |



23. Select the line and click on Receive. Enter the details and click on Create Receipt

| Item   | Item Description | Document Number | * Quantity | * UOM Name | Destination Type | Subinventory | Locator | Deliver-to Location | * Receipt Date  |
|--------|------------------|-----------------|------------|------------|------------------|--------------|---------|---------------------|-----------------|
| V21001 | Photo Paper...   | 143050          | 1          | Ea         | Receiving        |              |         |                     | 5/25/21 2:07 PM |

24. Enter the Receipt details and click on Submit

| Item   | Item Description  | Revision | Document Number | Quantity | UOM Name | Subinventory | Locator | Receiving Location | De Ty |
|--------|-------------------|----------|-----------------|----------|----------|--------------|---------|--------------------|-------|
| V21001 | Photo Paper Pa... |          | 143050          | 1        | Ea       |              |         | Chicago            | Re    |

25. Navigate to Put Away Receipts. Enter the Transfer Order Number and click on Search



Inventory Organization 003 [Change Organization](#)

Put Away Receipts ② [Done](#)

**Advanced Search** Saved Search [All Lines to Put Away](#) ▾

\*\* At least one is required

|                                                                                                                                                                                                                               |                                                                                                                                                                                        |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ** Receipt <input type="text"/><br>** Purchase Order <input style="width: 100px;" type="text"/><br>** Transfer Order <input type="text" value="143050"/><br>** In-Transit Shipment <input style="width: 100px;" type="text"/> | ** RMA <input type="text"/><br>** Supplier <input type="text"/><br>** Item <input type="text"/> <span style="font-size: small;">Search</span><br>Transaction Date <input type="text"/> |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

[Search](#) [Reset](#) [Save...](#) [Add Fields ▾](#) [Reorder](#)

Search Results

[View ▾](#) [Put Away](#)

| Organization         | Item | Item Description | Line Status | Receipt | Document Type | Document Number | Quantity | UOM Name | S |
|----------------------|------|------------------|-------------|---------|---------------|-----------------|----------|----------|---|
| No search conducted. |      |                  |             |         |               |                 |          |          |   |

< >

26. Select the line and click on Put Away. Select the Subinventory as Stores and click on Submit

Inventory Organization 003 [Change Organization](#)

Put Away Lines ② [Submit](#) [Cancel](#)

Organization: 003

[Actions ▾](#) [View ▾](#) Remove Line View Details

| Item   | Item Description   | Receipt | Document Type  | Document Number | * Quantity | * UOM Name | Destination Type | Subinventory |
|--------|--------------------|---------|----------------|-----------------|------------|------------|------------------|--------------|
| V21001 | Photo Paper Pac... | 30059   | Transfer order | 143050          | 1          | Ea         | Inventory        | Stores       |

< >

27. The Transfer Order process is completed, and the Line status is Closed.



## Shipments and Receipts: Transfer Order 143050

Done

Status: Closed      — Back-to-back

Transaction Origin Type: Inventory

Lines

| Line | Item   | Source Organization | Destination Location | Line Status | Fulfillment Status | UOM Name | Quantity | Requested | Shipped | Received | Delivered | Requested Delivery Date | Sch Sh |
|------|--------|---------------------|----------------------|-------------|--------------------|----------|----------|-----------|---------|----------|-----------|-------------------------|--------|
| 1    | V21001 | 001                 | Chicago              | Closed      | Shipped and re...  | Ea       |          | 1         | 1       | 1        | 1         | 5/26/21 1:16...         | 5/26   |

1, V21001: Shipments and Receipts

View ▾

| Shipment | Ship-from Organization | Shipment Status | Bill of Lading | Shipping Method      | Actual Ship Date | Receipt | Received Date   | Received By   | Gross W |
|----------|------------------------|-----------------|----------------|----------------------|------------------|---------|-----------------|---------------|---------|
| 80198    | 001                    | Closed          | 194676         | DHL-Air-Next day air | 5/25/21 2:03 PM  | 30059   | 5/25/21 2:09 PM | scm00 inst... |         |

## Internal Material Transfer Returns

Create a return transfer order to return material that was transferred in the previous use case.

### Process/Transaction Flow:

1. In the Destination Organization, navigate to Inventory Management > Tasks > Receipts > Return Receipts
2. Enter the Transfer Order number created in the previous use case and click on Search:

Inventory Organization 003 Change Organization

Return Receipts

Done

Advanced Search

At least one is required

|                   |             |
|-------------------|-------------|
| ** Receipt        | ** Supplier |
| ** Purchase Order | ** Customer |
| ** Transfer Order | ** Item     |
| ** RMA            | Line Status |

Search Reset Save... Add Fields Reorder

3. Select the row and click on Return:



Inventory Organization 003 [Change Organization](#)

**Return Receipts** [?](#)

[Done](#)

[► Advanced Search](#)

Saved Search [Received Lines](#) [▼](#)

Search Results

[View ▾](#)

[Return](#)

| Item   | Item Description  | Line Status | Receipt | Document Number | Subinventory | Locator | Quantity | UOM Name | S |
|--------|-------------------|-------------|---------|-----------------|--------------|---------|----------|----------|---|
| V21001 | Photo Paper Pa... | Delivered   | 30059   | 143050          | Stores       |         | 1        | Ea       | S |

4. Enter the Return Quantity and click on Submit:

Inventory Organization 003 [Change Organization](#)

**Return Lines** [?](#)

Organization: 003

[Submit](#) [Cancel](#)

[Actions ▾](#) [View ▾](#) [Remove Line](#) [View Details](#)

| Item   | Item Description  | Receipt | Return To    | Name    | Recorded Quantity | * Quantity | UOM Name | Physical Material Return Required   | RMA |
|--------|-------------------|---------|--------------|---------|-------------------|------------|----------|-------------------------------------|-----|
| V21001 | Photo Paper Pa... | 30059   | Organization | Seattle | 1                 | 1          | Ea       | <input checked="" type="checkbox"/> |     |

5. A confirmation message is displayed. Click on Done.
6. Navigate to Inventory Management > Tasks > Shipments > Manage Shipment Lines
7. Query by Order Type = Return Transfer Order and item = V21001



Inventory Organization 003 [Change Organization](#)

**Manage Shipment Lines** [?](#)

[Save](#) [Cancel](#)

**Advanced Search**

|                     |                       |                            |         |
|---------------------|-----------------------|----------------------------|---------|
| Order Type          | Return transfer order | Shipping Priority          | Equals  |
| Order               | Equals                | Ship-from Organization     | 003     |
| Scheduled Ship Date | Before                | Item                       | V21001  |
| Customer            |                       | Lines Assigned to Shipment | Include |
| Line Status         |                       | Exception Name             |         |

[Search](#) [Reset](#) [Save...](#) [Add Fields](#) [Reorder](#)

### Search Results

Actions ▾ View ▾ [Autocreate Shipment](#) [Add to Shipment](#) [Unassign from Shipment](#) Lines All

Summary Carrier Inventory Details Source Reference Other

|        |          | Summary |                       |                  |                                     |              |                    |                                  |
|--------|----------|---------|-----------------------|------------------|-------------------------------------|--------------|--------------------|----------------------------------|
| Item   | Shipment | Order   | Order Type            | Line Status      | Quick Ship Status                   | Quantity UOM | Requested Quantity | Maximum Undershipment Percentage |
| V21001 | 71218    | 137053  | Return transfer order | Interfaced       | <input checked="" type="checkbox"/> | Ea           | 2                  |                                  |
| V21001 | 75201    | 139055  | Return transfer order | Interfaced       | <input checked="" type="checkbox"/> | Ea           | 1                  |                                  |
| V21001 | 76199    | 139062  | Return transfer order | Interfaced       | <input checked="" type="checkbox"/> | Ea           | 1                  |                                  |
| V21001 |          | 143053  | Return transfer order | Ready to release |                                     | Ea           | 1                  |                                  |

### 8. Enter the Shipped Quantity, Tracking Number and click on Autocreate Shipment

**Confirmation**

The shipment 80199 was created.

[OK](#)

Actions ▾ View ▾ [Autocreate Shipment](#) [Add to Shipment](#)

Summary Carrier Inventory Details Source Reference Other

|        |          | Summary |                       |             |                                     |              |                    |                                  |
|--------|----------|---------|-----------------------|-------------|-------------------------------------|--------------|--------------------|----------------------------------|
| Item   | Shipment | Order   | Order Type            | Line Status | Quick Ship Status                   | Quantity UOM | Requested Quantity | Maximum Undershipment Percentage |
| V21001 | 71218    | 137053  | Return transfer order | Interfaced  | <input checked="" type="checkbox"/> | Ea           | 2                  |                                  |



9. Click on OK. Navigate to Actions > Click on Ship Confirm:

| Order  | Order Type            | Line Status      | Quick Ship Status                   | Quantity UOM | Requested Quantity | Maximum Undershipment Percentage |
|--------|-----------------------|------------------|-------------------------------------|--------------|--------------------|----------------------------------|
| 137053 | Return transfer order | Interfaced       | <input checked="" type="checkbox"/> | Ea           | 2                  |                                  |
| 139055 | Return transfer order | Interfaced       | <input checked="" type="checkbox"/> | Ea           | 1                  |                                  |
| 139062 | Return transfer order | Interfaced       | <input checked="" type="checkbox"/> | Ea           | 1                  |                                  |
| 143053 | Return transfer order | Ready to release | <input checked="" type="checkbox"/> | Ea           | 1                  |                                  |

10. A confirmation message is displayed. Query the Return Transfer order – observe that the shipment process is completed:

| Line | Item   | Source Organization | Destination Location | Line Status | Fulfillment Status | UOM Name | Requested | Shipped | Received | Delivered | Requested Delivery Date | Sch Shi         |
|------|--------|---------------------|----------------------|-------------|--------------------|----------|-----------|---------|----------|-----------|-------------------------|-----------------|
| 1    | V21001 | 003                 | Seattle              | Open        | Shipped            | Ea       | 1         | 1       |          |           | 5/25/21 2:18...         | 5/25/21 4:15 PM |



11. Change to the Destination Organization (001) and perform a Receipt:

Inventory Organization 001 [Change Organization](#)

**Receive Lines** [?](#)

Organization: 001

Add to Receipt [Create Receipt](#) [Cancel](#)

| Actions | View             | Remove Line     | Show Receipt Quantity | View Details |                  |              |         |                     |                 |
|---------|------------------|-----------------|-----------------------|--------------|------------------|--------------|---------|---------------------|-----------------|
| Item    | Item Description | Document Number | * Quantity            | * UOM Name   | Destination Type | Subinventory | Locator | Deliver-to Location | * Receipt Da    |
| V21001  | Photo Paper...   | 143053          | 1                     | Ea           | Inventory        | Stores       |         | Seattle             | 5/25/21 4:15 PM |

12. The Transfer Order return process is completed, and the status is updated to Closed:

Inventory Organization 003 [Change Organization](#)

**Shipments and Receipts: Transfer Order 143053**

Status: Closed [Done](#) [Back-to-back](#)

Transaction Origin Type: Return

**Lines**

| View |        | Source Organization | All                  | Destination Organization | All                | Quantity |           |         |          |           | Requested Delivery Date | Sch Shi |
|------|--------|---------------------|----------------------|--------------------------|--------------------|----------|-----------|---------|----------|-----------|-------------------------|---------|
| Line | Item   | Source Organization | Destination Location | Line Status              | Fulfillment Status | UOM Name | Requested | Shipped | Received | Delivered |                         |         |
| 1    | V21001 | 003                 | Seattle              | Closed                   | Shipped and re...  | Ea       | 1         | 1       | 1        | 1         | 5/25/21 12:18...        | 5/25    |

1, V21001: Shipments and Receipts

View ▾

| Shipment | Ship-from Organization | Shipment Status | Bill of Lading | Shipping Method | Actual Ship Date | Receipt | Received Date   | Received By   | Gross W |
|----------|------------------------|-----------------|----------------|-----------------|------------------|---------|-----------------|---------------|---------|
| 80199    | 003                    | Closed          | 194677         |                 | 5/25/21 4:15 PM  | 51678   | 5/25/21 4:19 PM | scm00 inst... |         |



# 5. Replenish Inventory

## Perform Min-Max Planning at Subinventory level

Setup Min-Max planning for a new item at the Subinventory level for the following requirements:

- Minimum Quantity – 10
- Maximum Quantity – 50
- Fixed Lot Multiple -7

### Process/Transaction Flow:

1. Create a new item or use an item that was created earlier.
2. Navigate to Setup and Maintenance > Manufacturing and Supply Chain Materials Management > Facilities > Manage Subinventories and Locators
3. Choose the Organization 002
4. Select the Completed subinventory and click Manage Item Subinventories

The screenshot shows the 'Manage Subinventories' page with the following details:

- Header:** Inventory Organization 002, Change Organization, Done.
- Search Bar:** Search.
- Section:** Search Results.
- Buttons:** Actions ▾ View ▾ + (highlighted), Manage Item Subinventories, Manage Locators.
- Table:** A grid of subinventory records with columns: Subinventory, Description, Active, Material Status, Locator Control, Subinventory Type, and Additional Information.
- Data:** The table lists several subinventories: Completed (Finished Goods), Inspection, KH Stores, Quarantine, Receiving, Staging, Stores, and WIP (Work in Process). All are marked as Active, Storage type, and None for Locator Control.
- Footer:** Completed: Subinventory Details.

5. Add a new record by clicking the + icon

The screenshot shows the 'Manage Item Subinventories' search interface with the following details:

- Header:** Done.
- Section:** Search.
- Search Fields:** Subinventory Equals Completed, Inventory Planning Method Equals (dropdown menu), Item Description Starts with (dropdown menu).
- Buttons:** Search, Reset, Add Fields ▾, Reorder.
- Section:** Search Results.
- Buttons:** Actions ▾ View ▾, Manage Item Locators.
- Table:** A grid of subinventory records with columns: Subinventory, Item, Item Description, Inventory Planning Method, and Additional Information.
- Text:** No results found.

6. Add the Min-Max attributes:



## Add Item to Subinventory

|                             |                  |
|-----------------------------|------------------|
| * Subinventory              | Completed        |
| * Item                      | DEMO Item        |
| Item Description            | Demo Item        |
| * Inventory Planning Method | Min-max planning |
| Min-Max Quantity UOM        | Ea               |
| Minimum Quantity            | 10               |
| Maximum Quantity            | 50               |
| Fixed Lot Multiple          | 7                |
| Minimum Order Quantity      |                  |
| Maximum Order Quantity      |                  |

## PAR Settings

|                          |  |
|--------------------------|--|
| Replenishment Count Type |  |
| PAR Level                |  |

## Lead Times in Days

|                |  |
|----------------|--|
| Preprocessing  |  |
| Processing     |  |
| Postprocessing |  |

## Sourcing

|              |              |
|--------------|--------------|
| Type         | Subinventory |
| Organization | Atlanta      |
| Subinventory | Stores       |
| Ordering UOM | Ea           |

|                            |  |
|----------------------------|--|
| PAR Maximum Quantity       |  |
| PAR Level UOM              |  |
| Count Tolerance Percentage |  |

[Save and Create Another](#) [Save and Close](#) [Cancel](#)

- Run the Print Min-Max Planning Report. Navigate to Tools> Scheduled Processes
- Provide the parameters as below:



### Process Details

This process will be queued up for submission at position 1

**Process Options** **Advanced** **Submit** **Cancel**

Name Print Min-Max Planning Report  Print output

Description Calculates min-max planning replenishment level...  Notify me when this process ends

Schedule As soon as possible

Submission Notes

### Basic Options

#### Parameters

\* Organization 002

\* Sort By Inventory item

From Item DEMO Item

To Item DEMO Item

\* Planning Level Subinventory

\* Item Selection All min-max planned items

Subinventory Completed

Batch Prefix

Lot Control include both lot and not lot controlled items

Demand Cutoff Date m/d/yy

Demand Cutoff Date Offset

Provide the Restock = Yes

### Process Details

This process will be queued up for submission at position 1

**Process Options** **Advanced** **Submit** **Cancel**

Name Print Min-Max Planning Report  Print output

Description Calculates min-max planning replenishment level...  Notify me when this process ends

Schedule As soon as possible

Submission Notes

### Basic Options

#### Parameters

Supply Cutoff Date m/d/yy

Supply Cutoff Date Offset

\* Restock Yes

9. Check for report completion and click the output



| Actions ▾ View ▾                |            |           | Schedule New Process | Resubmit | Put On Hold | Cancel Process | Release Process | View Log | ↻ |
|---------------------------------|------------|-----------|----------------------|----------|-------------|----------------|-----------------|----------|---|
| Name                            | Process ID | Status    |                      |          |             |                |                 |          |   |
| Print Min-Max Planning Report   | 2733258    | Succeeded |                      |          |             |                |                 |          |   |
| Index Active Meta Model Version | 2733237    | Wait      |                      |          |             |                |                 |          |   |
| Execute Entity Batch            | 2733236    | Error     |                      |          |             |                |                 |          |   |
| Execute Entity Batch            | 2733235    | Succeeded |                      |          |             |                |                 |          |   |

| Print Min-Max Planning Report, 2733258: Details                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                    |                         |             |                                |                         |             |                                     |               |          |        |      |  |  |  |  |  |  |  |                                     |  |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|-------------------------|-------------|--------------------------------|-------------------------|-------------|-------------------------------------|---------------|----------|--------|------|--|--|--|--|--|--|--|-------------------------------------|--|
| Status Succeeded                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Schedule Start 5/25/21 5:17 PM UTC |                         |             |                                |                         |             |                                     |               |          |        |      |  |  |  |  |  |  |  |                                     |  |
| <b>Log</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                    |                         |             |                                |                         |             |                                     |               |          |        |      |  |  |  |  |  |  |  |                                     |  |
| Attachment ESS_L_2733258                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                    |                         |             |                                |                         |             |                                     |               |          |        |      |  |  |  |  |  |  |  |                                     |  |
| <b>Output</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                    |                         |             |                                |                         |             |                                     |               |          |        |      |  |  |  |  |  |  |  |                                     |  |
| <div style="border: 1px solid #ccc; padding: 5px;"> <b>Output &amp; Delivery</b> <div style="display: flex; justify-content: space-between; align-items: center;"> <span>XML Data</span> <span>Diagnostic Log</span> <span>Republish</span> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Status All</th> <th>Output Name Default Document</th> <th>Template Min-Max Report</th> <th>Format HTML</th> <th>Locale English (United States)</th> <th>Time Zone UTC</th> <th>Calendar</th> <th>Status</th> <th>Send</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td><input checked="" type="checkbox"/></td> <td></td> </tr> </tbody> </table> </div> |                                    |                         | Status All  | Output Name Default Document   | Template Min-Max Report | Format HTML | Locale English (United States)      | Time Zone UTC | Calendar | Status | Send |  |  |  |  |  |  |  | <input checked="" type="checkbox"/> |  |
| Status All                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Output Name Default Document       | Template Min-Max Report | Format HTML | Locale English (United States) | Time Zone UTC           | Calendar    | Status                              | Send          |          |        |      |  |  |  |  |  |  |  |                                     |  |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                    |                         |             |                                |                         |             | <input checked="" type="checkbox"/> |               |          |        |      |  |  |  |  |  |  |  |                                     |  |

10. Review the report, to ensure the Reorder Quantity is updated considering the requirements.

| Batch Name: MINMAX2733258 |         |                  |                  |                  |                 |                 |                    |                        |                        | Min-Max Report          |                  |    | Report Date 5/25/21 5:17 PM |  |
|---------------------------|---------|------------------|------------------|------------------|-----------------|-----------------|--------------------|------------------------|------------------------|-------------------------|------------------|----|-----------------------------|--|
| Atlanta                   |         |                  |                  |                  |                 |                 |                    |                        |                        |                         |                  |    | Page 1 of 1                 |  |
| Item Item Description     | Sort By | Minimum Quantity | Maximum Quantity | On-Hand Quantity | Supply Quantity | Demand Quantity | Available Quantity | Order Quantity Minimum | Order Quantity Maximum | Order Quantity Multiple | Reorder Quantity |    |                             |  |
| <b>Subinventory</b>       |         |                  |                  |                  |                 |                 |                    |                        |                        |                         |                  |    |                             |  |
| Completed                 |         |                  |                  |                  |                 |                 |                    |                        |                        |                         |                  |    |                             |  |
| Ea                        |         |                  |                  |                  |                 |                 |                    |                        |                        |                         |                  |    |                             |  |
| DEMO Item/ Demo Item      |         | 10               | 50               | 0                | 0               | 0               | 0                  |                        |                        |                         | 7                | Ea |                             |  |

End of Report

11. Review the Movement Request created. Navigate to Supply Chain Execution > Inventory Management

12. Select the organization 002

13. Use the Task Manage Movement Requests and query for the item



## Manage Movement Requests

### Advanced Search

|                          |           |                      |                                  |                          |                      |
|--------------------------|-----------|----------------------|----------------------------------|--------------------------|----------------------|
| ** Movement Request      | Between   | <input type="text"/> | <input type="text"/>             | ** Line Status           | <input type="text"/> |
| ** Created By            |           | <input type="text"/> | <input type="button" value="▼"/> | Source Subinventory      | <input type="text"/> |
| ** Movement Request Type |           | <input type="text"/> | <input type="button" value="▼"/> | Destination Subinventory | <input type="text"/> |
| ** Transaction Type      |           | <input type="text"/> | <input type="button" value="▼"/> |                          |                      |
| ** Item                  | DEMO Item | <input type="text"/> | <input type="button" value="🔍"/> |                          |                      |

### Search Results

| Movement Request | Line Number | Movement Request Type | Required Date    | Transaction Type | Item      | Requested Quantity | Delivered Quantity | UOM Name | Line Status | Created By      |
|------------------|-------------|-----------------------|------------------|------------------|-----------|--------------------|--------------------|----------|-------------|-----------------|
| 241927           | 1           | Replenishment         | 5/25/21 12:00 AM | Movement Requ... | DEMO Item | 49                 |                    | Ea       | Preapproved | SCM00 INSTRU... |

### 14. Review the movement request created:

#### Movement Request: 241927

##### Movement Request

Movement Request 241927

Description

Movement Request Type Replenishment

Status Preapproved

##### Additional Information

#### Lines

Actions ▾ View ▾

| Line Number | Item      | Transaction Type | Requested Quantity | UOM Name | Status      | Required Date    | Source Subinventory | Destination Subinventory | Created By      |
|-------------|-----------|------------------|--------------------|----------|-------------|------------------|---------------------|--------------------------|-----------------|
| 1           | DEMO Item | Movement Requ... | 49                 | Ea       | Preapproved | 5/25/21 12:00 AM | Stores              | Completed                | SCM00.INSTRU... |



# 6. Maintain Inventory Accuracy

## Cycle Count – Perform ABC Classification

Vision wants to setup an automatic cycle count (CC) for Stores subinventory in one of their Organization. They want to use ABC Classification to group the items and want to setup different counts per class of items.

Requirements addressed:

- Use three classes A, B and C
- Use Onhand Quantity as a sort criteria at the Subinventory level
- Classify top 20% items as A, 40% items as B and remaining as C

### Process/Transaction Flow:

#### Create ABC Classes

1. Navigate to Setup and Maintenance > Manufacturing and Supply Chain Materials Management > Inventory Management > Manage ABC Classes
2. Set the organization as 002.
3. Create the ABC classes as follows. Optionally you can add more classifications if needed. Here we have three – A, B , C

| * ABC Class | Description | * Start Date | End Date |
|-------------|-------------|--------------|----------|
| A           | Most Imp    | 1/7/21       | m/d/yy   |
| B           | Medium      | 1/7/21       |          |
| C           | Least       | 1/7/21       |          |

#### Create ABC Classification Sets

4. Navigate to Setup and Maintenance > Manufacturing and Supply Chain Materials Management > Inventory Management > Manage ABC Classification Sets
5. Use the + icon to create a new Classification Set
6. Enter the details as below and click Submit. This spawns a ESS process.



## Create ABC Classification Set

|                                                                             |                                |                   |              |
|-----------------------------------------------------------------------------|--------------------------------|-------------------|--------------|
| * Name                                                                      | Demo Stores Classification Set | * Subinventory    | Stores       |
| Description                                                                 |                                | * Valuation Scope | Organization |
| Content Scope                                                               | Subinventory                   |                   |              |
| <b>Specifications</b>                                                       |                                |                   |              |
| * Criteria                                                                  | Current on-hand quantity       | End Date          | m/d/yy       |
| Start Date                                                                  | m/d/yy                         |                   |              |
| <span style="color: #0070C0;">▲</span> Additional Information               |                                |                   |              |
| <input type="button" value="Submit"/> <input type="button" value="Cancel"/> |                                |                   |              |

7. The ABC Classification Date gets stamped and Status as Completed.

| Manage ABC Classification Sets                                                                                      |             | Inventory Organization 002  |                          | Change Organization | ...                                       |                 |          |
|---------------------------------------------------------------------------------------------------------------------|-------------|-----------------------------|--------------------------|---------------------|-------------------------------------------|-----------------|----------|
| Search<br>Name Starts with Demo<br>Description Equals<br>Status Equals                                              |             |                             |                          | Criteria Equals     | ABC Classification Set Date Equals m/d/yy |                 |          |
| <span style="color: #0070C0;">▲</span> Search Results                                                               |             |                             |                          |                     |                                           |                 |          |
| Actions ▾ View ▾ + <span style="border: 1px solid #ccc; padding: 2px 5px;">View ABC Classification Set Items</span> |             |                             |                          |                     |                                           |                 |          |
| Name                                                                                                                | Description | ABC Classification Set Date | Criteria                 | Content Scope       | Subinventory                              | Valuation Scope | Status   |
| Demo Stores Classification Set                                                                                      |             | 5/26/21                     | Current on-hand quantity | Subinventory        | Stores                                    | Organization    | Complete |

8. Click on the Name hyperlink to view the number of items

| Actions ▾ View ▾ + <span style="border: 1px solid #ccc; padding: 2px 5px;">View ABC Classification Set Items</span>                                        |             |
|------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| Name                                                                                                                                                       | Description |
| Demo Stores Classification Set                                                                                                                             |             |
| Last Classification Set Results<br>ABC Classification Set Date 5/26/21<br>Status Complete<br>Total Items 356<br>Total Quantity 289,596<br>Total Value 0.00 |             |

## Create ABC Assignment Groups



9. Navigate to Setup and Maintenance > Manufacturing and Supply Chain Materials Management > Inventory Management > Manage ABC Assignment Groups

10. Create a new ABC Assignment Group with following details:

Create ABC Assignment Group ?

Associate ABC classes with an ABC classification set. Prioritize items for individual tasks, such as planning or cycle counting, by associating them with an ABC assignment group.

**ABC Assignment Group**

|                         |                            |
|-------------------------|----------------------------|
| * Assignment Group Name | DEMO Assignment Group      |
| ABC Classification Set  | Demo Stores Classification |
| Subinventory            | Stores                     |
| Valuation Scope         | Organization               |

**ABC Classes**

| * Sequence | * Name | Description |
|------------|--------|-------------|
| 3          | C      | Least       |
| 2          | B      | Medium      |
| 1          | A      | Most Imp    |

11. Click Perform ABC Assignments

Manage ABC Assignment Groups ?

Inventory Organization 002 | Change Organization | Save | Save and Close | Cancel

**Search**

Search Results ?

| Assignment Group Name | ABC Classification Set     | Description              | Criteria | Subinventory | Valuation Scope | Number of ABC Assignments |
|-----------------------|----------------------------|--------------------------|----------|--------------|-----------------|---------------------------|
| DEMO Assignment Group | Demo Stores Classification | Current on-hand quantity |          | Stores       | Organization    | All                       |

12. Provide the value in Item % for each class. The percentage is realigned to match the non decimal Item sequence. (like 20% is recalibrated to 20.22%)

Perform ABC Assignments ?

Submit | Cancel

**ABC Assignment Group Details**

|                        |                                |              |         |
|------------------------|--------------------------------|--------------|---------|
| Assignment Group Name  | DEMO Assignment Group          | Subinventory | Stores  |
| ABC Classification Set | Demo Stores Classification Set | Total Items  | 356     |
|                        |                                | Total Value  | 0.00USD |

**ABC Assignment Criteria**

| Name | Sequence | Inventory Value (USD) | Item Percentage | Value  | Item Description                                                  |
|------|----------|-----------------------|-----------------|--------|-------------------------------------------------------------------|
| A    | 72       | 0.00                  | 20.22           | 0.2022 | Vision InTab Air Series 6000 Slimline Tablet, 64GB, 10.1" Display |
| B    | 143      | 0.00                  | 40.17           | 0.4017 | Ultra Power Server (Blade) 3500                                   |
| C    | 356      | 0.00                  | 100             | 1.00   | 15.6 inch Laptop                                                  |

13. Click Submit



14. Query the Assignment Group again and click on Update ABC Assignments

15. Review the Item and Class assignment. You have an option to update the Class if required.

| * Item    | Description                                                       | * ABC Class | Description |
|-----------|-------------------------------------------------------------------|-------------|-------------|
| CM6651103 | Dual Core X8-5000 CPU                                             | A           | Most Imp    |
| CM6651101 | 8-inch 1920 x 1200, IPS LCD Display                               | A           | Most Imp    |
| AS6648333 | Vision InTab Air Series 6000 Slimline Tablet, 64GB, 10.1" Display | A           | Most Imp    |
| AS6648332 | Vision InTab Air Series 6000 Slimline Tablet, 32GB, 10.1" Display | A           | Most Imp    |
| AS6647333 | Vision In Tab Mini Slimline 4000 Tablet, 128GB, 8" Display        | A           | Most Imp    |
| AS6647332 | Vision In Tab Mini Slimline 4000 Tablet, 64 GB, 8" Display        | A           | Most Imp    |
| AS6647331 | Vision In Tab Mini Slimline 4000 Tablet, 32 GB, 8" Display        | A           | Most Imp    |
| SB6651111 | Ultra Mobile Superfast Tablet SSHD - 128GB                        | A           | Most Imp    |
| V50000    | Smartphone 5.0                                                    | A           | Most Imp    |

16. Save and Close. We now have a sorted list of items by onhand quantity criteria and Class assigned.

## Setup Cycle Count

Setup a Cycle Count.

Requirements addressed:

- Automatic Cycle Count setup using ABC classification.
- Count A class – 12 times a year, B class – 6 times a year and C class – once a year
- Approval with 5% tolerance

## Process/Transaction Flow:

### Create Cycle Count

1. Navigate to Supply Chain Execution > Inventory Management
2. Set the organization to 002
3. Use Create Cycle Count task
4. Provide a CC name and Include the Stores subinventory:



Enter Primary Details

Define Schedules and Approvals

Define Parameters

Define Item Categories

Define Items in Item Categories

Define Classes and Items

Review

Back

\* Count Name DEMO CC

Cycle Count by Item Category

Subinventories to Count

Actions ▾ View ▾ **Include in Count** **Exclude from Count**

| Subinventory  | Include in Count |
|---------------|------------------|
| Completed     | —                |
| Inspection    | —                |
| KH Stores     | —                |
| Quarantine    | —                |
| Staging       | —                |
| <b>Stores</b> | <b>✓</b>         |
| WIP           | —                |

5. Scroll down and select the ABC Classification created earlier. Set the Synchronization mode to Complete

ABC Assignment Group DEM0 Assignment Group

Synchronization Mode  Append Changes  Complete  None

Synchronize ABC association

Delete additional items

6. Enter the Schedule details and setup the approval attributes.

Inventory Organization 002 | Change Organization

Enter Primary Details **Define Schedules and Approvals** Define Parameters Define Item Categories Define Items in Item Categories Define Classes and Items Review

Back Next | Save Save and Close Cancel

Currency = US Dollar

Schedules

Automatically schedule

\* Frequency Daily

Last Scheduled Date

Next Scheduled Date mm/dd/yy

Workday Schedule Operations

Approvals

Approval Required

Approval Type  Always  If out of tolerance

Positive Adjustment Value Tolerance 5

Negative Adjustment Value Tolerance 5

Positive Quantity Tolerance Percentage

Negative Quantity Tolerance Percentage

7. Enter the Count parameters



Enter Primary Details Define Schedules and Approvals **Define Parameters** Define Item Categories Define Items in Item Categories Define Classes and Items Review

**Create Cycle Count: Define Parameters**

Count Parameters

|                            |         |                                                              |
|----------------------------|---------|--------------------------------------------------------------|
| * Starting Count Sequence  | 1       | <input checked="" type="checkbox"/> Manual counts allowed    |
| * Maximum Days Before Late | 5       | <input type="checkbox"/> Count Zero Quantity                 |
| Maximum Recounts           |         | <input type="checkbox"/> Display suggested quantity          |
| * Start Date               | 5/26/21 | <input checked="" type="checkbox"/> Serialized items allowed |
| End Date                   | m/d/yy  |                                                              |

Serial Number Options

|                          |                                      |                                                     |
|--------------------------|--------------------------------------|-----------------------------------------------------|
| Serial Numbers per Count | <input type="radio"/> Multiple       | <input type="checkbox"/> Record count serials       |
|                          | <input checked="" type="radio"/> One | <input type="checkbox"/> Serial discrepancy allowed |
| Serial Number Adjustment | Adjust if possible                   |                                                     |

Count Accuracy

|                                  |  |                                  |  |
|----------------------------------|--|----------------------------------|--|
| Positive Hit and Miss Percentage |  | Negative Hit and Miss Percentage |  |
|----------------------------------|--|----------------------------------|--|

Additional Information

## 8. Save and Click Next

## 9. Provide the counts per year:

Enter Primary Details Define Schedules and Approvals Define Parameters Define Item Categories Define Items in Item Categories **Define Classes and Items** Review

**Create Cycle Count: Define Classes and Items**

Currency = US Dollar

ABC Assignment Group DEMO Assignment Group

ABC Classes

| * ABC Class | * Counts per Year | Adjustment Value Tolerance |          | Quantity Variance Percentage |          | Hit and Miss Percentage |          |
|-------------|-------------------|----------------------------|----------|------------------------------|----------|-------------------------|----------|
|             |                   | Positive                   | Negative | Positive                     | Negative | Positive                | Negative |
| A           | 12                |                            |          |                              |          |                         |          |
| B           | 6                 |                            |          |                              |          |                         |          |
| C           | 1                 |                            |          |                              |          |                         |          |

## 10. Click Next and Save and Close

Inventory Organization 002 | Change Organization

Enter Primary Details Define Schedules and Approvals Define Parameters Define Item Categories Define Items in Item Categories Define Classes and Items **Review**

**Create Cycle Count: Review**

Currency = US Dollar

Count Details

|             |         |                              |   |
|-------------|---------|------------------------------|---|
| Count Name  | DEMO CC | Subinventories to Count      | 1 |
| Description |         | Cycle Count by Item Category |   |

Synchronize Count Classes and Items with ABC Group

|                      |                       |                             |
|----------------------|-----------------------|-----------------------------|
| ABC Assignment Group | DEMO Assignment Group | Synchronize ABC association |
| Synchronization Mode | Complete              | Delete additional items     |

Schedules

|                             |                     |
|-----------------------------|---------------------|
| ✓ Automatically schedule    | Last Scheduled Date |
| Frequency Daily             | Next Scheduled Date |
| Workday Schedule Operations |                     |

Approvals

|                                        |                                        |
|----------------------------------------|----------------------------------------|
| ✓ Approval Required                    | Negative Quantity Tolerance Percentage |
| Approval Type If out of tolerance      | Positive Adjustment Value Tolerance 5  |
| Positive Quantity Tolerance Percentage | Negative Adjustment Value Tolerance 5  |

Count Parameters

|                            |                                                           |
|----------------------------|-----------------------------------------------------------|
| Starting Count Sequence 1  | <input checked="" type="checkbox"/> Manual counts allowed |
| Maximum Days Before Late 5 | Manual Count Sequence Prefix                              |



## Generate Count Schedule

11. In the Manage Cycle Counts window, click Actions and select “Generate Count Schedules”

The screenshot shows the 'Manage Cycle Counts' window. The 'Actions' dropdown menu is open, displaying various options like 'Create Cycle Count', 'Edit Cycle Count', 'Purge Cycle Count', and 'Manage Manual Count Schedules'. The 'Generate Count Schedules' option is highlighted. On the right, there is a table titled 'Scheduling Options' with columns for Frequency, Last Scheduled Date, Next Scheduled Date, Manual Counts Allowed, Subinventories to Count, ABC Assignment Group, and Approval Required. A row for 'Generate Count Schedules' is shown with 'Frequency' set to 'Daily', 'Last Scheduled Date' and 'Next Scheduled Date' both set to '5/26/21', 'Manual Counts Allowed' checked, 'Subinventories to Count' set to '1 DEMO Assign...', 'ABC Assignment Group' set to 'DEMO Assign...', and 'Approval Required' checked.

12. This submits a process and the Last Scheduled Date is populated.

The screenshot shows the 'Search Results' window. It displays a table with columns for 'Count Name' and 'Description'. A single row is present for 'DEMO CC'. The 'Description' column shows the scheduling details: 'Frequency' is 'Daily', 'Last Scheduled Date' is '5/26/21', and 'Next Scheduled Date' is '5/27/21'.

## Generate and Record Count Sequences

13. In the Manage Cycle Counts window, click Actions and select “Generate Count Sequences”  
14. Navigate to Record Count Sequences window and query for the cycle count



Record Count Sequences [?](#)

Organization = 002 Currency = US Dollar

[Advanced Search](#)

|                                          |                                                  |
|------------------------------------------|--------------------------------------------------|
| * Count Name Equals DEMO CC              | Locator Equals <input type="text"/>              |
| From Count Sequence <input type="text"/> | Item <input type="text"/> <a href="#">Search</a> |
| To Count Sequence <input type="text"/>   | Lot Equals <input type="text"/>                  |
| Subinventory Equals <input type="text"/> | Count Type Equals <input type="text"/> All       |

Search Results: DEMO CC

Actions ▾ View ▾ + ✎ X

| Count Sequence | Item      | Count Quantity       | Count UOM | Reason               | Comments             | * Counted By      | * Count Date | Serial Numbers Required                          |
|----------------|-----------|----------------------|-----------|----------------------|----------------------|-------------------|--------------|--------------------------------------------------|
| 1              | PCM50001  | <input type="text"/> | Ea        | <input type="text"/> | <input type="text"/> | instructor, scm00 | 5/26/21      | <input checked="" type="checkbox"/> Not required |
| 2              | PCM50002  | <input type="text"/> | Ea        | <input type="text"/> | <input type="text"/> | instructor, scm00 | 5/26/21      | <input checked="" type="checkbox"/> Not required |
| 3              | PCM53037  | <input type="text"/> | Ea        | <input type="text"/> | <input type="text"/> | instructor, scm00 | 5/26/21      | <input checked="" type="checkbox"/> Not required |
| 4              | SB6651111 | <input type="text"/> | Ea        | <input type="text"/> | <input type="text"/> | instructor, scm00 | 5/26/21      | <input checked="" type="checkbox"/> Not required |
| 5              | AS6647331 | <input type="text"/> | Ea        | <input type="text"/> | <input type="text"/> | instructor, scm00 | 5/26/21      | <input checked="" type="checkbox"/> Not required |
| 6              | AS6647332 | <input type="text"/> | Ea        | <input type="text"/> | <input type="text"/> | instructor, scm00 | 5/26/21      | <input checked="" type="checkbox"/> Not required |
| 7              | AS6647333 | <input type="text"/> | Ea        | <input type="text"/> | <input type="text"/> | instructor, scm00 | 5/26/21      | <input checked="" type="checkbox"/> Not required |

15. Enter the Count Quantity and Submit. If the variance is more than 5% it would go for approvals which can be optionally done using “Approve Count Sequences”



## 7. Integration Capabilities

### File Based Data Import: Inventory Transactions

Upload on-hand balances via a Miscellaneous Receipt transaction and make corrections using the Pending Transactions screen.

#### Process/Transaction Flow:

1. Review the on-hand quantity of item AS65001 in the Inventory Org 001:

The screenshot shows the 'Manage Item Quantities' interface. At the top, there's a search bar with 'Item' selected and a 'View Item Availability' button. Below the search bar, there are buttons for 'Actions' and 'View'. The main area displays a table with columns: Item, On Hand, Receiving, Inbound, and UOM Name. Two rows are visible: one for 'Item AS65001' with 'On Hand' value 49 and 'UOM Name' Ea, and another for 'Organization 001' with 'On Hand' value 49 and 'UOM Name' Ea.

| Item             | Quantity |           |         |          |
|------------------|----------|-----------|---------|----------|
|                  | On Hand  | Receiving | Inbound | UOM Name |
| Item AS65001     | 49       |           |         | Ea       |
| Organization 001 | 49       |           |         | Ea       |

2. Populate the FBDI sheet. Click on the 'Generate CSV File' button on the first tab of the workbook:

The screenshot shows the 'FBDI' Excel template. It includes sections for 'Preparing the data' and 'Loading the Data'. The 'Preparing the data' section contains steps 1 and 2. The 'Loading the Data' section provides instructions for loading data into CSV files. A large grey button labeled 'Generate CSV File' is located in the center of the template. The bottom of the template has a green header 'Excel Template Format'.

3. Save the ZIP file on your desktop.
4. From the Navigator, go to Tools > Scheduled Processes > Execute the ESS job 'Load Interface File for Import'. Select the Import Process = Create Inventory Transactions and upload the Data File from your desktop:



**Process Details**

This process will be queued up for submission at position 2

**Name:** Load Interface File for Import

**Description:** Transfers setup or transaction data files from ...  Notify me when this process ends

**Schedule:** As soon as possible **Submission Notes:**

**Basic Options**

**Parameters:**

- \* Import Process: Create Inventory Transactions
- \* Data File: InvTransactionsInterface.zip

**Submission Time**

- 5/28/21 1:49 PM UTC
- 5/28/21 1:48 PM UTC
- 5/28/21 1:48 PM UTC
- 5/28/21 1:48 PM UTC

5. Click on Submit. Query by the Process ID and validate that it has completed successfully:

| Name                           | Process ID | Status    |
|--------------------------------|------------|-----------|
| Load Interface File for Import | 2737797    | Succeeded |

6. In a similar manner, execute the ESS job 'Manage Inventory Transactions':

**Process Details**

This process will be queued up for submission at position 1

**Name:** Manage Inventory Transactions

**Description:** Submits multiple requests to process inventory ...  Notify me when this process ends

**Schedule:** As soon as possible **Submission Notes:**

**Basic Options**



7. Click on Submit. Note that the job completes successfully:

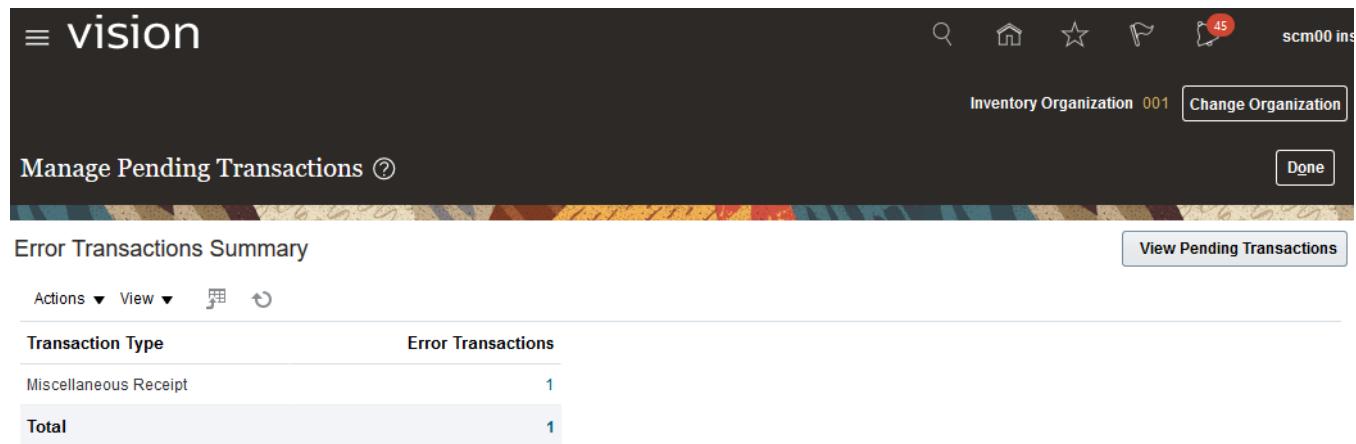
**Search Results** 

View  Flat List  Hierarchy

Actions ▾ View ▾ **Schedule New Process** Resubmit Put On Hold Cancel Process Release Process View Log 

| Name                          | Process ID | Status    |
|-------------------------------|------------|-----------|
| Manage Inventory Transactions | 2737807    | Succeeded |

8. Navigate to Inventory Management > Tasks > Manage Pending Transactions:



vision

Manage Pending Transactions 

Error Transactions Summary

View Pending Transactions

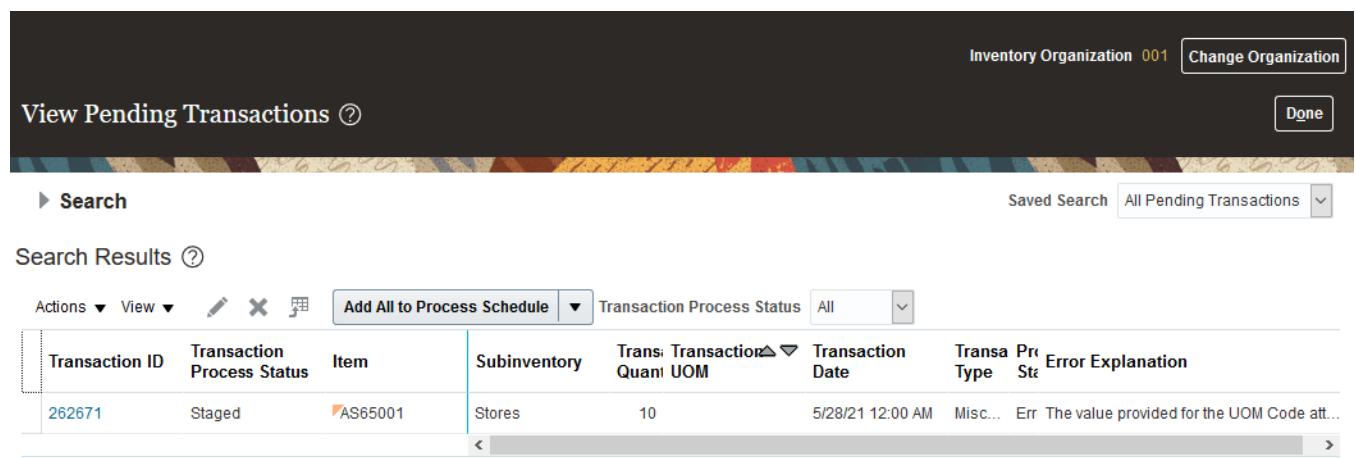
Inventory Organization 001 Change Organization

Done

Actions ▾ View ▾  

| Transaction Type      | Error Transactions |
|-----------------------|--------------------|
| Miscellaneous Receipt | 1                  |
| <b>Total</b>          | <b>1</b>           |

9. Click on the error transaction to view the details:



Inventory Organization 001 Change Organization

View Pending Transactions 

▶ Search

Saved Search All Pending Transactions 

Search Results 

Actions ▾ View ▾    Add All to Process Schedule Transaction Process Status All

| Transaction ID | Transaction Process Status | Item    | Subinventory | Trans. Quant UOM | Transaction Date | Trans. Type | Proc. Stt | Error Explanation                         |
|----------------|----------------------------|---------|--------------|------------------|------------------|-------------|-----------|-------------------------------------------|
| 262671         | Staged                     | AS65001 | Stores       | 10               | 5/28/21 12:00 AM | Misc...     | Err...    | The value provided for the UOM Code at... |



10. The ‘Error Explanation’ column indicates an issue with the UOM code. Click on the Edit icon and update the UOM on the transaction:

Inventory Organization 001 Change Organization

Edit Pending Transaction: 262671

Currency = US Dollar

Actions ▾ Save Save and Close Cancel

**Location**

Organization 001 \* Transaction Quantity 10

Item AS65001 Quantity Ea

Item Description Portable Wireless Printer Secondary Quantity

Revision

Inventory Project

Inventory Task

Inventory Country of Origin

Subinventory Stores

Locator

Location

**Transaction**

Transaction Header ID 262676

Transaction ID 262671

**Search and Select: UOM Name**

Advanced

Search

UOM Name Ea

Description

Search Reset

| UOM Name | UomCode |
|----------|---------|
| Ea       | zzu     |

OK Cancel

11. Repeat this process for all errored records. Once done, click on the ‘Add All to Process Schedule’ button.

12. Execute the ESS job ‘Manage Inventory Transactions’ again:

View  Flat List  Hierarchy

Actions ▾ View ▾ **Schedule New Process** Resubmit Put On Hold Cancel Process Release Process View Log

| Name                          | Process ID | Status    |
|-------------------------------|------------|-----------|
| Manage Inventory Transactions | 2737818    | Succeeded |



13. Check the on-hand quantity of the item to confirm that the transaction has been processed successfully:

| Item             | Quantity |           |         |          |
|------------------|----------|-----------|---------|----------|
|                  | On Hand  | Receiving | Inbound | UOM Name |
| Item AS65001     | 59       |           |         | Ea       |
| Organization 001 | 59       |           |         | Ea       |

## File Based Data Import: Master Data

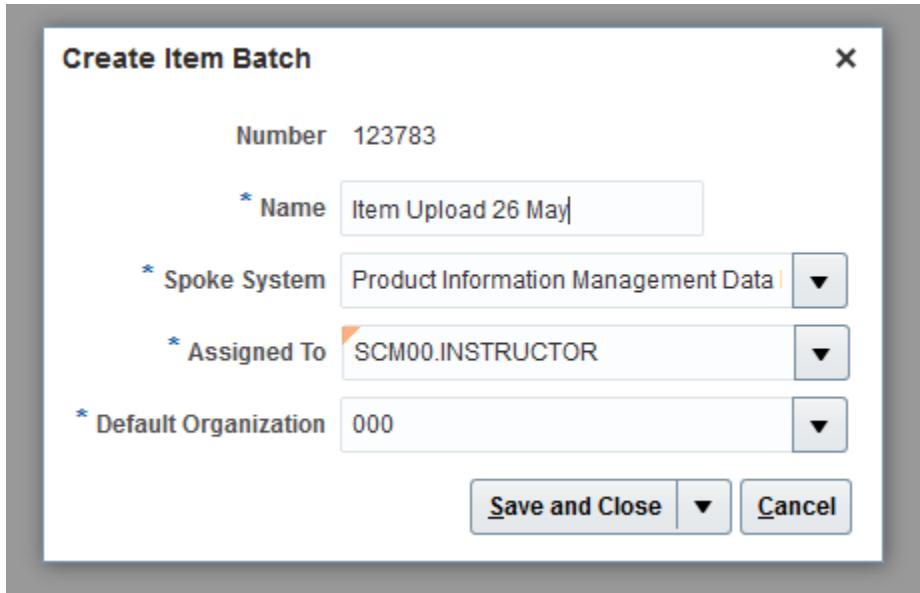
Upload items via FBDI and make corrections via ADFdi.

### Process/Transaction Flow:

1. Navigate to Product Management > Product Information Management > Tasks > Data Consolidation > Manage Item Batches



2. Click the '+' icon to create a new batch:



3. Click Save and Close. Query by the Batch Name and down the Batch ID:

The screen shows the 'Manage Item Batches' interface. The search results table has one row:

| Number | Batch ID        | Name               | Spoke System ID | Spoke System                            | Default Organization | Assigned To |
|--------|-----------------|--------------------|-----------------|-----------------------------------------|----------------------|-------------|
| 123783 | 300000212975068 | Item Upload 26 May | 300000000096... | Product Information Management Data Hub | 000                  | SCM00.      |

4. Populate the newly created Batch ID in all rows of the FBDI sheet:

| A                | B               | C            | D           | E               | F                 | G            | H              | I                  |
|------------------|-----------------|--------------|-------------|-----------------|-------------------|--------------|----------------|--------------------|
| Items Interface  |                 |              |             |                 |                   |              |                |                    |
| * Required       |                 |              |             |                 |                   |              |                |                    |
| Transaction Type | Batch ID        | Batch Number | Item Number | OUTSIDE_PROCESS | Organization Code | Description  | Template Name  | Source System Code |
| CREATE           | 300000212975068 |              | 0421-001    |                 | 000               | 0421-001 SCM | Purchased Item | PIMDH              |
| CREATE           | 300000212975068 |              | 0421-002    |                 | 000               | 0421-002 SCM | Purchased Item | PIMDH              |
| CREATE           | 300000212975068 |              | 0421-003    |                 | 000               | 0421-003 SCM | Purchased Item | PIMDH              |
| CREATE           | 300000212975068 |              | 0421-004    |                 | 000               | 0421-004 SCM | Purchased Item | PIMDH              |



5. Click on the 'Generate CSV File' button on the first tab of the workbook:

6 **Preparing the data**  
1. Prepare the data for each interface table using the corresponding worksheet in this template. See the section [Example](#)  
2. Refer to the bubble text on each column header either for detailed instructions on preparing the data in that col

7 **Loading the Data**  
After you finish preparing the data in the parent and child sheets, click the Generate CSV File button to generate a  
For information on loading the data in the CSV files into the interface tables, see the Documentation tab for the Lo  
Oracle Fusion Applications.

8 **Generate CSV File**

9

10

11

12

13

14 **Excel Template Format**

6. Save the ZIP file on your desktop.
7. From the Navigator, go to Tools > Scheduled Processes > Execute the ESS job 'Load Interface File for Import'. Select the Import Process = Item Import and upload the Data File from your desktop:

**Process Details**

This process will be queued up for submission at position 1

**Process Options** **Advanced** **Submit** **Cancel**

Name Load Interface File for Import

Description Transfers setup or transaction data files from ...  Notify me when this process ends

Schedule As soon as possible Submission Notes

**Basic Options**

Parameters

\* Import Process Item Import

\* Data File egiitemsimport.zip



8. Click on Submit. Query by the Process ID and validate that it has completed successfully:

Search Results [?](#)

View  Flat List  Hierarchy

| Name                           | Process ID | Status    |
|--------------------------------|------------|-----------|
| Load Interface File for Import | 2734151    | Succeeded |

9. In a similar manner, execute the ESS job 'Item Import' with the Batch ID as an input parameter:

Process Details

This process will be queued up for submission at position 1

Process Options  Advanced  Submit  Cancel

Name: Item Import

Description: Imports items in product hub.  Notify me when this process ends

Schedule: As soon as possible Submission Notes:

Basic Options

Parameters

Batch ID: 300000212975068

Process All Organizations:

Organization:

Process Only:

Delete Processed Rows:

Reprocess Error:

Process Sequentially:



10. Click on Submit. Note that the job ends in Error:

View  Flat List  Hierarchy

Actions ▾ View ▾ **Schedule New Process** Resubmit Put On Hold Cancel Process Release Process View Log

| Name        | Process ID | Status |
|-------------|------------|--------|
| Item Import | 2734364    | Error  |

11. Navigate to the Manage Item Batches screen and click on the newly imported batch:

Product Information Management Manage Item Batches x Edit Item Batch: 123783 x

Edit Item Batch: 123783 (Product Information Ma... Actions ▾ Save Save and Close ▾ Cancel

Item Class Root Item Class View By Last Run

▶ Search: Items Saved Search Application Default

Summary In Progress (0) Errors (4) Completed (0)

◀ Items ▶ Errors Items by Item Class :

| Phase       | Count |
|-------------|-------|
| In Progress | 0     |
| Errors      | 4     |
| Completed   | 0     |

Legend: Unconfirmed (blue), Confirmed (green), Errors (yellow), Imported (red)

12. Navigate to the Errors tab. The Error Description column helps in troubleshooting:

Summary In Progress (0) **Errors (4)** Completed (0)

Search Results

Actions ▾ View ▾ Format ▾ Freeze Detach Wrap

| Item     | Item Description | Item Class      | Phase   | Error Type | Entity | Error Value | Error Description                                  | Error Date | Re  |
|----------|------------------|-----------------|---------|------------|--------|-------------|----------------------------------------------------|------------|-----|
| 0421-004 | 0421-004 SCM ... | Root Item Class | Process | Validation | It...  | 0...        | The value of the attribute Primary Unit of Meas... | 5/26/21    | 27: |
| 0421-001 | 0421-001 SCM ... | Root Item Class | Process | Validation | It...  | 0...        | An Item with the same name already exists.         | 5/26/21    | 27: |
| 0421-002 | 0421-002 SCM ... | Root Item Class | Process | Validation | It...  | 0...        | An Item with the same name already exists.         | 5/26/21    | 27: |
| 0421-003 | 0421-003 SCM ... | Root Item Class | Process | Validation | It...  | 0...        | An Item with the same name already exists.         | 5/26/21    | 27: |

Rows Selected 1 Columns Hidden 595 Columns Frozen 3





13. Click on Manage in Spreadsheet:

The screenshot shows the 'Manage in Spreadsheet' dialog box. The 'Import Entity' dropdown is set to 'Items'. The 'Item Class' dropdown is set to 'Root Item Class'. The 'Import Format' dropdown is set to 'Application Default'. A 'Download' button is present. A 'Done' button is highlighted with a red box. In the background, there is a table with three rows of item data. The first row has an error message: 'Attribute Primary Unit of Meas... name already exists.' The second row has an error message: 'An Item with the same name already exists.' The third row also has an error message: 'An Item with the same name already exists.'

14. Click on Download. The ADFdi spreadsheet is displayed. Provide your credentials to login.

15. Update the item numbers to make them unique and fix the UOM for the errored record:

The screenshot shows an ADFdi spreadsheet. At the top, there is a toolbar with icons for Login, Logout, Clear, Edit, About, Remove, Upload, Status, and Viewer. Below the toolbar, the worksheet title is 'ORACLE'. The 'Worksheet Status' section shows 'Number' 123783 and 'Name' Item Upload 26 May. The Spoke System is identified as Product Information Management Data Hub. The main area is a table with the following columns: Changed, Flagged, Status, Transaction Type, Template, Organization, Item Class, Item, Item Description, Primary Unit, Lifecycle Phase, and Item Status. Rows 14, 15, 16, and 17 are flagged with blue triangles in the 'Changed' column, indicating errors. The 'Item' column for these rows contains values like 0421-001-1, 0421-002-2, 0421-003-3, and 0421-004-4 respectively.

16. Click on Upload. Click on Submit.



17. Refresh the status of the Item Batch. Observe that all the records are successfully imported:

The screenshot shows the 'Edit Item Batch: 123783' page. At the top, there are navigation links: Product Information Management, Manage Item Batches, and Edit Item Batch: 123783. Below the title, there are dropdown menus for 'Item Class' (Root Item Class) and 'View By' (Last Run). A toolbar with 'Actions', 'Social', 'Save', and 'Save and C...' buttons is visible. The main area is titled 'Search: Items' with tabs for 'Summary', 'In Progress (0)', 'Errors (0)', and 'Completed (4)' (which is selected). Below this is a 'Search Results' section with a table header: 'Last Import Request', 'Import Status', 'Item', 'Item Description', 'Long Description', 'Lifecycle Phase', and 'Item Status'. The table contains four rows of data, each with a green checkmark in the 'Import Status' column, indicating successful import. The data includes Request ID 2734378, Date 5/26/21, Item numbers 0421-001-1 through 0421-004-4, and various descriptions and lifecycle phases.

18. The Item Batch displays the Summary stats as well:

The screenshot shows the 'Manage Item Batches' page. At the top, there is a title 'Manage Item Batches' and a 'Done' button. Below the title is an 'Advanced Search' section with various filters: Status (Equals Active), \*\* Number (Equals), \*\* Name (Starts with), Item (Starts with), \*\* Assigned To (Equals SCM00.INSTRUCTOR), and Last Updated Date (On or after 5/25/21 12:00 AM). There are also buttons for 'Search', 'Reset', 'Save...', 'Add Fields', and 'Reorder'. Below the search section is a 'Search Results' table with columns: Location, Assigned To, Status, Last Import Request Phase, Last Publication Request Phase, Total Item Records, Total Item Records Processing, Total Item Records in Error, Total Item Records Successfully Imported, and Type. The table shows one row of data: Location is 'SCM00.INSTR...', Assigned To is 'SCM00.INSTRUCTOR', Status is 'Active', Last Import Request Phase is 'Import', Last Publication Request Phase is 'Import', Total Item Records is 4, Total Item Records Processing is 0, Total Item Records in Error is 0, Total Item Records Successfully Imported is 4, and Type is 'Import'.



## Web Services

Performing a miscellaneous receipt and miscellaneous issue using REST API.

### Process/Transaction Flow:

1. Enter your credentials and login to [Postman](#) (or any other API client of your choice).
2. In your Workspace, create a new Collection 'Inventory':

The screenshot shows the Postman interface with the 'Workspaces' tab selected. On the left, there's a sidebar with 'Collections', 'APIs', and 'Environments'. A new collection named 'Inventory' is listed under 'Collections'. The main area is titled 'My Workspace' with a summary: 'Add summary to briefly explain what this workspace is all about...' and a note: 'This is your personal, private workspace to play around in. Only you can see the collections and APIs you create here - unless you share them with your team.' There are 'New' and 'Import' buttons at the top of the workspace area.

3. Click the '...' beside the Collection > Click on Add Request

4. Provide a name as illustrated below:

The screenshot shows the same Postman workspace after adding requests to the 'Inventory' collection. The 'Inventory' collection is now expanded, showing two POST requests: 'POST Check Available Quantity' and 'POST Inventory Transactions'. The rest of the workspace interface remains the same, with the 'New' and 'Import' buttons visible.



5. Test out the Inventory Transactions API by providing the following details:

|                                         |                                                                                                                                                                                                                                                                                                                              |
|-----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Authorization</b>                    | Basic Auth                                                                                                                                                                                                                                                                                                                   |
| <b>Headers<br/>(Content-Type)</b>       | Application/json                                                                                                                                                                                                                                                                                                             |
| <b>Request Type</b>                     | POST                                                                                                                                                                                                                                                                                                                         |
| <b>Request URL</b>                      | <a href="https://&lt;replace with instance name&gt;-fa-ext.oracledemos.com/fscmRestApi/resources/11.13.18.05/inventoryTransactions">https://&lt;replace with instance name&gt;-fa-ext.oracledemos.com/fscmRestApi/resources/11.13.18.05/inventoryTransactions</a>                                                            |
| <b>Request Body<br/>(Misc. Receipt)</b> | <pre>{   "transactionLines": [     {       "OrganizationName" : "Seattle",       "Item" : "AS65001",       "Subinventory" : "Stores",       "TransactionType" : "Miscellaneous Receipt",       "TransactionUnitOfMeasure" : "Ea",       "TransactionQuantity" : 10,       "TransactionDate" : "YYYY-MM-DD"     }   ] }</pre> |
| <b>Request Body<br/>(Misc. Issue)</b>   | <pre>{   "transactionLines": [     {       "OrganizationName" : "Seattle",       "Item" : "AS65001",       "Subinventory" : "Stores",       "TransactionType" : "Miscellaneous issue",       "TransactionUnitOfMeasure" : "Ea",       "TransactionQuantity" : -10,       "TransactionDate" : "YYYY-MM-DD"     }   ] }</pre>  |



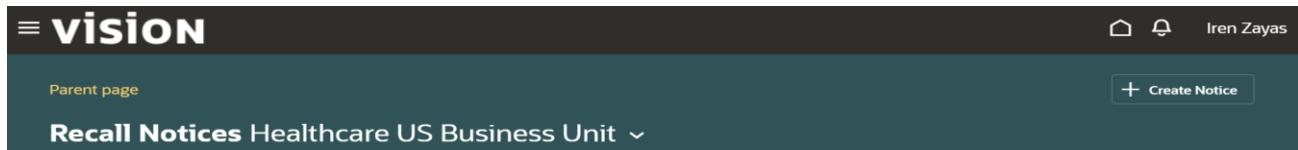
# 8. Product Recall Management

## Product Recall Management

Create Recall Notice for Items and perform Disposal of Recalled parts.

### Process/Transaction Flow:

1. Navigate to Supply Chain Execution > Recall Notices > Create Notice



2. Click on Create Notice. Capture the Source Document Reference and Initiation Date.

A screenshot of the 'New Recall Notice' creation form. The title bar says 'New Recall Notice' with a 'New' badge. It includes buttons for 'Cancel', 'Save', 'Delete', and 'Publish'. The form fields include 'Healthcare US Business Unit', 'Creation Date' (with a date input field), 'Source Document Reference' (containing '15112023-1'), and 'Initiation Date' (containing '11/15/23' with a calendar icon).

3. Select the Source Type, Source and enter the Recall Reason. Capture the Recalling Firm details.



Source Type

- Internal
- Manufacturer
- Regulatory Authority
- Supplier

Source

Food and Drug Administration



Recall Reason

Unsterile product could increase infection risk

## Recalling Firm

Manufacturer

BD Medical



## 4. Enter the Contact, Position

### Contact 1



Name

Jamie Ryan

Position

Customer Service

## 5. Enter the Risk Profile Details.



## Risk Profile

Notice Type

- Advisory
- Quality
- Safety
- Voluntary

Classification

- Class 1
- Class 2
- Class 3

Potential Risk

Unsterile product could increase infection risk

## 6. Capture Recall Instructions and Click on Save.

### Recall Instructions

Replacement Type

- Make correction to product
- Request a credit without product return
- Request a product return with credit

Recall Instructions

Dispose of affected lot items, credit note required.

## 7. Observe that a Recall Notice number is assigned.

### General

Notice Number  
RN100025

Creation Date  
11/15/23

## 8. Click on Add Part. Enter the Part Details.



**Part Details**

|                                         |                                    |
|-----------------------------------------|------------------------------------|
| Line                                    |                                    |
| Manufacturer Part Number<br>42295400    | ▼                                  |
| Required                                |                                    |
| Brand Name                              | Model Name                         |
| Item Number<br>HP2001                   | Item Category<br>Blood Draw        |
| Item Description<br>CHG Prep Applicator |                                    |
| Product Type<br>Med Device              | National Drug Code<br>54365-400-12 |

9. Enter the Lot details (Item Control Type is Lot controlled)

Item Control Type

- Lot controlled
- Serial controlled
- Lot and serial controlled
- None

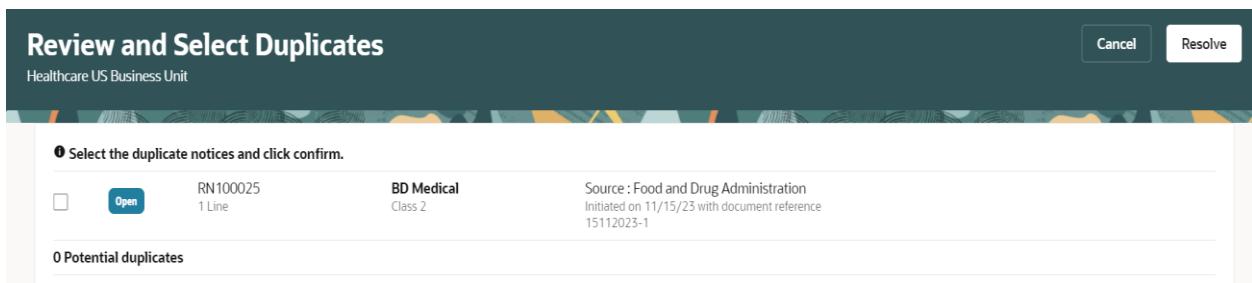
**Lot 1**

|                             |                    |                    |             |
|-----------------------------|--------------------|--------------------|-------------|
| Lot Number<br>LTBD51221-014 | Manufacturing Date | Days to Expiration | Expiry Date |
| <a href="#">+ Add</a>       |                    |                    |             |

10. Click on Publish and then select the Publish and Review Duplicates



11. Resolve if there are any duplicates and select the Resolve button.



12. Enter the Start Date and End Date and click on Locate as shown below



Parent page

**Notice RN100025** [Open](#)

Progress

Healthcare US Business Unit    1 Line    Initiated on 11/15/23    Class 2

**⚠ Locate the lines for this notice**

Specify a date range

Start Date: 11/1/23    End Date: 11/15/23    **Locate**

13. Select Refresh. Locate Complete appears.

**✓ Locate complete**

### BD Medical

#### Recall Reason

Unsterile product could increase infection risk

Source Document Reference  
15112023-1

Creation Date  
11/15/23

Track Start Date  
11/1/23

Track End Date  
11/15/23

14. Click on the Download Recall Count Template to download the VBCS Excel Template.

**VISION**

Parent page

**Notice RN100025** [Open](#)

Progress

Healthcare US Business Unit    1 Line    Initiated on 11/15/23    Class 2

**Download Recall Count Template**

15. Click on the Manufacturer part number hyperlink at the Lines Tab

**Lines**    Tasks    Locations

**1**    **1**    -  
Line of 1 found    Line in progress    Lines complete

**Search**

| Line | Status                      | Item                          | Manufacturer Part Number   | Item Category | Estimated Quantity | Inbound Quantity | Count Quantity |
|------|-----------------------------|-------------------------------|----------------------------|---------------|--------------------|------------------|----------------|
| 1    | <a href="#">In Progress</a> | HP2001<br>CHG Prep Applicator | <a href="#">④ 42295400</a> | Blood Draw    | 325 Ea             | 50 Ea            | 0 Ea           |



16. Navigate to the Task details, Select the first task and click on Complete Task.

The screenshot shows a table of tasks with columns: Task Name, Task Status, Inventory Organization, Location, Subinventory, and Requester. The first task in the list is 'Deliver Recalled Parts to Quarantine Location' with status 'In Progress'. A context menu is open over this row, displaying three options: 'Complete Task', 'Resend Notifications', and 'Manage Attachments'.

| Task Name                                               | Task Status | Inventory Organization | Location                    | Subinventory | Requester |
|---------------------------------------------------------|-------------|------------------------|-----------------------------|--------------|-----------|
| Deliver Recalled Parts to Quarantine Location           | In Progress | HC01                   | -                           | -            | -         |
| Perform Physical Count and Quarantine Recalled Parts    | In Progress | HC01                   | Wondercare General Hospital | Stores       | -         |
| Perform Disposal of Recalled Parts                      | Not Started | HC01                   | -                           | -            | -         |
| Raise Debit Memo Against Disposition for Recalled Parts | Not Started | HC01                   | -                           | -            | -         |

17. Enter the Comments and click on Complete Task. Observe that the task status is set to Completed.

The screenshot shows the same table of tasks. The first task, 'Deliver Recalled Parts to Quarantine Location', now has a status of 'Completed' with the date '11/16/23'.

| Task Name                                               | Task Status           | Inventory Organization | Location                    | Subinventory | Requester |
|---------------------------------------------------------|-----------------------|------------------------|-----------------------------|--------------|-----------|
| Deliver Recalled Parts to Quarantine Location           | Completed<br>11/16/23 | HC01                   | -                           | -            | -         |
| Perform Physical Count and Quarantine Recalled Parts    | In Progress           | HC01                   | Wondercare General Hospital | Stores       | -         |
| Perform Disposal of Recalled Parts                      | Not Started           | HC01                   | -                           | -            | -         |
| Raise Debit Memo Against Disposition for Recalled Parts | Not Started           | HC01                   | -                           | -            | -         |

18. Open the already downloaded VBCS Excel template to report the Recall Count data-Sch\_Prm\_Recall\_Count\_Task\_Template

19. Navigate to the Recall Count Tasks Tab. Select Review -> Unprotect Sheet

20. Select the Oracle Visual Builder tab-> Advanced-> Edit Service Host and capture the URL of the instance as shown below. The Service host will be updated.

The screenshot shows the Oracle Visual Builder ribbon with the 'Oracle Visual Builder' tab selected. A 'Service Configuration' dialog box is open, displaying the 'Service host' field with the value 'https://fa-eudq-dev1-saasfademo1.ds-fa.oraclepdemos.com'. There are 'OK' and 'Cancel' buttons at the bottom of the dialog.

21. Click on the Download data.

22. Enter the User credentials to connect to the instance.

23. The Search Window opens and enter the Recall number created (RN100025) and click on OK. The Recall Notice is fetched as shown below.



| Change | Status | Recall Notice Number | Recall Line Number | Sequence Number | Item Number | Revision | Item Description    | Manufacturer Part Number | Organization Code | Location Name          |
|--------|--------|----------------------|--------------------|-----------------|-------------|----------|---------------------|--------------------------|-------------------|------------------------|
|        |        | RN100025             | 1                  |                 | 1           | HP2001   | CHG Prep Applicator |                          | HC01              | Wondercare General Ho. |

24. Capture the Processing Mode Code as PROCESS. Enter the Count quantity, Secondary quantity (if any), Counted by Employee and click on Upload Changes.

The screenshot shows the Oracle Visual Builder interface. At the top, there's a ribbon menu with tabs like File, Home, Insert, Draw, Page Layout, Formulas, Data, Review, View, Help, and Oracle Visual Builder. Below the ribbon is a toolbar with icons for Download Data, Table Row Changes, Upload Changes, Clear, Status Viewer, Network Monitor, About, Log Console, Show, and Misc. The main area contains a table with columns: A, B, C, D, E, F, G, H, I, J, K. Rows 1 and 2 show data corresponding to the table above. A status bar at the bottom right says "Uploading changes...".

25. Observe that the Recall Notice is updated and Status changes to Update Succeeded.

This screenshot shows the Oracle Visual Builder interface during an update process. A central dialog box is titled "Upload" with the sub-titile "Uploading changes...". To the right, a status bar displays "Status" with sections for "Notifications" (showing "Uploading changes...") and "Selected row status" (showing "Pending update"). Below the dialog, a table shows the updated data. Another status bar on the right shows "Status" with "Notifications" (Table upload completed), "Elapsed time: 00:00:24", and "Selected row status" (Update Succeeded).

26. Check the Task – Perform Physical Count and Quarantine Recalled Parts. The Task Status is moved to Completed Status.

| Task Name                                            | Task Status           | Inventory Organization | Location                    | Subinventory | Requester |     |
|------------------------------------------------------|-----------------------|------------------------|-----------------------------|--------------|-----------|-----|
| Deliver Recalled Parts to Quarantine Location        | Completed<br>11/16/23 | HC01                   | -                           | -            | -         | ... |
| Perform Physical Count and Quarantine Recalled Parts | Completed<br>11/16/23 | HC01                   | Wondercare General Hospital | Stores       | -         | ... |

27. Now Login as the Inventory Manager to perform the Disposal of Recalled parts.

Navigate to Supply Chain Execution-> Inventory Management-> Receipts-> Manage Supplier Returns Without Receipt

Choose the appropriate Organization.



Manage Supplier Returns Without Receipt 

**Advanced Search**

\*\* Supplier Return Number  Subinventory   
Supplier Return Line Status  Locator   
\*\* Supplier  Item    
Supplier Site  Item Keyword

\*\* At least one is required

Actions  View         

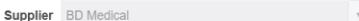
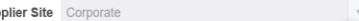
### Search Results

Actions  View    

28. Click on Create. Enter the Supplier and Supplier Site. Click on + Symbol. Capture the Line details, enter the Item, Sub inventory as Recall, Requested Quantity, Lot Number, Recall Notice, Line number and click on Submit.

Create Supplier Return Without Receipt 

**Supplier Return Without Receipt**

Supplier Return Number 13001  Supplier BD Medical  Supplier Site Corporate 

Description   
One-Time Ship-to Location

**Lines**

Actions  View    

| Line | * Item | Physical Material Return Required                                                   | * Requested Quantity | * UOM Name | Lot       | Recall Notice | Recall Notice Line Number | Requested Date                                                                        | * Returned By |
|------|--------|-------------------------------------------------------------------------------------|----------------------|------------|-----------|---------------|---------------------------|---------------------------------------------------------------------------------------|---------------|
| 1    | HP2001 |  | 25                   | Ea         | LTBD51221 | RN100025      | 1                         |  | Harmon, Max   |

29. Note the Supplier Return number.

### Confirmation

Supplier return number 13001 was submitted for processing.



30. Select the Disposal of Recall parts task and choose the option Complete Task.

31. Observe that all the tasks move to Completed Status.

| Task Name                                               | Task Status                                            | Inventory Organization | Location                    | Subinventory | Requester |                                                                                                                                                                             |
|---------------------------------------------------------|--------------------------------------------------------|------------------------|-----------------------------|--------------|-----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Deliver Recalled Parts to Quarantine Location           | <input checked="" type="radio"/> Completed<br>11/16/23 | HC01                   | -                           | -            | -         |   |
| Perform Physical Count and Quarantine Recalled Parts    | <input checked="" type="radio"/> Completed<br>11/16/23 | HC01                   | Wondercare General Hospital | Stores       | -         |   |
| Perform Disposal of Recalled Parts                      | <input checked="" type="radio"/> Completed<br>11/16/23 | HC01                   | -                           | -            | -         |   |
| Raise Debit Memo Against Disposition for Recalled Parts | <input checked="" type="radio"/> Completed<br>11/16/23 | HC01                   | -                           | -            | -         |   |

32. Also, notice that the Recall Notice status is moved to Closed Status.

### Review Notice RN100025

Healthcare US Business Unit



ORACLE

