Oracle Cloud ERP - SCM Inventory – Hands-ON Vol1

Contents

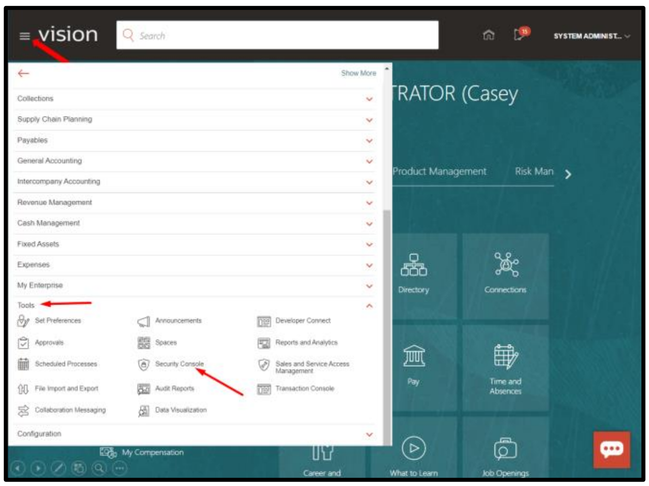
Common Applications Configurations for SCM

Hands-On: Create Implementation User

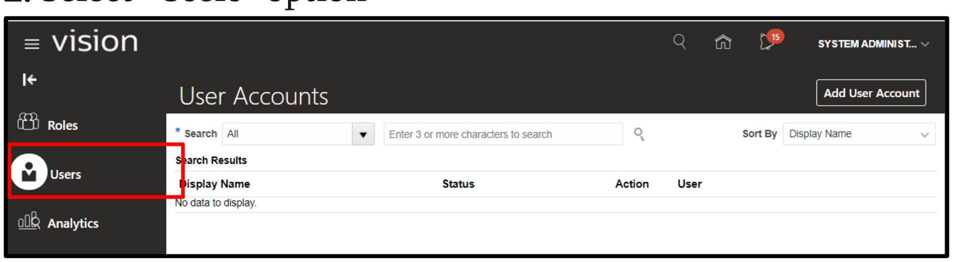
In this practice and demonstration, you will be:

Scenario:	Create Implementation User
Pre-Requirement:	• Have access to Oracle Cloud Environment
Procedure:	Describe steps below
Expected outcome:	Implementation User Created
Estimate Time to do:	15min

1. Navigate to: Homepage → Navigator (Hamburguer) → Tools → Security Console



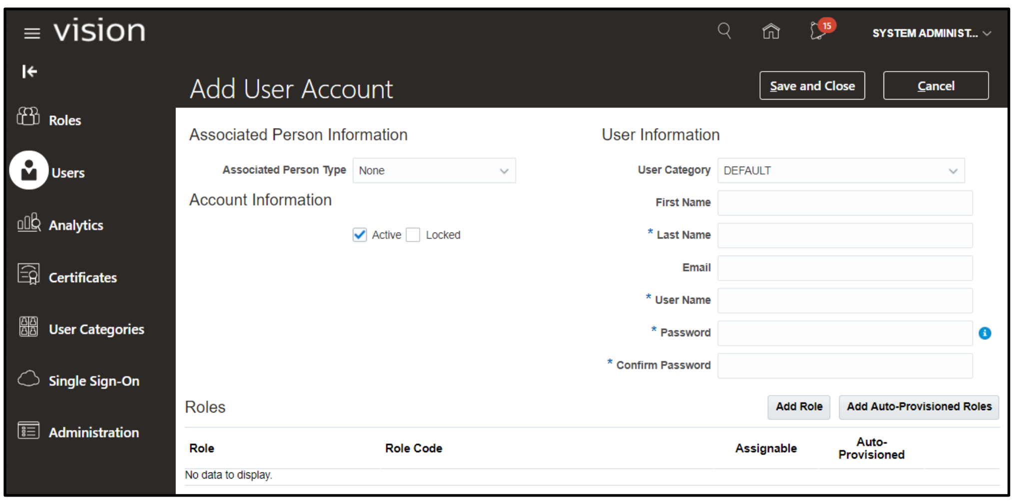
2. Select "Users" option



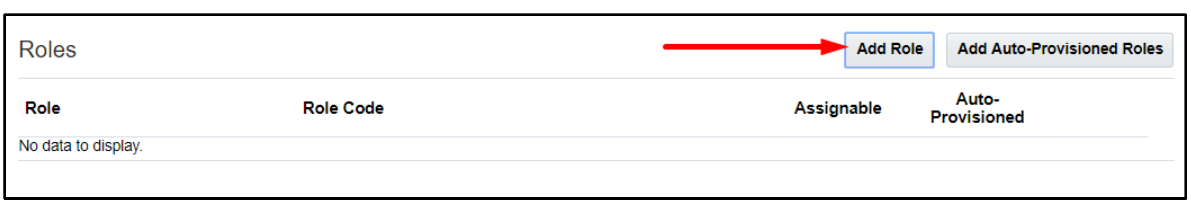
3. Click on "Add User Account" button:

Complete the fields below:

Associated Person Information	
Associated Person Type:	None
Account Information	
Active:	Enabled
User Information	
User Category:	Default
First Name:	Xxxxxx
Last Name:	Yyyyyy
Email:	xxx.yy@gmail.com
User Name:	Define your username
Password:	Your password
Confirm Password	Confirm your password



4. After complete these steps, click on the Add Roles



Role Name	Description
Application Implementation Manager ORA_ASM_APPLICATION_IMPLEMENTATION_MANAGER_JOB	Configures offerings, options and features and assigns resources to tasks.
Application Implementation Consultant ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB	Has access to all setup tasks across all products.
Application Implementation Administrator ORA_ASM_APPLICATION_IMPLEMENTATION_ADMIN_ABSTRACT	Performs all Oracle Fusion Functional Setup Manager duties
Application Developer ORA_FND_APPLICATION_DEVELOPER_JOB	Provides enterprise-wide application administration needed for configuring and extending applications.
IT Security Manager ORA_FND_IT_SECURITY_MANAGER_JOB	Protects assets such as information technology systems, data, and networks
Inventory Manager ORA_INV_INVENTORY_MANAGER_JOB	Manages activities in the warehouse such as managing inventory transactions, planning inventory replenishment and managing cycle, and physical inventory counts.
Receiving Agent ORA_RCV_RECEIVING_AGENT_JOB	Performs receiving activities such as receiving expected shipment lines, inspecting received lines, correcting received lines, and managing returns.
Shipping Agent ORA_WSH_SHIPPING_AGENT_JOB	Records and processes outbound shipments including packing and labeling. Ensures that orders are correctly filled and captures freight, handling, and value service charges. Records weight, volume, and attributes associated with the shipment.
Shipping Manager ORA_WSH_SHIPPING_MANAGER_JOB	Monitors and analyzes outstanding and completed work for the warehouse. Manages the outbound shipment process including reviewing and resolving shipping exceptions. Implement shipping standards and process improvements.
Warehouse Manager ORA_INV_WAREHOUSE_MANAGER_JOB	Manages and analyzes all warehouse activities including analyzing materials management and logistics performance, managing inventory transactions, managing cycle, and physical counts, configuring warehouse setup, and reviewing inventory balances.

Role Name	Description
Warehouse Operator ORA_INV_WAREHOUSE_OPERATOR_JOB	Performs warehouse activities such as creating inventory transactions, processing movement requests, recording cycle and physical inventory counts, performing material put away, and confirming pick slips.
Cost Accountant ORA_CST_COST_ACCOUNTANT_JOB	Performs cost and management accounting functions.
Supply Chain Controller ORA_FOS_SUPPLY_CHAIN_CONTROLLER_JOB	Models the supply chain financial orchestration by defining the primary and financial routes among the profit centers, defining transfer pricing rules, defining accounting rules and tax determinants and monitor the financial orchestration execution.
Employee ORA_PER_EMPLOYEE_ABSTRACT	Identifies the person as an employee.
Product Data Steward ORA_EGI_PRODUCT_DATA_STEWARD_JOB	Executes change requests upon approval and maintains the quality of the product master. Responsible for data loads. Develops consistent data in accordance with the business rules of the corporation. Responsibilities also include data scrubbing, monitoring data entry exception, data de-duplication, ensuring overall data quality.

5. Click on “Save and Close” button

Note:

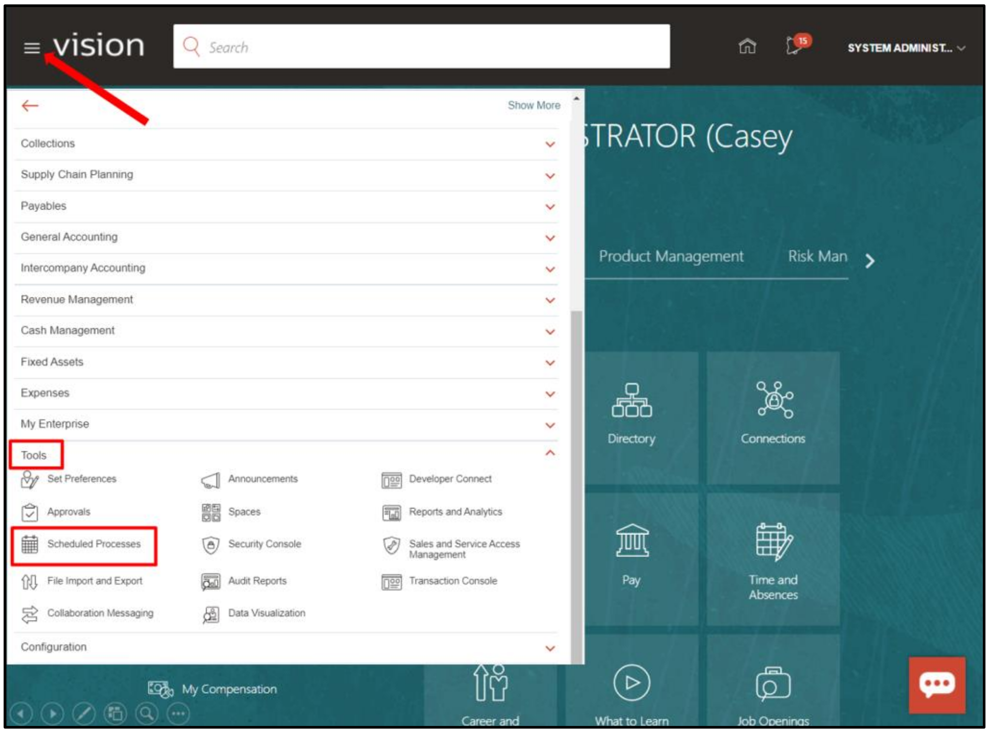
Assignable: *A role is assignable if it can be delegated to another user.*

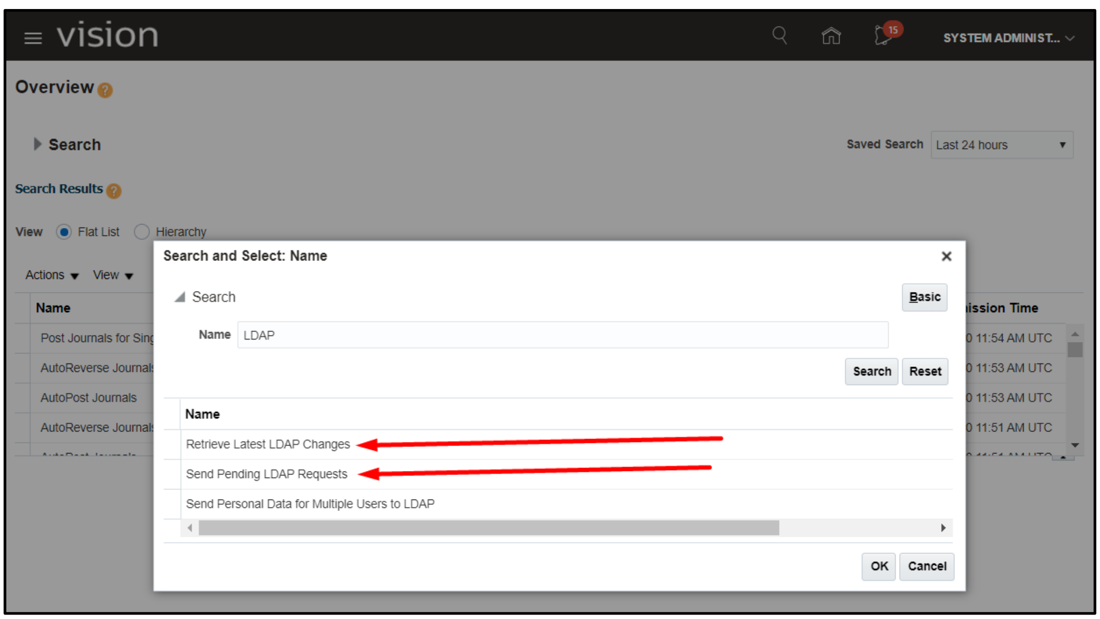
Auto-Provisioned: *To update a user's roles automatically, select Add Auto-Provisioned Roles. This action applies to roles for which the Auto-provision option is selected in all current role mappings. Autoprovisioning is the automatic allocation or removal of user roles. It occurs for individual users when you create or update assignments.*

More details: *Oracle Fusion Recruiting Cloud: Provisioning Roles for Application Users (Doc ID 2585791.1)*

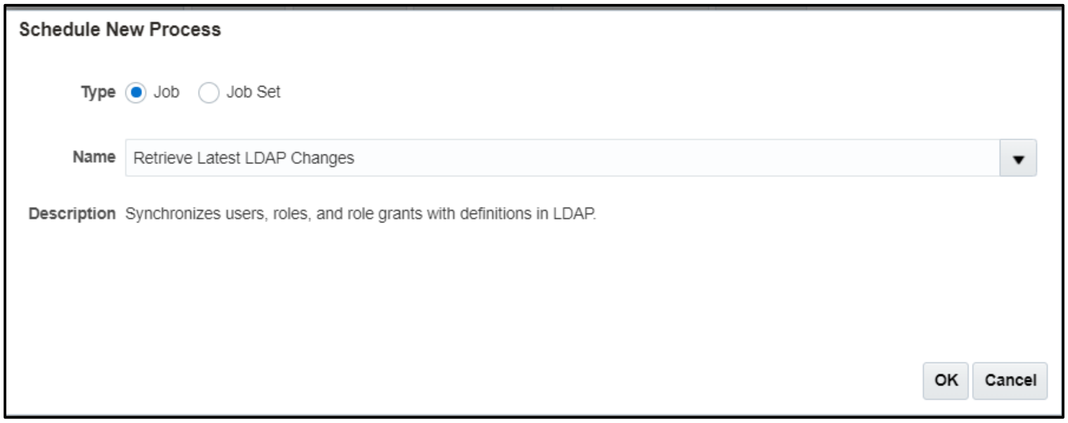
7. After that, compile the roles definition using:

Navigate to: Homepage → Navigator (Hamburguer) → Tools → Scheduled Processes

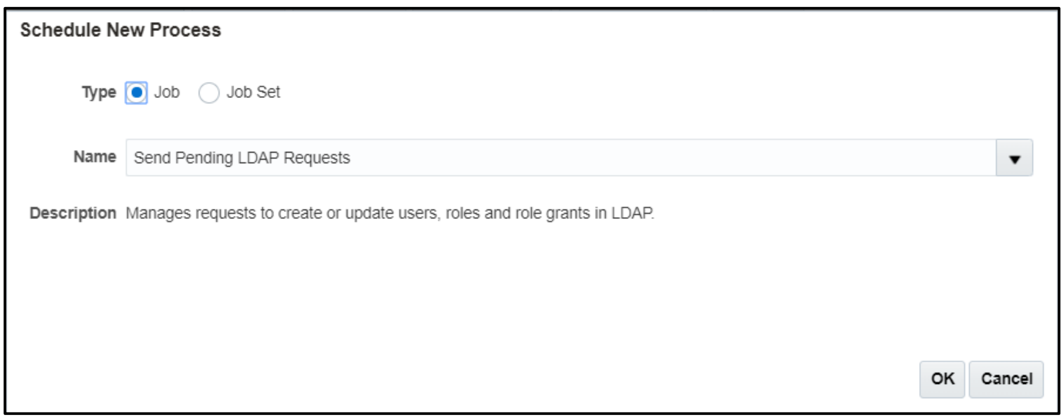




8. Schedule New Process → **Name:** Retrieve Latest LDAP Changes → Ok → Submit (Synchronize user roles…)



9. Schedule New Process → **Name:** Send Pending LDAP Requests → Ok → Submit (Requests to create, suspend, and reactivate user accounts…)



END

More Details: *Welcome to Fusion ERP Cloud Applications - Getting Started (Doc ID 1610327.1)*
Oracle ERP Cloud Guided Path and Configuration Best Practices (Doc ID 2226879.1)
DM:Troubleshooting Issues Related To Planning Setup (Doc ID 2665952.1)
Mapping Of Roles, Duties and Privileges in Fusion Applications (Doc ID 1460486.1)

Common Financials Configurations for SCM

Hands-On: Create Locations

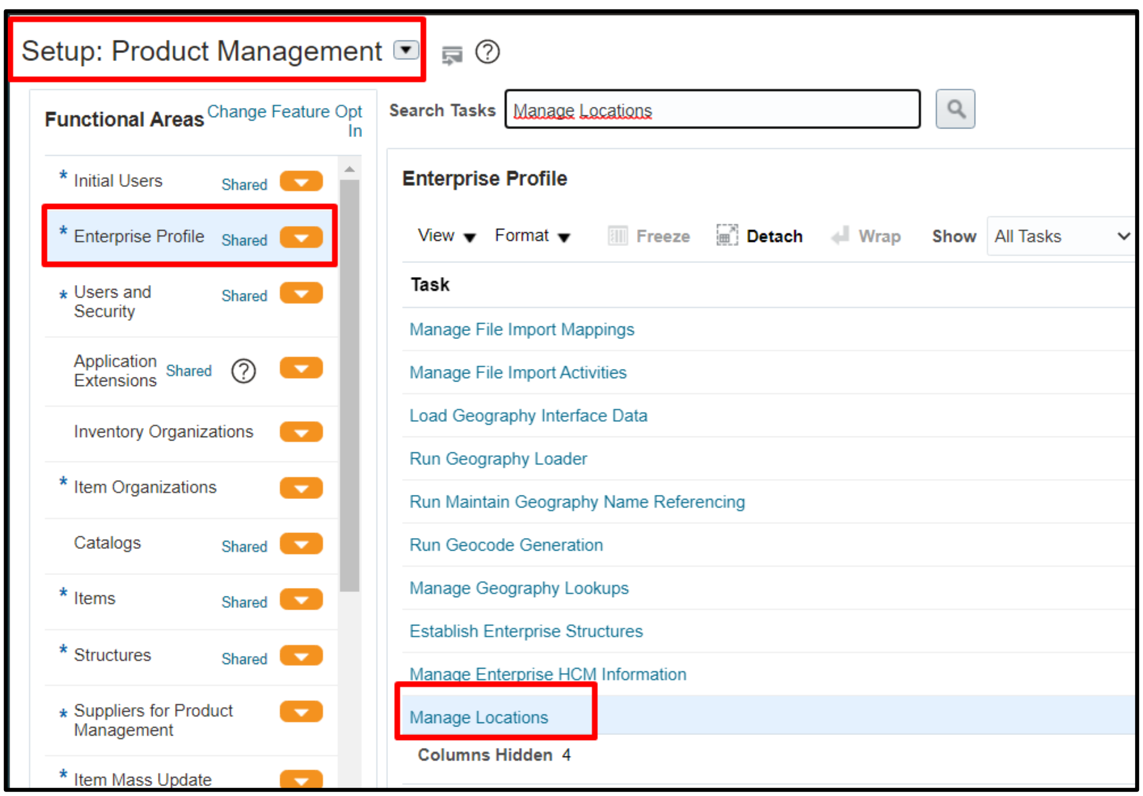
In this practice and demonstration, you will be:

Scenario:	Create your Location
Pre-Requirement:	None
Procedure:	Describe steps below
Expected outcome:	Location Created
Estimate Time to do:	20min

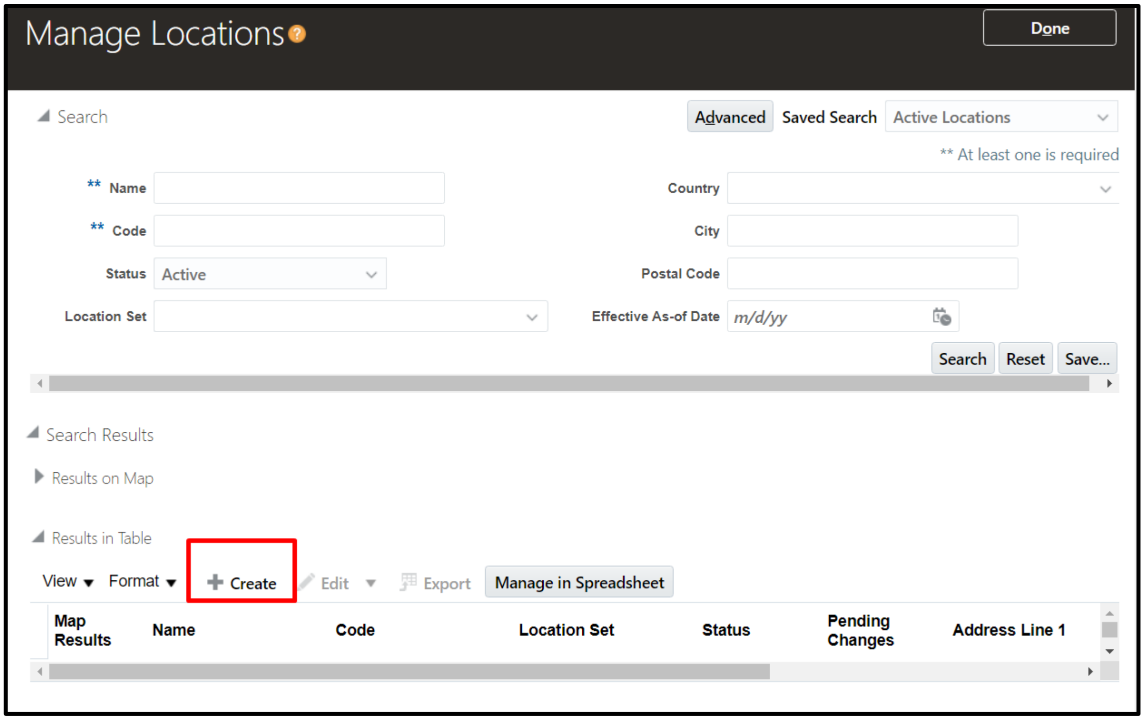
Create Locations

1. Navigate to:

Others → Setup and Maintenance → **Setup:** Product Management → **Functional Areas:** Enterprise Profile → **Task:** Manage Locations



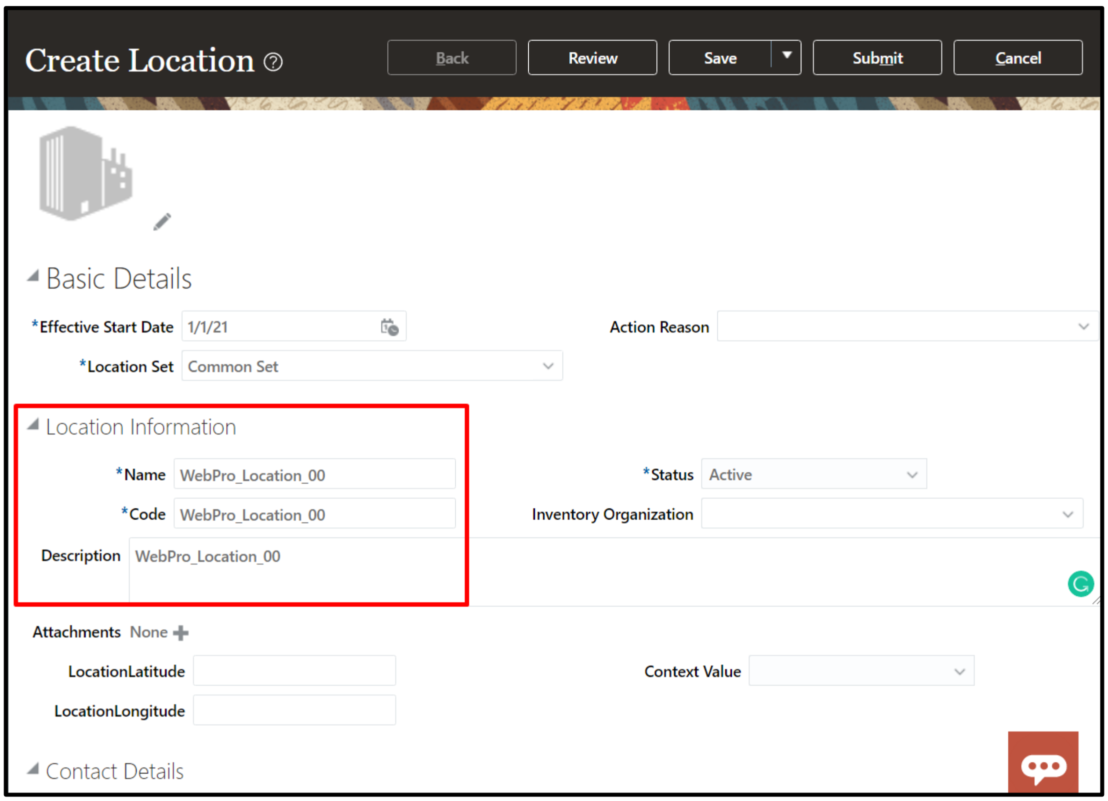
2. Click on "+" to create your location:



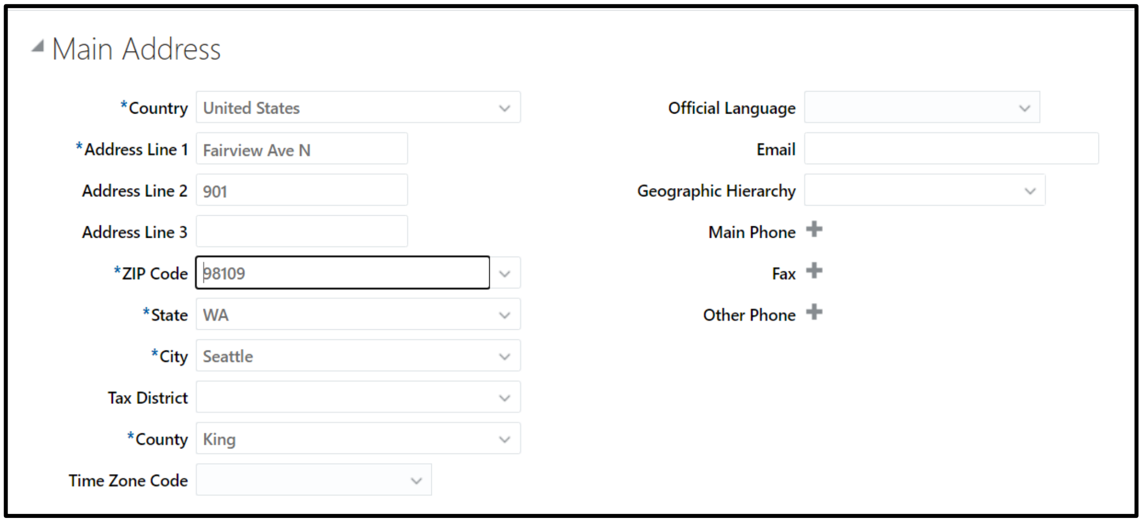
3. Enter the data for your **Item Master Organization**:

Complete the fields below:

Basic Details	
Effective Start Date:	01/Jan/XX
Location Set:	Common Set
Location Information	
Name:	Your_Location_00
Code:	Your_Location_00
Description:	Your_Location_00
Status:	Active



Main Address	*Complete the data based on your country structure address*
Country:	Xxxx
Address Line 1	Xxxx
Address Line 2	
…	Your_Location_00

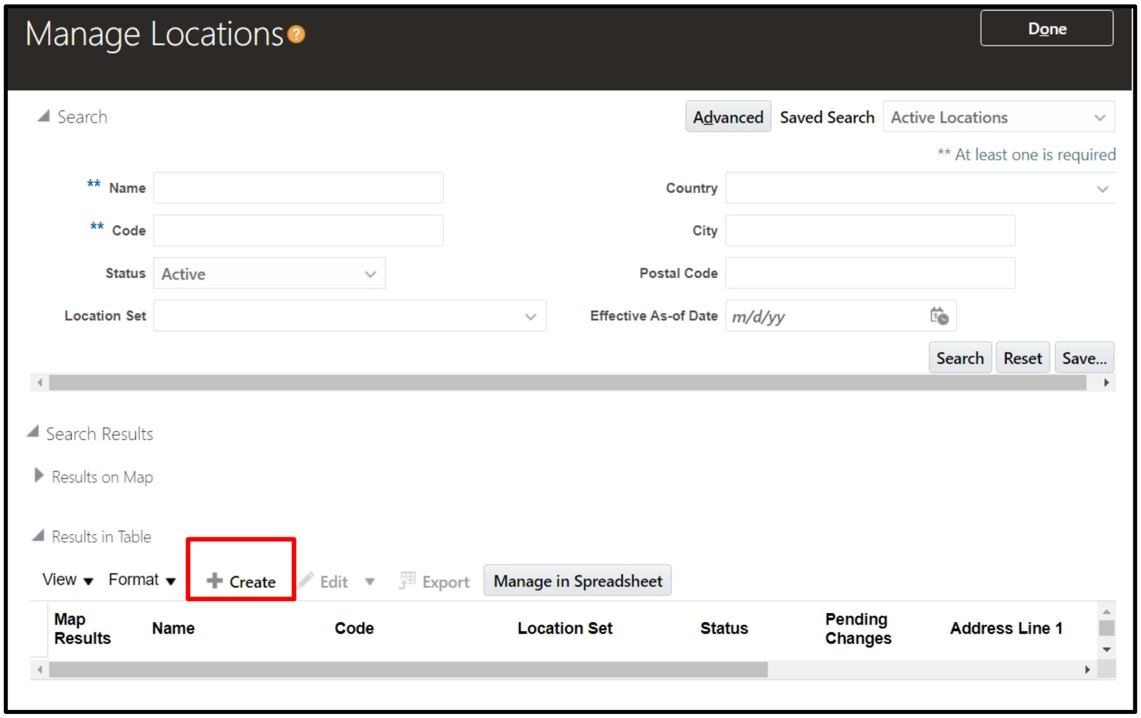


Shipping Details	
Ship-to Site:	(X) Yes
Receiving Site:	(X) Yes
Bill-to Site:	(X) Yes
Office Site:	(X) Yes
Designated Receiver:	-

4. Save

5. Submit → "Yes"

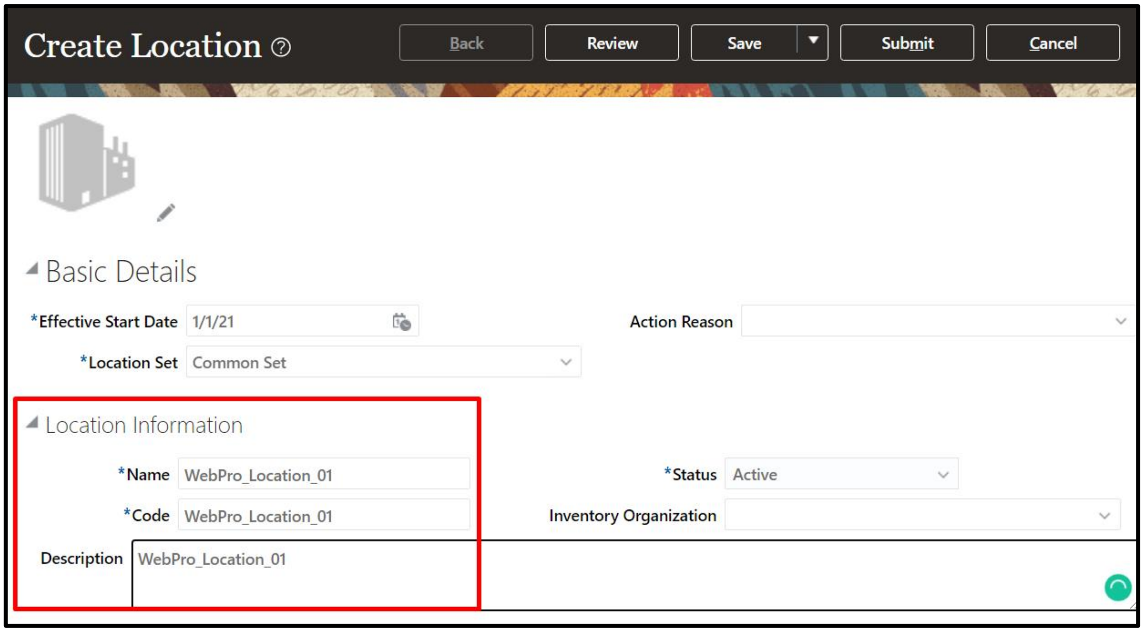
6. Click on “+” to create your location:



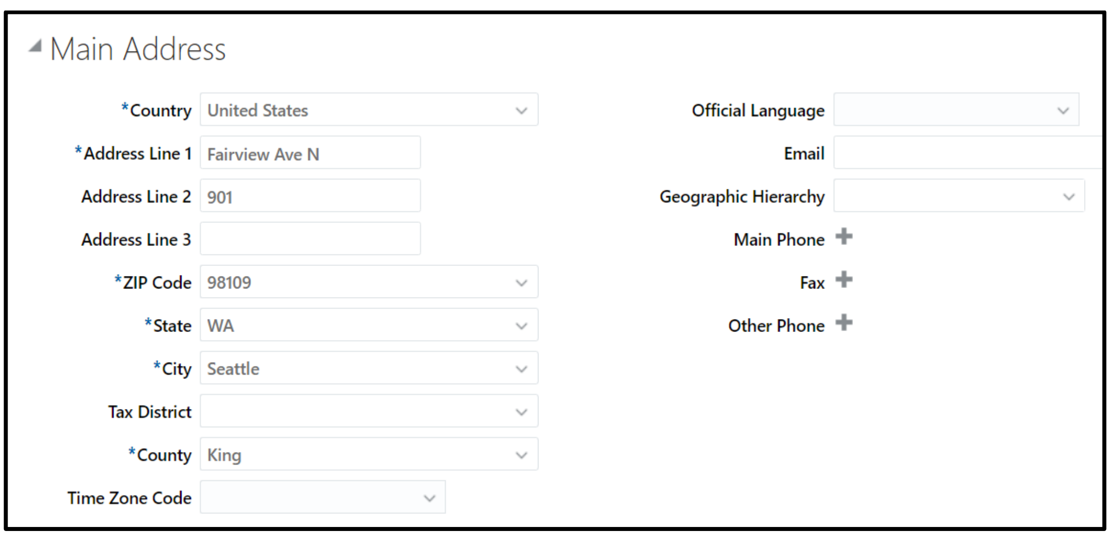
7. Enter the data for your **Inventory Organization**:

Complete the fields below:

Basic Details	
Effective Start Date:	01/Jan/XX
Location Set:	Common Set
Location Information	
Name:	Your_Location_01
Code:	Your_Location_01
Description:	Your_Location_01
Status:	Active



Main Address	*Complete the data based on your country structure address*
Country:	Xxxx
Address Line 1	Xxxx
Address Line 2	
…	XX_Location_01



Shipping Details	
Ship-to Site:	(X) Yes
Receiving Site:	(X) Yes

Bill-to Site:	(X) Yes
Office Site:	(X) Yes
Designated Receiver:	-

8. Save

9. Submit → "Yes"

END

More Details:

Manage Locations -
https://docs.oracle.com/en/cloud/saas/financials/21a/faigl/enterprise.html#FAIGL1453103

Create Location - Geography Validation Is Not Respected (Doc ID 2580955.1)

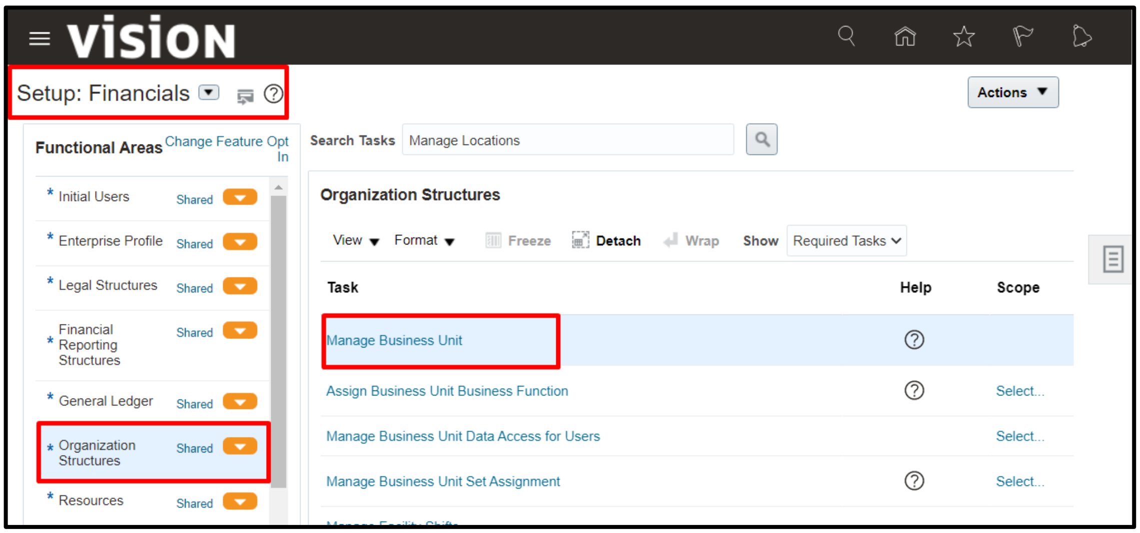
Hands-On: Create Business Unit

In this practice and demonstration, you will be:

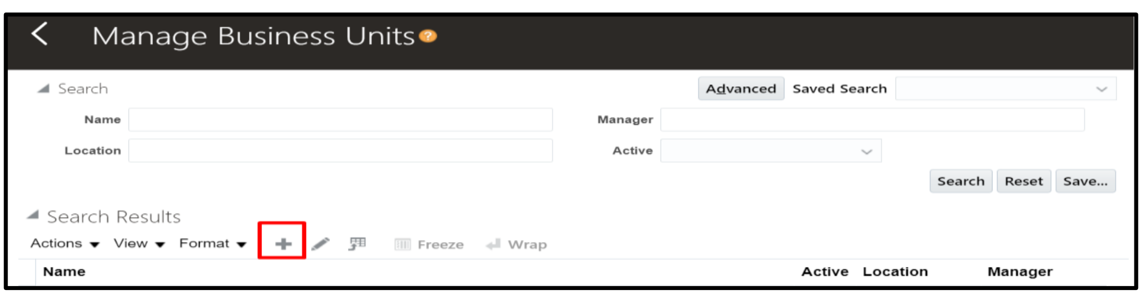
Scenario:	Create Business Unit
Pre-Requirement:	None
Procedure:	Describe steps below
Expected outcome:	Business Unit Created
Estimate Time to do:	15min

1. Navigate to:

Others → Setup and Maintenance → **Setup:** Financials → **Functional Areas:** Organization Structures → **Task:** Manage Business Unit



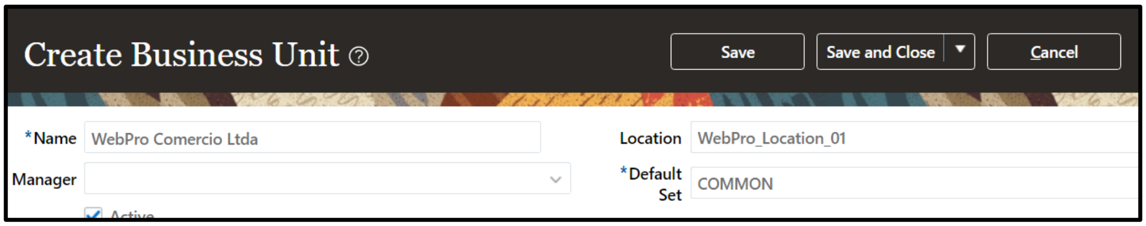
2. Click on "+" to create your Business Unit:



3. Enter the data:

Complete the fields below:

Create Business Unit	
Name:	Your_Business_Unit
Manager:	-
Location:	Your_Location_01
Default Set:	COMMON



4. Save and Close

END

More Details:

How To Create A New Business Unit (Doc ID 2512696.1)

How To Create Data Roles for Business Units (Doc ID 1432441.1)

How To Create Copies Of A Business Unit? (Doc ID 2073333.1)

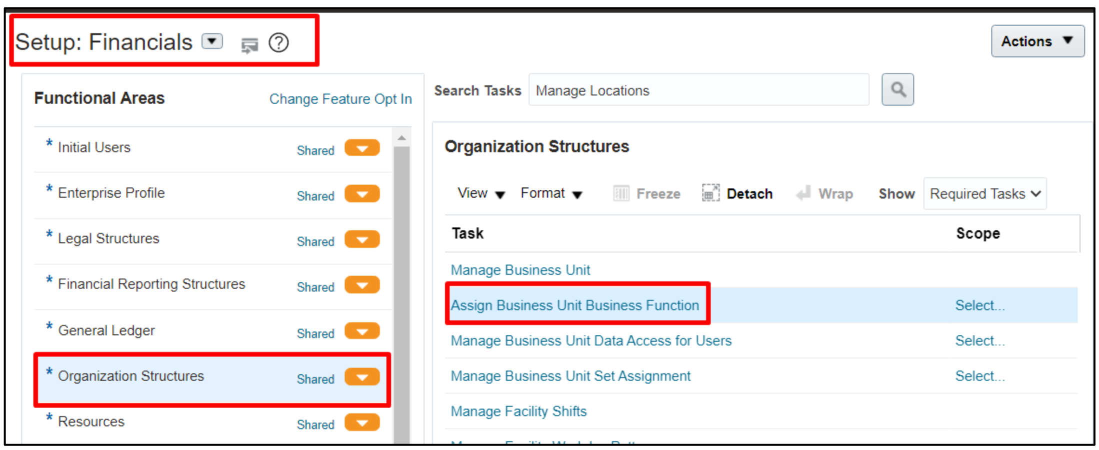
Hands-On: Assign Business Unit Business Function

In this practice and demonstration, you will be:

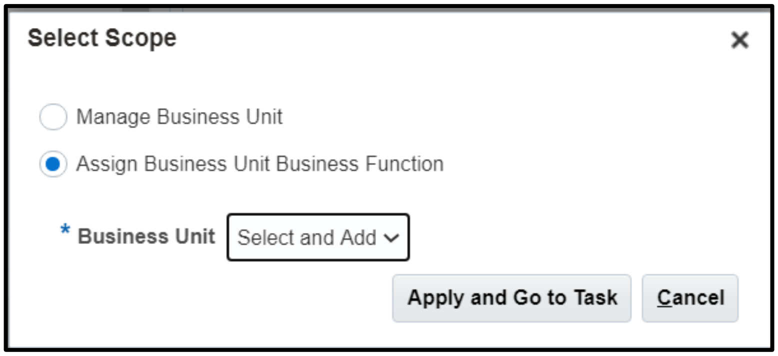
Scenario:	Assign Business Unit Business
Pre-Requirement:	None
Procedure:	Describe steps below
Expected outcome:	Business Unit Business Assigned
Estimate Time to do:	10 min

1. Navigate to:

Others → Setup and Maintenance → **Setup:** Financials → **Functional Areas:** Organization Structures → **Task:** Assign Business Unit Business Function → **Scope:** Select…

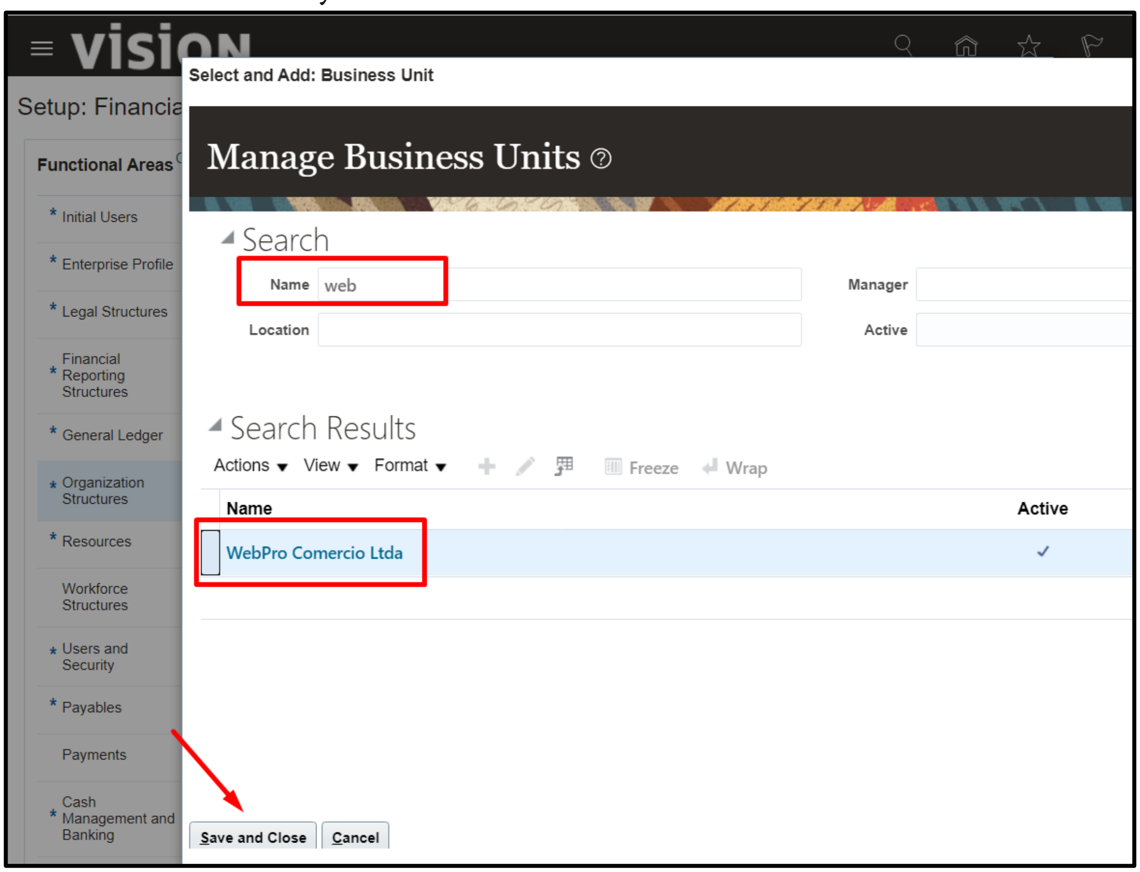


2. Click on “Scope“, select the option “Assign Business Unit Business Function” and on line Business Unit choice “Select and Add”:



3. Click on Appy and Go to Task button

4. Search and select your business unit:

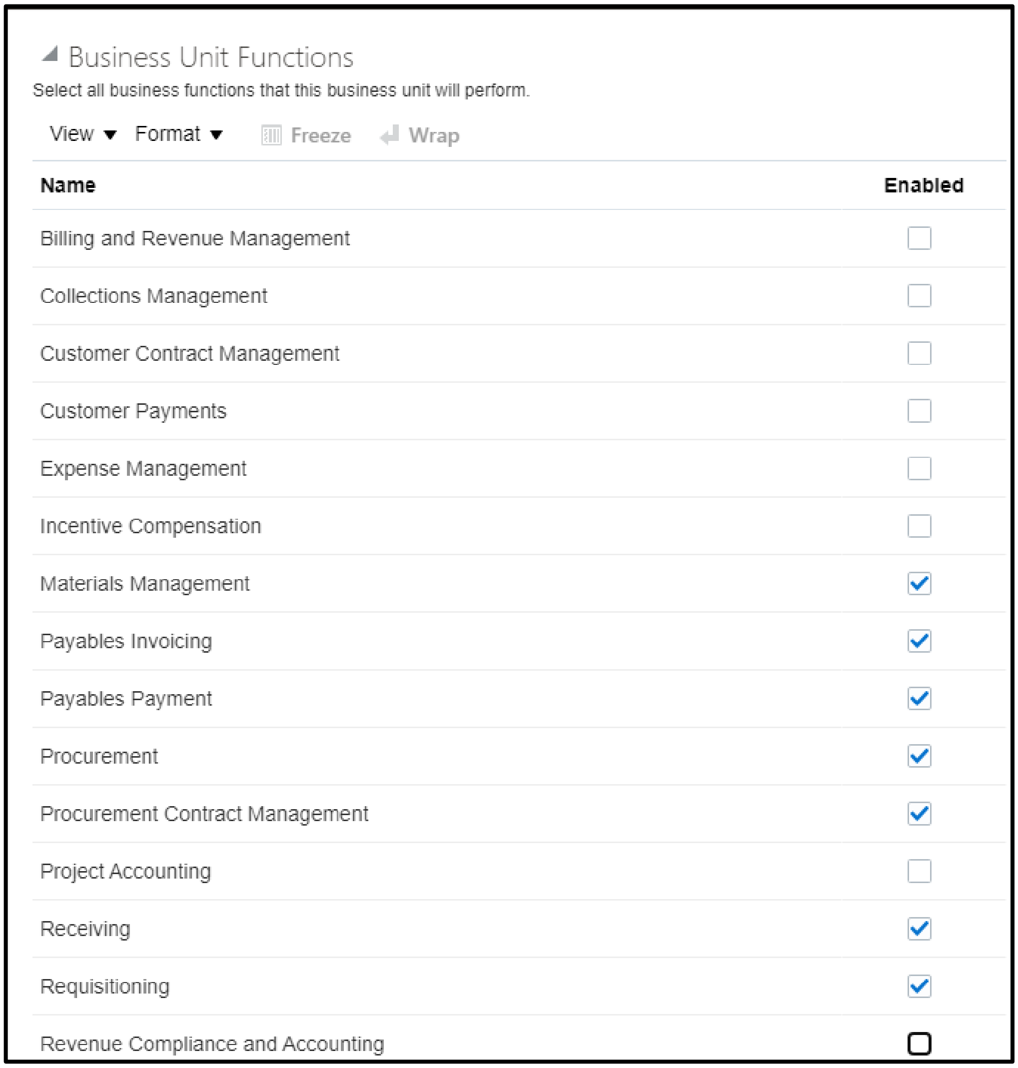


Click on “Save and Close” Button.

5. Select the follow lines for the Business Unit Functions:

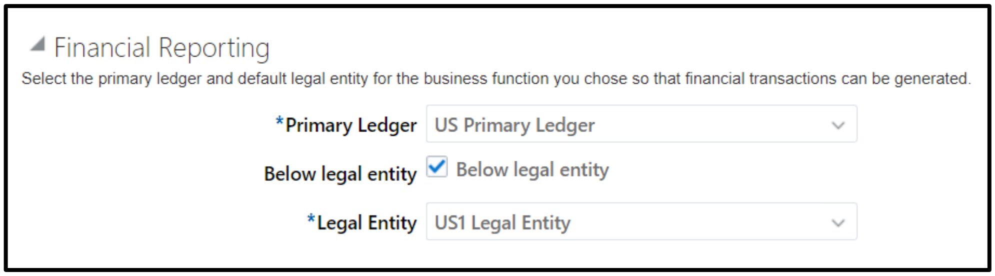
- Requisitioning

- Procurement
- Receiving
- Procurement Contract Management
- Materials Management
- Payables Invoicing
- Payables Payment



6 Select the follow lines for the Financial Reporting:

- **Primary Ledger:** US Primary Ledger / your primary ledger;
- **Below legal Entity:** (enable) Below legal entity / Profit Center Business Unit;
- **Default Legal Entity:** US1 Legal Entity / your legal entity;



7. Save and Close

END

More Details:
How to access task "Business Unit Business Function" (Doc ID 2093332.1)
Assign Business Unit Business Function - Procurement (Doc ID 2193373.1)
How To Create Copies Of A Business Unit? (Doc ID 2073333.1)
How to assign Functions to different Business Units (Doc ID 2525075.1)

Hands-On: Manage your Business Unit Set Assignment

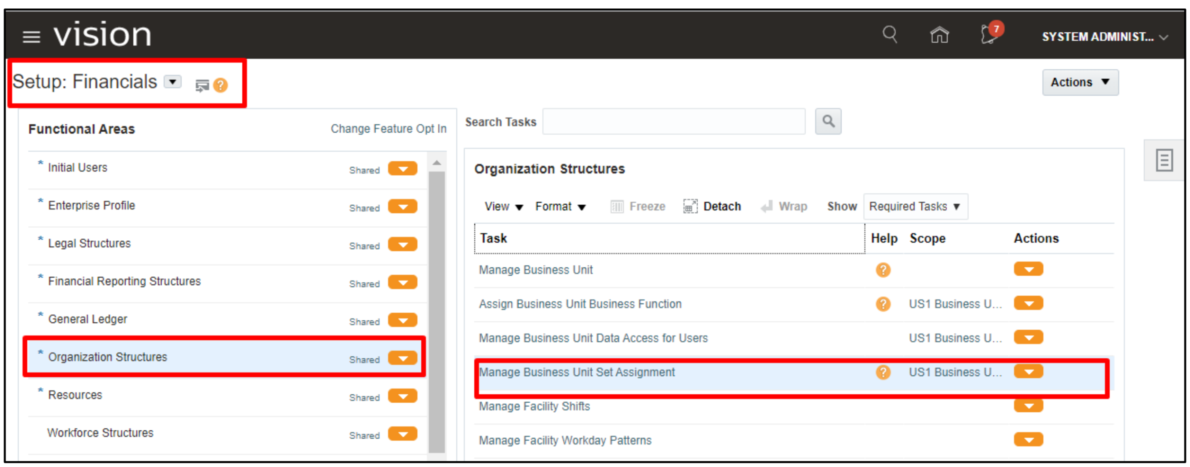
In this demonstration, you will be:

Scenario:	Review your assigned business unit functions
Pre-Requirement:	-
Procedure:	Describe steps below
Expected outcome:	Assigned Done
Estimate Time to do:	5min

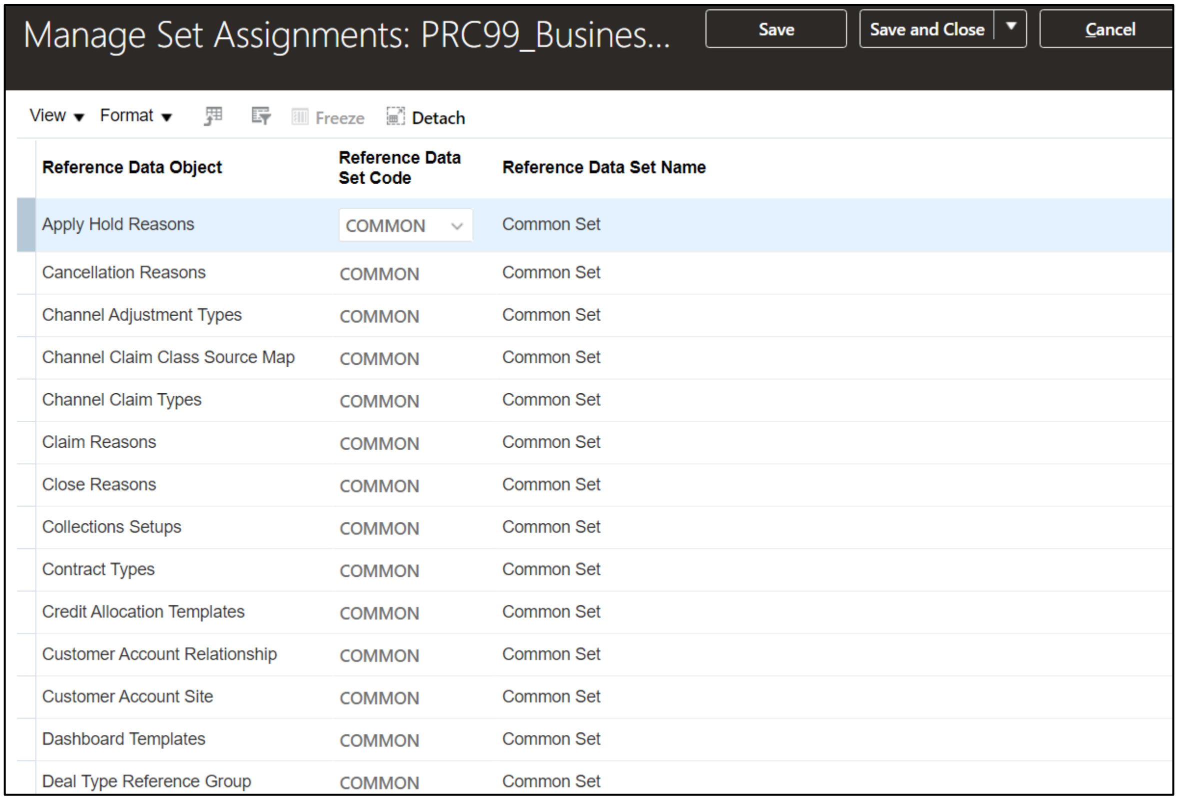
(*) Create your Manage Reference Data Sets first, to change the code here.

1. Navigate to:

Others → Setup and Maintenance → **Setup:** Financials → **Functional Areas:** Organization Structures → **Task:** Manage Business Unit Set Assignment



2. Define the Reference Data Set code for your Data objects:



Reference Data Object	Reference Data Set Code	Reference Data Set Name
Apply Hold Reasons	COMMON	Common Set
Cancellation Reasons	COMMON	Common Set
Channel Adjustment Types	COMMON	Common Set
Channel Claim Class Source Map	COMMON	Common Set
Channel Claim Types	COMMON	Common Set
Claim Reasons	COMMON	Common Set
Close Reasons	COMMON	Common Set
Collections Setups	COMMON	Common Set
Contract Types	COMMON	Common Set
Credit Allocation Templates	COMMON	Common Set
Customer Account Relationship	COMMON	Common Set
Customer Account Site	COMMON	Common Set
Dashboard Templates	COMMON	Common Set
Deal Type Reference Group	COMMON	Common Set

3. Save and Close.

END

More Details:

Reference Data Set Assigned To Locations Not Filtering (Doc ID 2251227.1)
Managing Data Access for Users in ERP Cloud in Fusion Release 12 (Doc ID 2241822.1)
Manage Data Access for Users: How to Assign Multiple Data Security Context Values at a Time (Doc ID 2321330.1)

Hands-On: Create Workday Facility

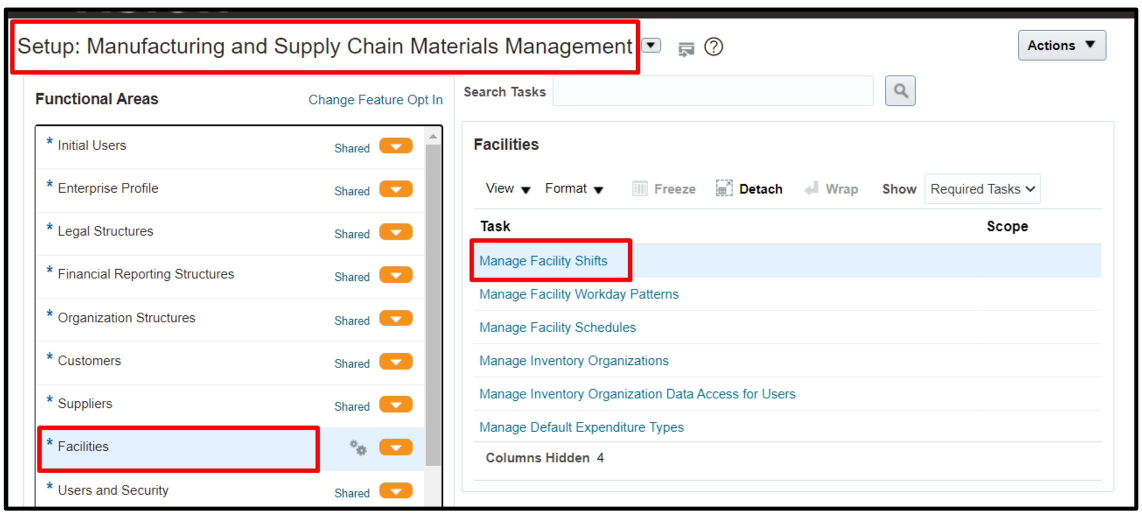
In this practice and demonstration, you will be:

Scenario:	Create your Work Schedule calendar
Pre-Requirement:	None
Procedure:	Describe steps below
Expected outcome:	Work Schedule calendar Created
Estimate Time to do:	20min

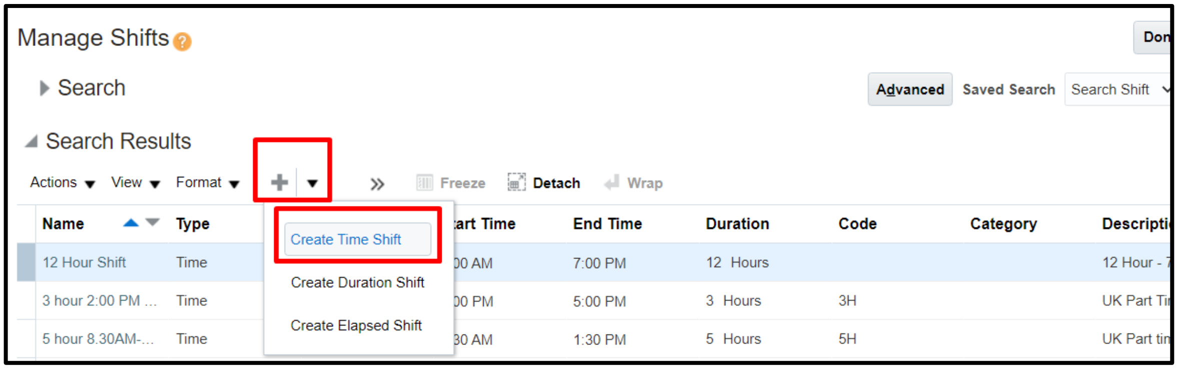
Create Shift

1. Navigate to:

Others → Setup and Maintenance → **Setup:** Manufacturing and Supply Chain Materials Management → **Functional Areas:** Facilities → **Task:** Manage Facility Shifts



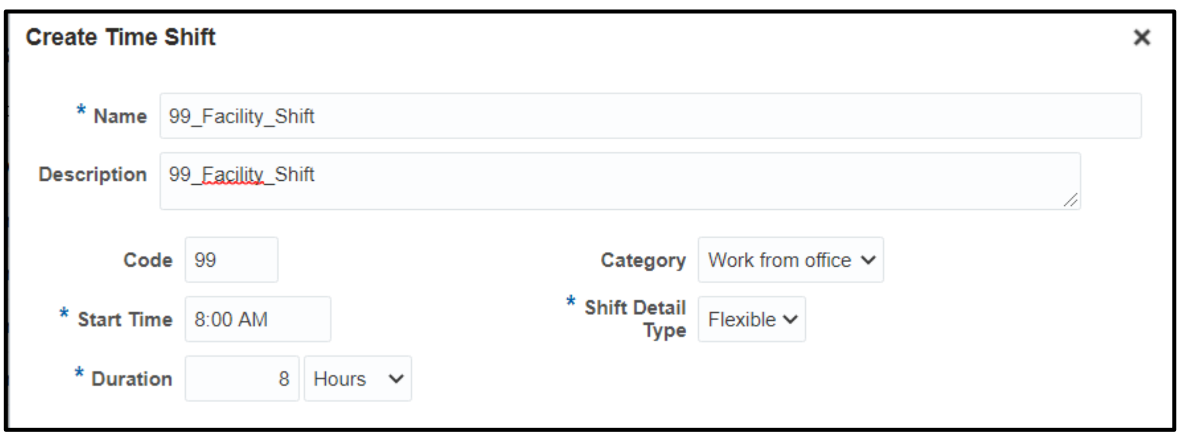
2. Click on “+” (Create Time Shift) to create your time shift:



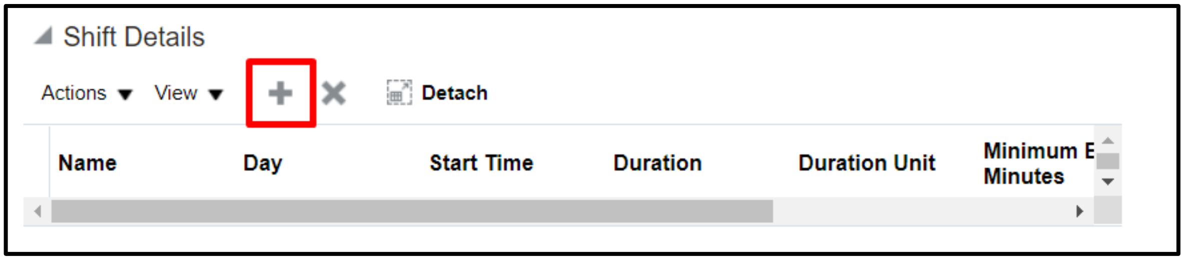
3. Enter the data:

Complete the fields below:

Manage Shift	
Name:	XX_Facility_Shift
Description:	XX_Facility_Shift
Code:	XX
Start Time:	8:00 AM
Duration:	8 hours
Category:	Work from Office
Shift Detail Type:	Flexible



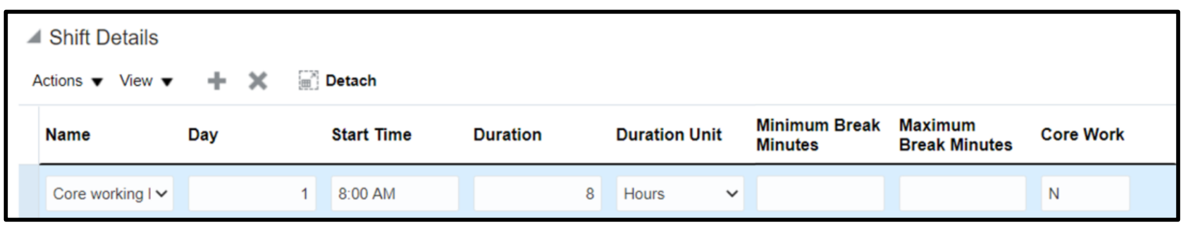
4. Click on Shift Details and select “+” to enter the data:



5. Enter Shift Details Data:

Complete the fields below:

Shift Details	
Name:	Core Working hours
Day:	1
Start Time:	8:00 AM
Duration:	8
Duration Unit:	Hours
Minimum Break Minutes:	-
Maximum Break Minutes:	-
Core Work:	N



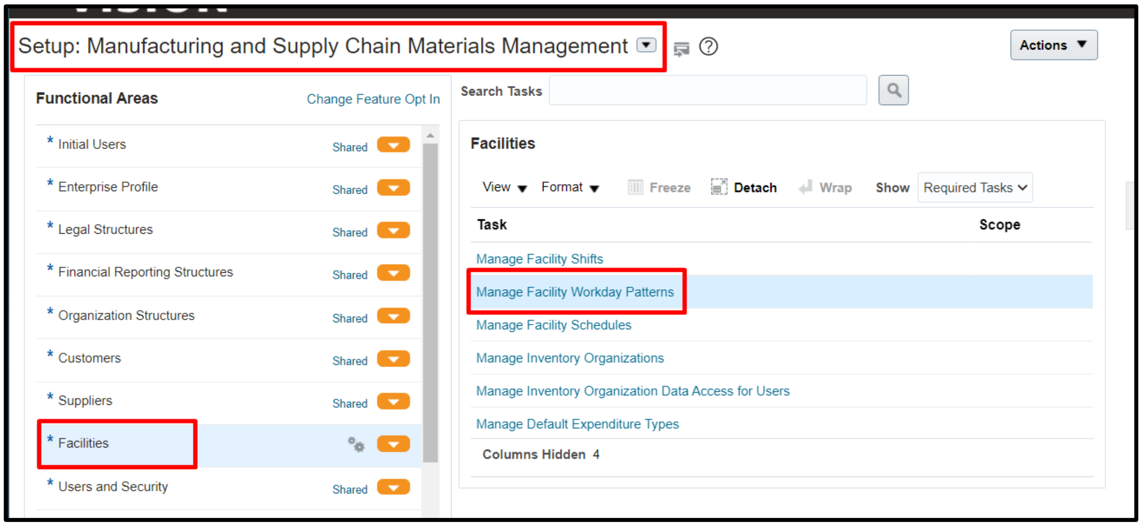
6. Save and Close

7. Done

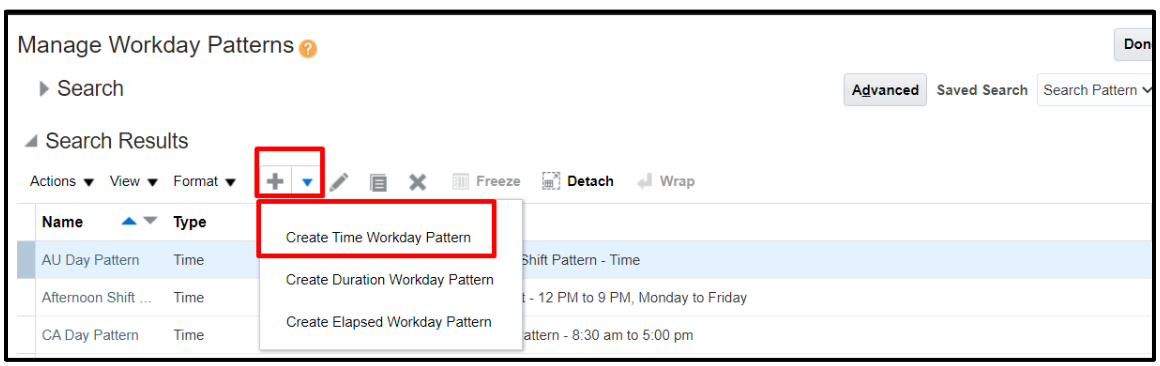
Create Workday Patterns

8. Navigate to:

Others → Setup and Maintenance → **Setup:** Manufacturing and Supply Chain Materials Management → **Functional Areas:** Facilities → **Task:** Manage Facility Workday Patterns



9. Click on "+" (Create Time Shift) to create your time shift:

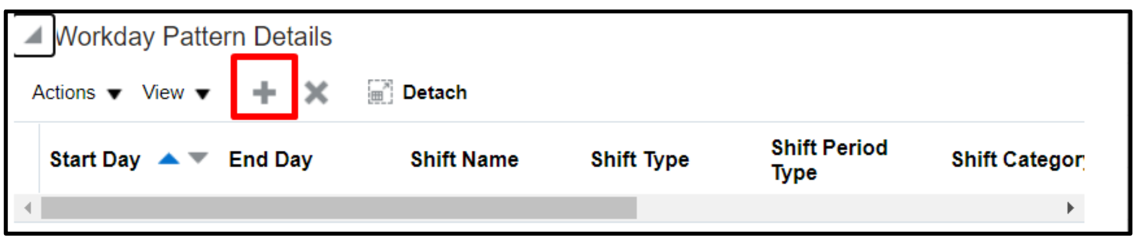


10. Enter the data:

Complete the fields below:

Create Time Workday Pattern	
Name:	XX_WDP
Description:	XX_WDP
Length in Days:	7

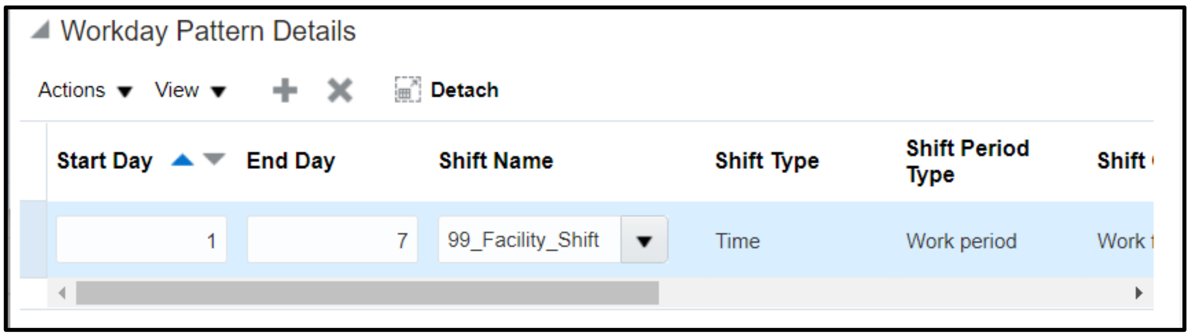
11. Click on Workday Pattern Details and select "+" to enter the data:



12. Enter Shift Details Data:

Complete the fields below:

Pattern Details	
Start Day:	1
End Day:	7
Shift Name:	XX_Facility_Shift *Select your Facility Shift register done before*



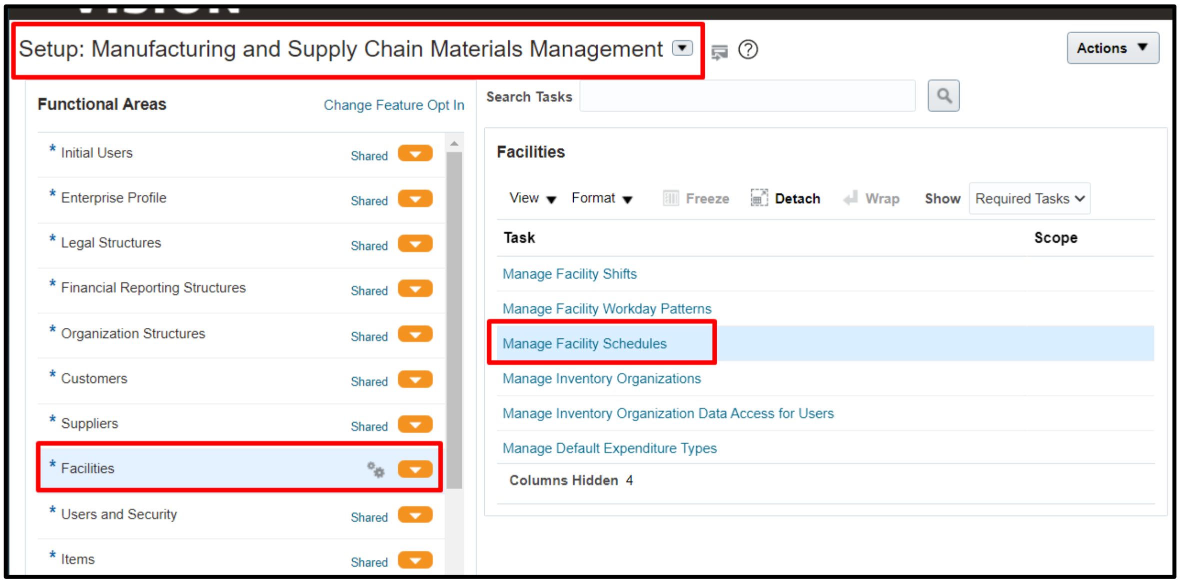
13. Save and Close

14. Done

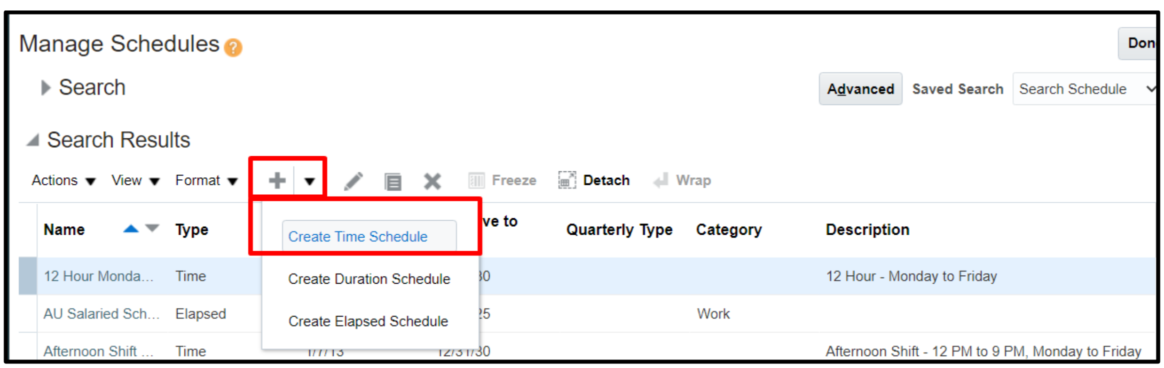
Create Schedules

15. Navigate to:

Others → Setup and Maintenance → **Setup:** Manufacturing and Supply Chain Materials Management → **Functional Areas:** Facilities → **Task:** Manage Facility Schedules



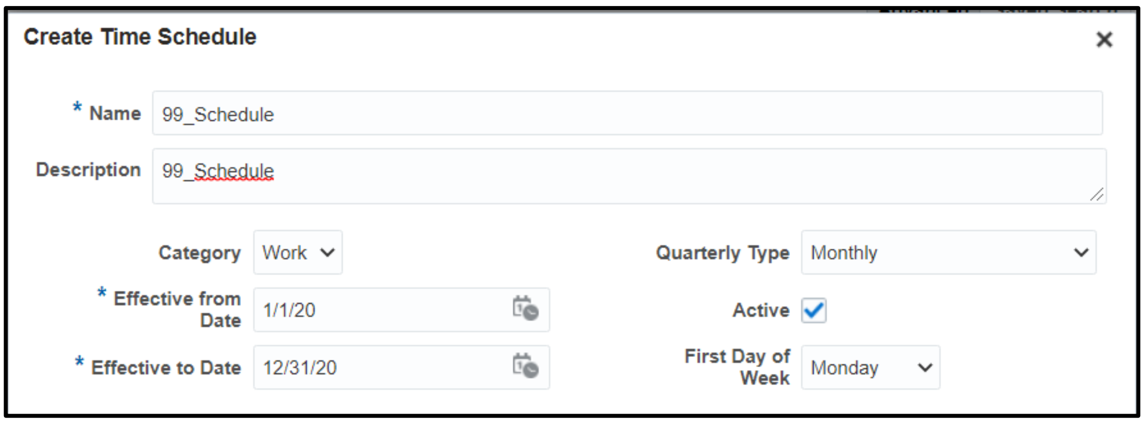
16. Click on "+" (Create Time Schedule) to create your time schedule:



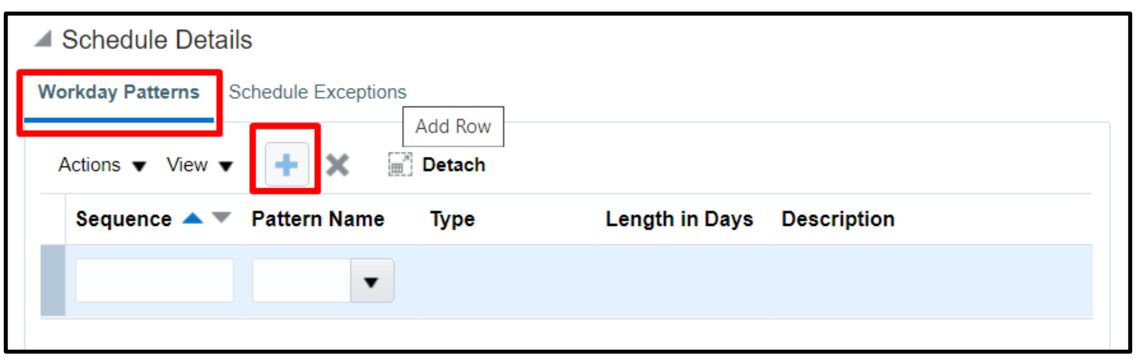
17. Enter the data:

Complete the fields below:

Create Time Schedule	
Name:	XX_Schedule
Description:	XX_Schedule
Category:	Work
Effective from Date:	01/Jan/XX
Effective to Date:	31/Dec/XX
Quarterlty Type:	Monthly
Active:	(X) Checked
First Day of Week:	Monday



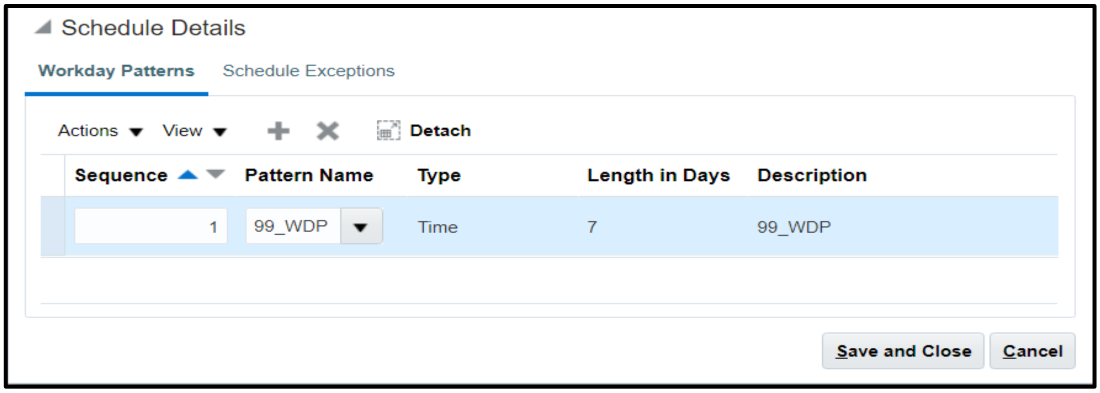
18. Click on Schedule Details, tab "Workday Pattern" and select "+" to enter the data:

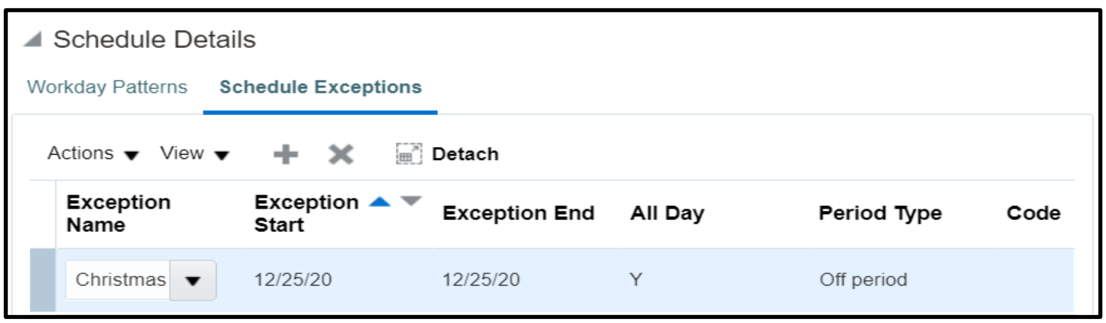


19. Enter Schedule Details Data:

Complete the fields below:

Workday Patterns	
Sequence:	1
Pattern Name:	XX_WDP *Select your Work Day Pattern register done before*
Shift Name:	XX_Facility_Shift *Select your Facility Shift register done before*





20. Save and Close

21. Done

Note:

Check if you need add holidays on “Manage Facility Schedule Exceptions”

END

More Details:

Troubleshooting Issues with Data Collections for Calendars (Doc ID 2662781.1)
Master KM: Guide to Manufacturing Calendar and Resource Scheduling (Setup, FAQ, Troubleshooting) (Doc ID 2657499.1)
Fusion SCM - Common Problems: SCM Common Setup (Doc ID 1391930.1)

Hands-On: Create Inventory Organizations

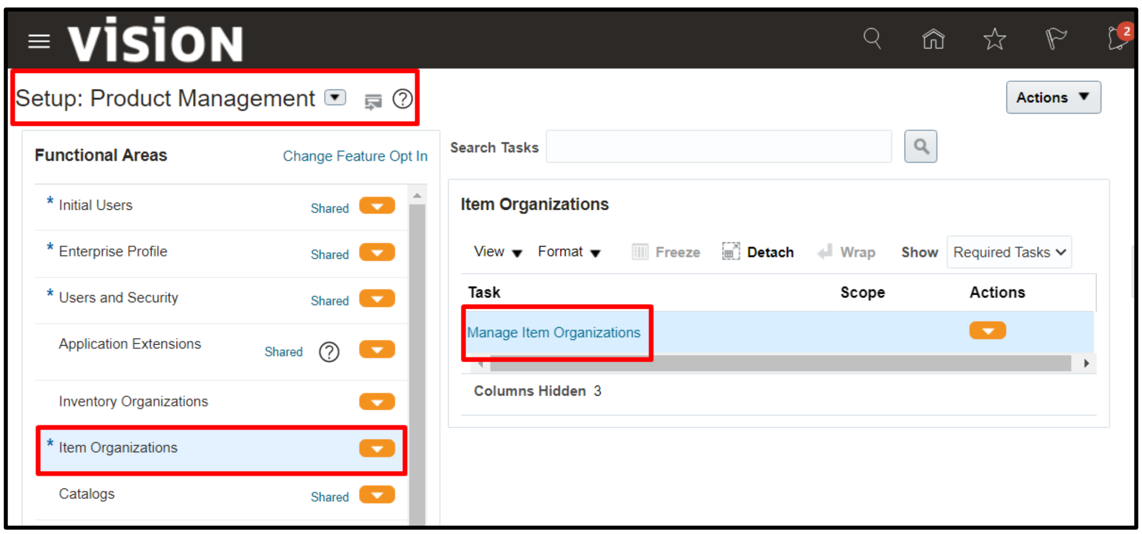
In this practice and demonstration, you will be:

Scenario:	Create Master Inventory Organization
Pre-Requirement:	None
Procedure:	Describe steps below
Expected outcome:	Inventory Organization Created
Estimate Time to do:	20 min

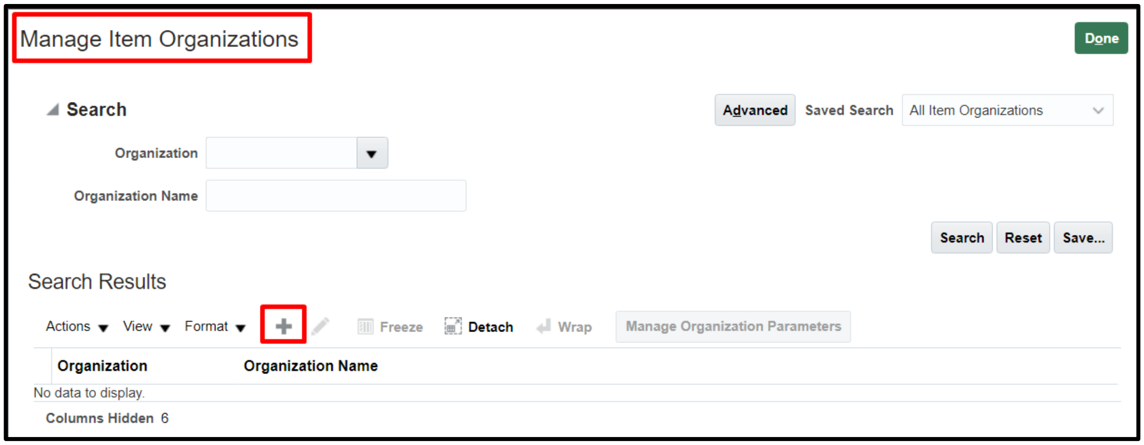
Create Master Item Organization

1. Navigate to:

Others → Setup and Maintenance → **Setup:** Product Management → **Functional Areas:** Item Organizations → **Task:** Manage Item Organizations



2. Click on "+" to create your Master Item Organization:

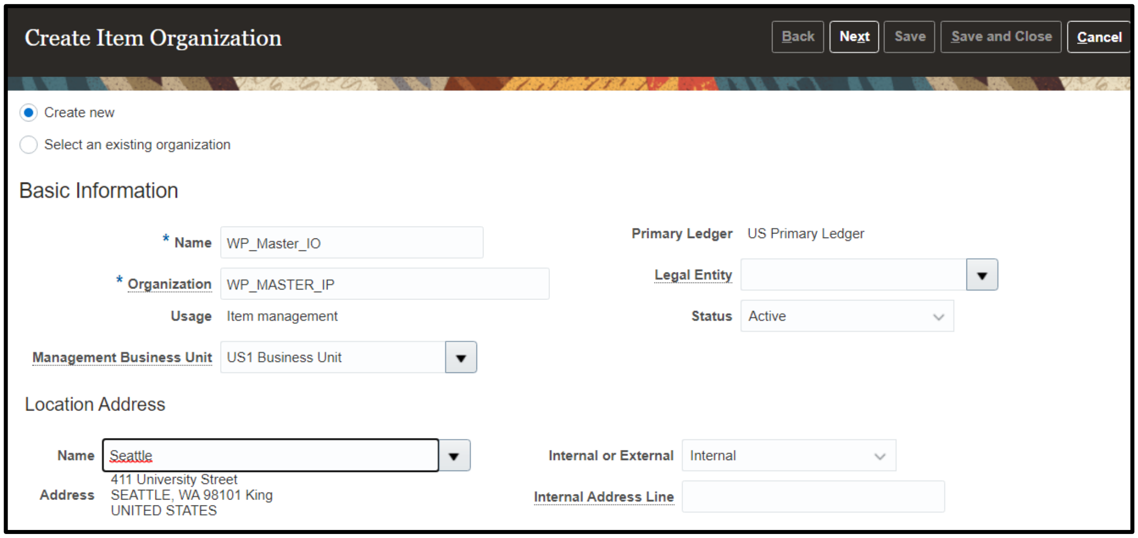


3. Enter the data:

Complete the fields below:

Create Item Organization	
Basic Information	
Name:	Your_Master_IO
Organization:	Your_MASTER_IO (UPPERCASE)
Usage:	Item Management
Management Business Unit:	Your business unit
Primary Ledger	
Legal Entity:	Your Legal Entity
Status:	Active

(*) this Master Organization on Cloud version means Item Organization.



Pay attention for your Location Address

Complete the fields below:

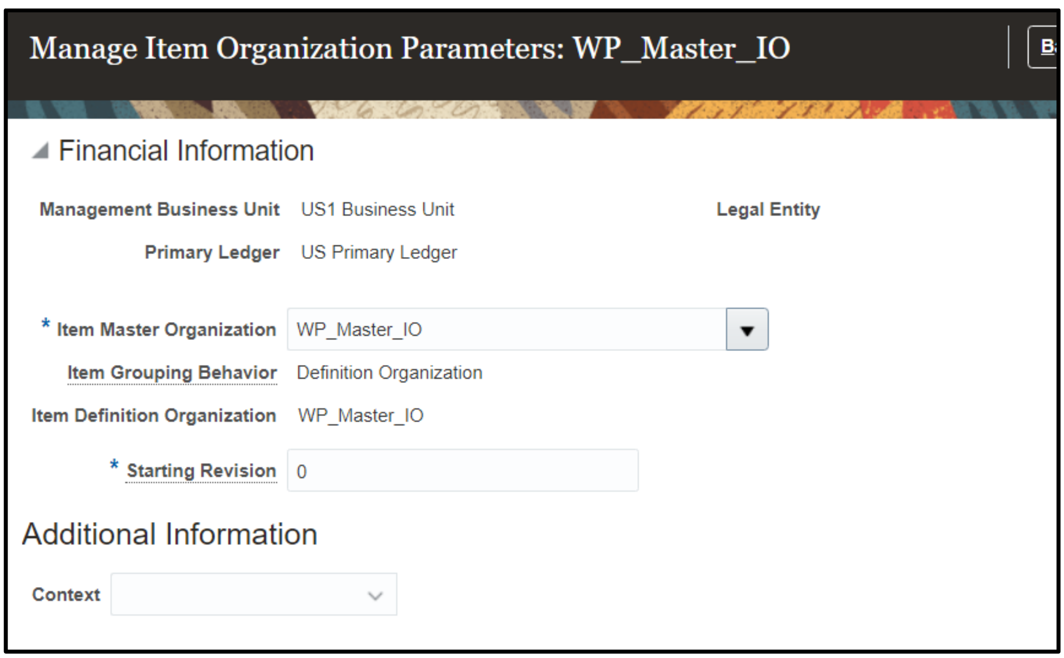
Location Address	
Name:	Your location information (00)
Address:	Completed based on location address
Internal or External:	Internal
Internal Address Line:	-

Click on “Next”

4. Enter the data for your inventory:

Complete the fields below:

Manage Item Organization Parameters	
Financial Information	
Manage Business Unit:	Your business unit
Primary Ledger:	US Primary Ledger
Legal Entity:	US1 Legal Entity
Item Master Organization:	Your Master Item Org
Item Grouping Behavior	Definition Organization
Item Definition Organization	Your Master Item Org
Starting Revision:	0
Additional Information	
Context:	-



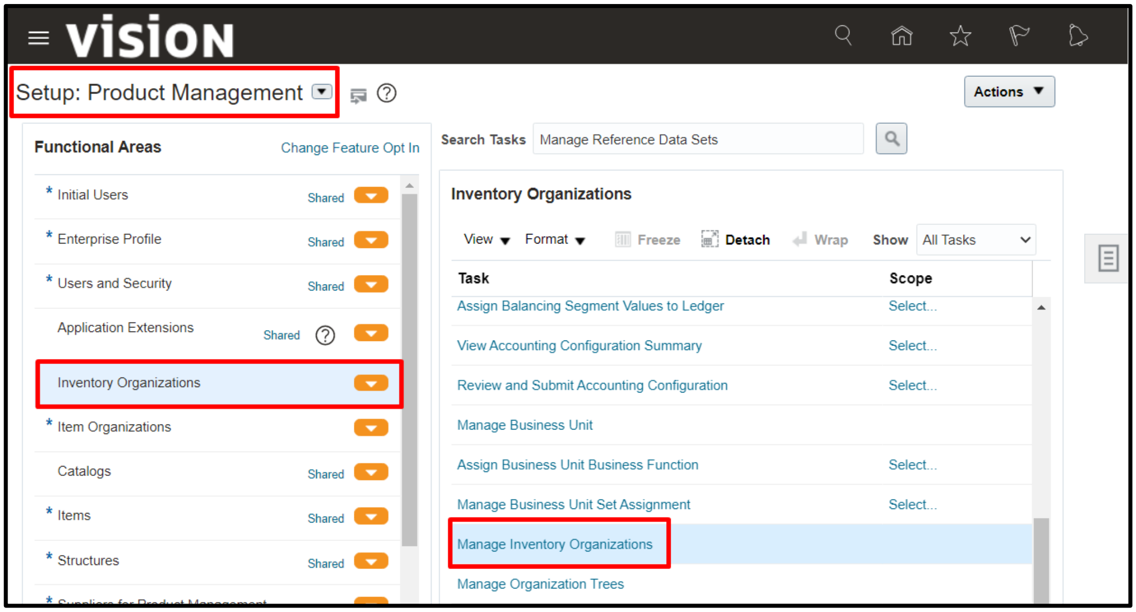
5. Click on "Save and Close"

6. Click on "Done"

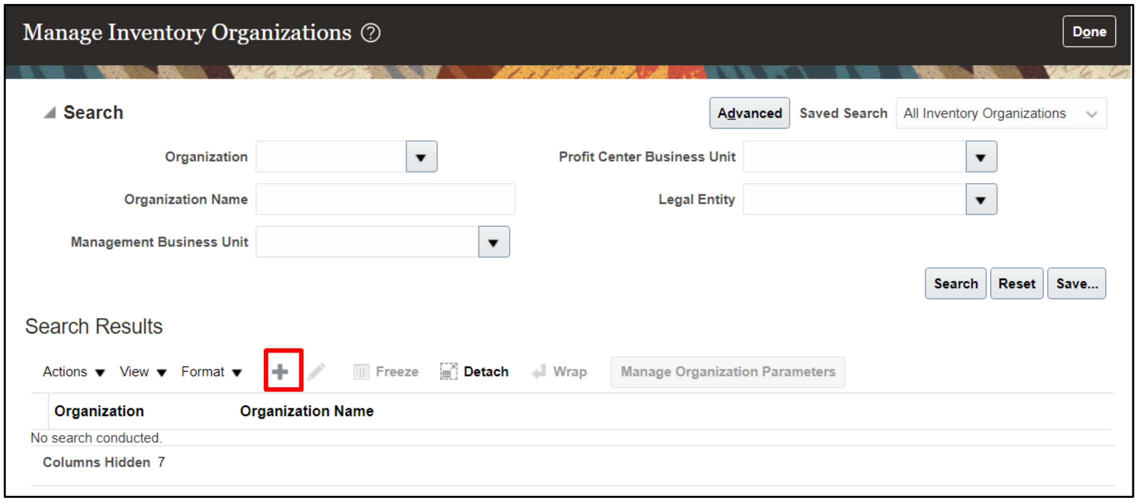
Create Inventory Organization

7. Navigate to:

Others → Setup and Maintenance → **Setup:** Product Management → **Functional Areas:** Inventory Organization → **Task:** Manage Inventory Organization



8. Click on "+" to create your Master Inventory Organization:

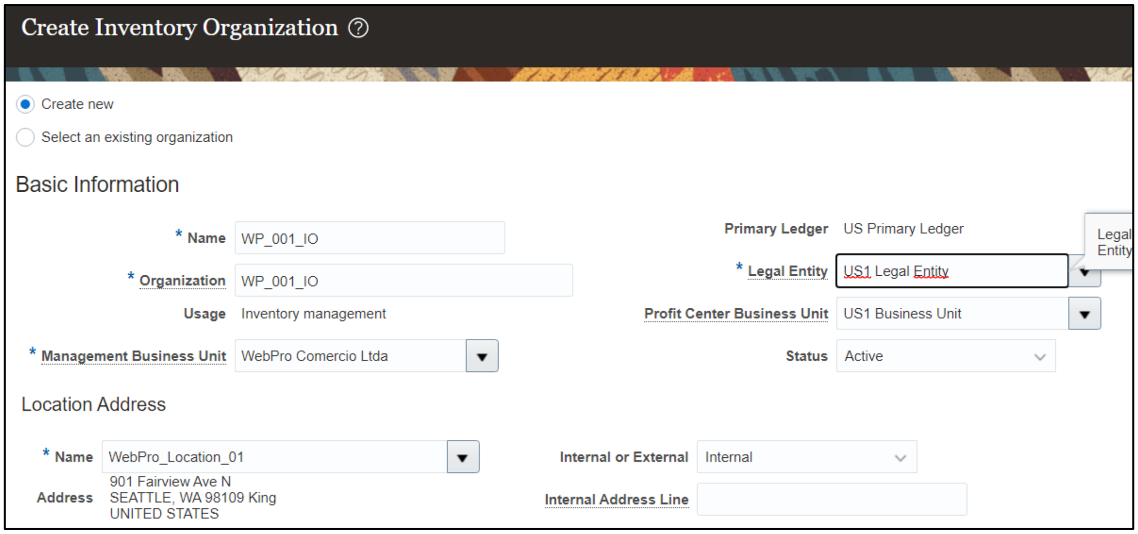


9. Enter the data:

Complete the fields below:

Create Inventory Organization	
Basic Information	
Name:	Your_Inv_001
Organization:	YOUR_INV_001 (UPPERCASE)
Usage:	Inventory Management
Management Business Unit:	Your business unit
Primary Ledger	
Legal Entity:	Your Legal Entity
Profit Center Business Unit (*):	Your business unit
Status:	Active

(*) Profit Center Business Unit: Pay attention to complete it with your business unit, because this field is related to the creation of the Organization Cost.



Complete the fields below:

Location Address	
Name:	Your location information
Address:	Completed based on location address
Internal or External:	Internal
Internal Address Line:	-

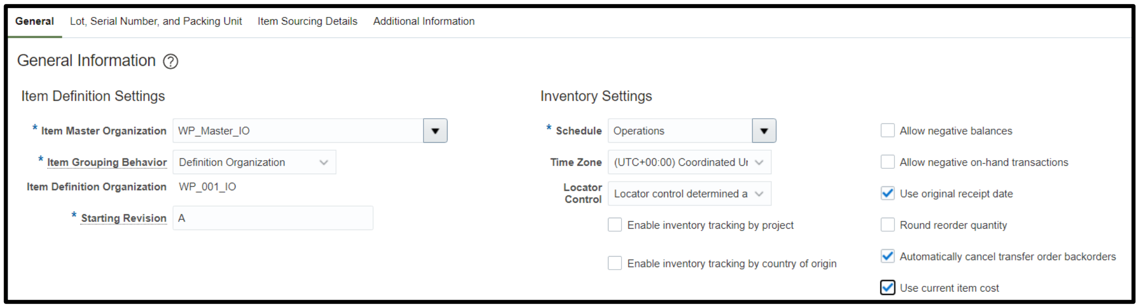
Click on “Next”

10. Enter the data for your inventory:

Complete the fields below:

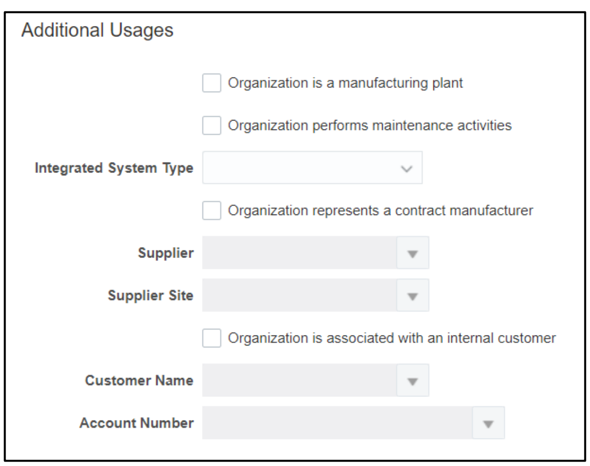
Manage Inventory Organization Parameters	
Financial Information	
Management Business Unit:	Your business unit
Primary Ledger:	US Primary Ledger
Legal Entity:	US1 Legal Entity
General (Tab)	
General Information	
Item Definition Settings	
Item Master Organization:	Your_Master_IO
Item Grouping Behavior	Reference Organization or Definition Organization
Item Definition Organization	If Definition Org = your Item master If Reference org = your inventory org
Starting Revision:	A
Additional Information	
Context:	-
Inventory Settings	
Schedule:	Your calendar created
Timezone:	-
Locator Control:	Locator Control determined at subinventory level
Enable Inventory Tracking by project	-
Enable Inventory Tracking by country of origin:	-
Allow Negative Balances:	-
Allow negative on-hand transactions:	-
Use original receipt date:	(x) Enabled
Round reorder quantity:	-
Automatically cancel transfer order backorder:	(x) Enabled
Use current item cost	(x) Enabled

Definition Organization: *organization that stores the item attributes;*
Reference Organization: *organization that references the item attributes values from the destination organization;*



Complete the fields below:

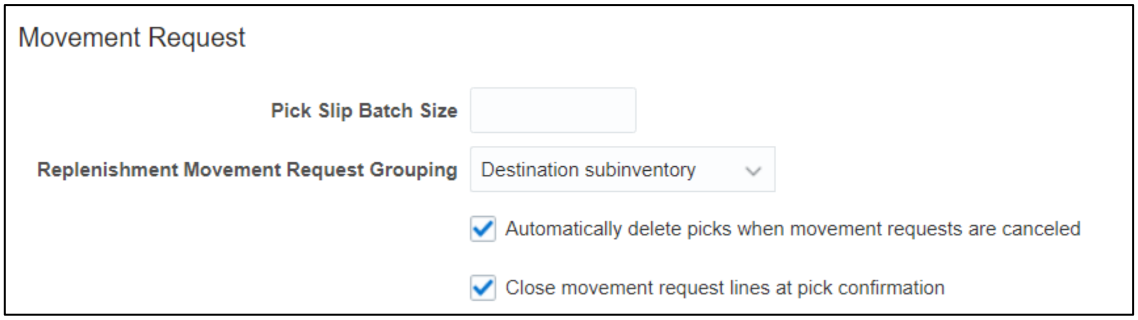
Additional Usages	
Organization is a mandatory plan:	-
Organization performs maintenance activities (EAM):	-
Integrated system type (WMS):	-
Organization represents a contract manufacturer:	-
Supplier:	-
Supplier Site:	-
Organization is associated with an internal customer:	-
Customer Name:	
Account number:	



Complete the fields below:

Movement Request	
Pick Slip Batch Size:	-

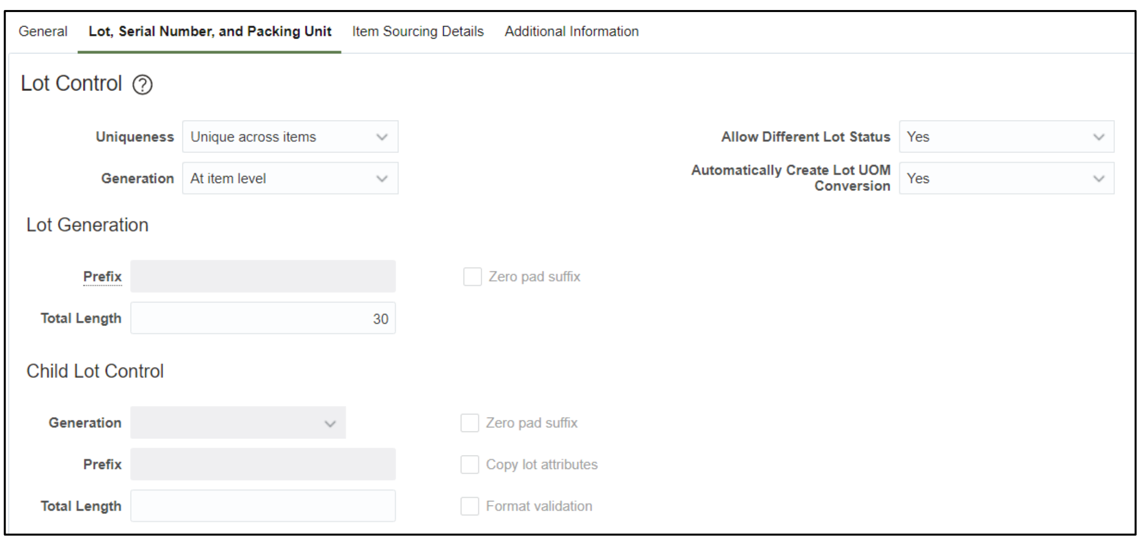
Replenishment Movement Request Grouping (Min-Max):	Destination subinventory
Automatically delete picks when movement requests are canceled	(x) enabled
Close movement request lines at pick confirmation:	(x) enabled



11. Click on “Lot, Serial Number, and Packing Unit” tab:

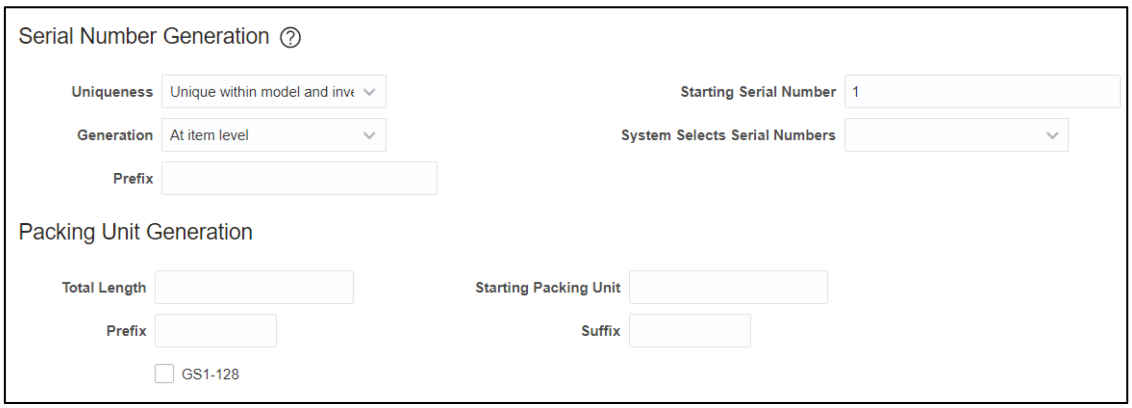
Complete the fields below:

Lot Control	
Uniqueness:	Unique across items
Generation:	At item level
Allow Different Lot Status:	Yes
Automatically Create Lot UOM Conversion:	Yes
Lot Generation	
Prefix:	-
Total Length:	30
Zero pad sulfix:	-
Child Lot Control	
Generation:	-
Prefix:	-
Total Length:	-
Zero pad sulfix:	-
Copy lot attributes:	-
Format validation:	-



Complete the fields below:

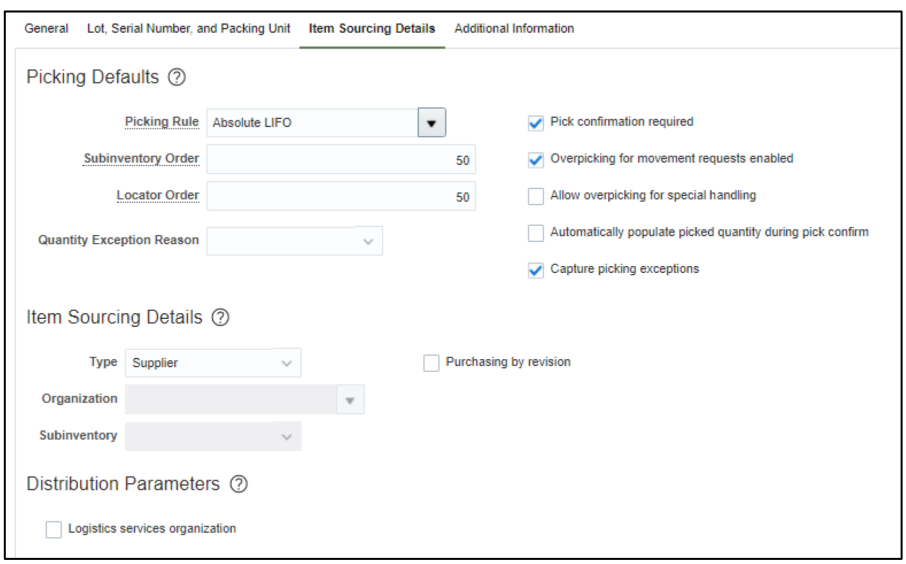
Serial Number Generation	
Uniqueness:	Unique within model and inventory items
Generation:	At item level
Prefix:	-
Starting Serial Number:	1
System Selects Serial Numbers:	-
Packing Unit Generation	
Total Length:	-
Prefix:	-
Starting Packing Unit:	-
Suffix:	-
System Selects Serial Numbers:	-



12. Click on “Item Sourcing Details” tab:

Complete the fields below:

Picking Defauls	
Picking Rule:	Absolute LIFO
Subinventory Order:	50
Locatior Order:	50
Quantity Exception Reason:	-
Pick confirmation required:	(x) Enabled
Overpicking for movement requests enabled:	(x) Enabled
Allow overpicking for special handling:	-
Automatically populate picked quantity during pick confirm:	-
Capture picking exceptions:	(x) Enabled
Item Sourcing Details	
Type:	Supplier
Organization:	-
Subinventory:	-
Purchasing by revision:	-
Distribution Parameters	
Logistics services organization	-



(*) What happens if I create an inventory organization as a logistics services organization?

The inventory organization is not costed, and shipment lines from different logistics service provider customers cannot be packed in the same packing unit.
This is due to a feature from Logistics called 'Flexible sources of supply and demand'. This feature provides support for 3rd party logistics providers. One certain company A may outsource their logistics operations to company B (LSP). Company B in this case does not own the inventory or control the purchasing or sales operations, but provides facility to receive, store and ship material on request of company A. This also means that when a receipt in this scenario happens in Company B, no costing/invoicing operations are performed.

13. Click on “Save and Close”

14. Click on “Done”

END

More Details:
https://cloudcustomerconnect.oracle.com/posts/bf5af37abe
FA: SCM: SHIPPING : Understand Automatically Cancel Transfer Orders Backorders Setup (Doc ID 2644669.1)
https://www.oracle.com/webfolder/technetwork/tutorials/tutorial/cloud/r13/wn/inv/releases/19D/19D-scm-inventory-wn.htm#F8070
How to Create Non Costing Inventory Organization (Doc ID 2422298.1)
Fusion PIM / INV: How to create an Item Organization And an Inventory Organization (Doc ID 1379313.1)
Creating Inventory Organization for Fusion Financials (Doc ID 1945370.1)
Is It Mandatory To Define An 'Item Management' Organization As A Master Organization? (Doc ID 2641696.1)
Fusion : How to Convert a Reference Org to Definition Org ? (Doc ID 2502865.1)
Default Deliver To Org List Doesn't Show Some Organization Values (Doc ID 1678352.1)

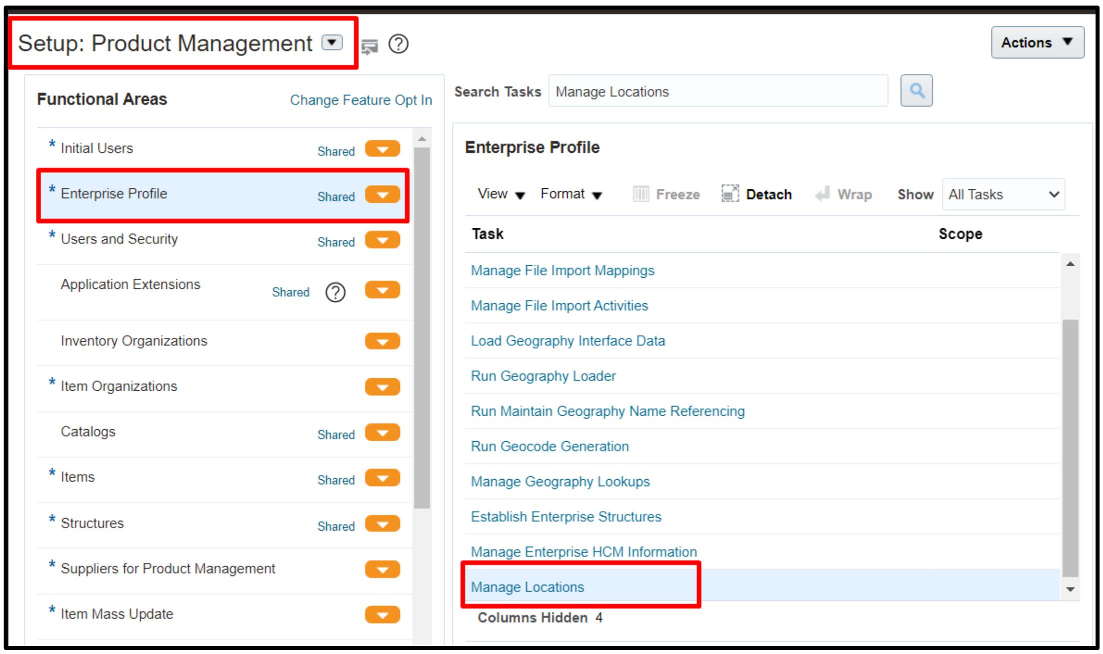
Hands-On: Associate Location vs Inventory

In this practice and demonstration, you will be:

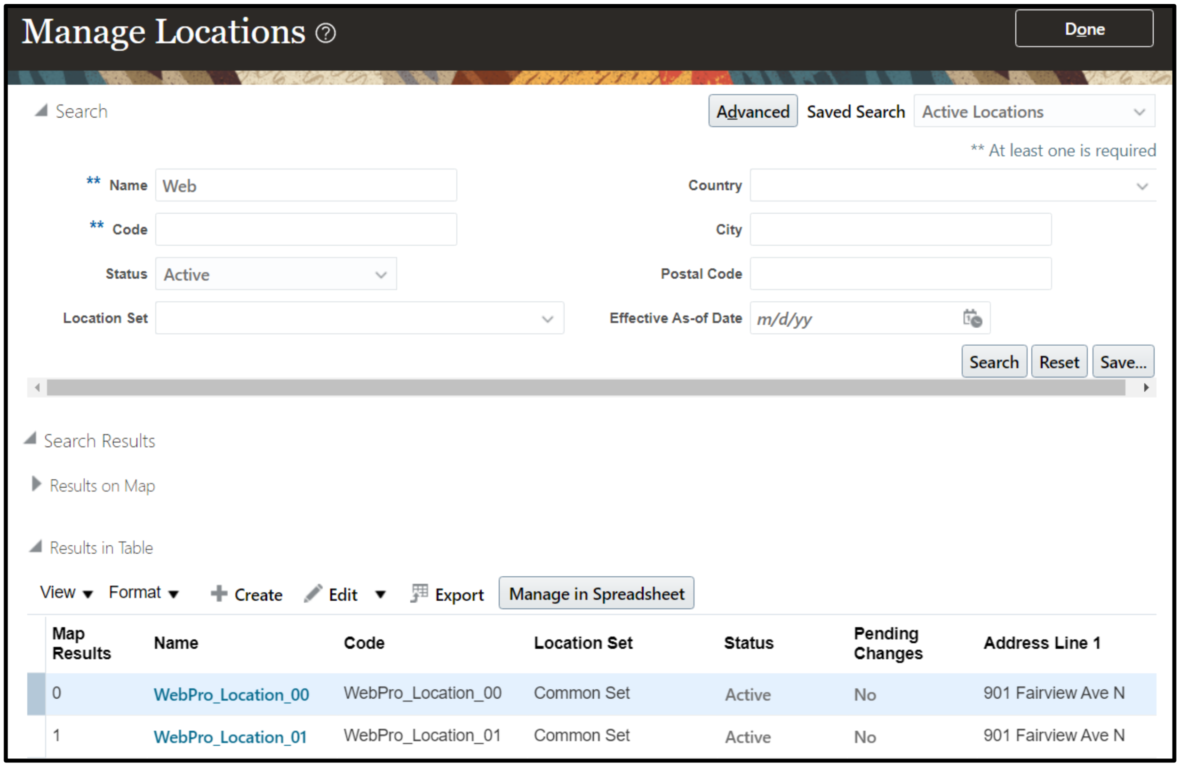
Scenario:	Associate Location vs Inventory
Pre-Requirement:	None
Procedure:	Describe steps below
Expected outcome:	Location vs Inventory associate Created
Estimate Time to do:	10min

1. Navigate to:

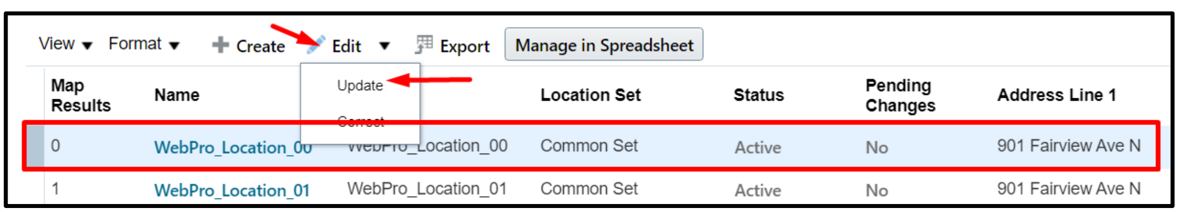
Others → Setup and Maintenance → **Setup:** Product Management → **Functional Areas:** Enterprise Profile → **Task:** Manage Locations

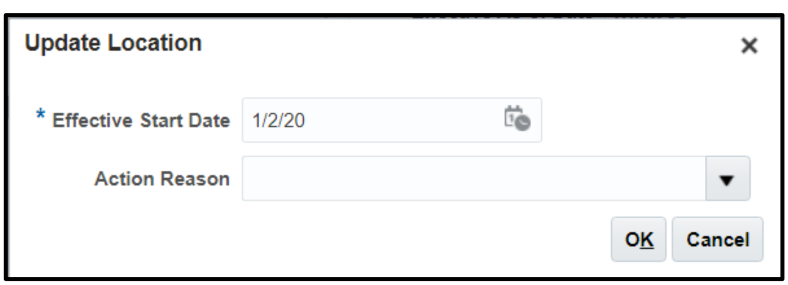


2. Enter the name of your locations and click on search:

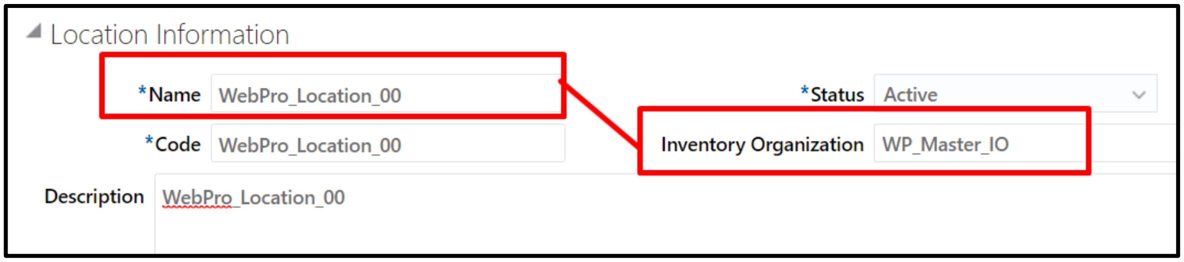


3. Select the line of location XX_Location_00 and click to Edit → Update:





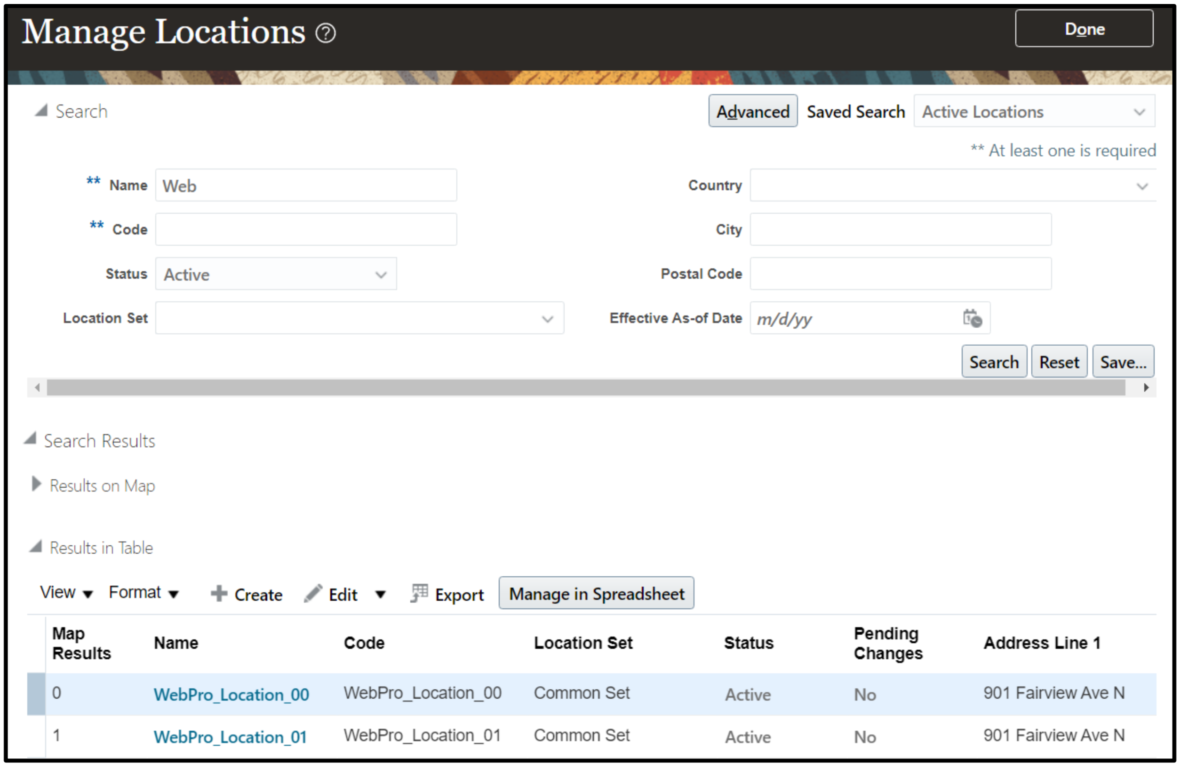
4. Associate the Master Item Organization for this Location XX_Location_00:



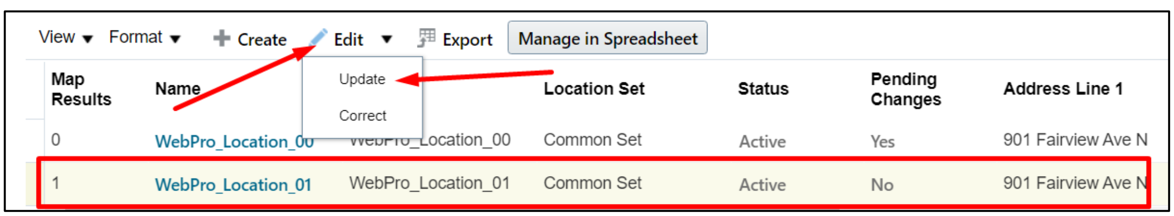
5. Save

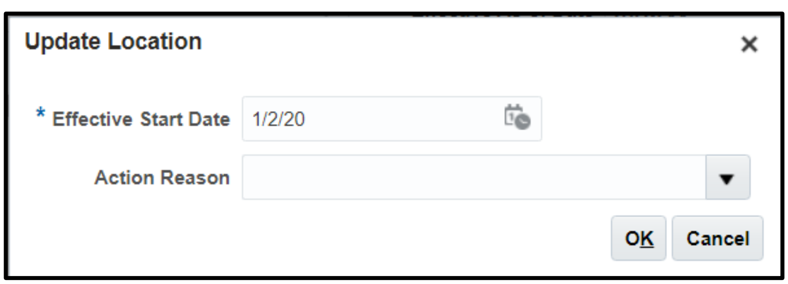
6. Click on Submit → Yes

7. Enter the name of your locations and search:

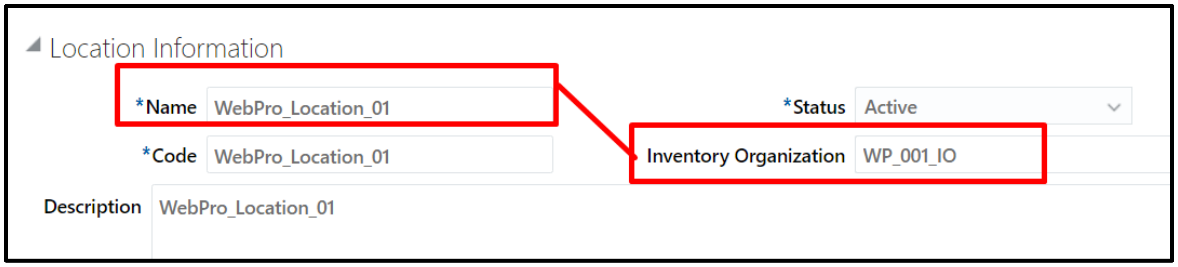


8. Select the line of location XX_Location_01 and click to Edit → Update:





9. Associate the Inventory Organization for this Location XX_Location_01:



10. Save

11. Click on Submit → Yes

END

More Details:
https://docs.oracle.com/en/cloud/saas/human-resources/20d/fawhr/workforce-structures.html#FAWHR141950

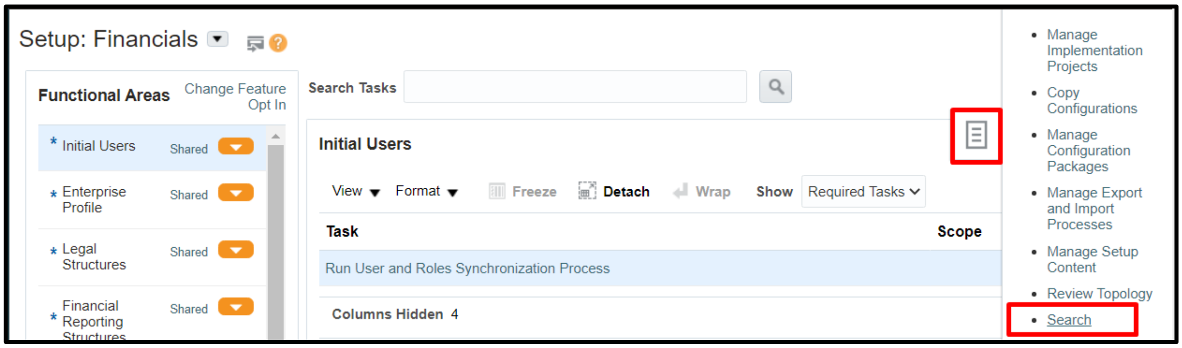
Hands-On: Create SubInventory

In this practice and demonstration, you will be:

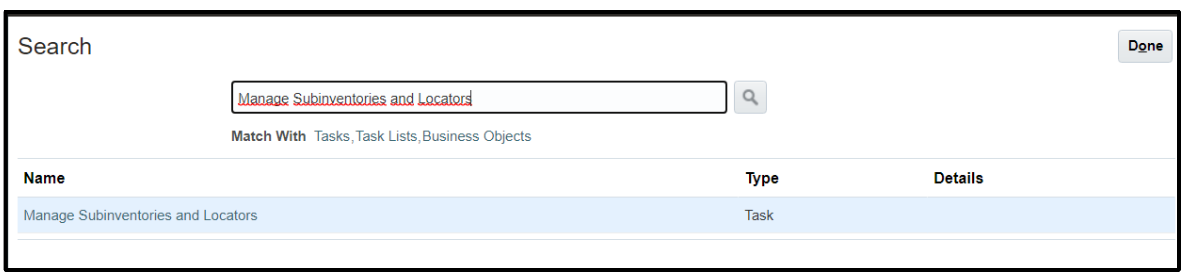
Scenario:	Create SubInventory to Inventories
Pre-Requirement:	None
Procedure:	Describe steps below
Expected outcome:	SubInventory Created
Estimate Time to do:	10min

1. Navigate to:

Others → Setup and Maintenance →Task Icon → Search

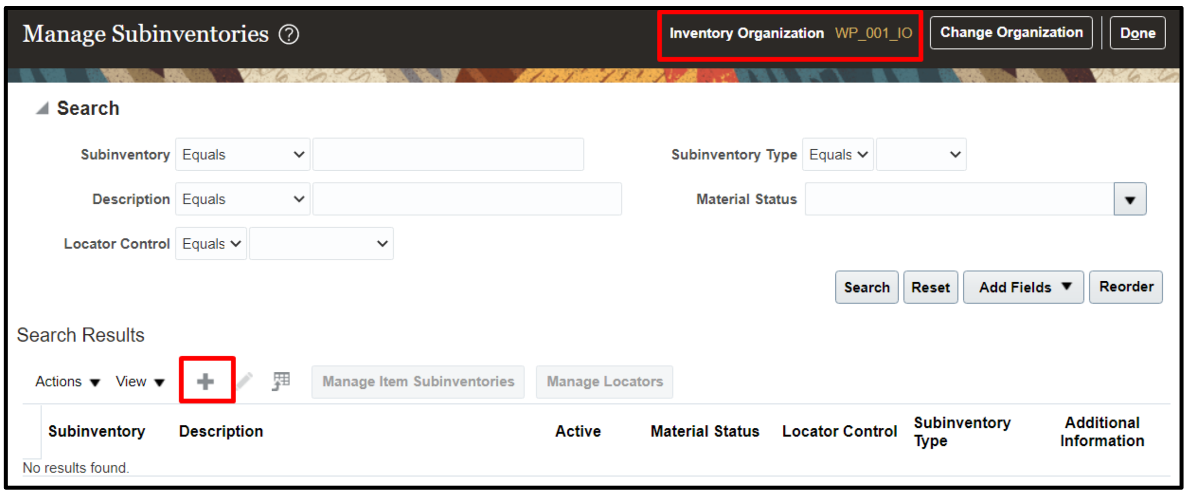


2. Enter "Manage Subinventories and Locators" to search:



3. Enter the initial code that your Organization, "XX" to search, click on OK:

4. Make sure are you using the your IO Organization, click on " + " to create Subinventory:

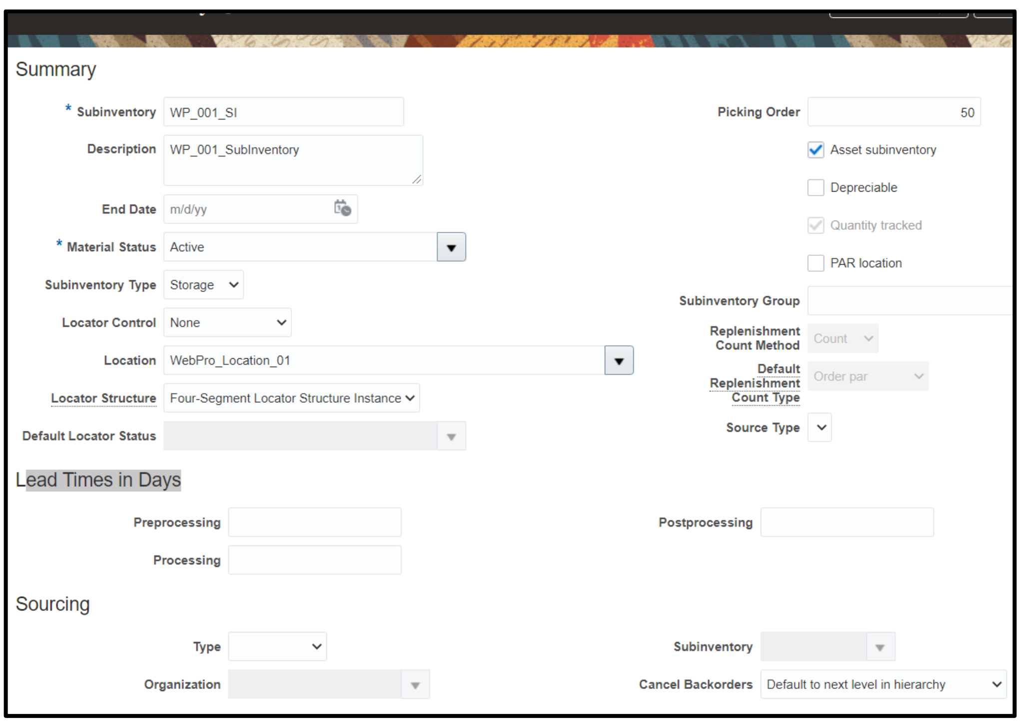


5. Enter the data for your Subinventory:

Complete the fields below:

Create Subinventory	
Summary	
Subinventory:	XX_001_Sub
Description:	XX_001_Subinventory
End Date:	-
Material Status:	Active
Subinventory Type:	Storage
Locator Control:	None
Location:	Your location
Locator Structure:	Four-Segment Locator Structure Instance
Pick Order:	50
Asset Subinventory:	(X) Checked
PAR Location (Periodic Automated Replenishment)	-

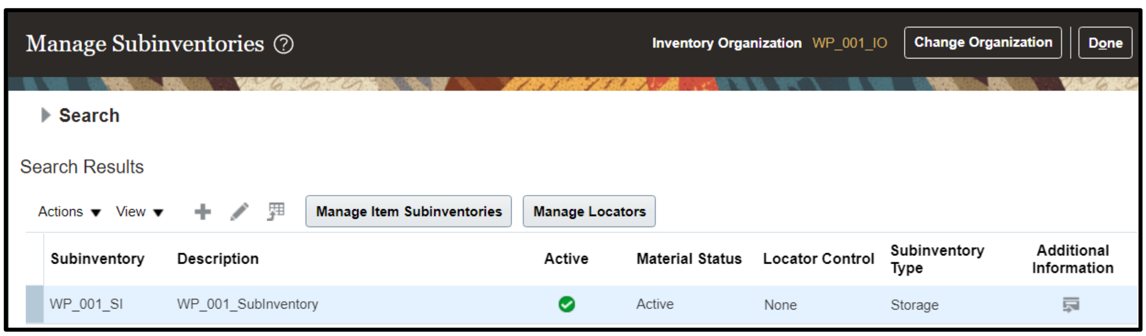
(*) With PAR location management, organizations can perform locator-level stock counting for both quantity and non-quantity tracked subinventories.



(*) Cancel Backorders Option Description

At the destination subinventory level, select the appropriate option for the Cancel Backorders setting. This option specifies whether the cancel decision is made at this level for transfer orders that are being delivered to a specific destination subinventory. Use the Manage Subinventories and Locators task to set this option.
Options for this setting include:
Cancel remaining quantities
Do not cancel remaining quantities
Use next level in hierarchy
If select the Use next level in hierarchy, the inventory organization is used for intraorganization transfer orders, and the interorganization parameter is used for interorganization transfer orders.

6. Save and Close



END

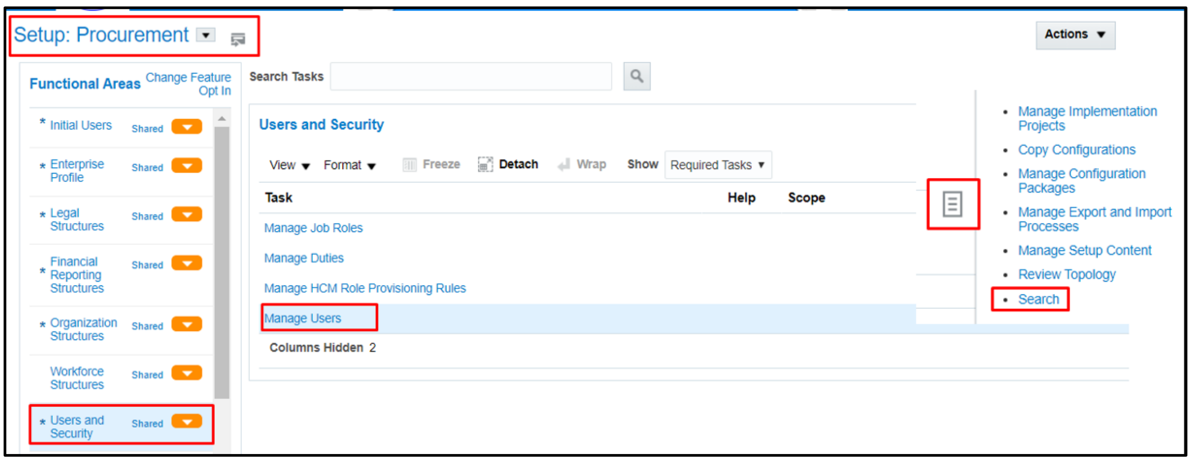
More Details:
Fusion INV:Create Subinventory With No "Quantity Tracked" (Doc ID 2517548.1)
Which Role Can Be Assigned to Users to Create Subinventory and Locators? (Doc ID 2345331.1)

Hands-On: Create Employee

In this practice and demonstration, you will be:

Scenario:	Create Employee
Pre-Requirement:	• Job Created • Department Created • Position Created
Procedure:	Describe steps below
Expected outcome:	Employee Created
Estimate Time to do:	30min

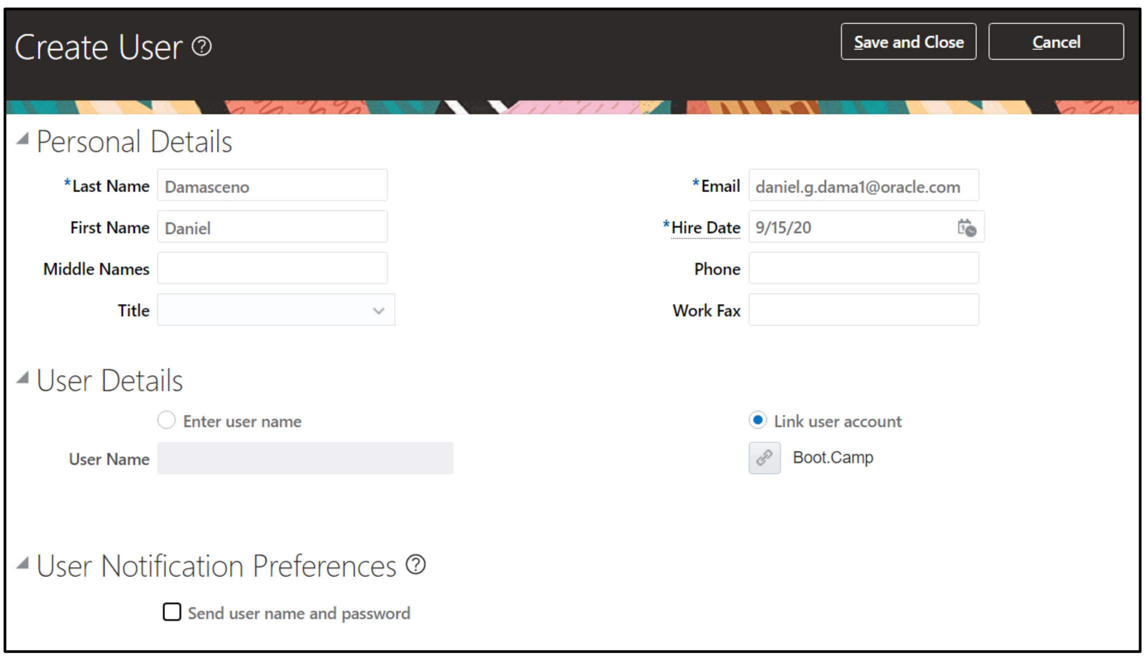
1. Navigate to: Homepage → Settings and Actions → Setup and Maintenance → **Setup:** Procurement → Users and Security → Manage Users



2. Click on "+" to create a new Employee:

Complete the fields below:

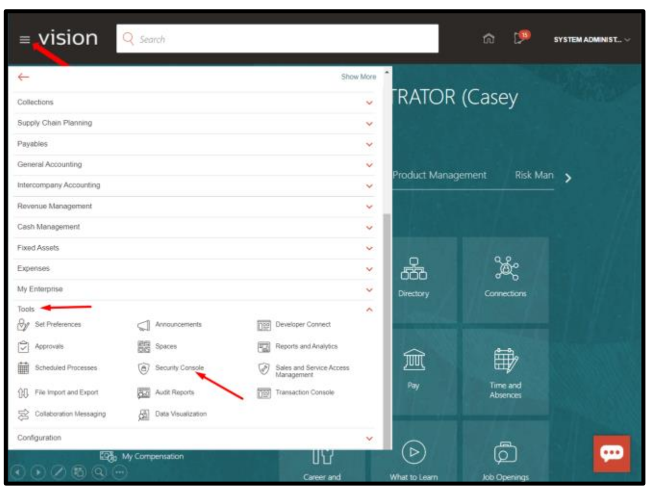
Personal Details	
Last Name:	YYYYY
First Name:	XXXXX
Hire Date:	MM/DD/YY
User Details	
User Name:	YYYYY.XXXXX
User Notification Preferences	
Send user name and password:	-



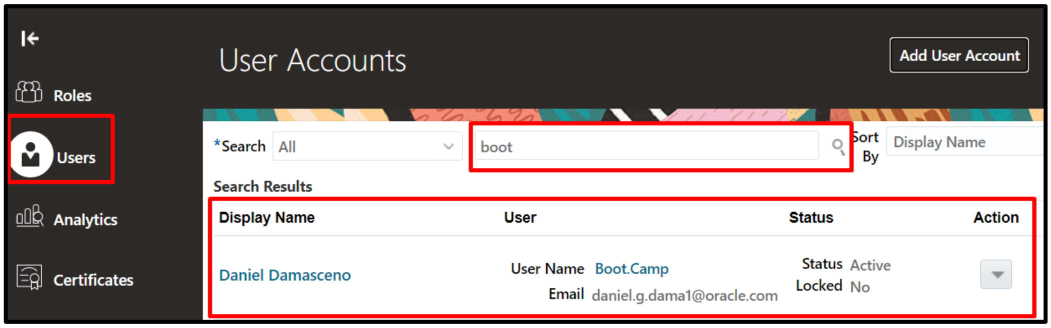
Employment Information	
Person Type:	Employee
Legal Employer	Your legal Entity
Business Unit:	Your business Unit
Job:	Buyer (JOB012)
Location:	Your location
Manager:	Roth, Calvin

Save and Close

3. Navigate to: Homepage → Navigator (Hamburguer) → Tools → Security Console

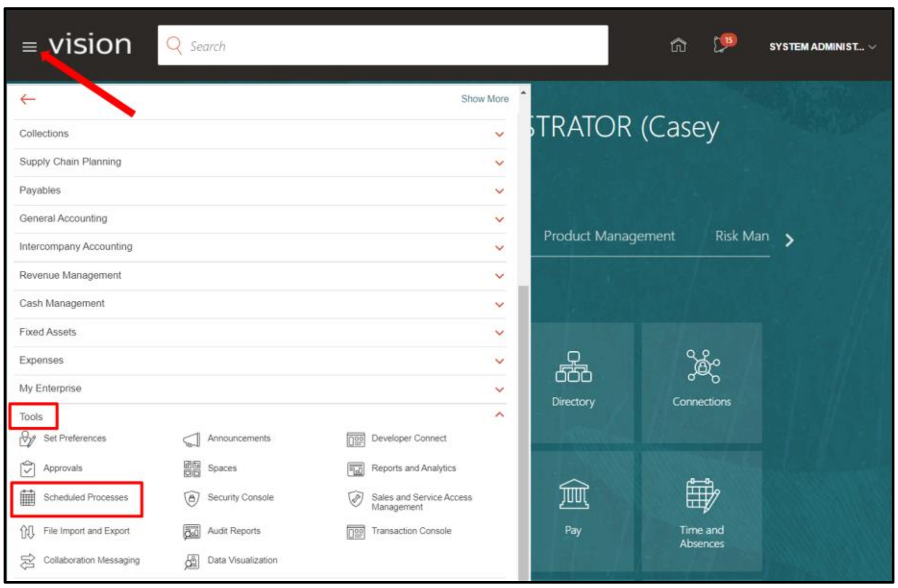


4. Select Users option, search your employee:



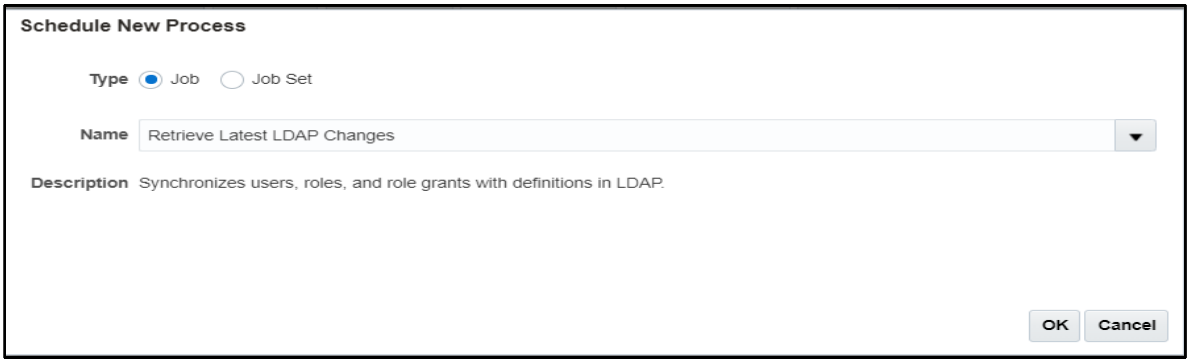
5. After that, compile the roles definition using:

Navigate to: Homepage → Navigator (Hamburguer) → Tools → Scheduled Processes



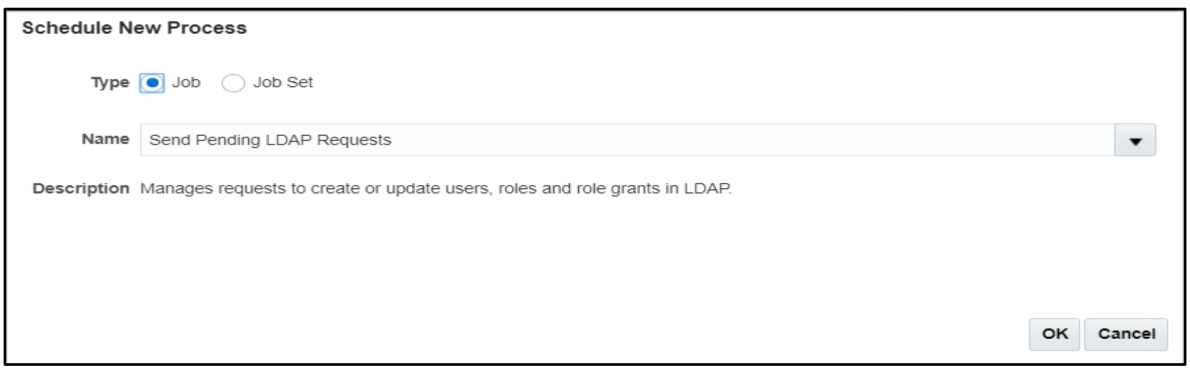
6. Schedule New Process → **Name:** Retrieve Latest LDAP Changes → Ok → Submit

(Synchronize user roles…)



7. Schedule New Process → **Name:** Send Pending LDAP Requests → Ok → Submit

(Requests to create, suspend, and reactivate user accounts…)



END

More Details:

Permission - Manage Users (Doc ID 1044186.1)

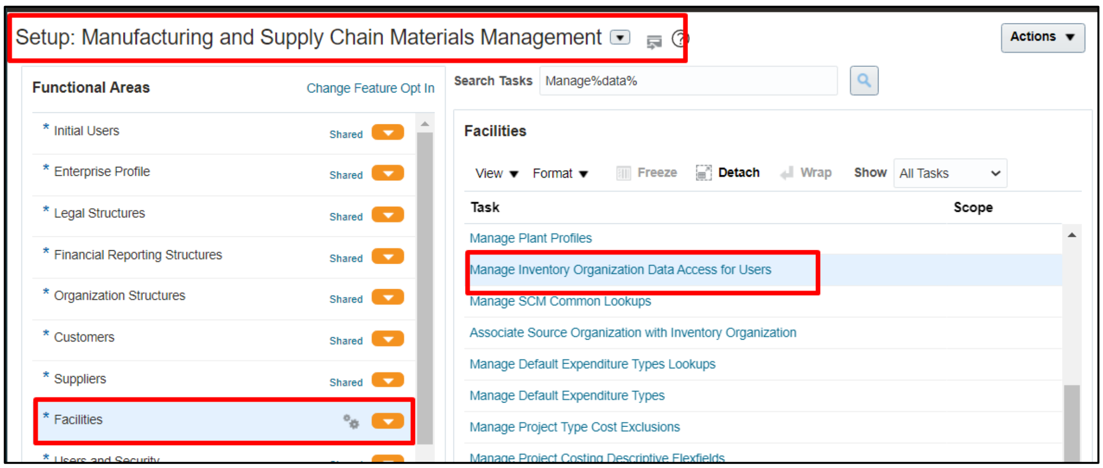
Hands-On: Manage Business Unit Data Access for Users

In this demonstration, you will be:

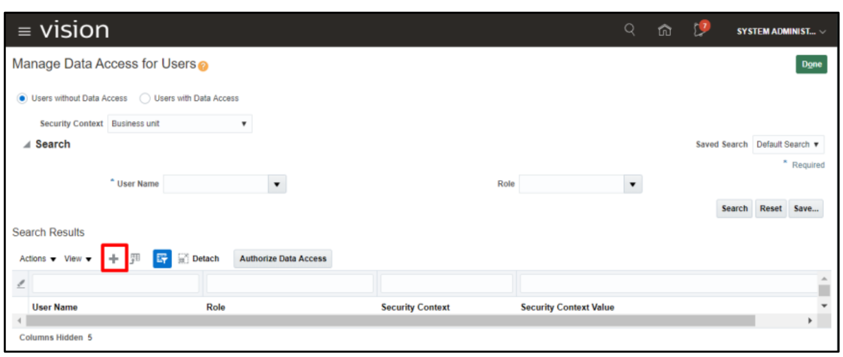
Scenario:	Assigning BU for your User
Pre-Requirement:	-
Procedure:	Describe steps below
Expected outcome:	Assigned Done
Estimate Time to do:	10min

1. Navigate to:

Others → Setup and Maintenance → **Setup:** Manufacturing and Supply Chain Materials Management → **Functional Areas:** Facilities → **Task:** Manage Inventory Organization Data Access for Users



2. Select Create option by icon “+” :

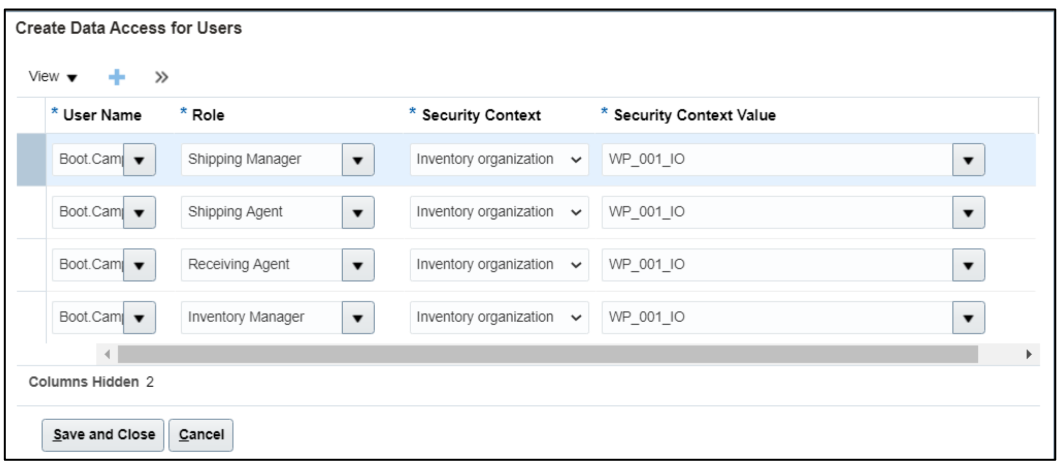


3. Complete the follow data – “Create Data Access for Users”:

Complete the fields below:

User Name	Role	Security Context	Security Context Value
Your user	Inventory Manager	Inventory organization (IO)	Your IO
Your user	Receiving Agent	Inventory organization	Your IO
Your user	Shipping Agent	Inventory organization	Your IO
Your user	Shipping Manager	Inventory organization	Your IO
Your user	Warehouse Manager	Inventory organization	Your IO
Your user	Warehouse Operator	Inventory organization	Your IO
Your user	Cost Accountant	Cost Organization	Your IO
Your user	Supply Chain Controller	Inventory organization	Your IO
Your user	Product Data Steward	Inventory organization	Your IO

(*) will be necessary complete the cost tasks to do that

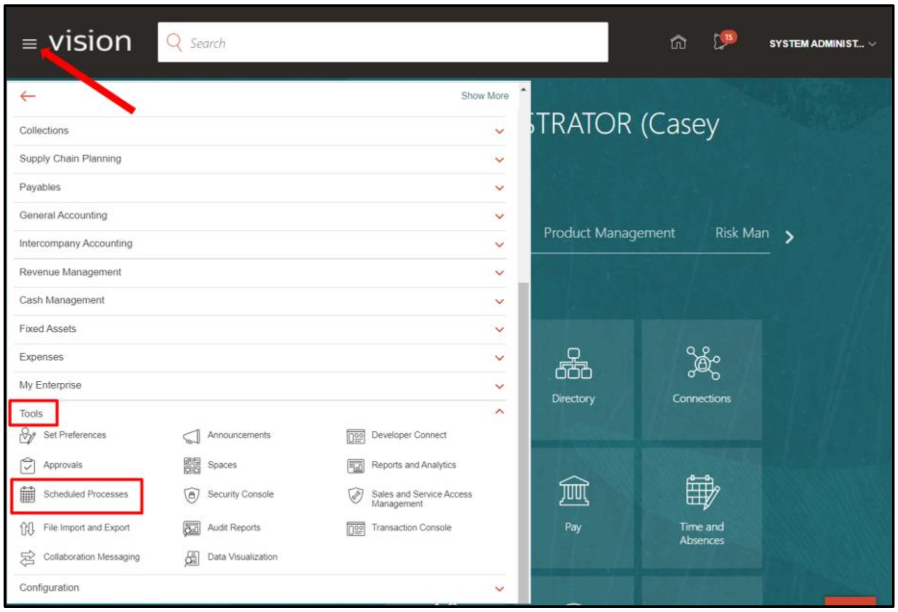


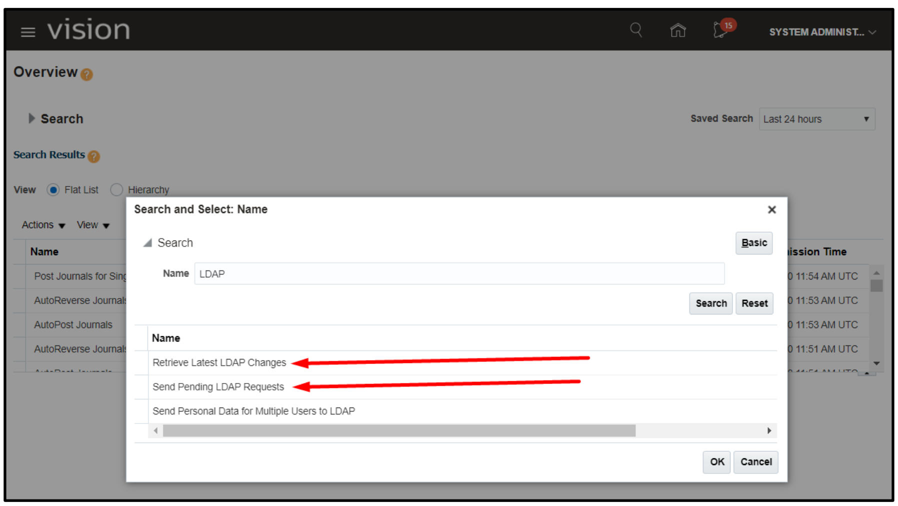
Example of how to do

4. Click on “Save and Close”

5. After that, compile the roles definition using:

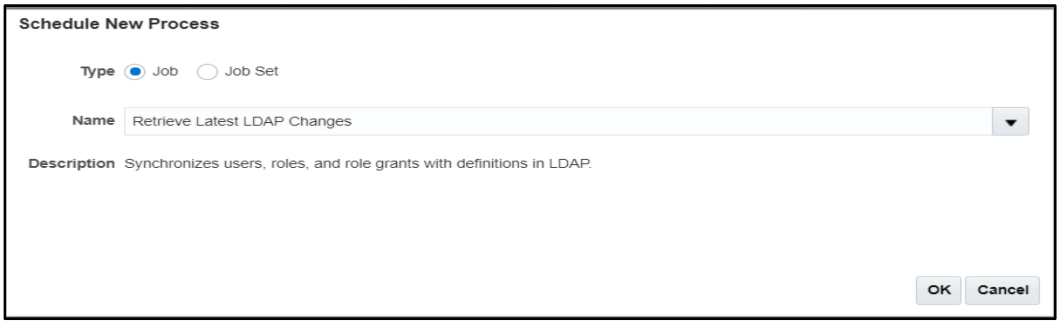
Navigate to: Homepage → Navigator (Hamburguer) → Tools → Scheduled Processes





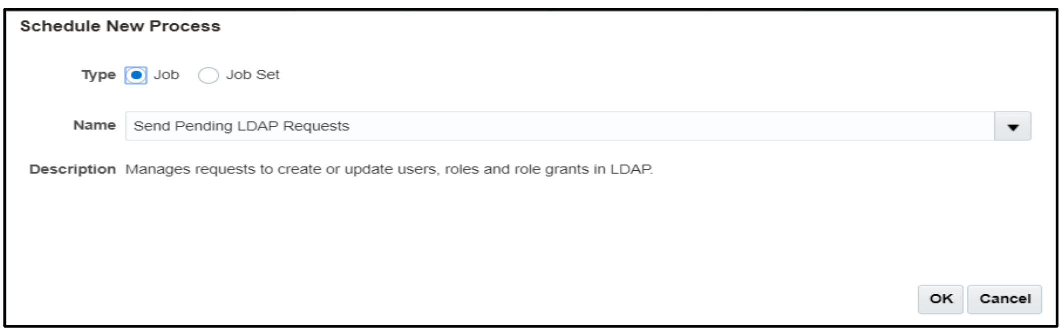
6. Schedule New Process → **Name:** Retrieve Latest LDAP Changes → Ok → Submit

(Synchronize user roles…)



7. Schedule New Process → **Name:** Send Pending LDAP Requests → Ok → Submit

(Requests to create, suspend, and reactivate user accounts…)



END

More Details:

Roles:

https://docs.oracle.com/en/cloud/saas/supply-chain-management/21a/faspm/index.html

Inventory Configurations for SCM

Hands-On: Create Units of Measure

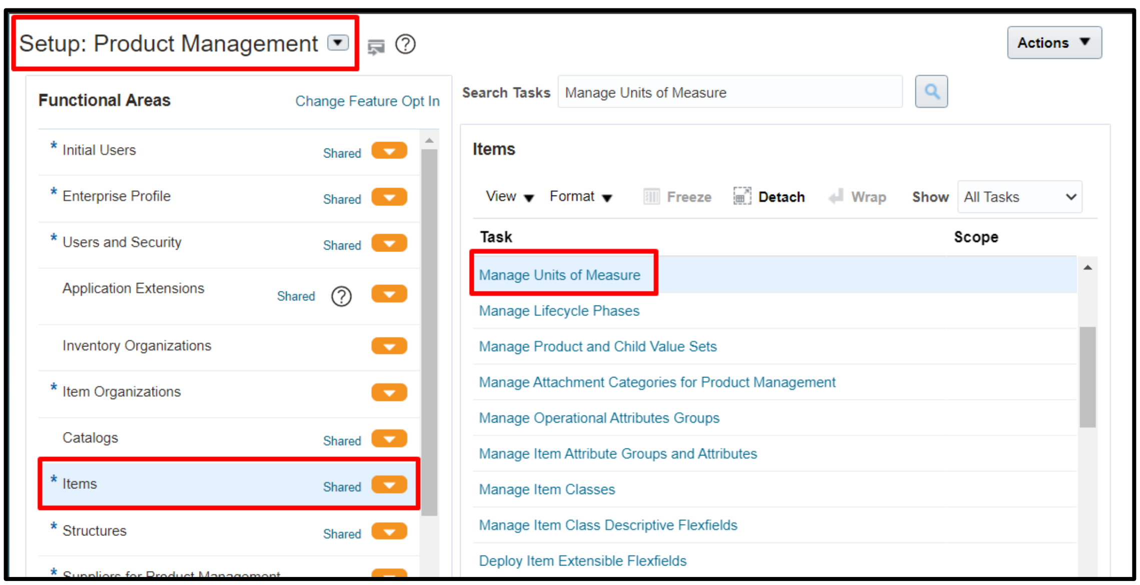
In this practice and demonstration, you will be:

Scenario:	Create Units of Measure
Pre-Requirement:	None
Procedure:	Describe steps below
Expected outcome:	Units of Measure Created
Estimate Time to do:	10min

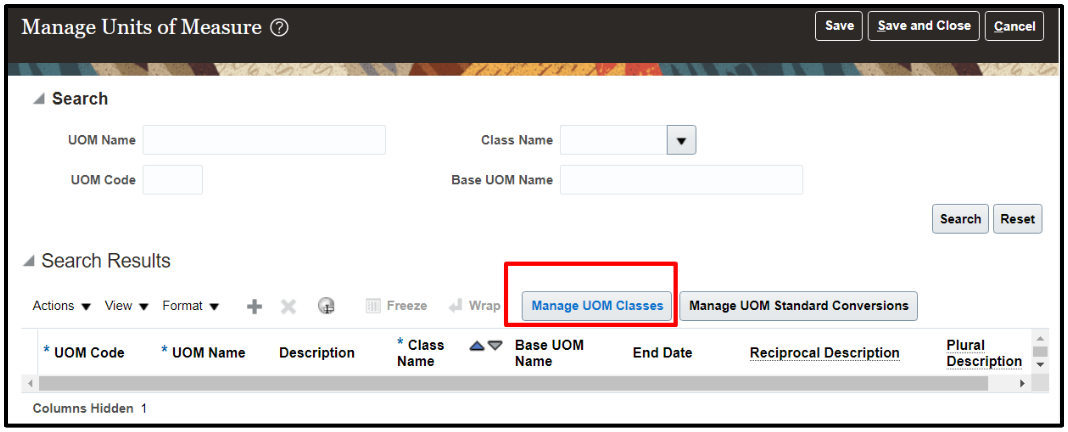
UOM Classes

1. Navigate to:

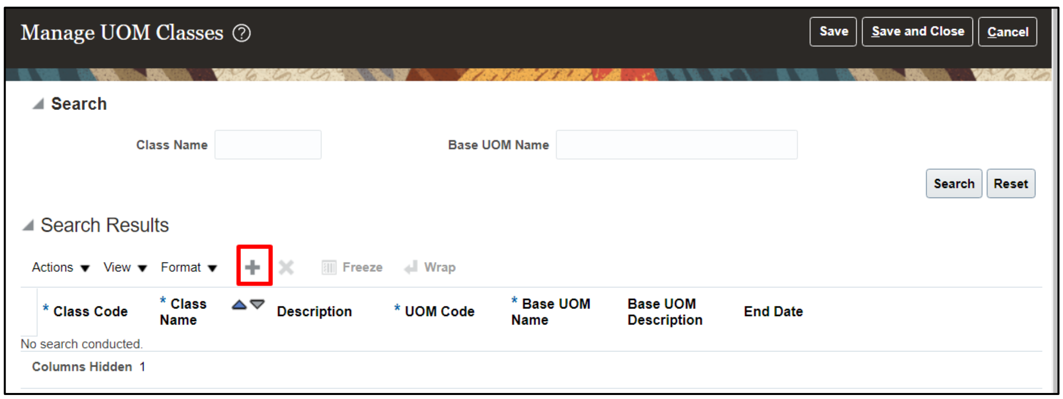
Others → Setup and Maintenance → **Setup:** Product Management → **Functional Areas:** Items → **Task:** Manage Units of Measure



2. Click on button “Manage UOM Classes” to create your UOM Classes:



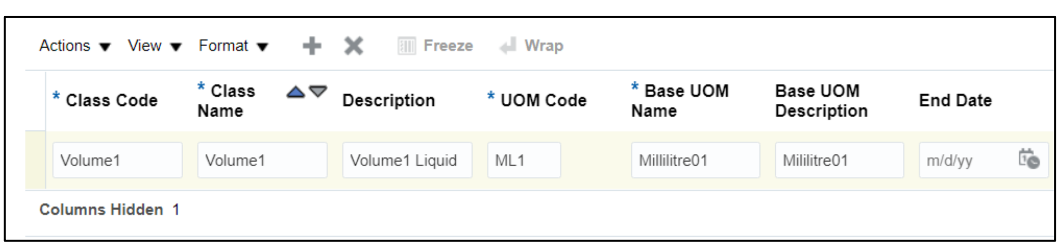
3. Click on “+” to create new register:



4. Enter the data:

Complete the fields below:

Create UOM Classes	
Class Code:	VolumeXX
Class Name:	VolumeXX
Description:	Volume - Units per millilitre
UOM Code:	MLX
Base OUM Name:	MililitreXX
Base UOM Description	MililitreXX

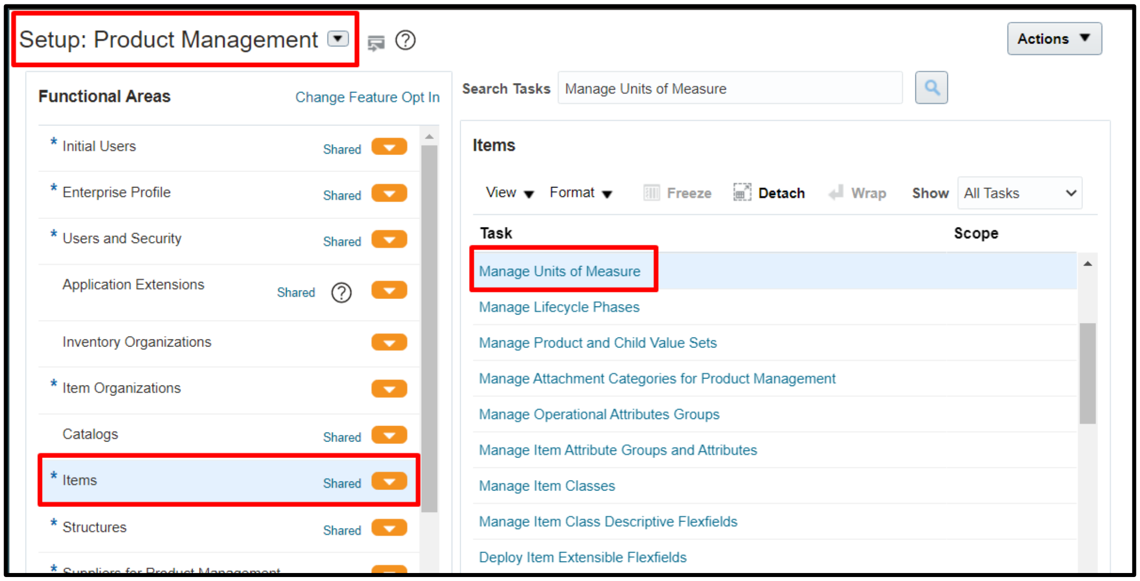


5. Save and Close

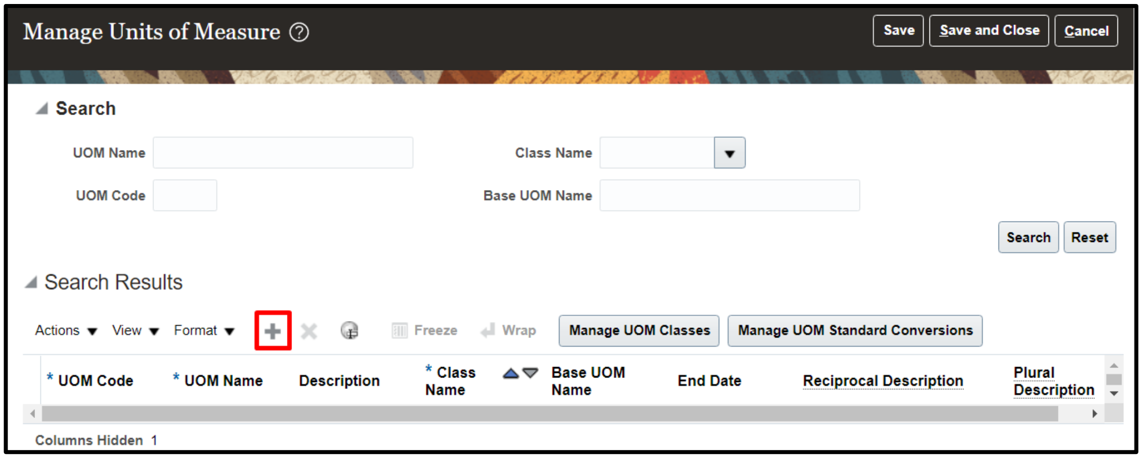
UOM

6. Navigate to:

Others → Setup and Maintenance → **Setup:** Product Management → **Functional Areas:** Items → **Task:** Manage Units of Measure



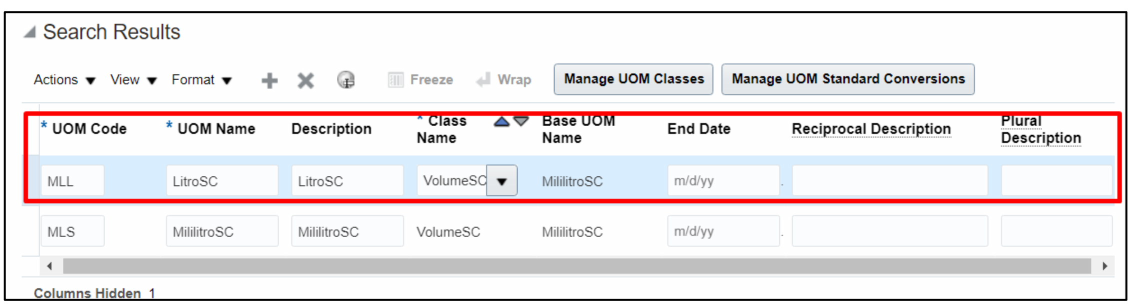
7. Click on "+" to create your UOM:



8. Enter the data:

Complete the fields below:

Create UOM	
UOM Code:	MLL
UOM Name:	LitroXX
Description:	LitroXX
Class Name:	VolumeXX

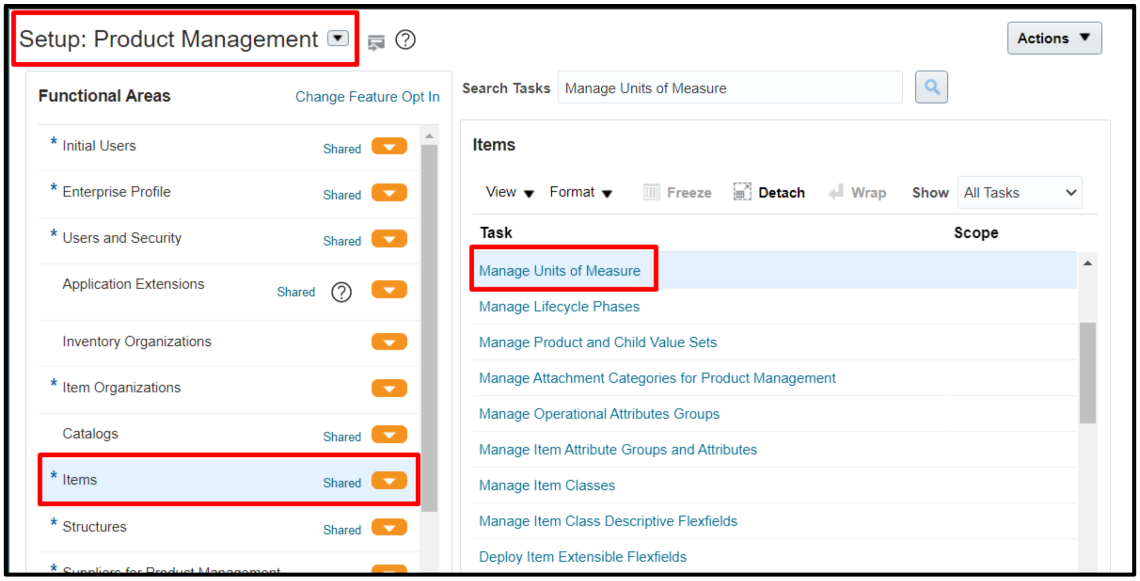


9. Save and Close

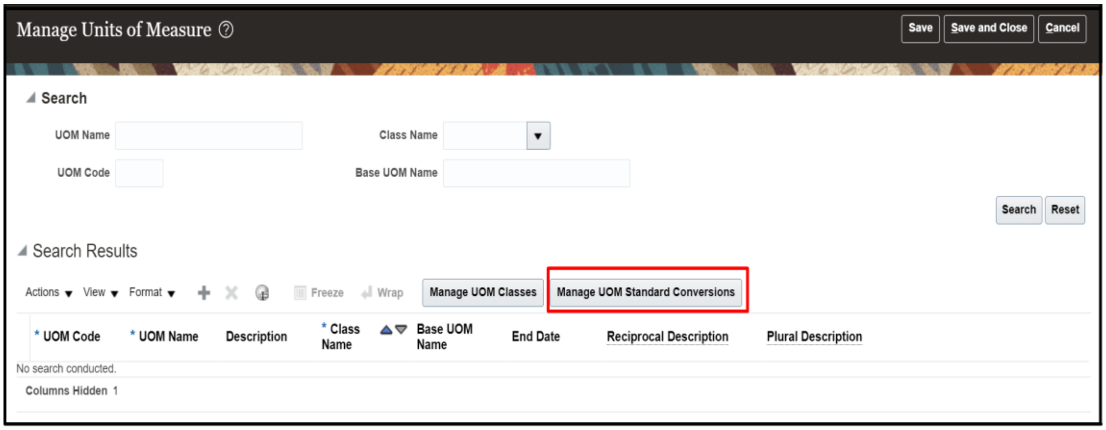
UOM Standard Conversion

10. Navigate to:

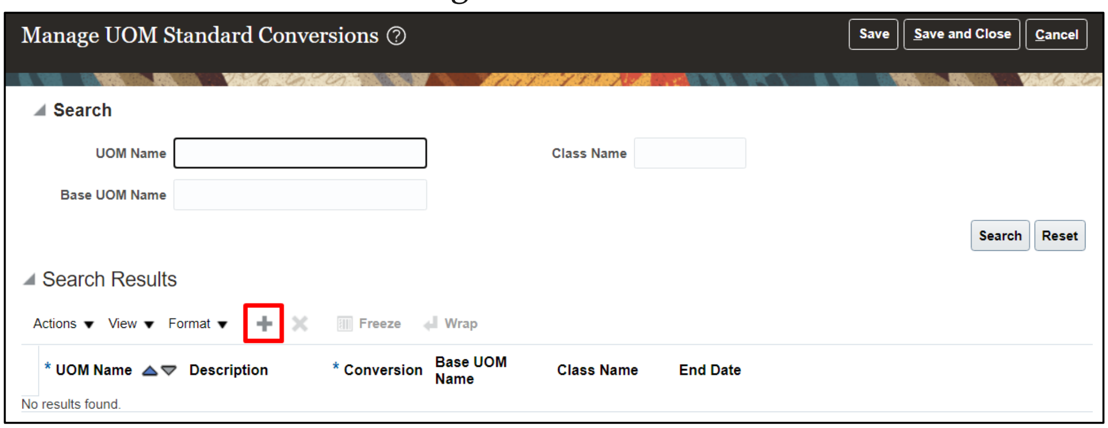
Others → Setup and Maintenance → **Setup:** Product Management → **Functional Areas:** Items → **Task:** Manage Units of Measure



11. Click on "Manage UOM Standard Conversions" to create new one:



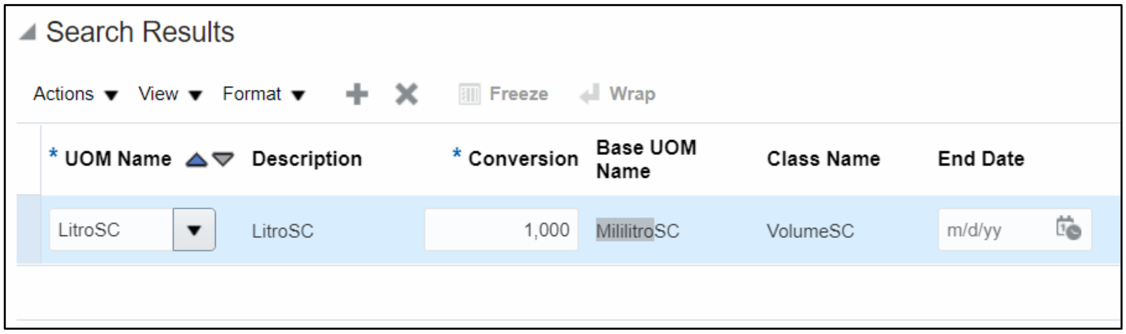
Click on "+" to create new register:



12. Enter the data:

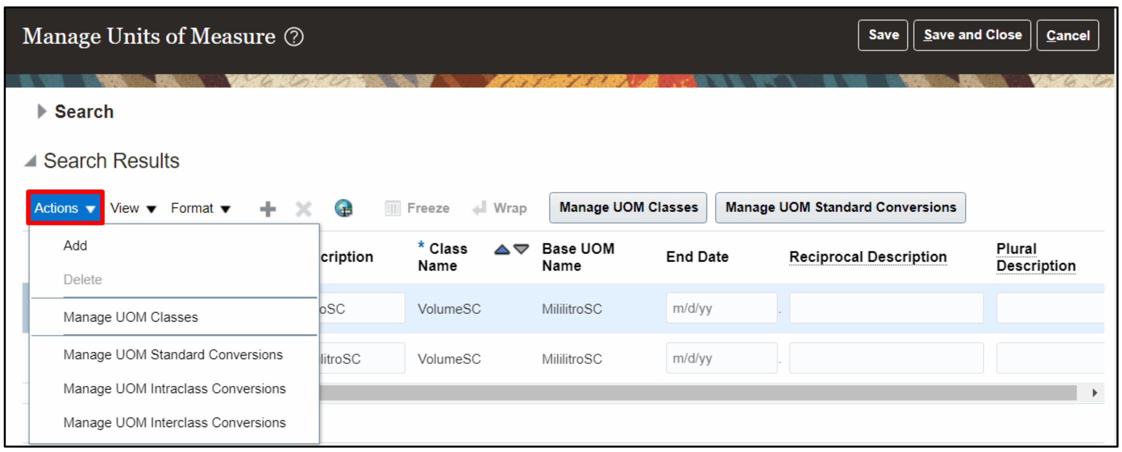
Complete the fields below:

Create UOM Standard Conversions	
UOM Name:	LitroXX
Description:	LitroXX
Conversion:	1000
Base UOM Name:	MililitroXX
Class Name:	VolumeXX



13. Save and Close

Other conversion types



END

More Details:

PRC:SSP: Getting an Error When Trying to Edit the Requisition Lines and Change the UOM (Doc ID 2134692.1)

Product Launch Not Using Uom Conversion (Doc ID 2546381.1)

The UOM Conversion Are Not Working Correctly (Doc ID 2425844.1)

Interclass, Intraclass and Standard UOM Conversions (Doc ID 2629480.1) (Task: Manage Units of Measure for Interclass Conversion)

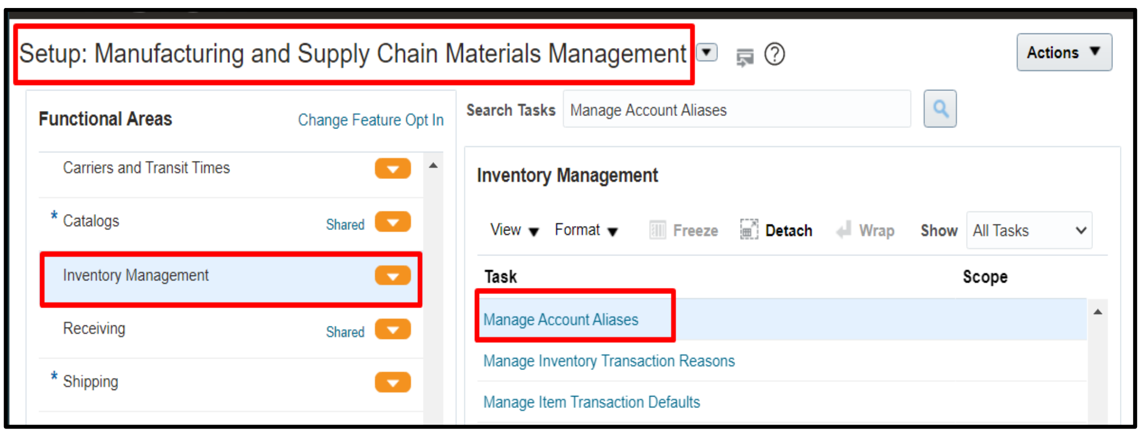
Hands-On: Define Inventory Account Aliases

In this practice and demonstration, you will be:

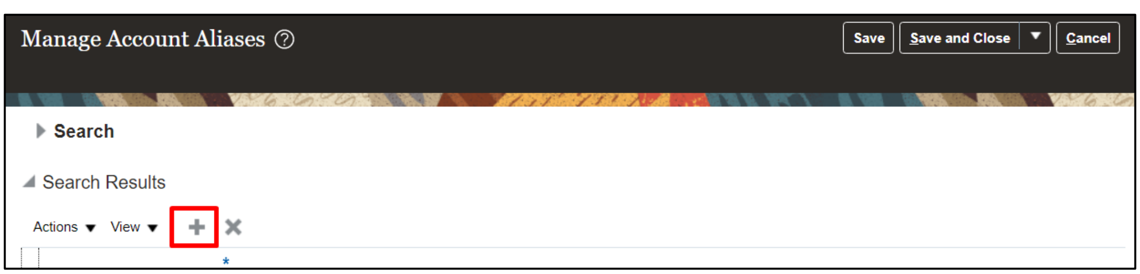
Scenario:	Define Account Aliases
Pre-Requirement:	None
Procedure:	Describe steps below
Expected outcome:	Account Aliases Created
Estimate Time to do:	10min

1. Navigate to:

Others → Setup and Maintenance → **Setup:** Manufacturing and Supply Chain Materials Management → **Functional Areas:** Inventory Management → **Task:** Manage Account Aliases



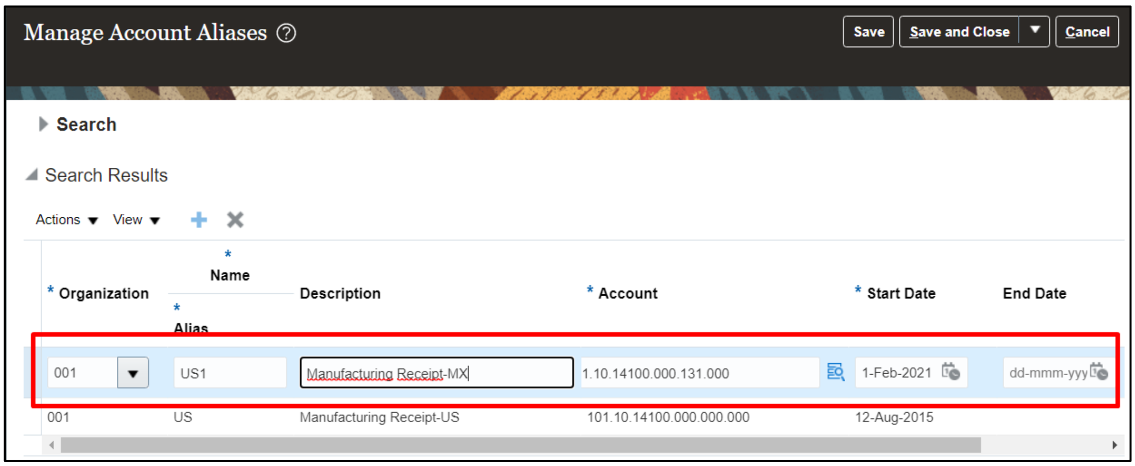
2. Click on "+" to create new register / line:



3. Enter the data:

Complete the fields below:

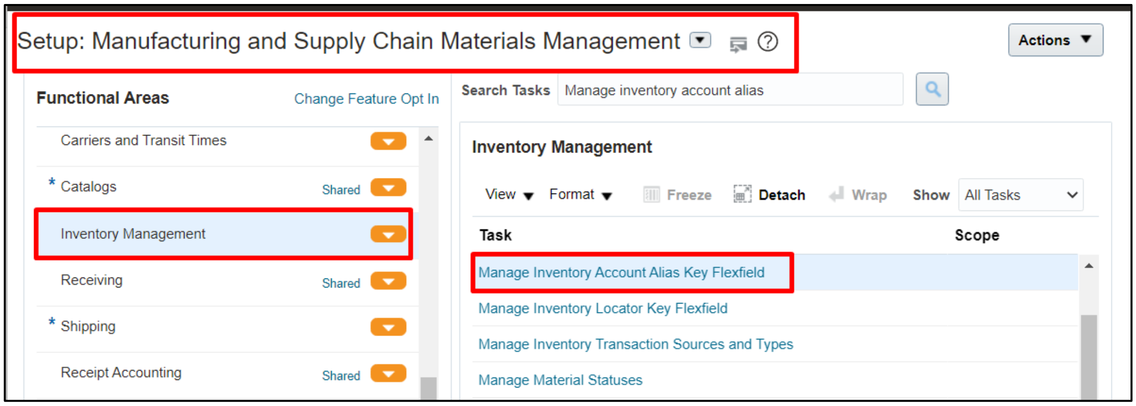
Manage Account Aliases	
Organization:	Your inventory organization
Alias:	Account alias
Description:	Account alias description
Account:	Your CCID
Start Date:	Your start date
End Date:	-



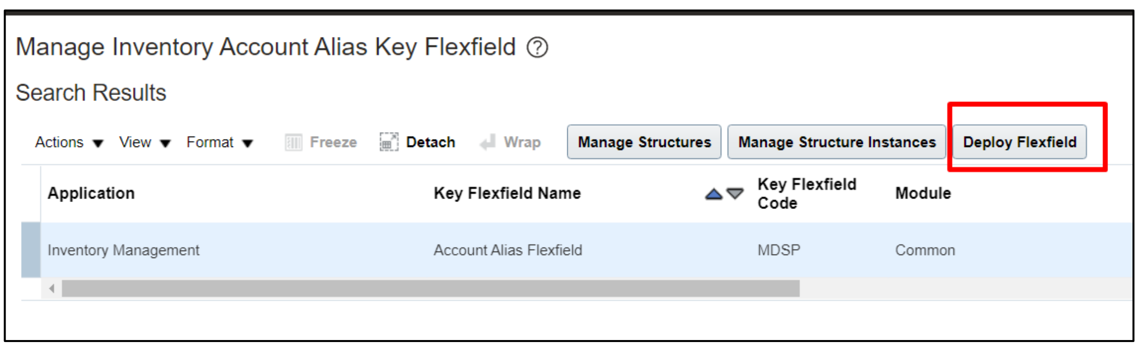
4. Save and Close

5. Navigate to:

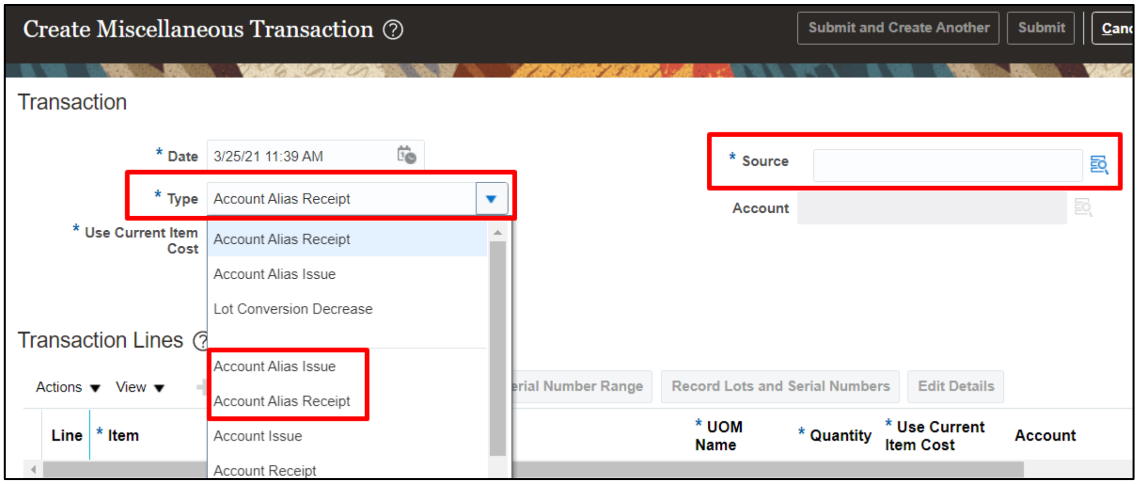
Others → Setup and Maintenance → **Setup:** Manufacturing and Supply Chain Materials Management → **Functional Areas:** Inventory Management → **Task:** Manage Inventory Account Alias Key Flexfield



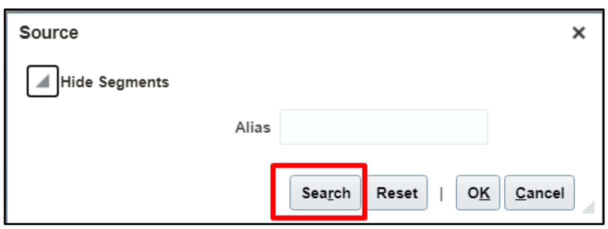
6. Click on "Deploy Flexfield" to complete the task Inventory Account Alias



7. This Inventory Account Alias could be used on Inventory transactions, like:



8. Click on "Search" button:



9. To add GL Account Alias, create the alias on Financials → Manage Shorthand Aliases

END

More Details:

Account Combinations Fails when Creating Miscellaneous Transactions (Doc ID 2436990.1)
How to Create Misc Transaction Using Rest API With New CCID (Doc ID 2615100.1)
https://www.oracle.com/webfolder/technetwork/tutorials/tutorial/cloud/r13/wn/inv/releases/21A/21A-inventory-wn.htm#F15580

USE DYNAMIC CREATION OF ACCOUNT COMBINATION FOR INVENTORY TRANSACTIONS

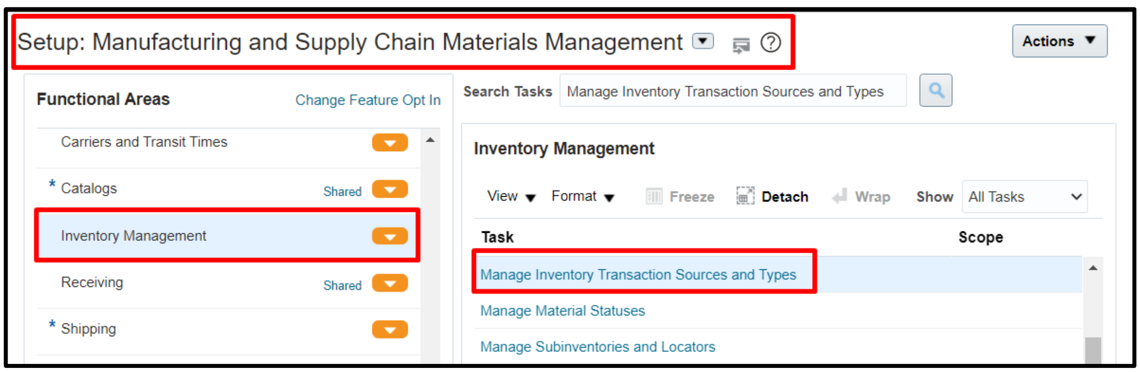
Hands-On: Define Transaction Sources and Types

In this practice and demonstration, you will be:

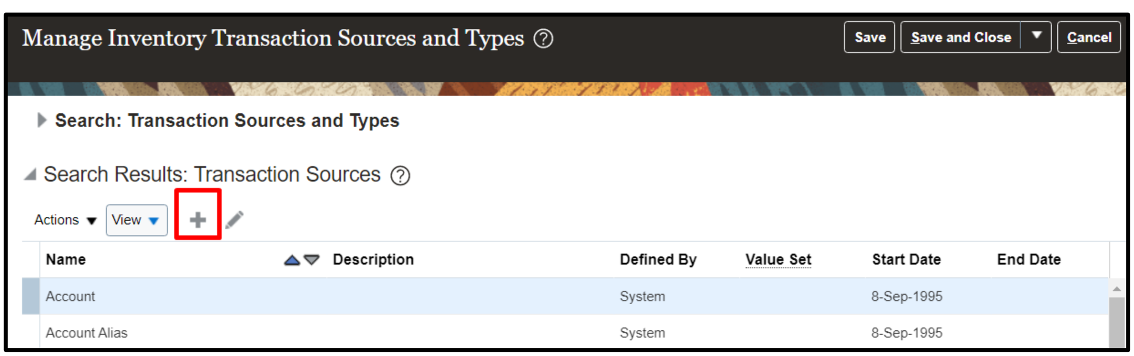
Scenario:	Define Transaction Sources and Types
Pre-Requirement:	None
Procedure:	Describe steps below
Expected outcome:	Transaction Sources and Types Created
Estimate Time to do:	10min

1. Navigate to:

Others → Setup and Maintenance → **Setup:** Manufacturing and Supply Chain Materials Management → **Functional Areas:** Inventory Management → **Task:** Manage Inventory Transaction Sources and Types



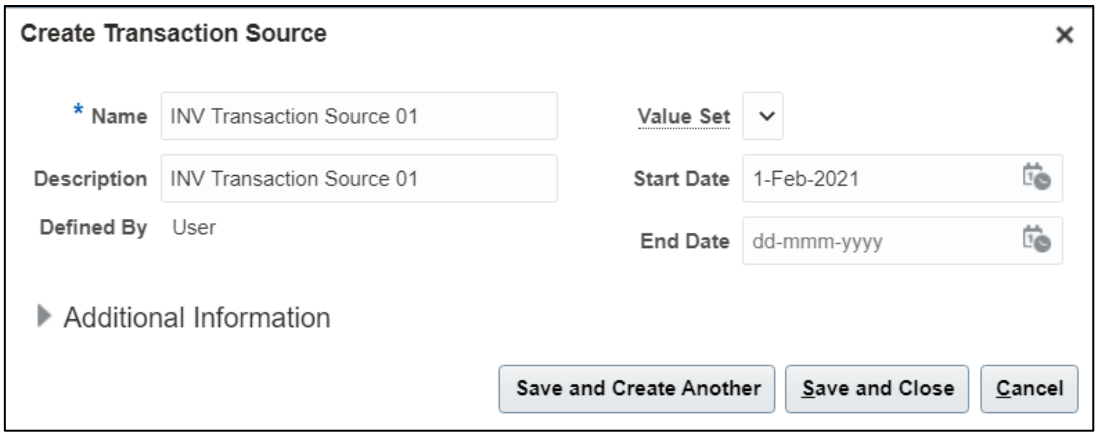
2. Click on "+" to create new register / line:



3. Enter the data:

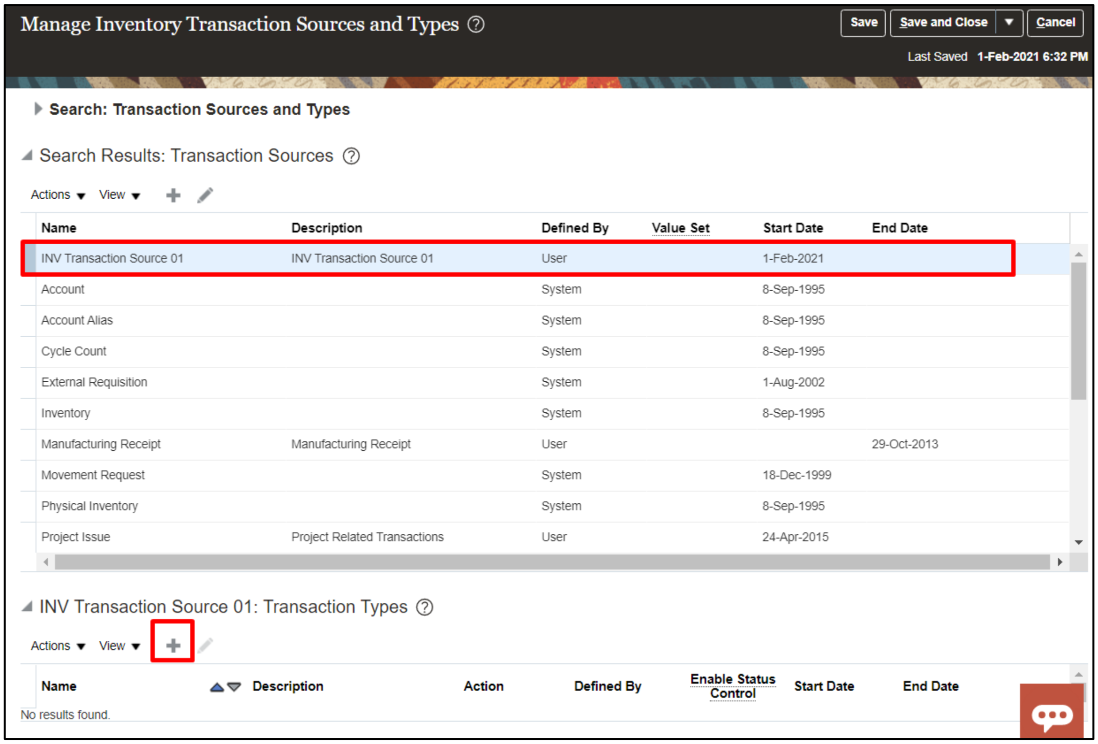
Complete the fields below:

Create Transaction Source	
Name:	INV Transaction Source XX
Description:	INV Transaction Source XX
Defined by:	User
Value Set:	-
Start Date:	Your start date (Sysdate)
End Date:	-



4. Save and Close

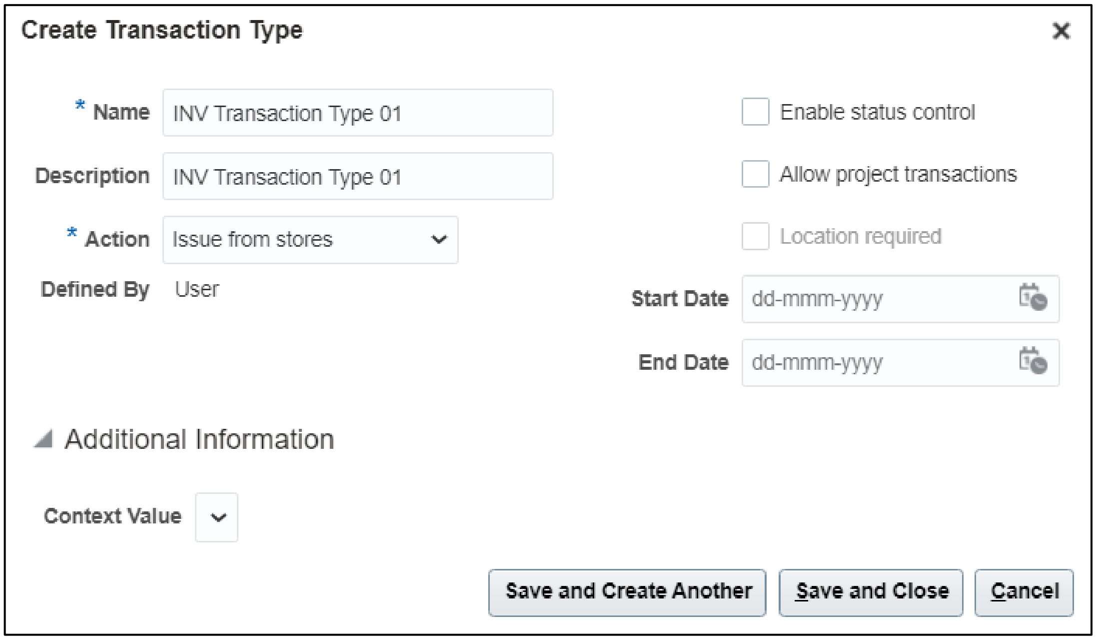
5. Select your Transaction Source and scroll down, and click on "+" to create Transaction Type:



6. Enter the data:

Complete the fields below:

Create Transaction Type	
Name:	INV Transaction Type XX
Description:	INV Transaction Type XX
Action:	Issue from Stores
Defined by:	User
Enable status control:	-
Allow project transaction:	-
Location required:	-
Start Date:	Your start date (Sysdate)
End Date:	-



7. Save and Close

END

More Details:

Restrict Inventory Transactions Types Based On Business Unit (Doc ID 2247377.1)
How to Enable the Status Control for an Account Issue Transaction Type? (Doc ID 2300710.1)
Unable To Find Project & Task Information On A Project Enabled Inventory Transaction (Doc ID 2513331.1)
Fusion INV - Explanation of Inventory Transaction Type, Transaction Action and Transaction Source Type (Doc ID 1523050.1)

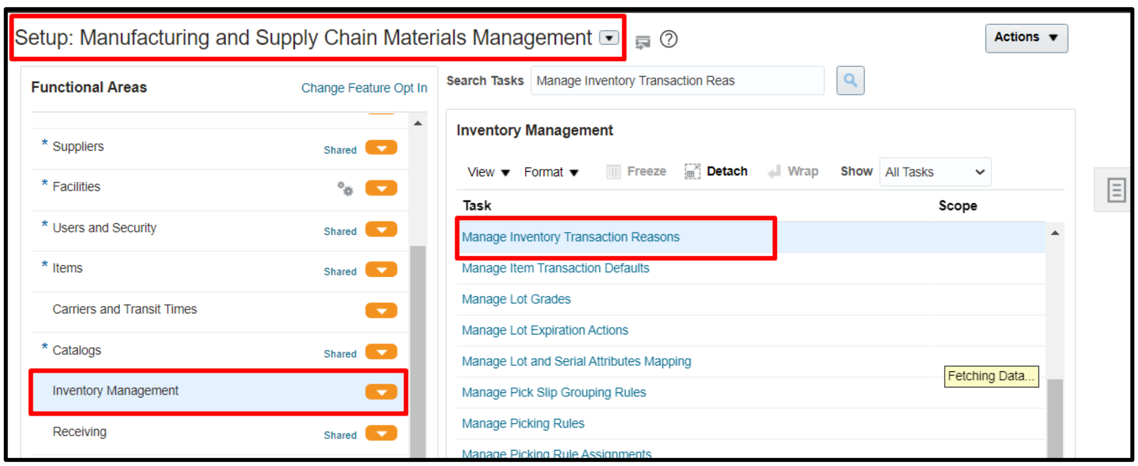
Hands-On: Define Transaction Reasons

In this practice and demonstration, you will be:

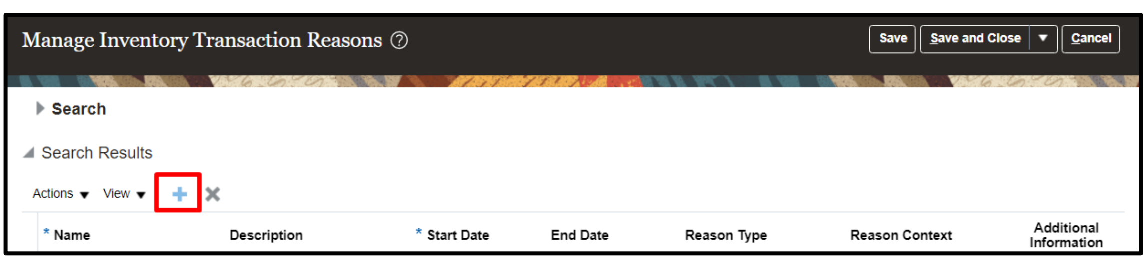
Scenario:	Define Transaction Reasons
Pre-Requirement:	None
Procedure:	Describe steps below
Expected outcome:	Transaction Reasons Created
Estimate Time to do:	10min

1. Navigate to:

Others → Setup and Maintenance → **Setup:** Manufacturing and Supply Chain Materials Management → **Functional Areas:** Inventory Management → **Task:** Manage Inventory Transaction Reason



2. Click on "+" to create new register / line:

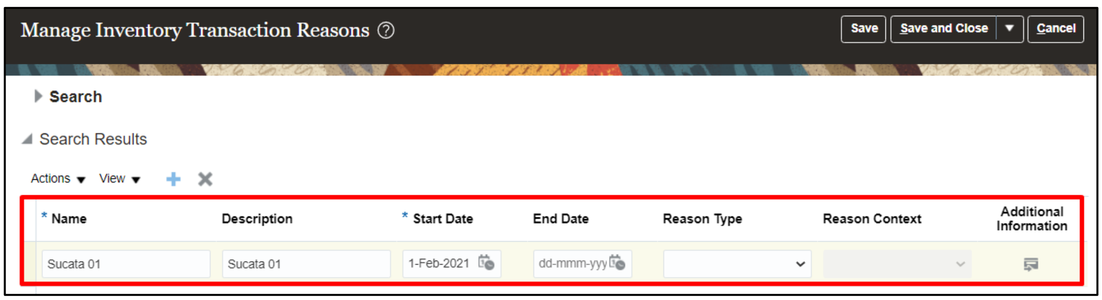


3. Enter the data:

Complete the fields below:

Transaction Reason	
Name:	Sucata XX
Description:	Sucata XX
Start Date:	Your start date (Sysdate)
End Date:	-
Reason Type(*):	-
Reason Context(*):	-

(*) if you create an inventory transaction reason with a reason type of Receiving and a reason context of Change Subinventory/Locator, the user will only be able to select that transaction reason when the user is in Receiving and moving material to a different subinventory and locator combination.



4. Save and Close

END

More Details:

Fusion INV: How To Setup "Reason" to Use In Miscellaneous Transaction (Doc ID 2187938.1)
Fusion Inv : How To Setup Quantity Exception Reason In Manage Inventory Organization Task ? (Doc ID 2487343.1)
Fusion INV: Can New Values be Created for Miscellaneous Transactions Reasons LOV ? (Doc ID 2004988.1)
FA:SCM:RCV: How To Add A Reason Code To Returns UI? (Doc ID 1508315.1)

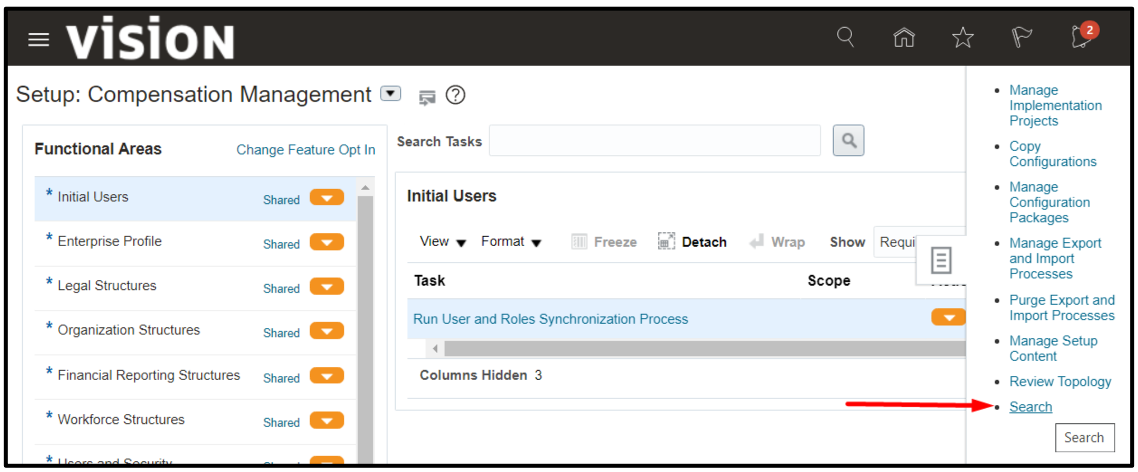
Hands-On: Define Value Set - Item Category (READONLY)

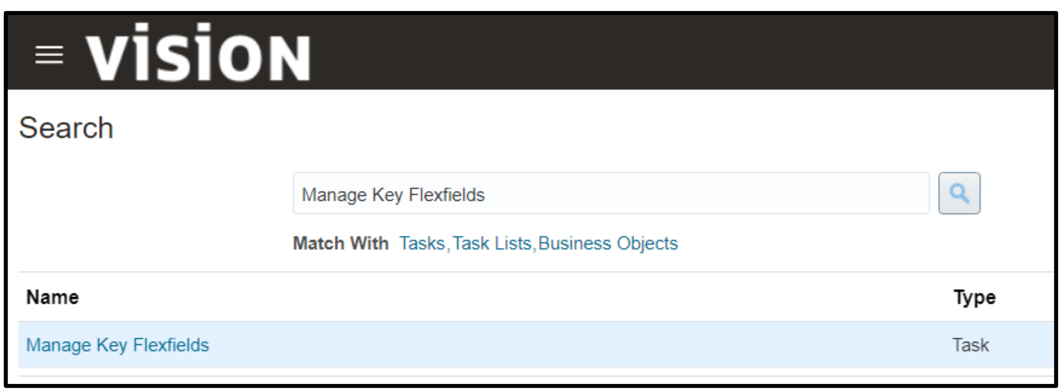
In this practice and demonstration, you will be:

Scenario:	Define Item Category Value Set
Pre-Requirement:	• Manage Item Statuses • Manage Item Types
Procedure:	Describe steps below
Expected outcome:	Item Category Value Set Defined
Estimate Time to do:	-

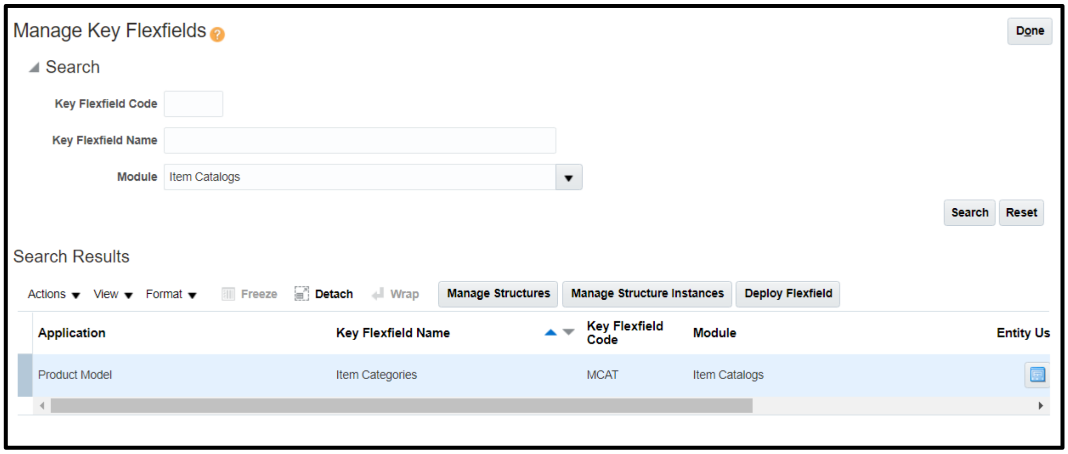
1. Navigate to:

Others → Setup and Maintenance → **Tasks:** Search → Manage Key Flexfields

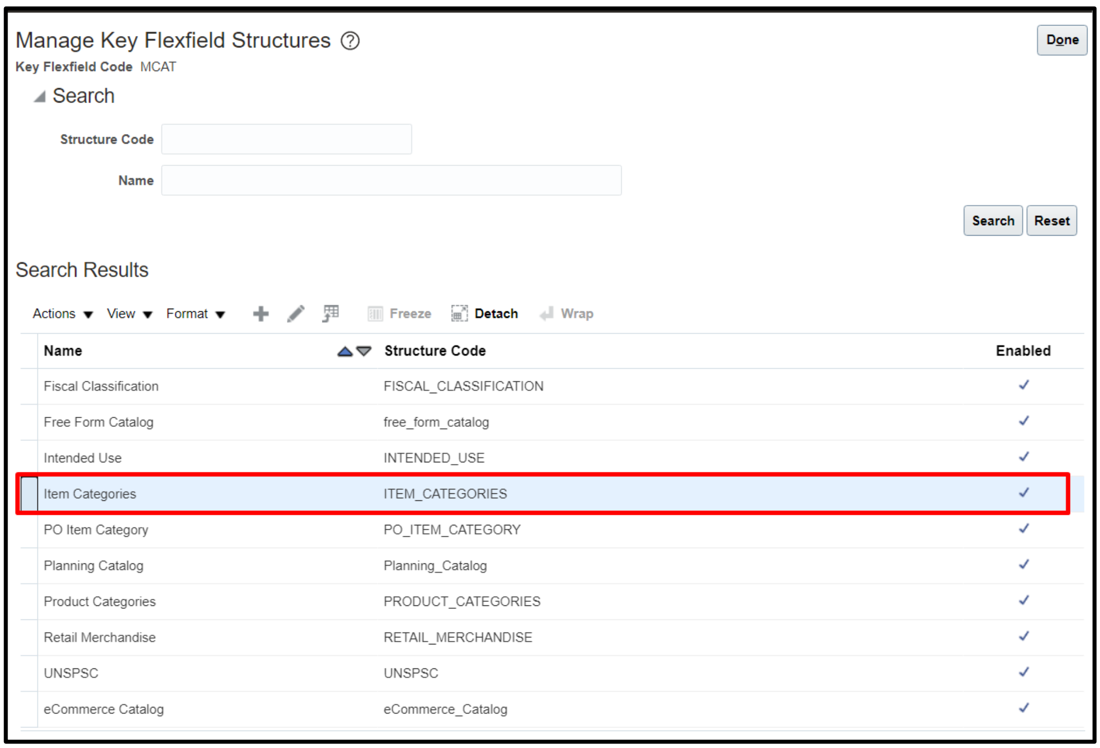




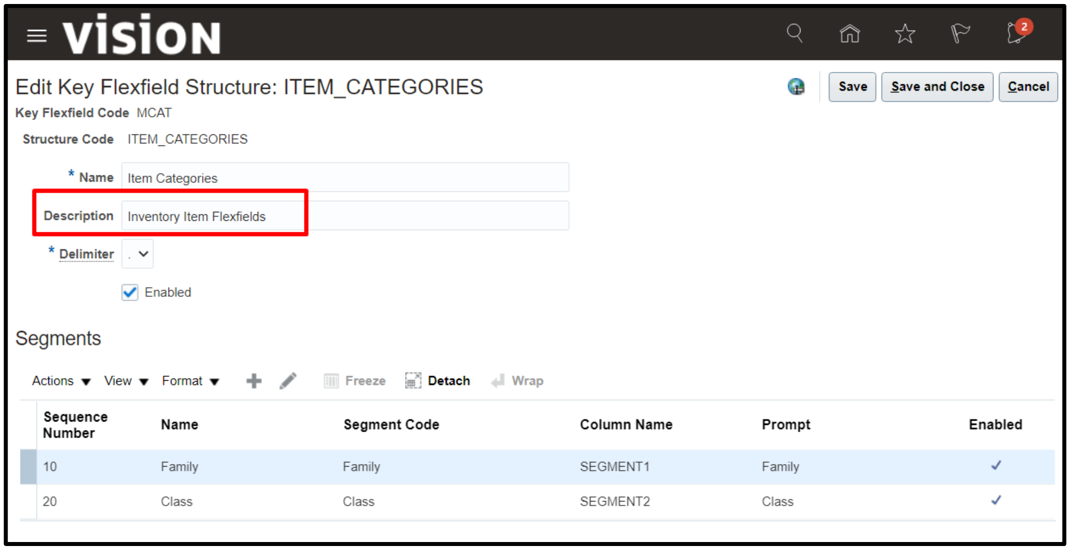
2. Search by module equal "Item Catalogs":



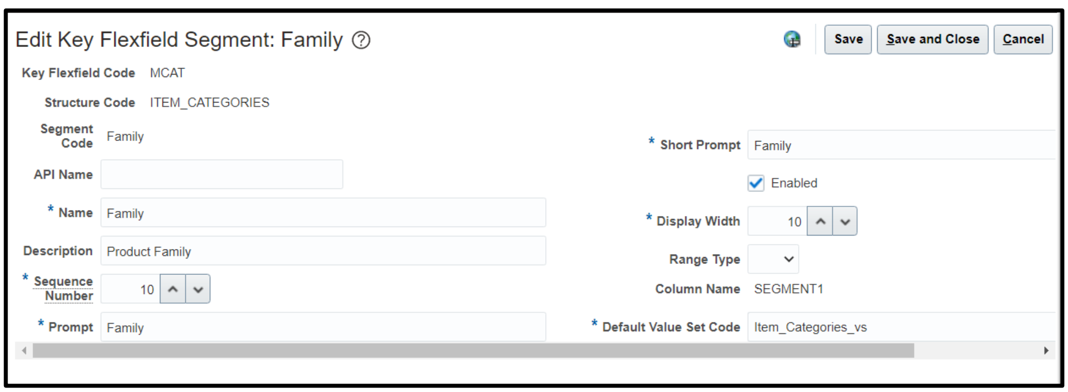
3. Click on "Manage Structure" button:



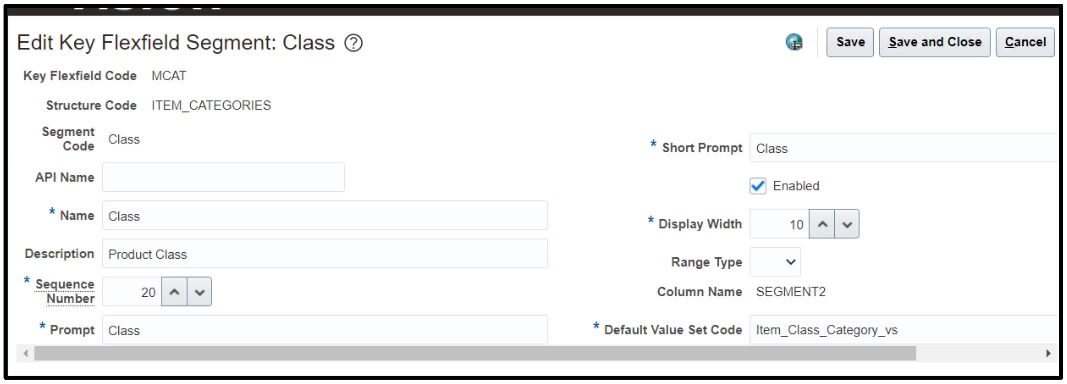
4. Click on Edit button:



5. Select the first line, click to edit:



6. Select the second line, click to edit:



END

More Details:

Fusion PIM: How To Create Item Catalog Structures And Catalogs (viewlet) (Doc ID 1454539.1)

Hands-On: Define Item Catalog / Category

In this practice and demonstration, you will be:

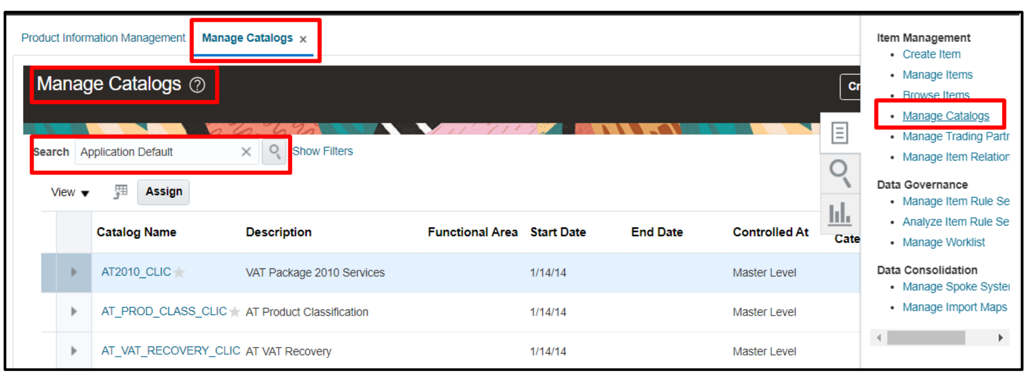
Scenario:	Define Item Catalog / Category
Pre-Requirement:	None
Procedure:	Describe steps below
Expected outcome:	Item Catalog / Category Defined
Estimate Time to do:	20min

1. Navigate to:

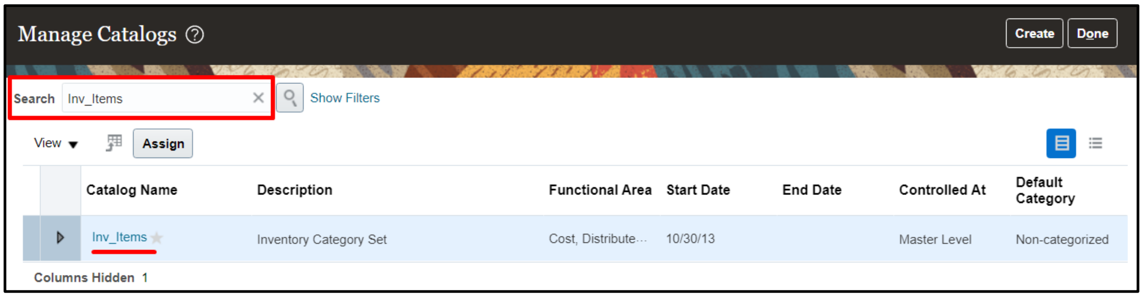
Springboard → Product Management → Product Information Management → **Task:** Manage Catalogs → **Search:** Inv_Items

Or

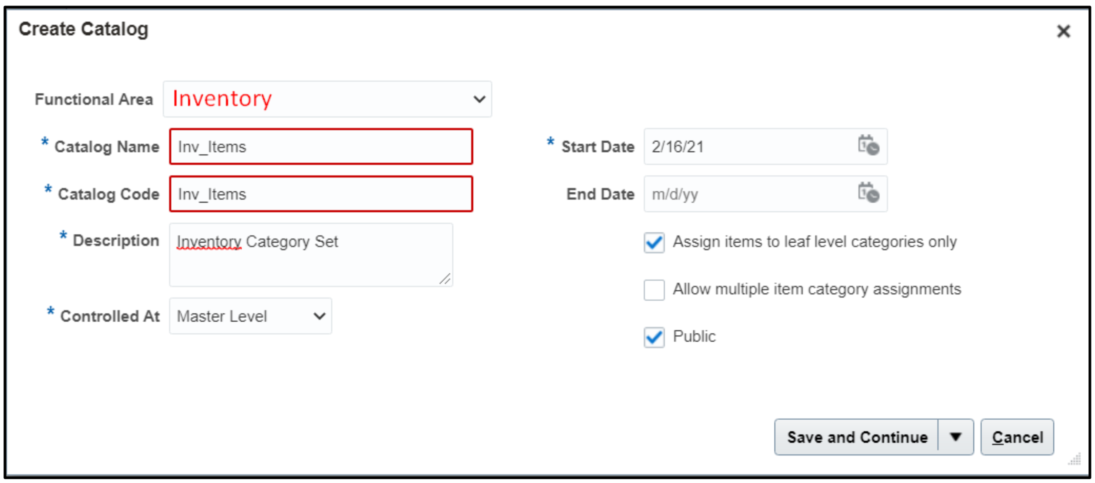
Others → Setup and Maintenance → **Setup:** Product Management → **Functional Areas:** Catalogs → **Task:** Manage Functional Area Catalogs → **Search:** Inv_Items



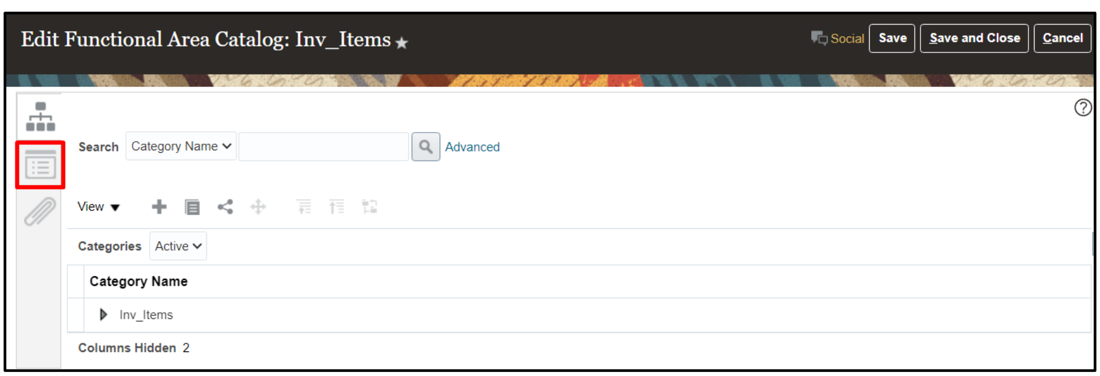
2. After search "Inv_Items", click on Catalog Name link:



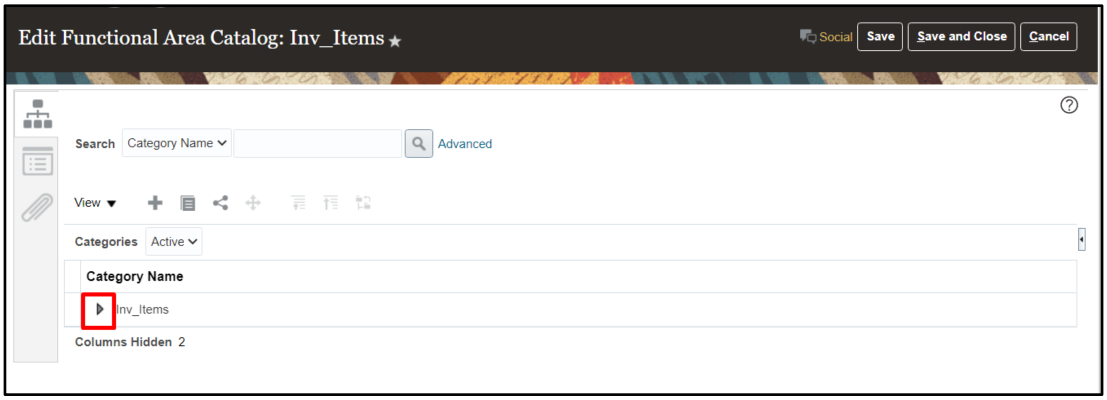
For this environment this Catalog "Inv_Items" was already created:



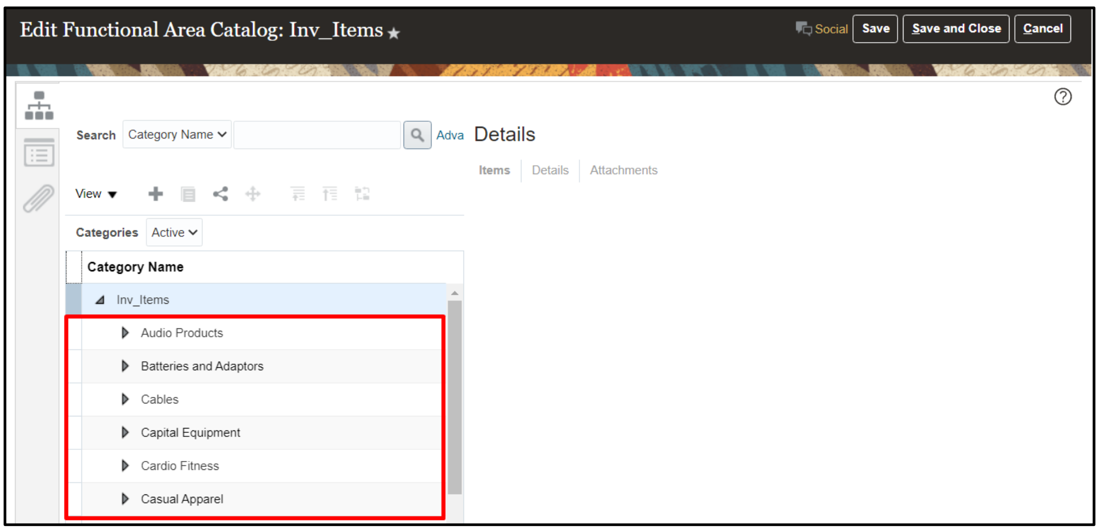
3. To check the default category associated, click on details icon:



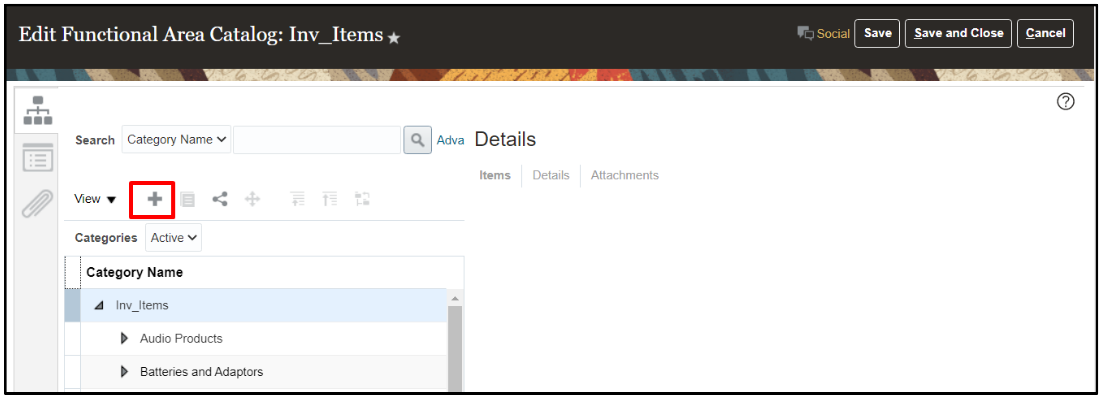
4. To check the Category details, click on this icon:



5. These are the content of Inv_Items:



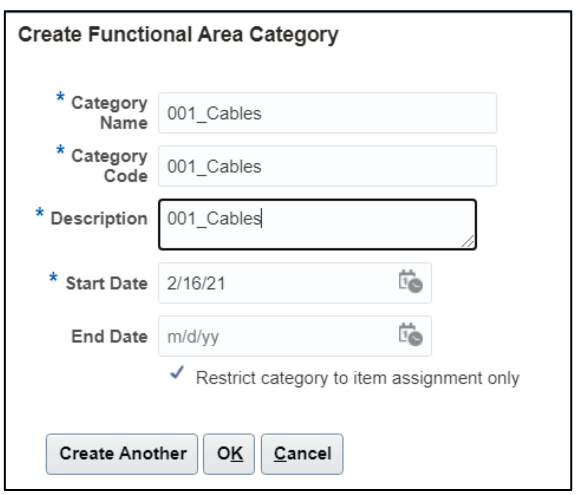
6. To create new Category Name, click on “+”:



7. Enter the data:

Complete the fields below:

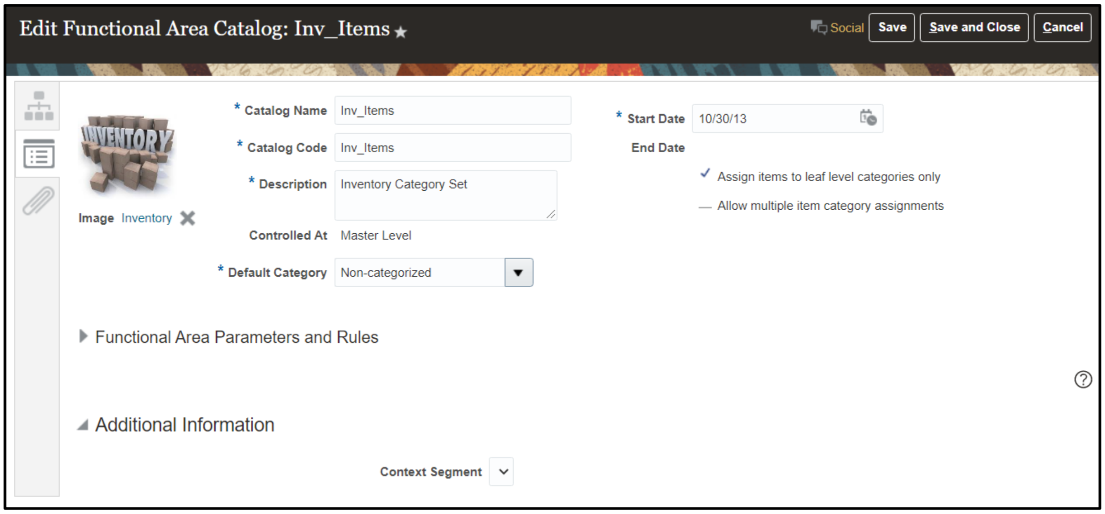
Create Functional Area Category	
Category Name:	Your category name
Category Code:	Your category name
Description:	Your description
Start date:	Sysdate
End Date:	-



Click on “Ok”

8. Click on “Save” button:

9. For this Test Environment, We have Default Category = Non-categorized



10. Click on "Save and Close" button:

END

More Details:

https://docs.oracle.com/en/cloud/saas/supply-chain-management/21a/faipr/catalogs.html#FAIPR1916621

What are the Requirements for a Catalog to be Assigned to a Functional Area in Manage Functional Area Catalogs UI? (Doc ID 1488509.1)

Hands-On: Define Item Classes

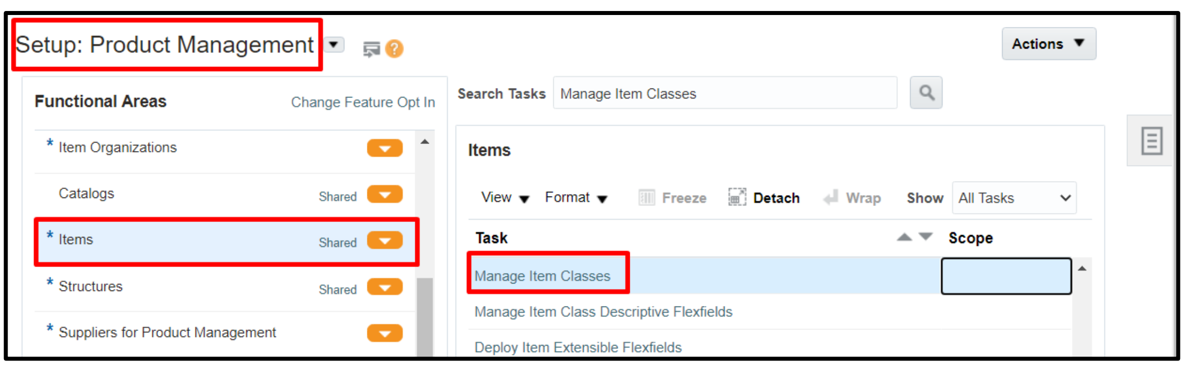
In this practice and demonstration, you will be:

Scenario:	Define Item Classes
Pre-Requirement:	None
Procedure:	Describe steps below
Expected outcome:	Item Classes Defined
Estimate Time to do:	20min
Reason	Item classes are created at the root item class or within a parent item class, and inherit values based on selections made when defining the item class. For Product Hub customers, the Manage Item Classes task is used to create and manage item classes, user defined attributes and data security. All items are created within an item class. The item class hierarchy can be used to control processes for some levels of the hierarchy.

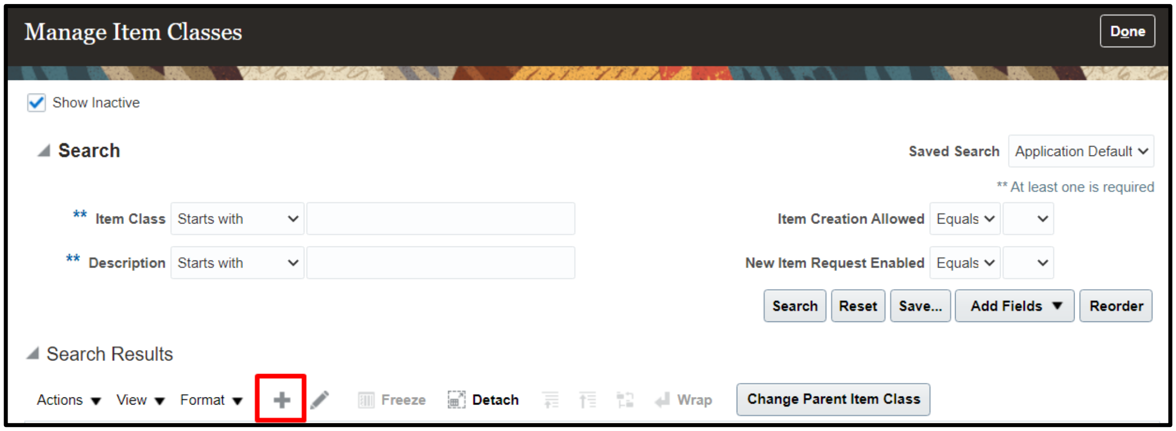
Item Class Security

1. Navigate to:

Others → Setup and Maintenance → **Setup:** Product Management → Items → **Task:** Manage Item Classes



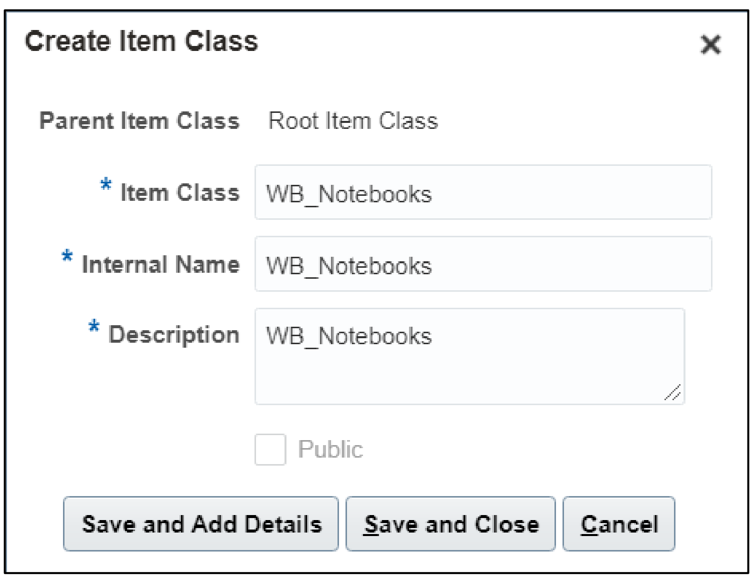
2. Click on “+” to create new Item Classes



3. Enter the data:

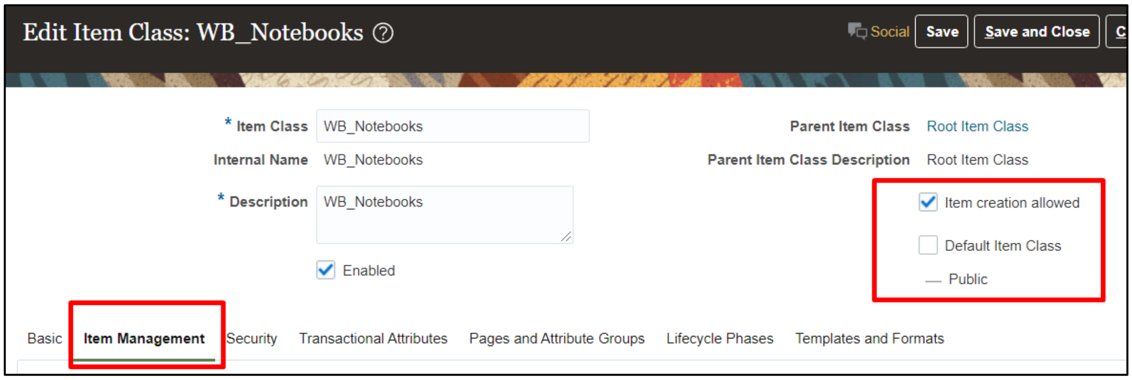
Complete the fields below:

Create Item Class	
Parent Item Class	Root Item Class
Item Class:	Your_item_class
Internal Name:	Your_item_class
Description:	Your master organization



4. Click on “Save and Add Details”

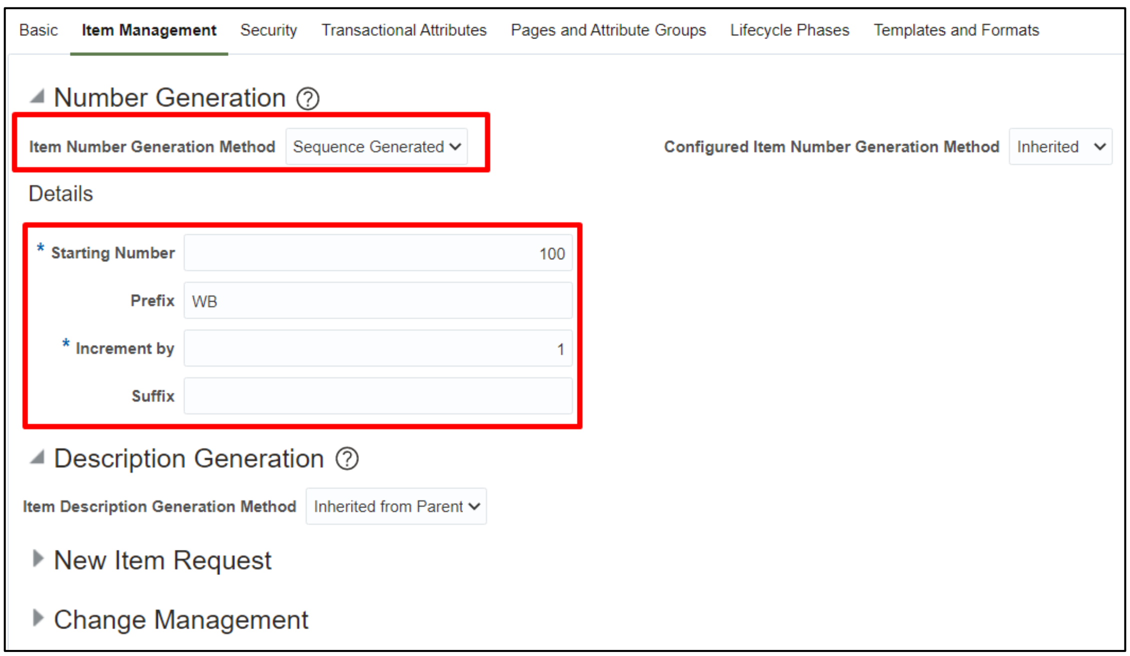
5. Click on Item Management tab



6. Enter the data:

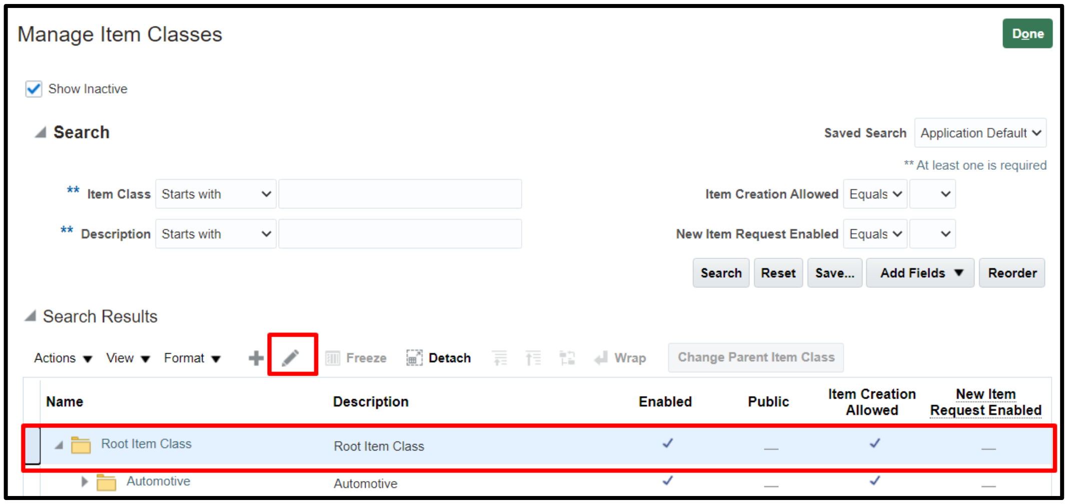
Complete the fields below:

Item Management (TAB)	
Number Generation	
Item Number Generation Method:	Sequence Generated
Details	
Starting Number:	100
Prefix:	Your prefix
Increment by:	1
Suffix:	-



7. Click on "Save and Close"

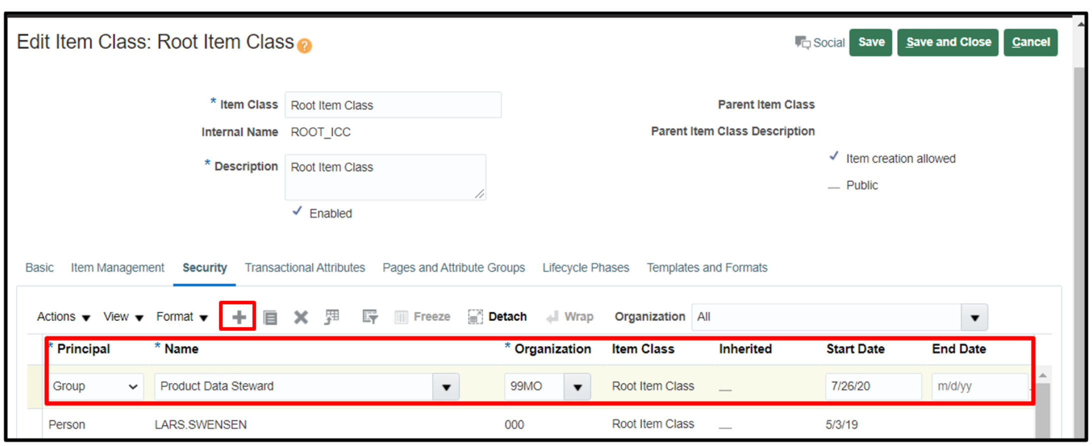
8. Select the line “Root Item Class”, click on “Edit”:



9. Click on “Security” tab, click on “+” to add line:

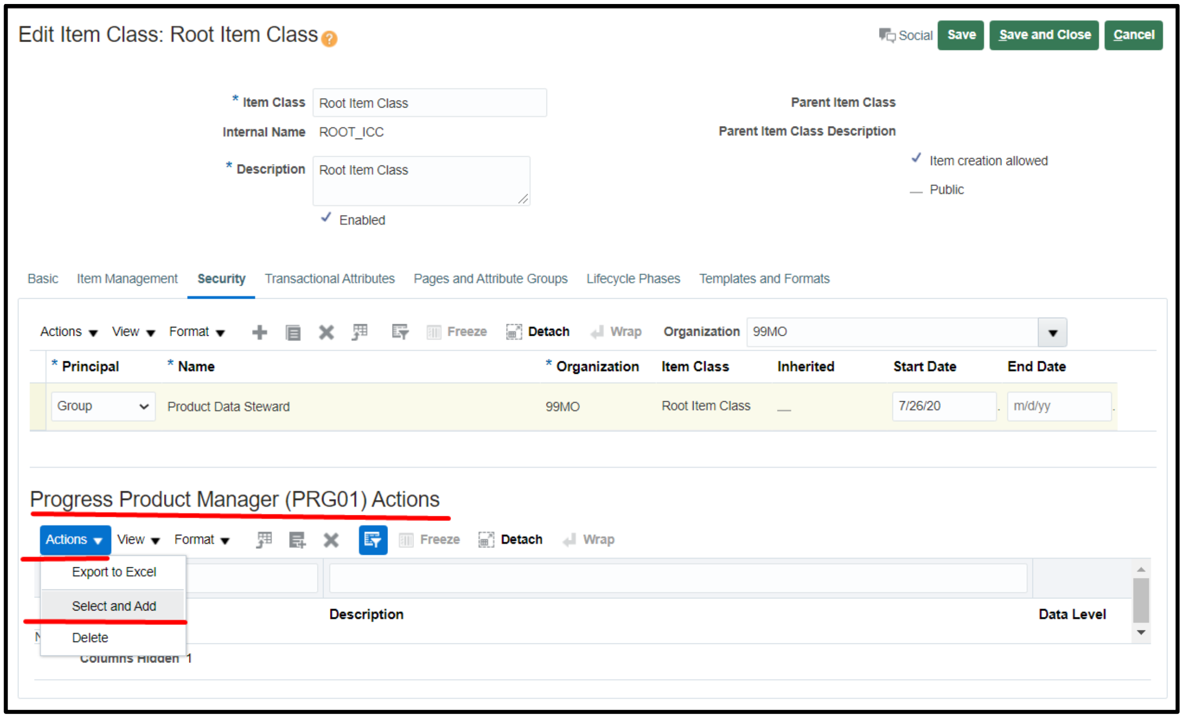
Complete the fields below:

Edit Item Class	
Security	
Principal:	Group
Name:	Product Data Steward (ORA_EGI_PRODUCT_DATA…)
Organization	Your master organization
Start Date:	DD/MM/YYYY

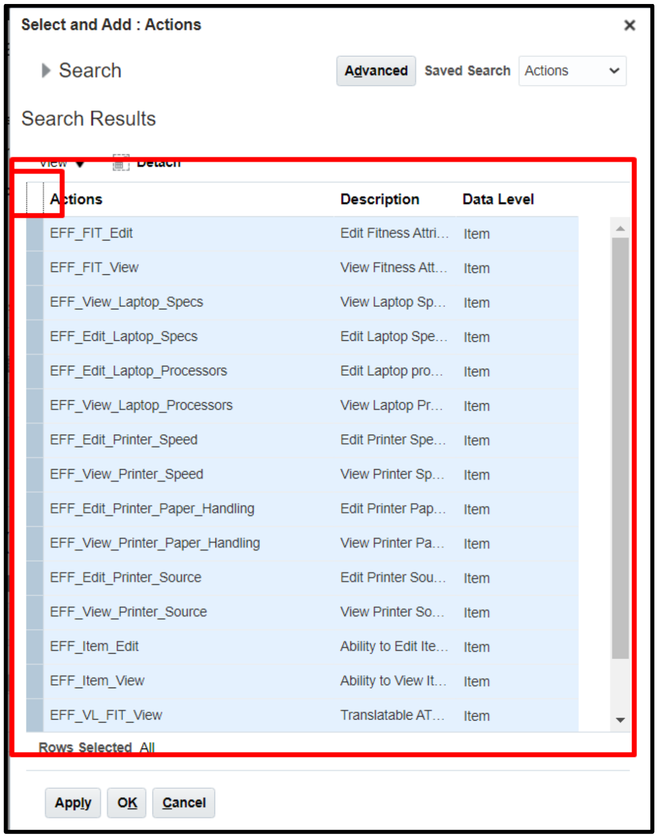


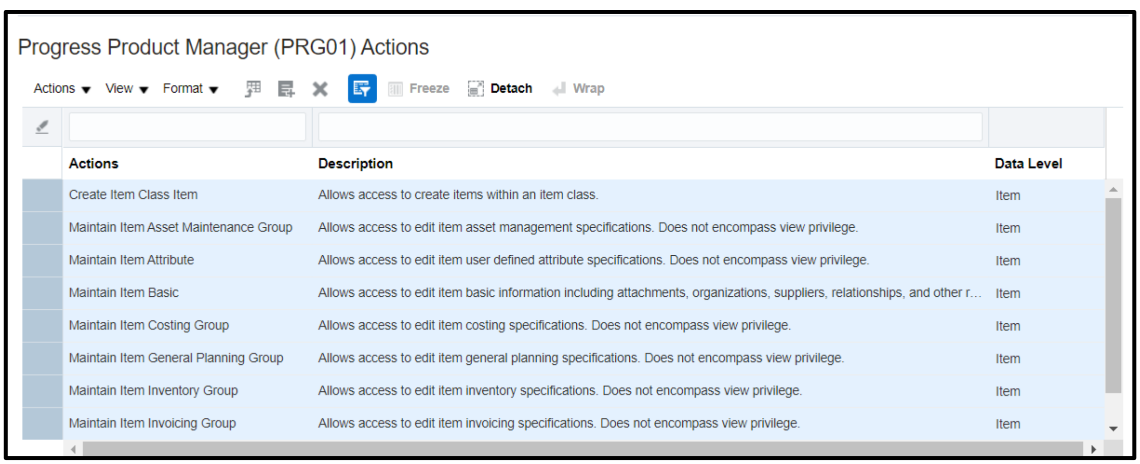
10. Click on “Save”.

11. Click Actions → Select and Add:



12. Click Search → Select all lines → apply → ok:



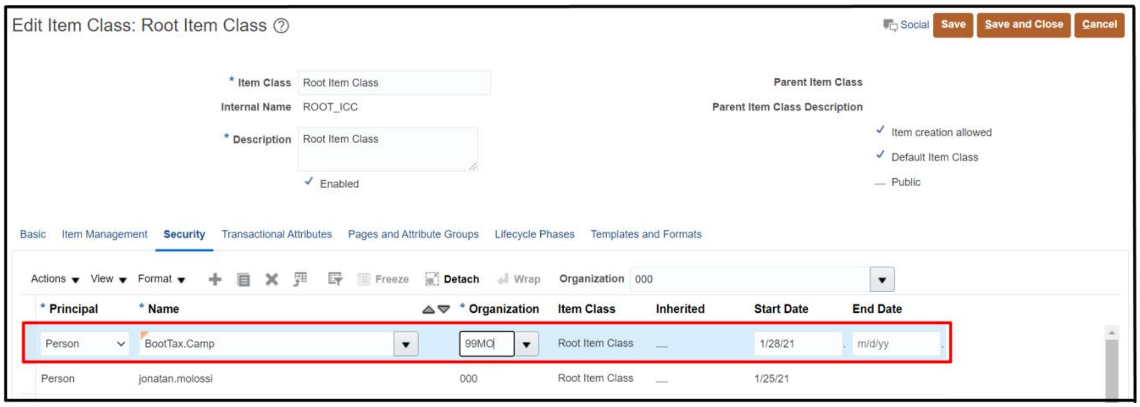


13. Click on “Save”.

Now for Person:

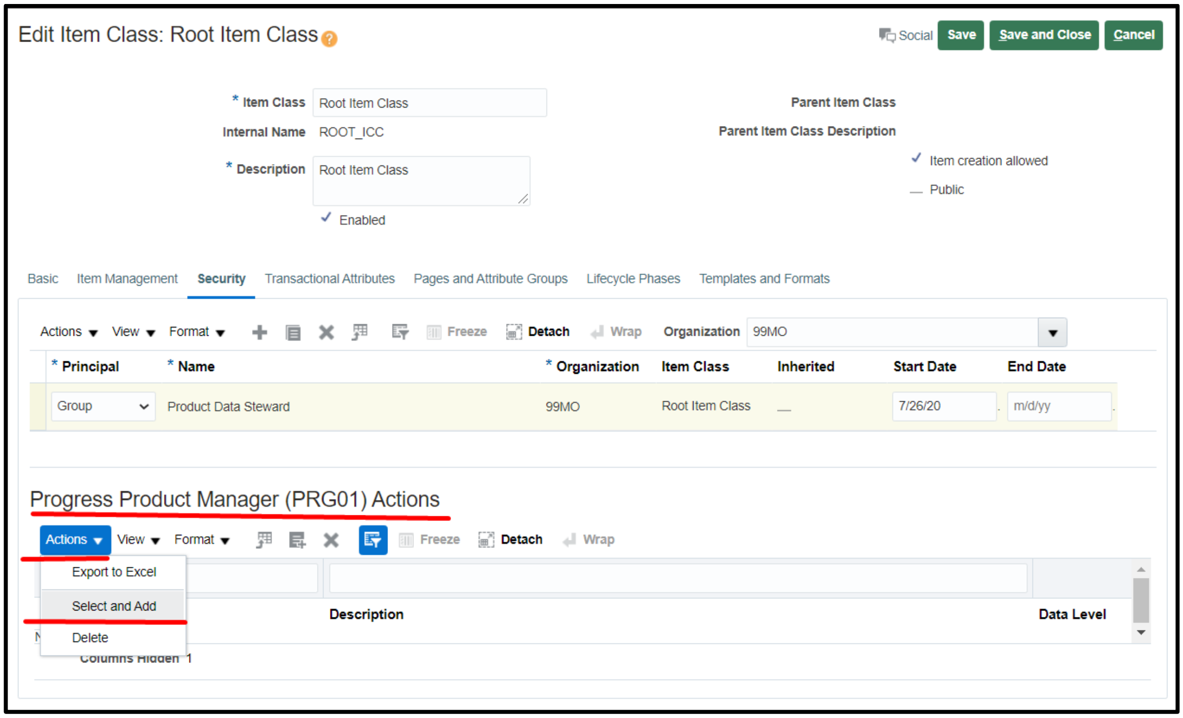
Security	
Principal:	Person
Name:	User name
Organization	Your master organization
Start Date:	DD/MM/YYYY

14. Click on “+” to add line:

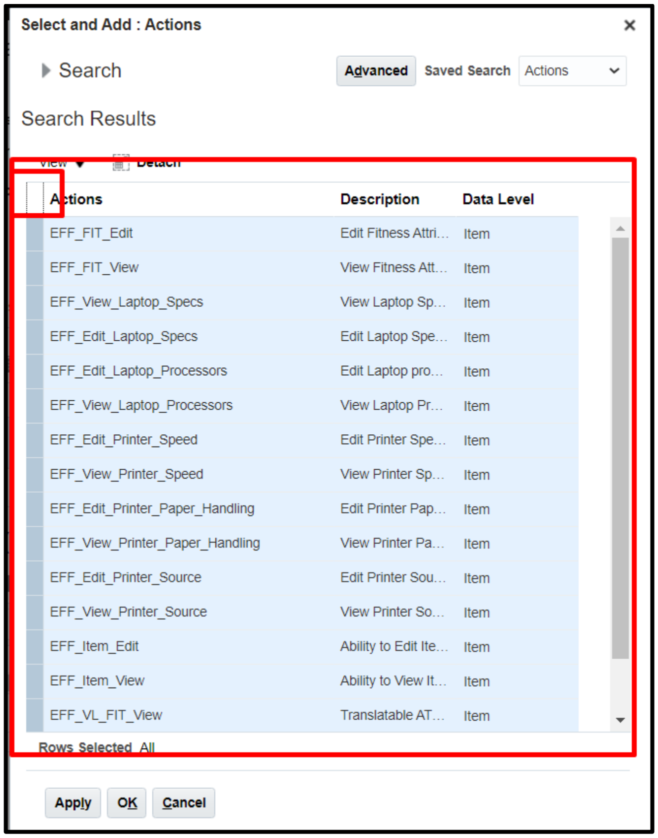


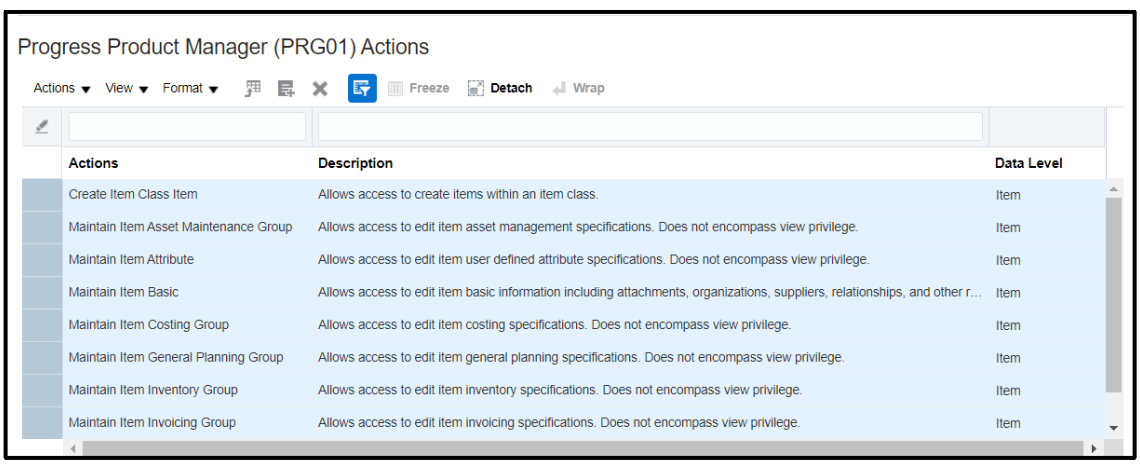
15. Click on “Save”

16. Click Actions → Select and Add:



17. Click Search → Select all lines → apply → ok:



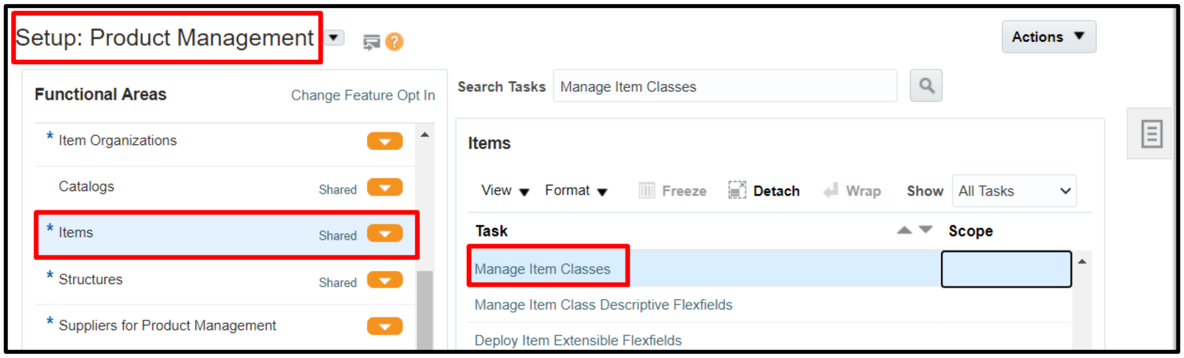


18. Click on "Save and close".

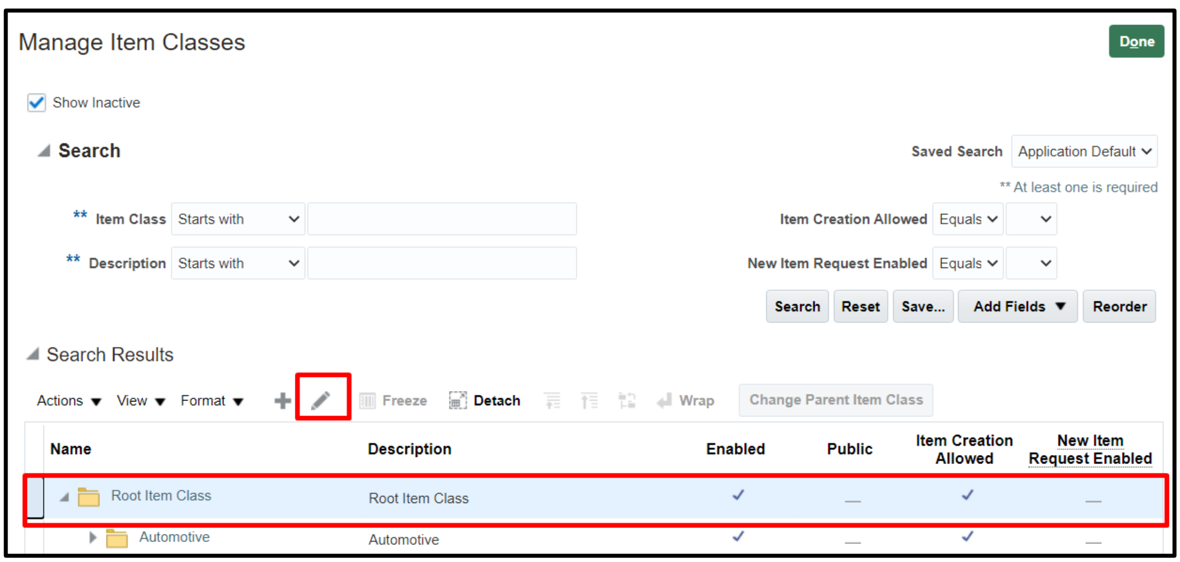
Repeat the steps now for you other organization / transaction inventory organization:

19. Navigate to:

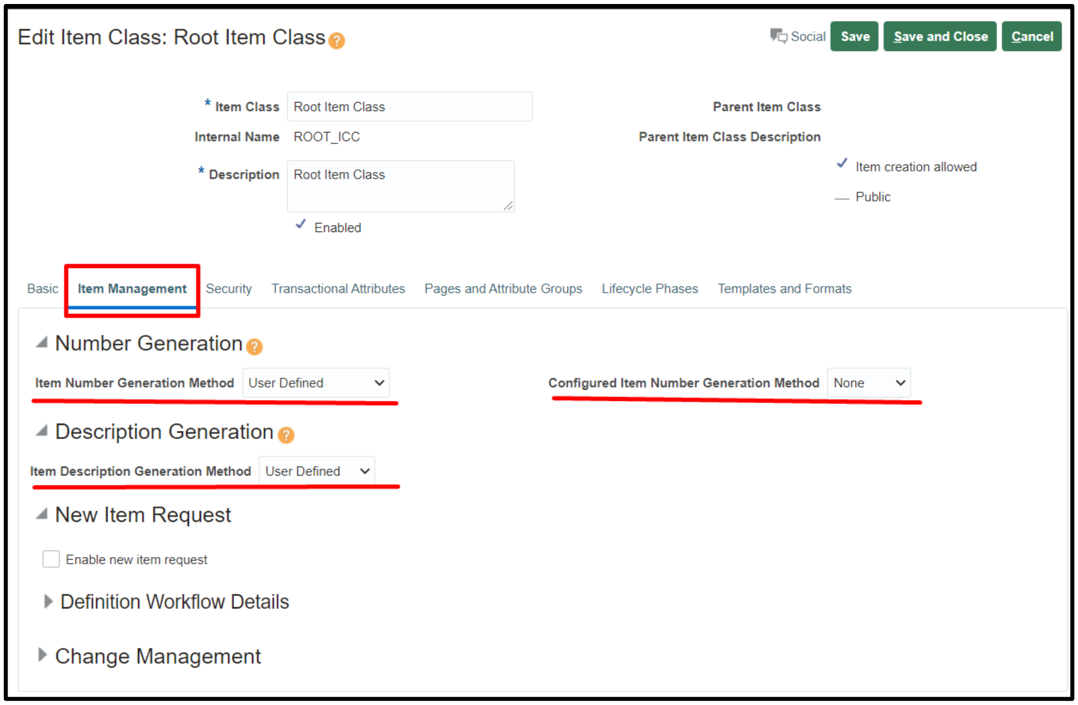
Others → Setup and Maintenance → **Setup:** Product Management → Items → **Task:** Manage Item Classes



20. Select the line “Root Item Class”, click on “Edit”:



21. Review the details about "Item Management":

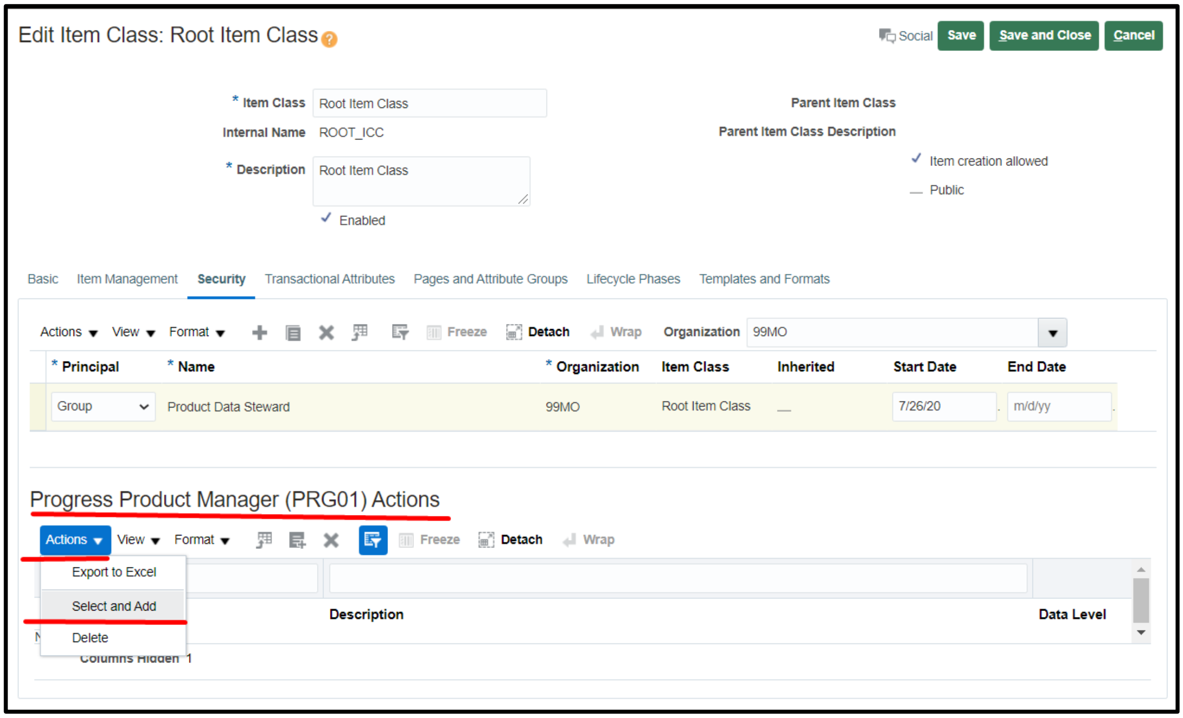


22. Click on “Security” tab, click on “+” to add line:

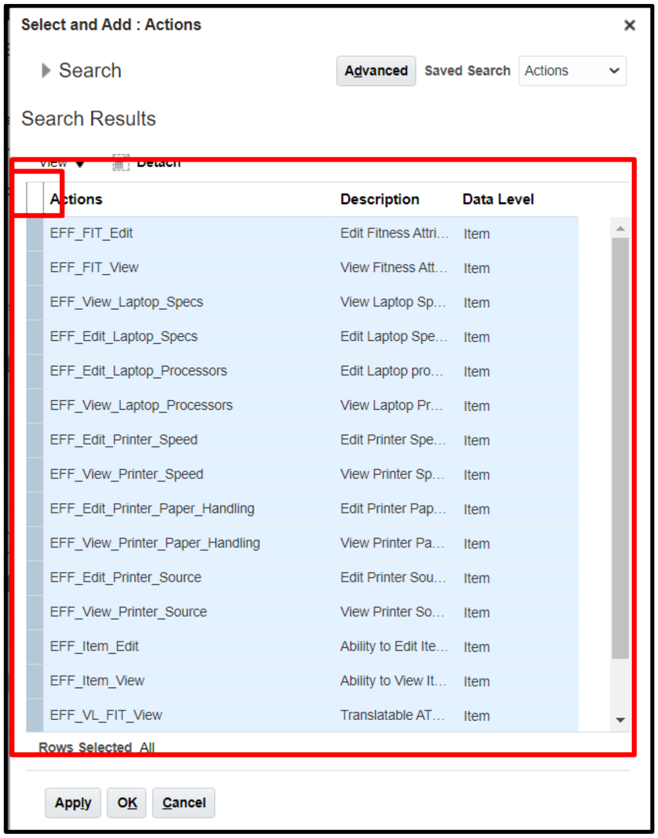
Complete the fields below:

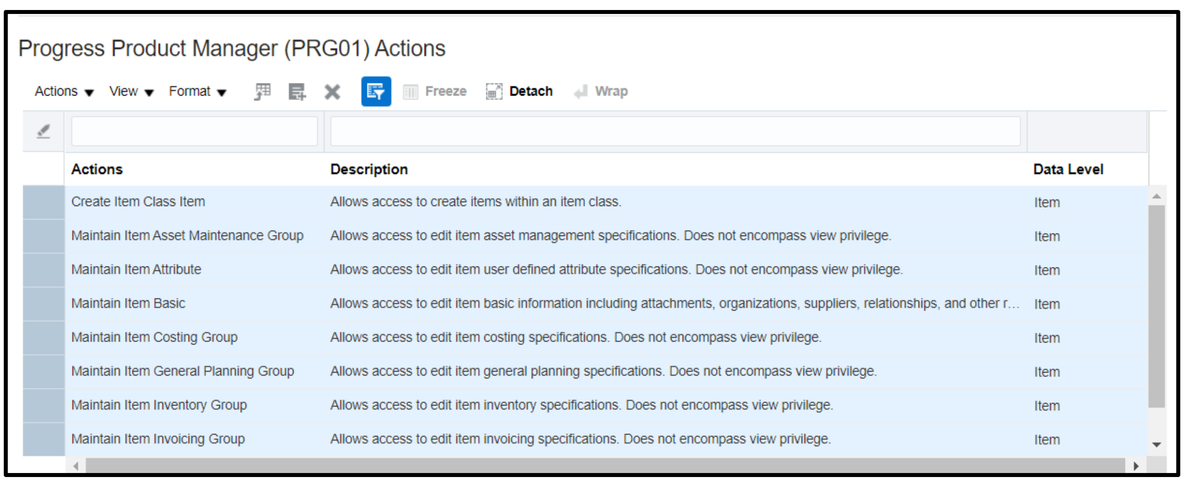
Edit Item Class	
Security	
Principal:	Group
Name:	Product Data Steward (ORA_EGI_PRODUCT_DATA…)
Organization	XX_001 (Your inventory organization)
Start Date:	DD/MM/YYYY

23. Click Actions → Select and Add:



24. Click Search → Select all lines → apply → ok:



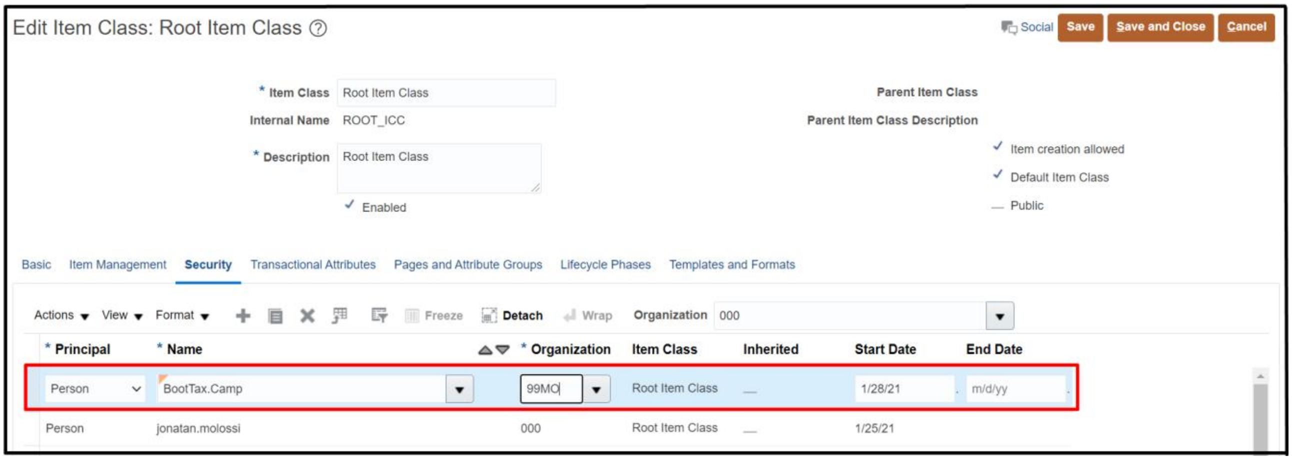


25. Click on “Save and Close”

Now for Person:

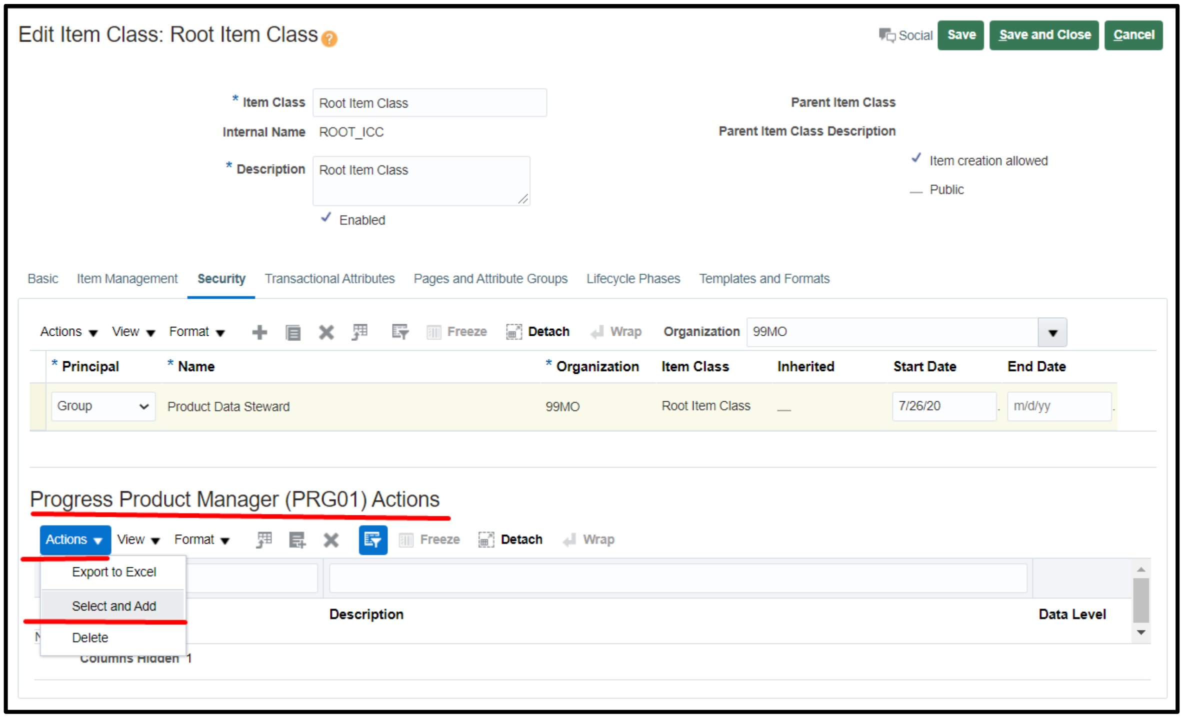
Security	
Principal:	Person
Name:	User name
Organization	Your master organization
Start Date:	DD/MM/YYYY

26. Click on “+” to add line:

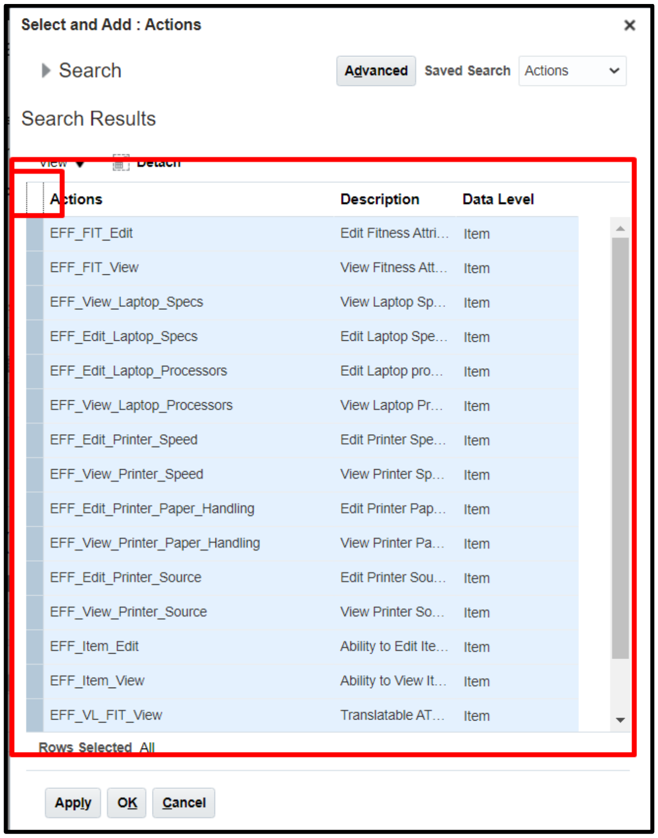


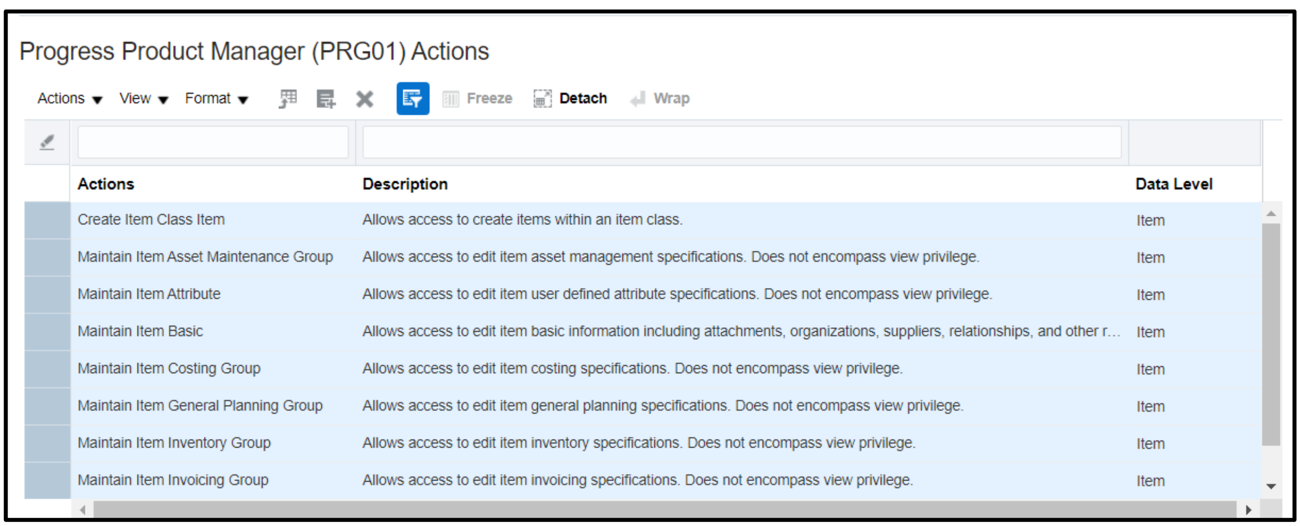
27. Click on “Save”

28. Click Actions → Select and Add:



29. Click Search → Select all lines → apply → ok:





30. Click on “Save”.

31. Click on “Save and Close”

END

More Details:
Cannot Add Actions under Manage Item Classes Security (Doc ID 2548335.1)
Not Able to Add Actions under- Manage Item Classes- Security (Doc ID 2516190.1)
Fusion PIM: Common Problems and Solutions - Manage Item Class / Item Class Security Tab (Doc ID 1391245.1)

Hands-On: Create Item

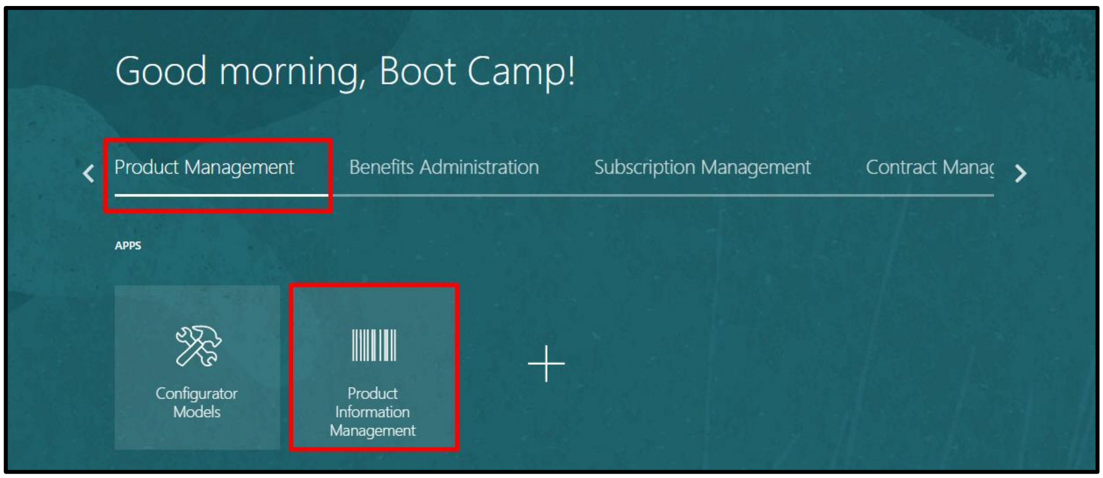
In this practice and demonstration, you will be:

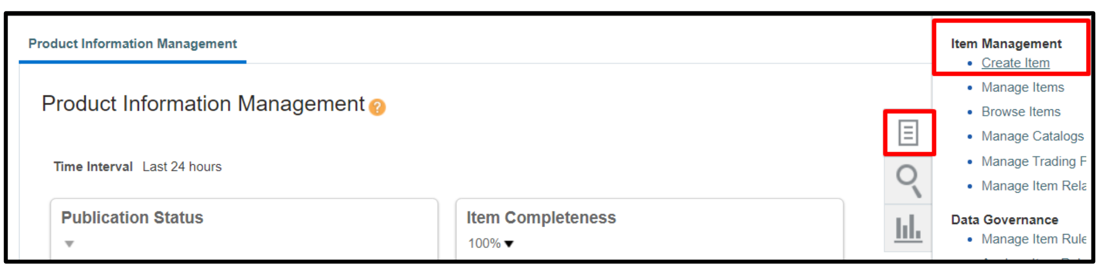
Scenario:	Create Item
Pre-Requirement:	None
Procedure:	Describe steps below
Expected outcome:	Item Created
Estimate Time to do:	20min

(*) transactions will be used from this moment

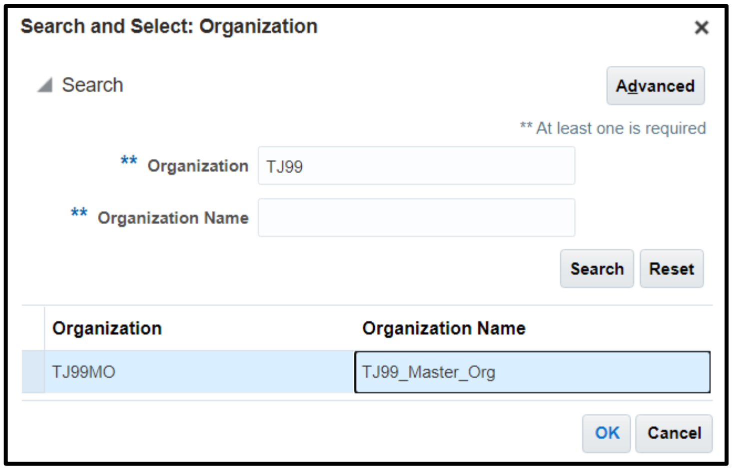
1. Navigate to:

Springboard → Product Management → Product Information Management → **Task:** Create Item





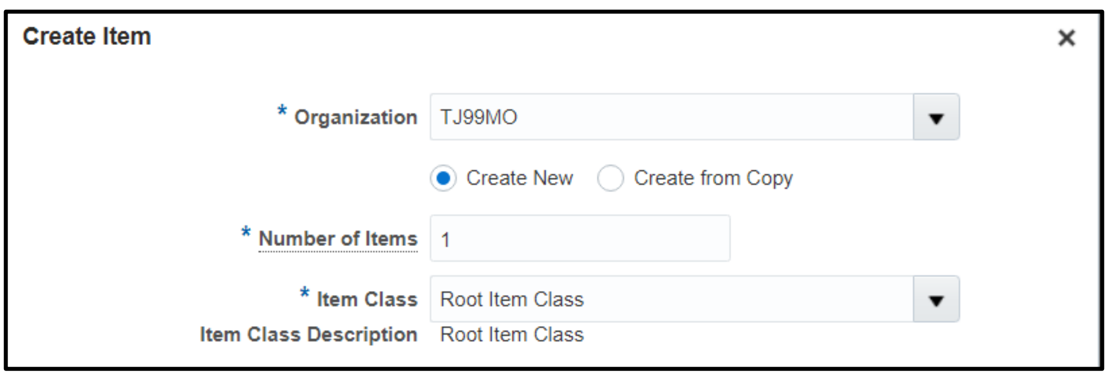
2. Enter with your Master Organization → Click on "ok":



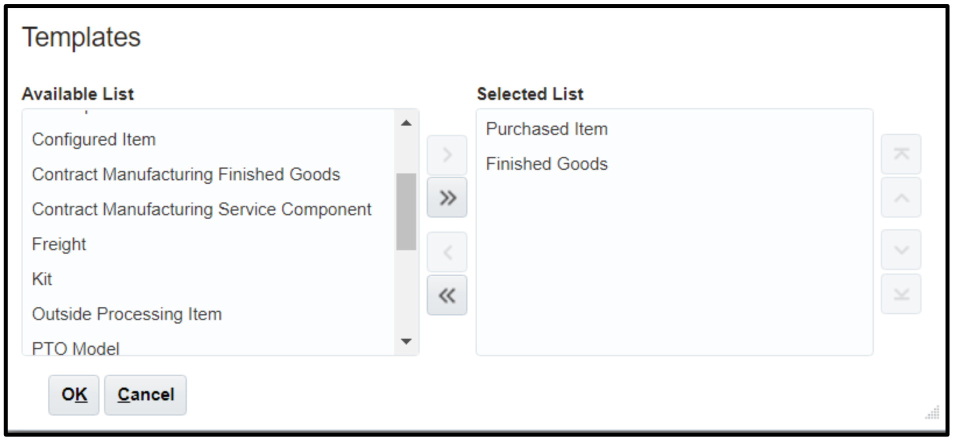
3. Enter with details:

Complete the fields below:

Create Item	
Organization:	Your inventory organization (master)
Create New:	(x) checked
Number of Item:	1
Item Class:	Your Item Class



4. Scroll down to "Template", select on the "Available List" the "Purchased Item" and "Finished Goods" and move both to column "Selected List":



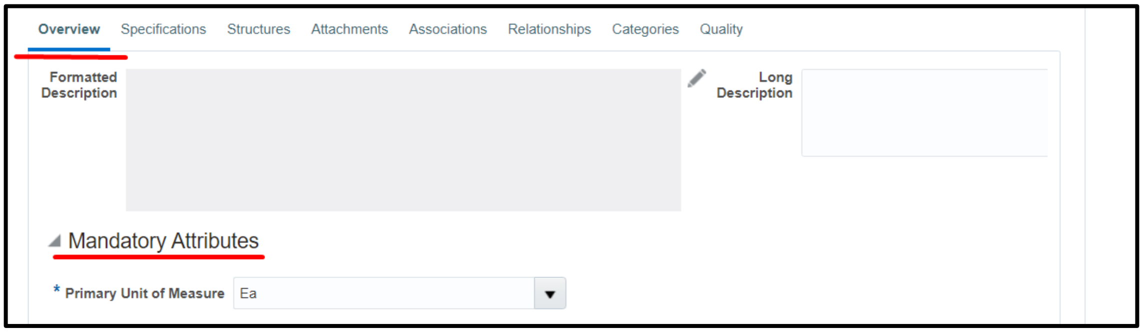
5. Click on "Ok"

6. Enter with details:

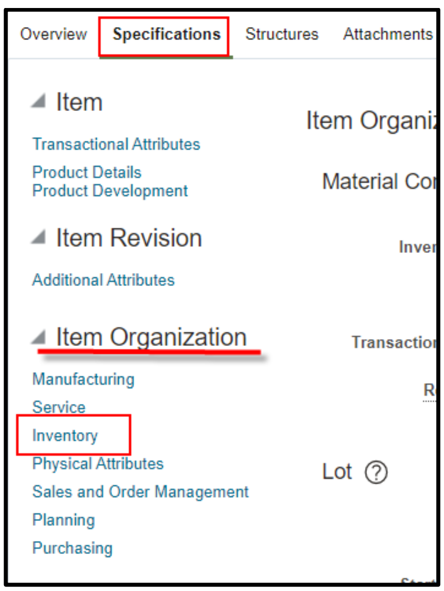
Complete the fields below:

Create Item	
Item:	ItemXXX
Description:	ItemXXX
Item Status:	Active
Lifecycle Phase:	Your lifecycle phase
User item Type:	Purchased Item

Overview (Tab)	
Mandatory Attributes	
Primary Unit of Measure:	Ea



7. Click on **Specifications** tab and go to **Item Organization Menu**, than click on **Inventory** option:



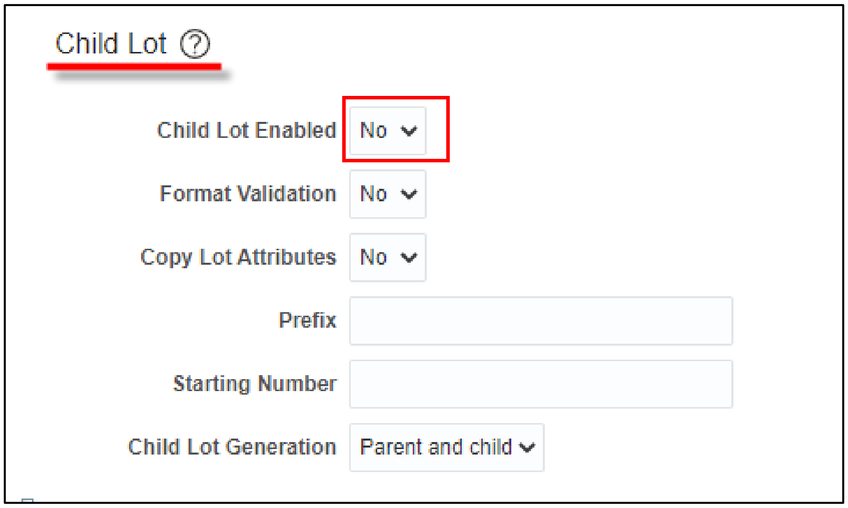
8. Go to **Lot** section:

Specifications (Tab)	
Item Organization: Inventory	
Lot	
Control:	Full lot control
Starting Prefix:	Choose your prefix
Starting Number:	Choose your starting number
Maturity Days	-
Hold Days	-

(*) https://docs.oracle.com/en/cloud/saas/supply-chain-management/21a/famml/lot-and-serial-numbers.html#FAMML4123683

9. Scroll Down to **Child lot** section:

Specifications (Tab)	
Item Organization: Inventory	
Child Lot	
Child lot Enable (*):	No
Format Validation:	No
Copy Lot Attributes:	No
Prefix	-
Starting Number:	-
Child Lot Generation	Parent and Child



(*) if you want a Child Lot Control you can choose YES to enable it and will need to define the prefix and starting number fields.
A child lot is a subdivision of a lot that you can use if you produce a lot over a period of time, but still want to group the material as a single lot. Using a child lot maintains the integrity of the lot, but enables you to consume it in manageable pieces. When you process transactions for material under child lot control, you enter the child lot as the lot number. The system also maintains a genealogy relationship between the parent lot and the child lot.

10. Scroll Down to **Grade Control** section:

Specifications (Tab)	
Item Organization: Inventory	
Grade Control	
Grade Control (*):	No
Default Grade (*) :	-

(*) if you want a Grade Control you can choose YES option and will need to define grades.
Use the ***Manage Lot Grades task*** *in the Setup and Maintenance work area to define grades that you can associate with a lot for quality control purposes. Grades are usually based on criteria such as color, size, or quality of the lot. For example, you can define lot grades such as excellent, average, or poor. Then, when you receive material that is in excellent condition, you can associate the lot grade of Excellent with the material. A grade is a characteristic of an item lot, and not a lot location.*

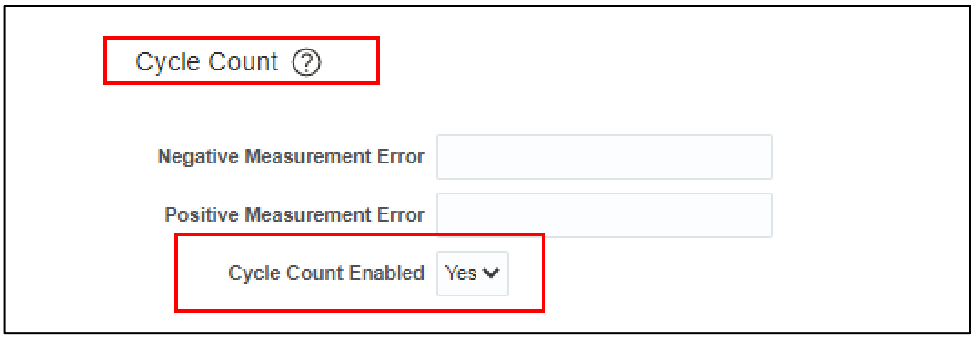
11. Scroll Down to **Serial** section:

Specifications (Tab)	
Item Organization: Inventory	
Serial	
Generation (*):	No serial number control
Starting Prefix :	-
Starting Number:	-

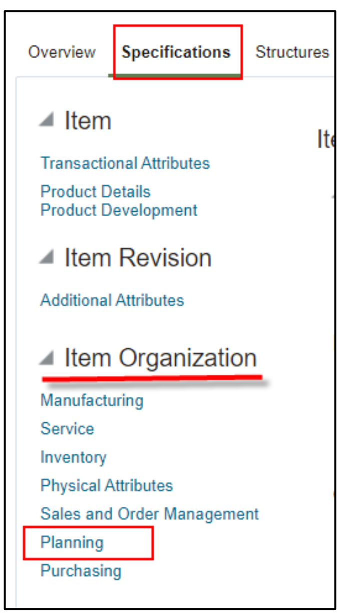
(*) You can use serial number control for specific items in your inventory. A serial number is an alphanumeric identifier that you assign to an individual unit of an item. For items under serial number control, you assign unique serial numbers to individual units and then reference the same serial numbers each time you perform material transactions. This lets you have tight control over every unit of every item in your inventory.

12. Scroll Down to **Cycle Count** section:

Specifications (Tab)	
Item Organization: Inventory	
Cycle Count	
Negative Measurement Error:	-
Positive Measurement Error :	-
Cycle Count Enable:	Yes

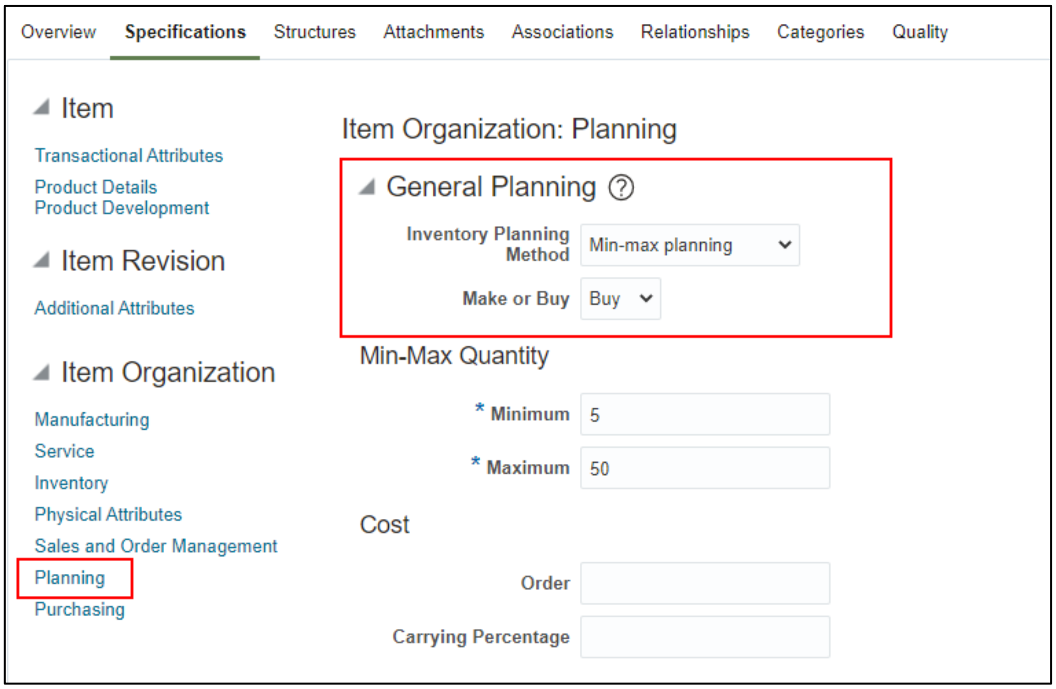


13. On the **Specifications** tab and go to **Item Organization Menu**, than click on **Planning** option:



14. Go to **General Planning** section:

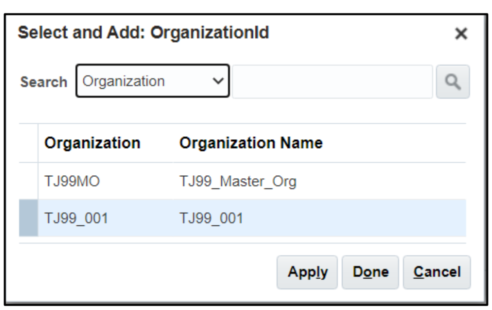
Specifications (Tab)	
Item Organization: Planning	
General Planning	
Inventory Planning Method:	Min-Max Planning
Make or Buy	Buy



15. On the **Specifications** tab and go to **Item Organization Menu**, than click on **Purchasing** option:

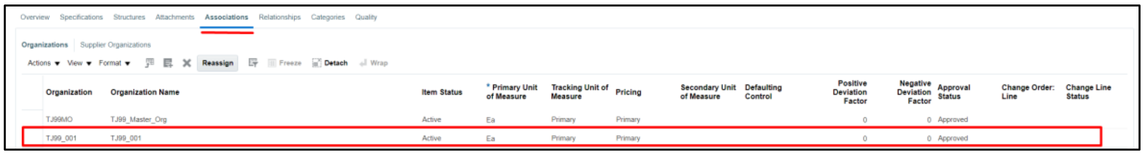
Specifications (Tab)	
Item Organization: Purchasing	
Purchased:	Yes
Purchasable:	Yes

16. Click on Associations → Click on Actions → Select and Add:

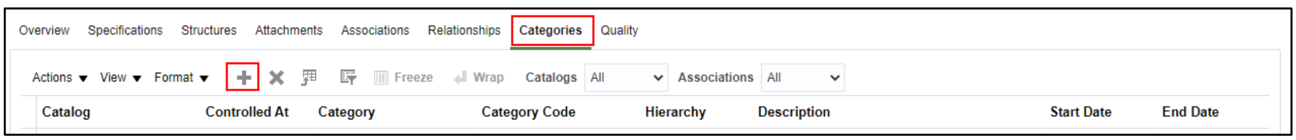


17. Select your inventory organization line → Apply → Done

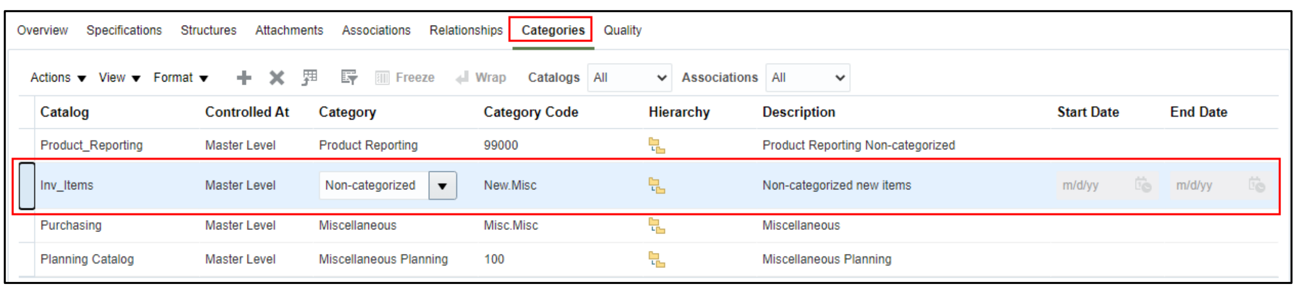
Associations (Tab)	
Organizations	
Select and Add: OrganizationId	Your inventory organization



18. Click on Categories and Click on (+) icon to add a new category:



Categories (Tab)	
Catalog:	Inv_Items
Category:	Non-categorized



19. Click on "Save" button

END

Fusion PIM: What Are The Pre-Requisite Setups For Creating Items (Doc ID 1417878.1)
https://docs.oracle.com/en/cloud/saas/supply-chain-management/20d/fapim/new-item-requests.html#FAPIM4093271
R13 : New Item Request And Change Order Workflow Management White Paper (Doc ID 1960108.1)
FA: SCM: OM: How Does Item Substitution Work In Fusion Order Management? (Doc ID 2188378.1)

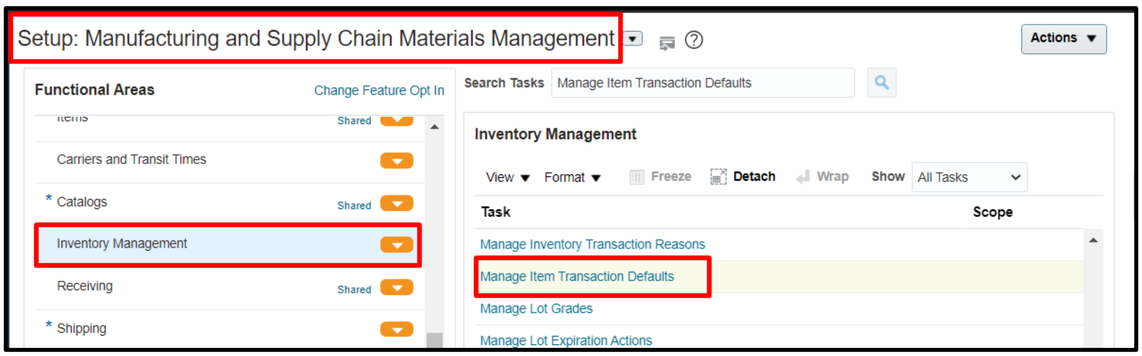
Hands-On: Define Item Transaction Default

In this practice and demonstration, you will be:

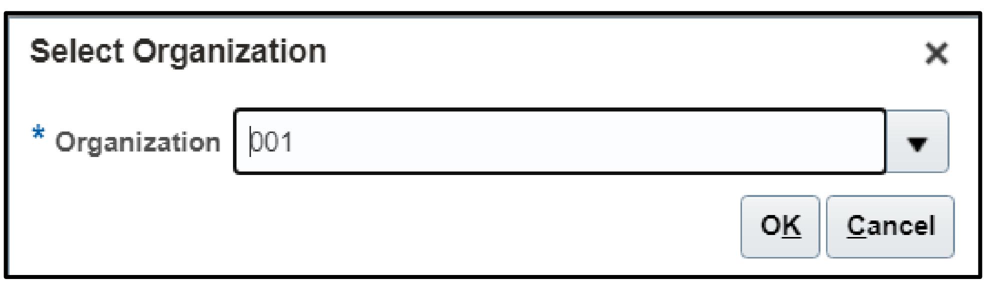
Scenario:	Define Item Transaction Default
Pre-Requirement:	None
Procedure:	Describe steps below
Expected outcome:	Item Transaction Default Created
Estimate Time to do:	10min

1. Navigate to:

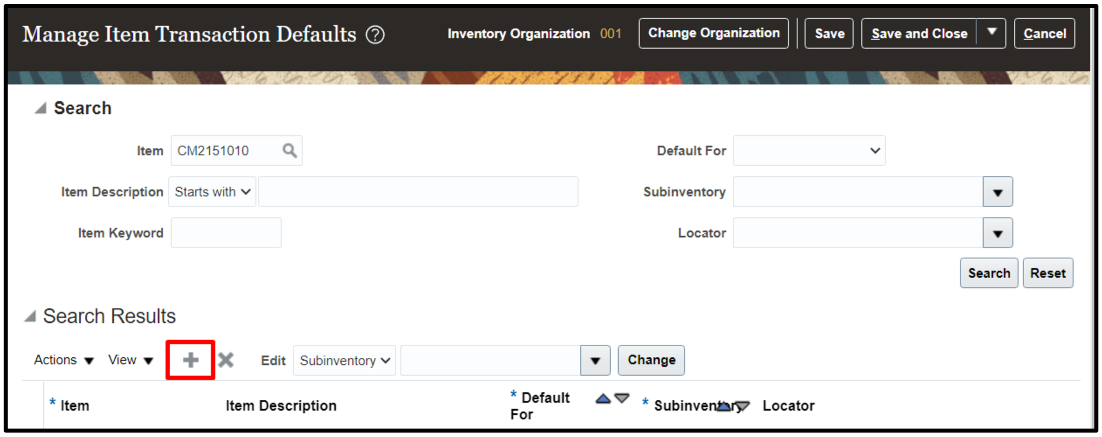
Others → Setup and Maintenance → **Setup:** Manufacturing and Supply Chain Materials Management → **Functional Areas:** Inventory Management → **Task:** Manage Item Transaction Defaults



2. Select your Organization (IO):



3. Click on "+" to create new register / line:

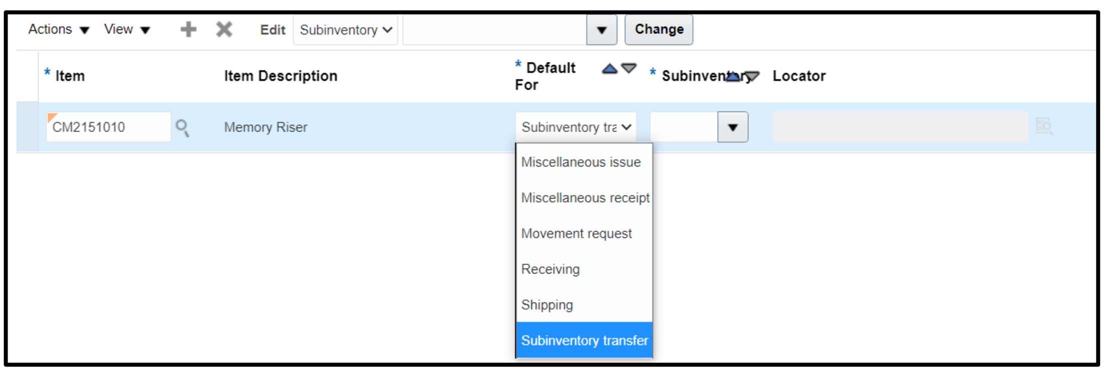


4. Enter the data:

Complete the fields below:

Item Default	
Item:	Your item
Item Description:	Your item description
Default For:	Your option / choice
SubInventory:	Your option / choice
Locator:	-

(*) An item transaction default specifies the default subinventory or locator for a specified item when the specified shipping or receiving transaction is performed on that item.



5. Save and Close

END

More Details:

FSM Import for Manage Item Transaction Defaults Has Not Finished for a Long Time (Doc ID 2634170.1)

FA:SCM:INV: How To Mass Upload Manage Item Transaction Defaults By Subinventory (Doc ID 2627257.1)

Fusion Inv: Using Functional Setup Manager Export/Import to Import Sub-Inventories, Locators for a Sub-Inventory, and add Items to a Sub-Inventory. (Doc ID 2203883.1)

Fusion INV: How To Import Item Transaction Default Data (Doc ID 2223360.1)

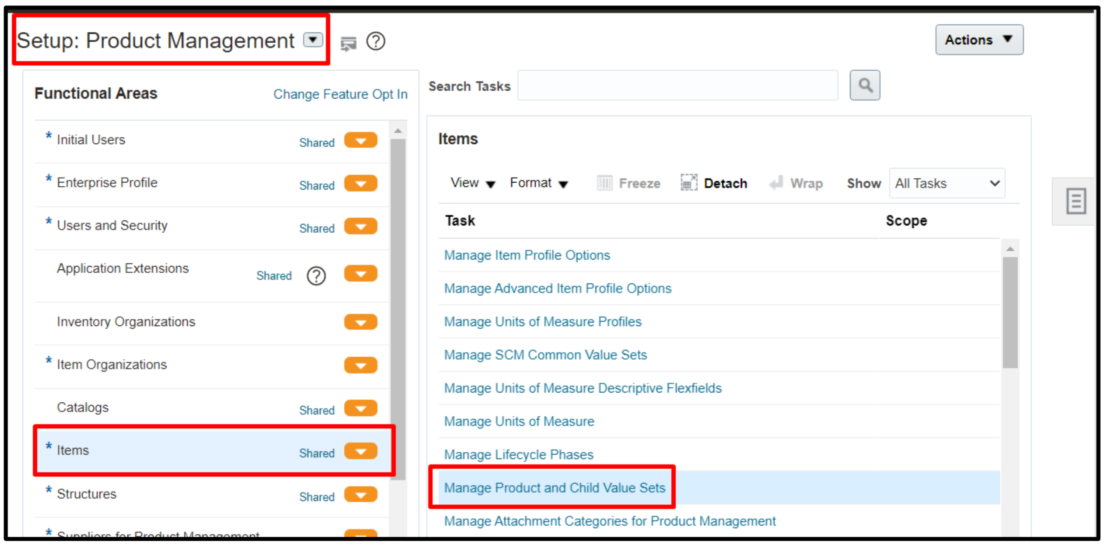
Hands-On: Define Item Attributes

In this practice and demonstration, you will be:

Scenario:	Define Item Attributes
Pre-Requirement:	None
Procedure:	Describe steps below
Expected outcome:	Define Item Attributes Defined
Estimate Time to do:	10min

1. Navigate to:

Others → Setup and Maintenance → **Setup:** Product Management → **Functional Areas:** Items → **Task:** Manage Product and Child Value Sets

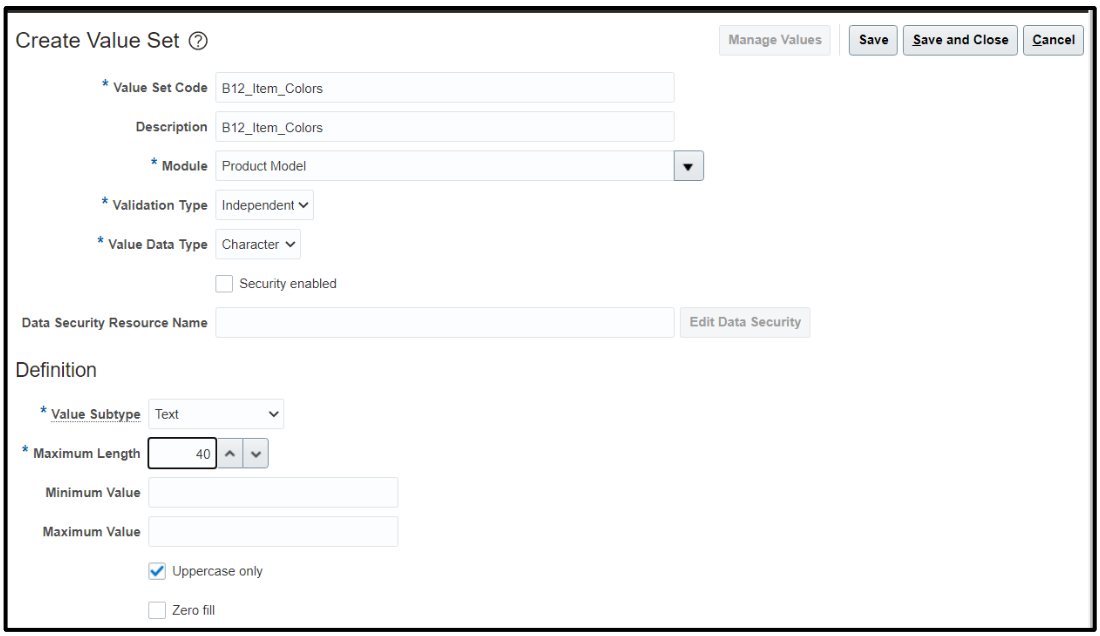


2. Click on "+" icon to create new line / register:

3. Enter the details:

Complete the fields below:

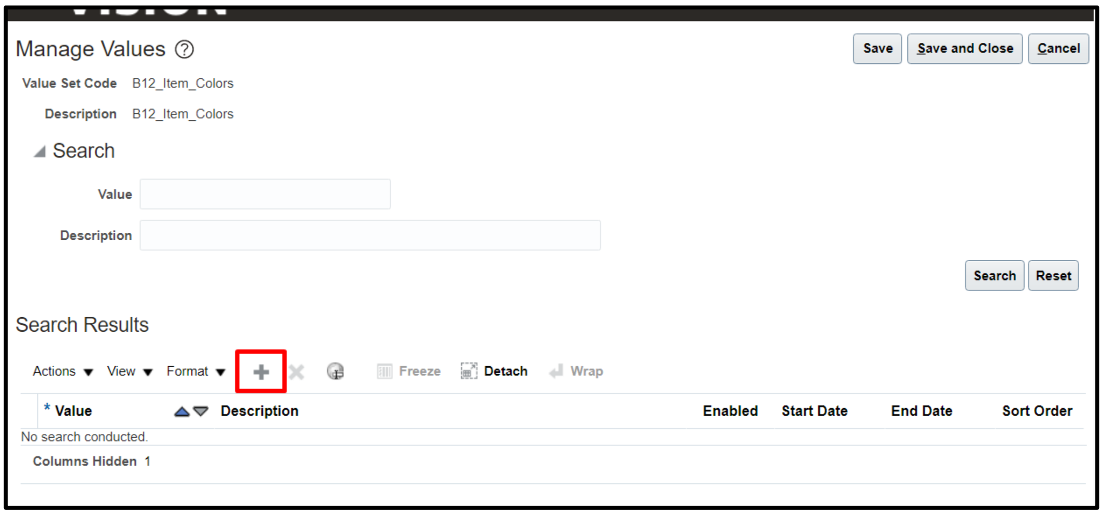
Create Value Set	
Value Set Code:	Name of Value Set
Description:	Your description
Module:	Product Model
Validation Type:	Independent
Value Data Type:	Character
Definition	
Value Subtype:	Text
Maximum Length:	40
Minimum Value:	-
Maximum Value:	-
Uppercase only:	Yes
Zero fill:	-



Click on "Save" button

4. Click on "Manage Values" button:

5. Click on "+" icon to create new lines:

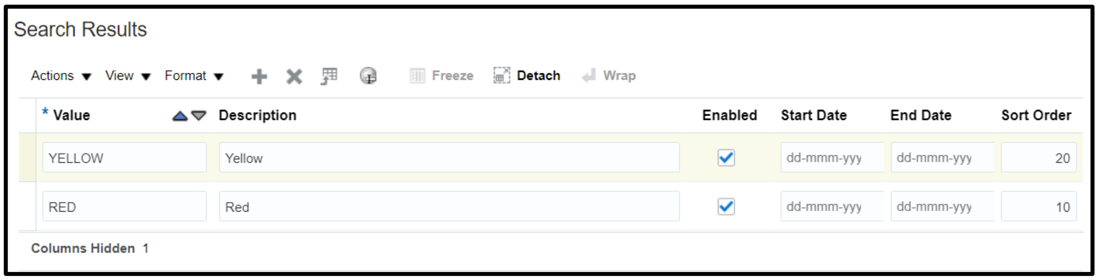


6. Enter the details:

Complete the fields below:

Value	
Value:	RED
Description:	Red

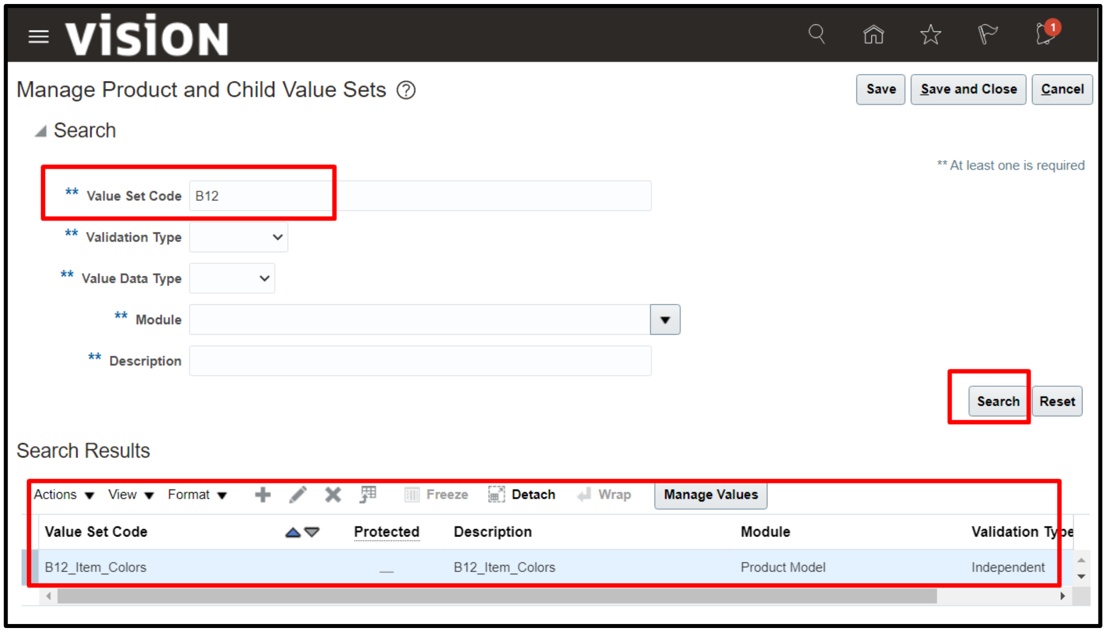
Value	
Value:	YELLOW
Description:	Yellow



Click on "Save and Close"

7. Click on "Save and Close" (Create Value Set Page)

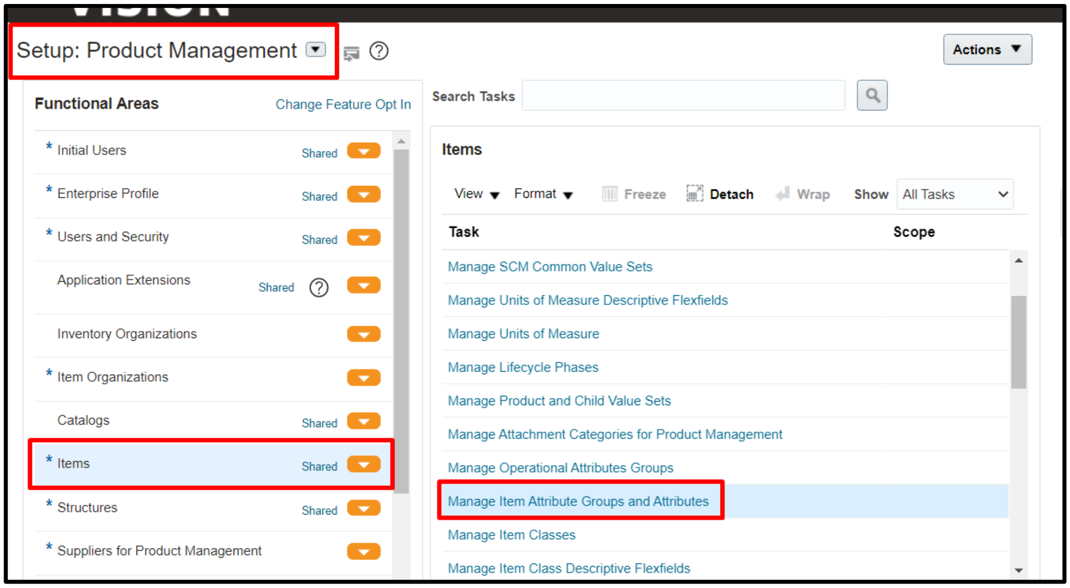
8. Search by your Value Set:



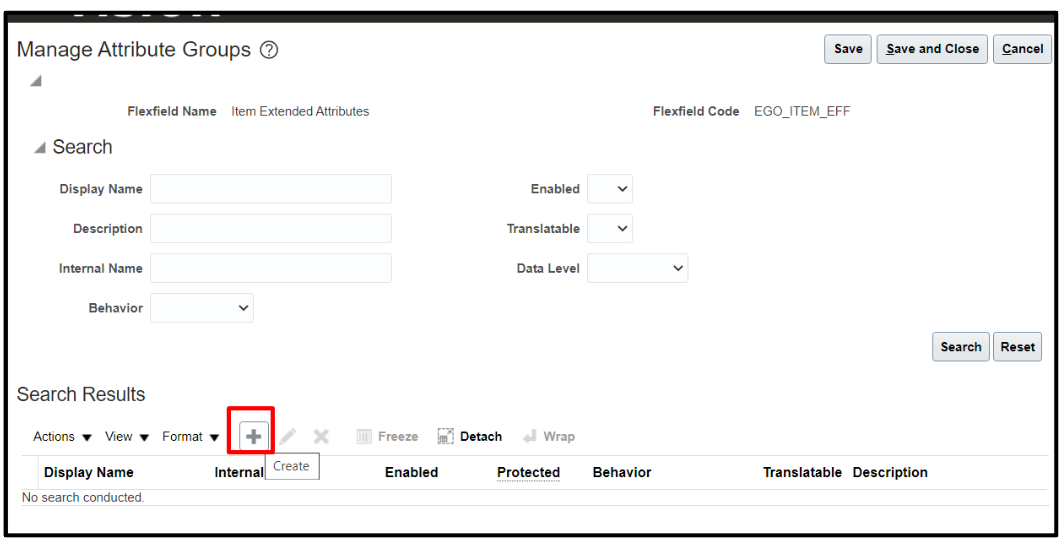
Click on “Save and Close” button

9. Navigate to:

Others → Setup and Maintenance → **Setup:** Product Management → **Functional Areas:** Items → **Task:** Manage Item Attribute Groups and Attributes



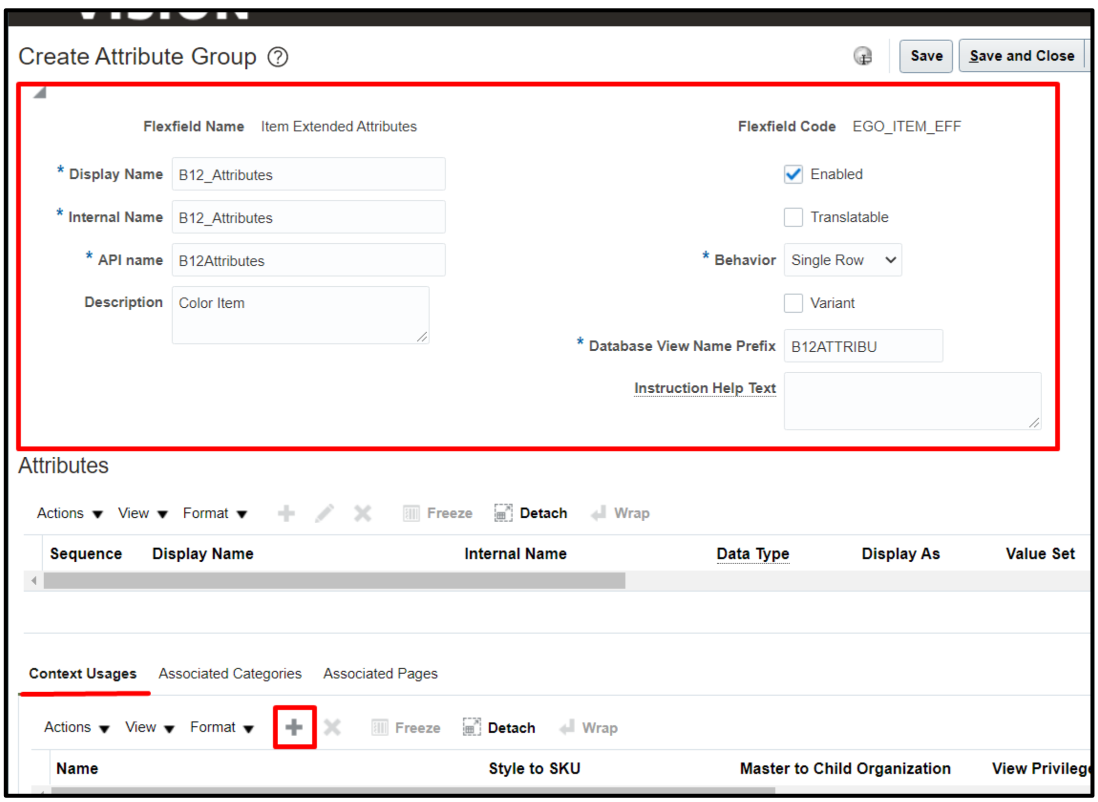
10. Click on "+" icon to create new register / line:



11. Enter the details:

Complete the fields below:

Create Attribute Group	
Display Name:	Your Attribute Group
Internal Name:	Your Attribute Group
API Name:	Your Attribute Group
Description:	Your Item Attribute
Flexfield Code:	EGO_ITEM_EFF
Enabled:	(x) Enabled
Translatable:	-
Behavior:	Single Row
Variant:	-
Database View Name Prefix:	Provided by system
Instruction Help Text:	-

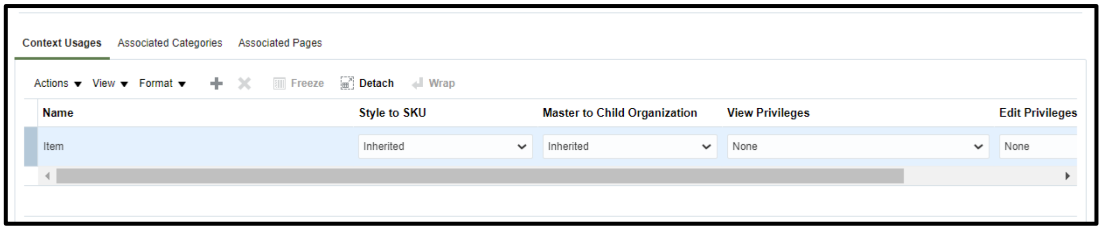


12. Scroll down to “Context Usages”, click on “+” icon to create new line / register:

Complete the fields below:

Context Usages	

Name:	Your Item Attribute
Style to SKU:	Inherited (Herdado)
Master to Child Organization:	Inherited (Herdado)
View Privileges:	None
Edit Privileges:	None



Name: *This selection indicates the entity that the attribute group is associated with;*

Style to SKU: *This selection controls how the attribute will be inherited or defaulted or not for style to SKU relationships;*

Master to Child Organization: *This selection controls how the attribute will be inherited or defaulted or not for master organization to child organization;*

View Privileges: *This selection indicates the privileges associated with viewing this attribute group and its details in the item user interface. None means that no data security is enabled for viewing the attribute group. As a result, all users can view it;*

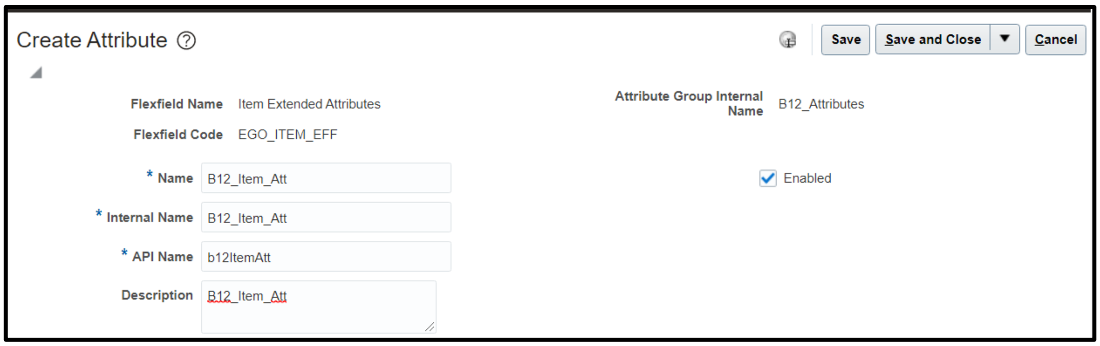
Edit Privileges: *This selection sets up the data security for extensible attributes. You must create the data grant and assign it to the context usage to enable data security for the attributes;*

13. Click on “Save” button

14. Come back to “Attributes” region, and click on “+” to create new line:

Complete the fields below:

Create Attribute	
Name:	Your item Class
Internal Name:	Your item Class
API Name:	Provided by system
Description:	Your Description



Column Assignment	
Data Type:	Character
Table Column:	ATTRIBUTE_CHAR1

Validation	
Value Set:	Your value set
Table Column:	ATTRIBUTE_CHAR1

Display Properties	
Prompt:	Your prompt value
Display type:	List of values

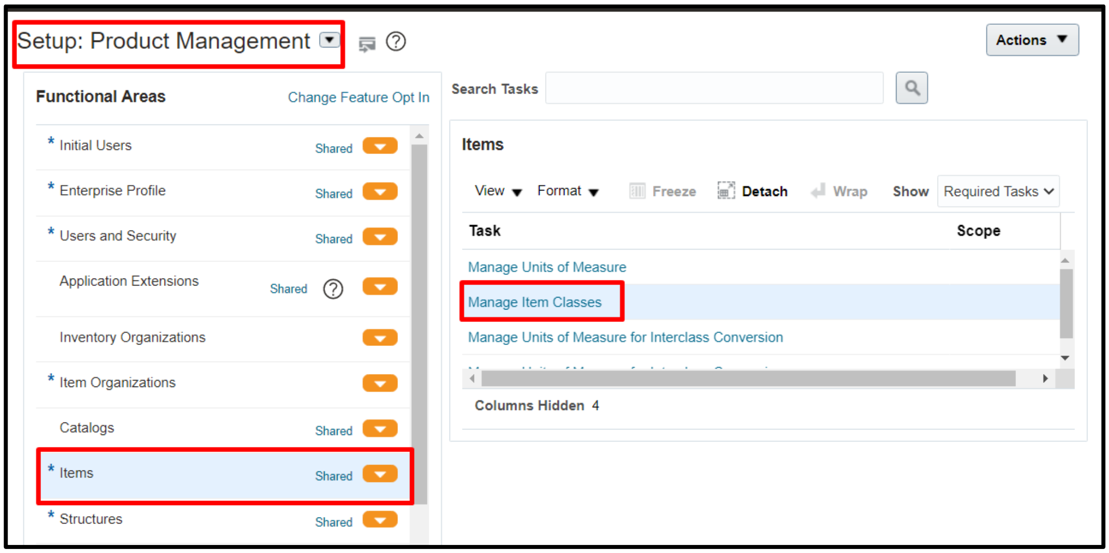
Click on “Save and Close” button

Click on “Save and Close” button (Edit Attribute Page)

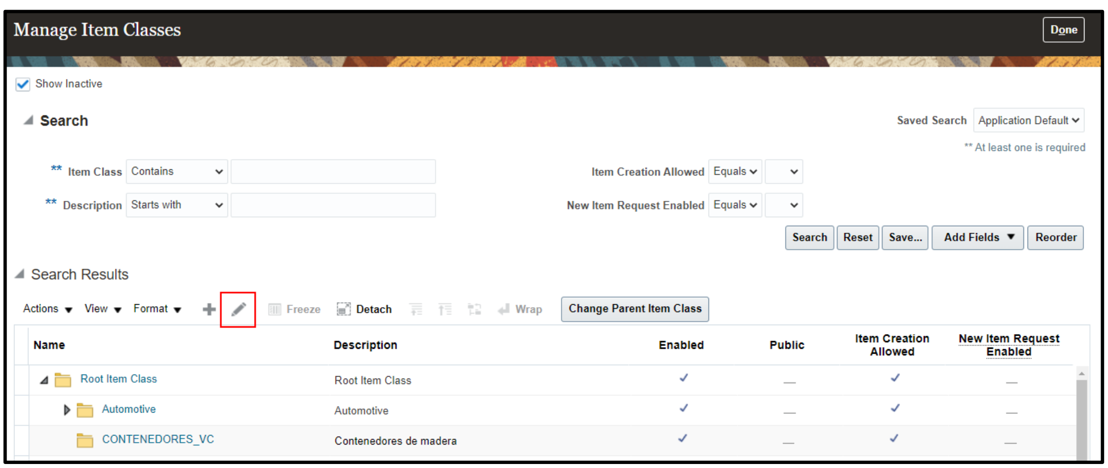
Click on “Save and Close” button (Manage Attribute Page)

15. Navigate to:

Others → Setup and Maintenance → **Setup:** Product Management → **Functional Areas:** Items → **Task:** Manage Item Classes



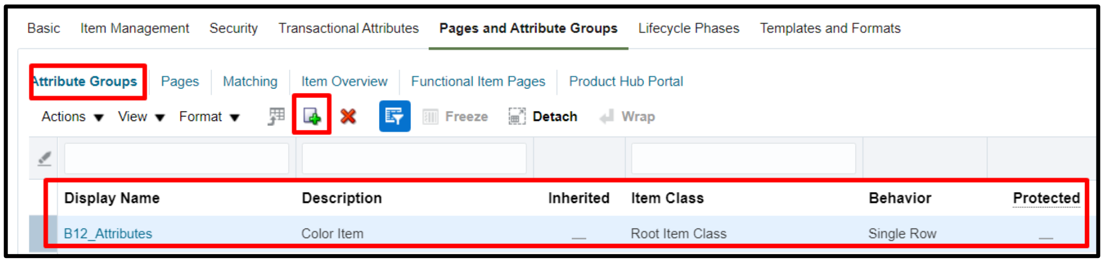
16. Select "your item class" and click on "Edit":



(*) Find and select the item class created by you previously.

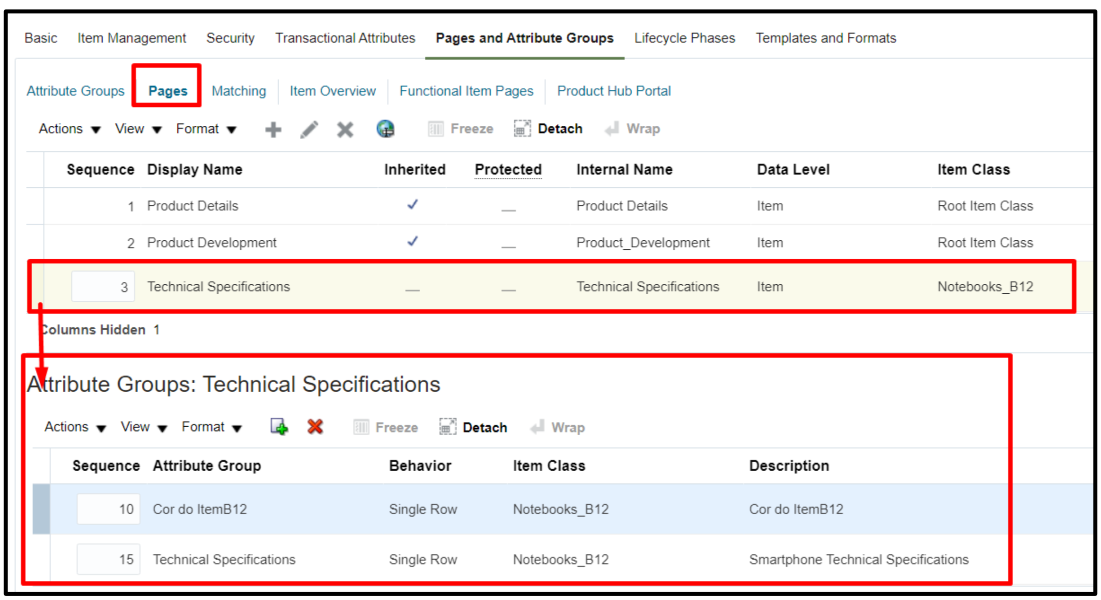
17. Select the "Pages and Attribute Group" tab:

18. On the "Attribute Group" search and add your attribute group done on step done 9-14:



Please, Save the data before move to next task!!

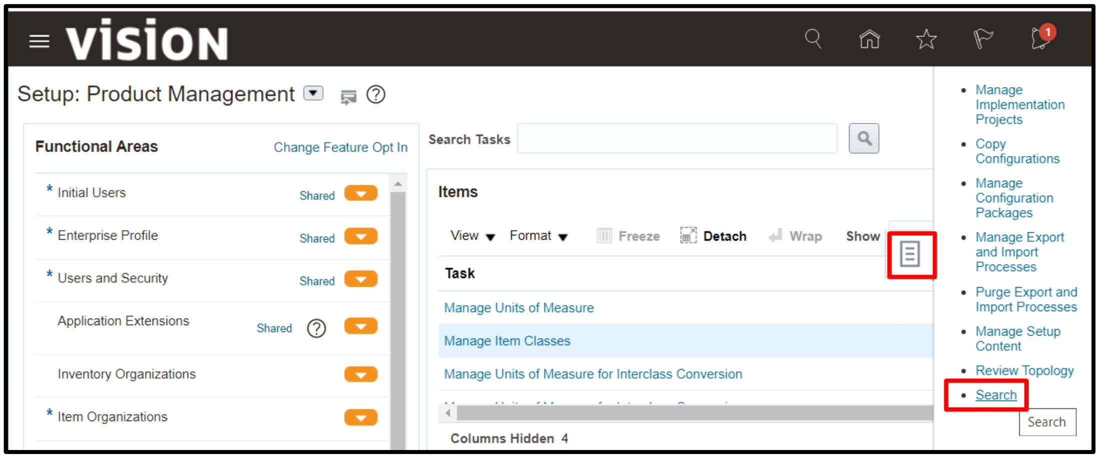
19. On the "Pages", it is possible include or create new Display Name and associate to Attribute Group:



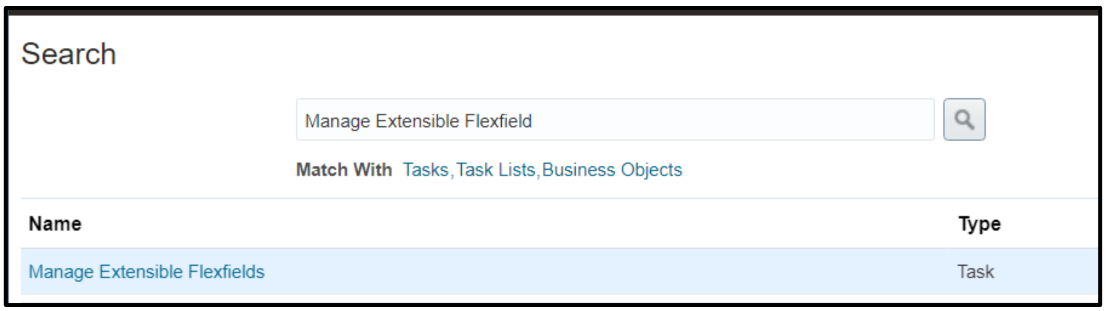
Click on "Save and Close"

20. Navigate to:

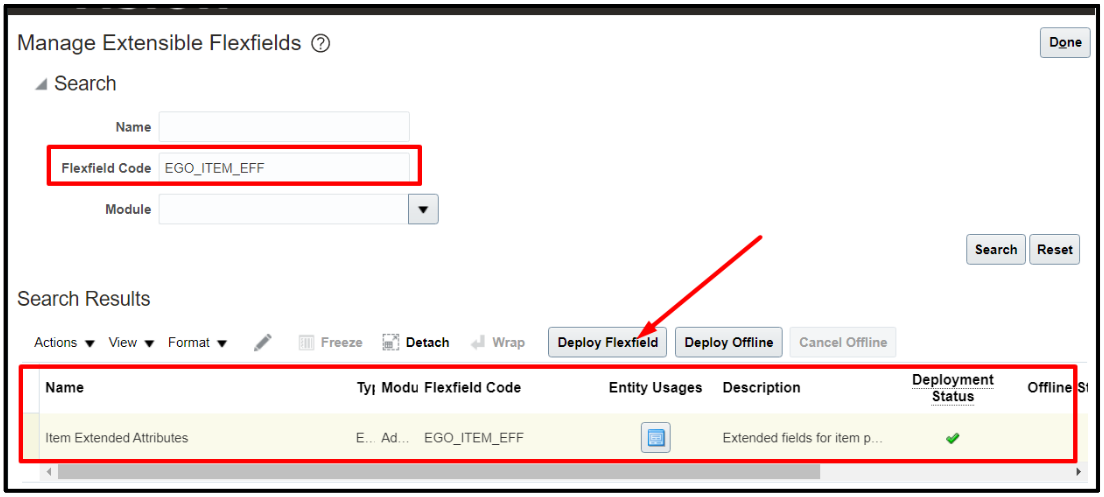
Others → Setup and Maintenance → **Tasks** → **Search**



21. Search by “Manage Extensible Flexfield”:

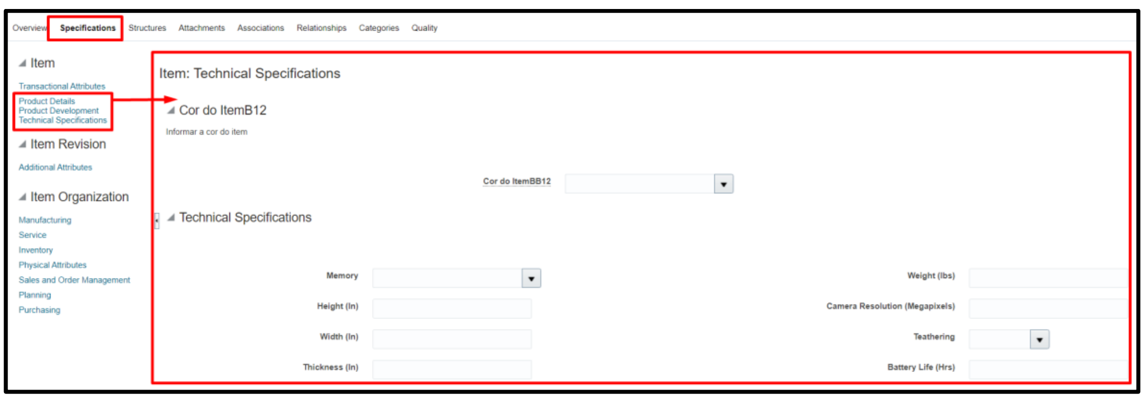


22. Search by “EGO_ITEM_EFF” flexfield code:

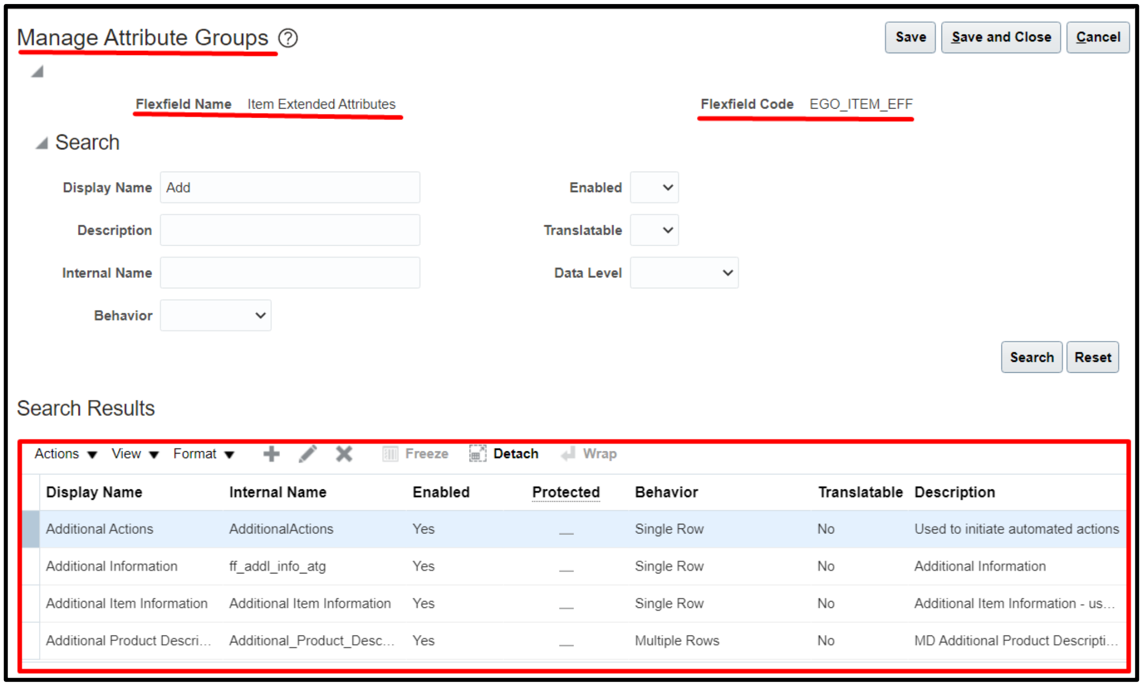


Click on “Deploy Flexfield”

23. Try create new item using your item class with this feature enabled and check if this new attribute is available:



24. Using the task Manage Item Attribute Groups and Attributes, is possible check the Item Extended Attributes created:



END

More Details:

Fusion PIM: Common Problems and Solutions - Product Item Creation / Definition (Doc ID 1391260.1)
How to Check EFF EGO_ITEM_EFF Deployment Attribute Errors (Doc ID 2052512.1)
User Defined Attribute Groups and Attributes (Extensible Flexfields-EFFs) Setup White Paper (Doc ID 1992317.1)
Fusion PIM: How to Create and Query Item Rule Sets (Doc ID 1376908.1)
Fusion PIM: How to Create Validation Rule Sets (Doc ID 1379318.1)
Fusion PIM: Operators and Syntax For Building Item Rule Expressions With Rule-Builder (Doc ID 1378719.1)
How to Setup Security for Item EFF attributes (Doc ID 2483167.1)
Fusion PIM - How the Item Class in Fusion is related to that of EBS? (Doc ID 1298029.1)
https://docs.oracle.com/en/cloud/saas/supply-chain-management/21a/faipr/items-and-documents.html#FAIPR3449814

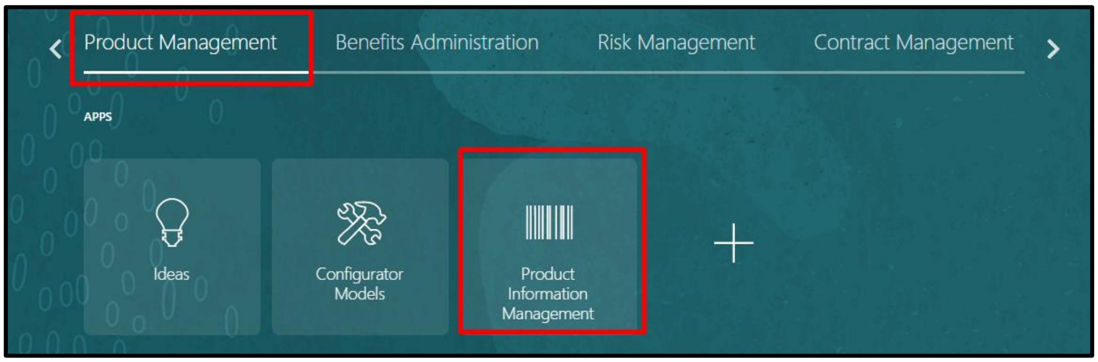
Hands-On: Define Lot and Serial Number

In this practice and demonstration, you will be:

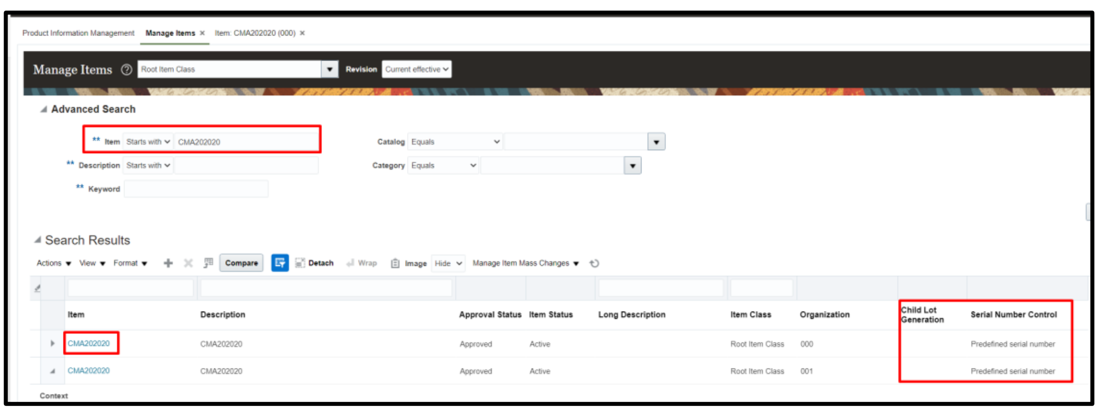
Scenario:	Define Lot and Serial Number
Pre-Requirement:	Inventory Organization Setup done on “Lot, Serial Number, and Packing Unit” tab
Procedure:	Describe steps below
Expected outcome:	Lot and Serial Number Defined
Estimate Time to do:	10min

1. Navigate to:

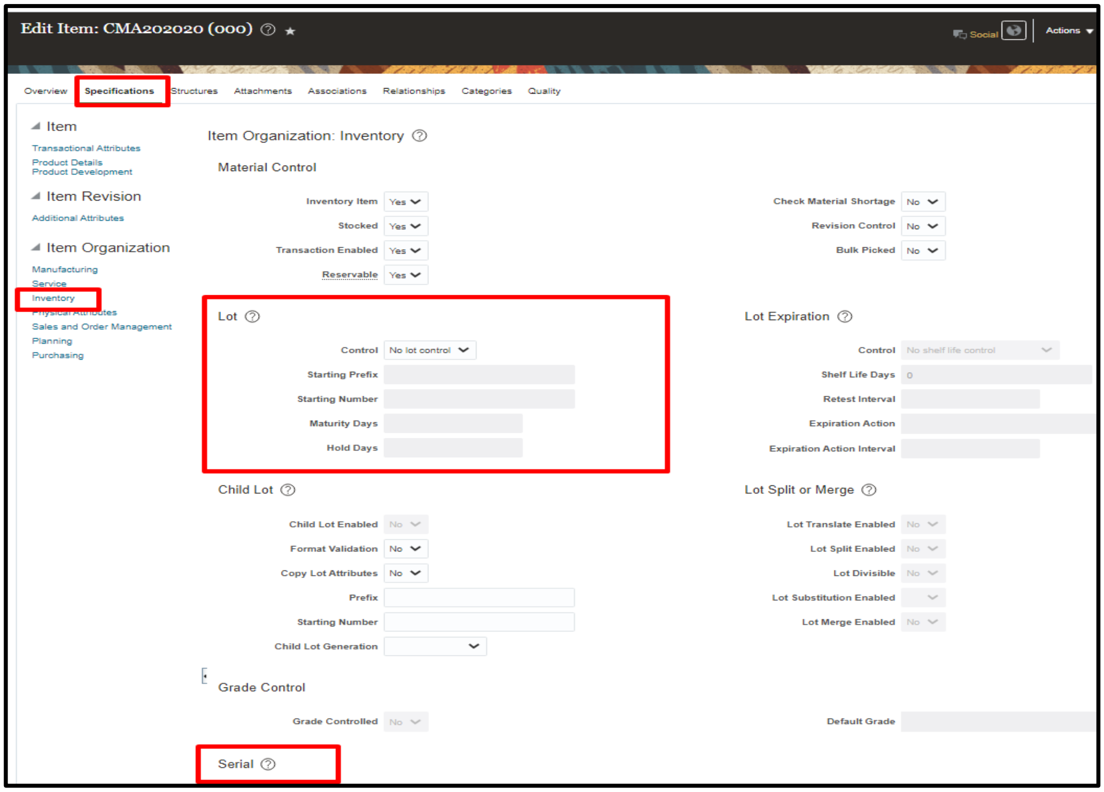
Springboard → Product Management → Product Information Management



2. Click on Tasks → Manage items → search by your item:



3. Click on Item that belong to your Item Master Org, go to Specifications tab → Inventory and check the Lot an Serial informations:



Check the Lot and Serial number generation attributes for a given inventory organization.

END

More Details:

Information Center: Fusion Applications Supply Chain Management (Doc ID 108.2)

Does Manual Procurement of Materials for Work Order Support Lot and Serial Control Items? (Doc ID 2571334.1)

Fusion INV : View Lot And Serial Number is disabled In Case Of Inbound Shipments (Doc ID 2538255.1)

Hands-On: Define Mapping Sets (Procurement / Receiving / Cost)

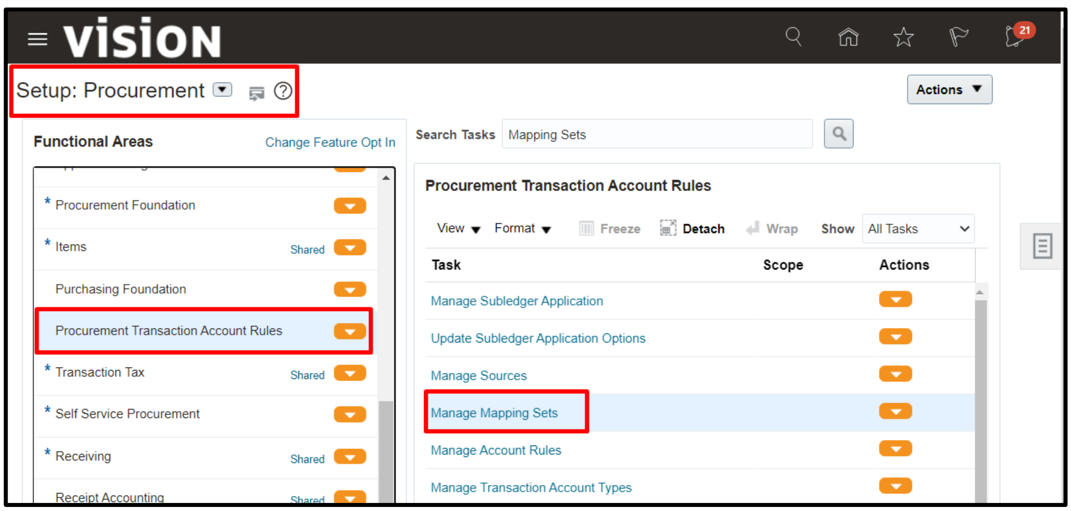
In this practice and demonstration, you will be:

Scenario:	Define Mapping Sets
Pre-Requirement:	None
Procedure:	Describe steps below
Expected outcome:	Mapping Sets Defined
Estimate Time to do:	30min

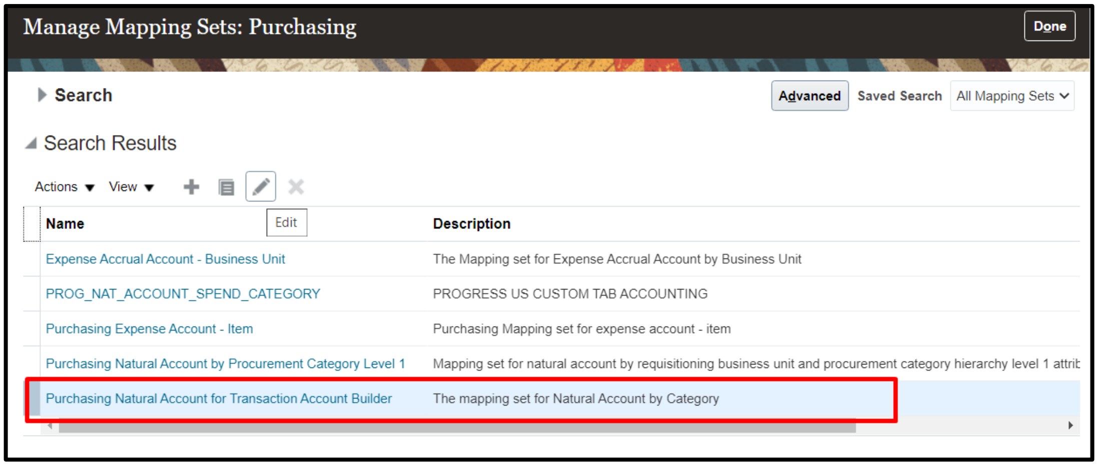
Procurement

1. Navigate to:

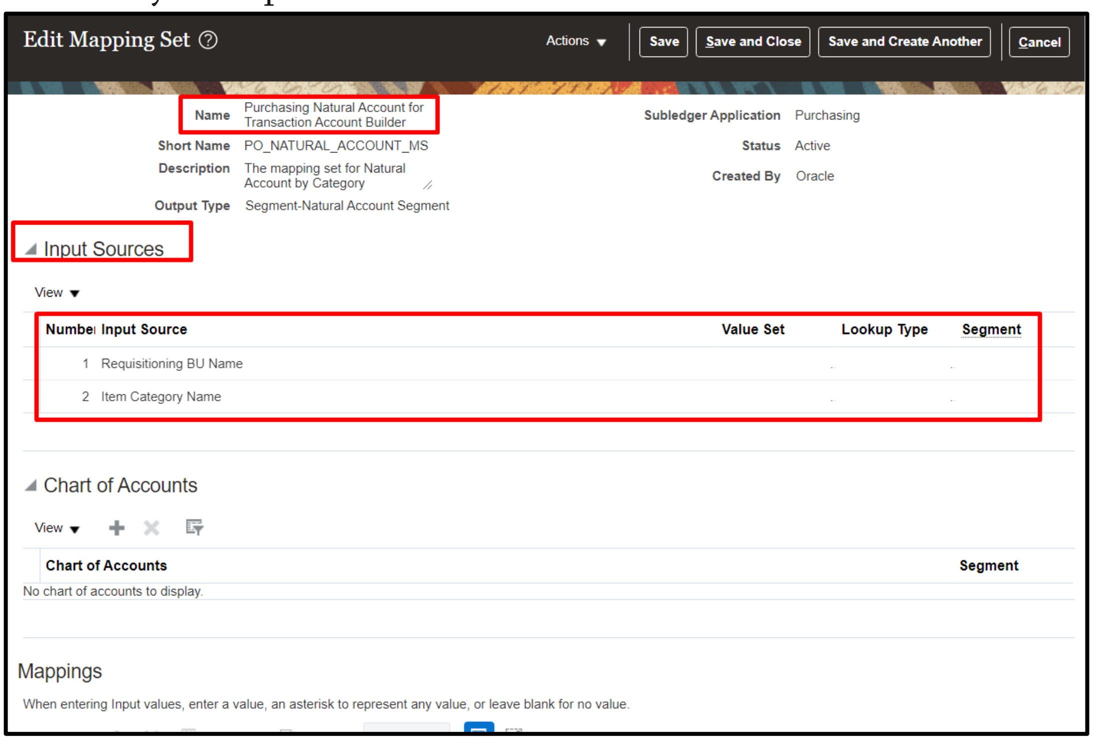
Others → Setup and Maintenance → **Setup:** Procurement → **Functional Areas:** Procurement Transaction Account Rules → **Task:** Manage Mapping Sets



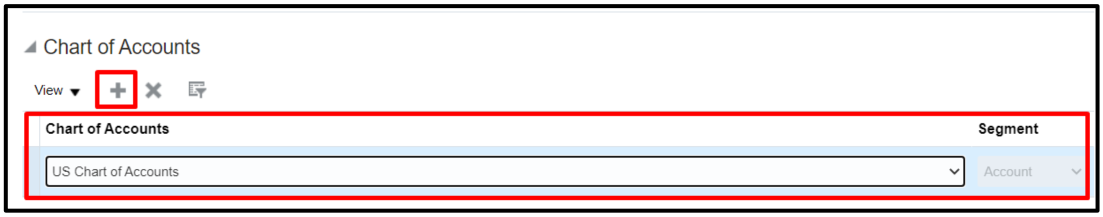
2. Select the name "Purchasing Natural Account for Transaction Account Builder", click on "edit":



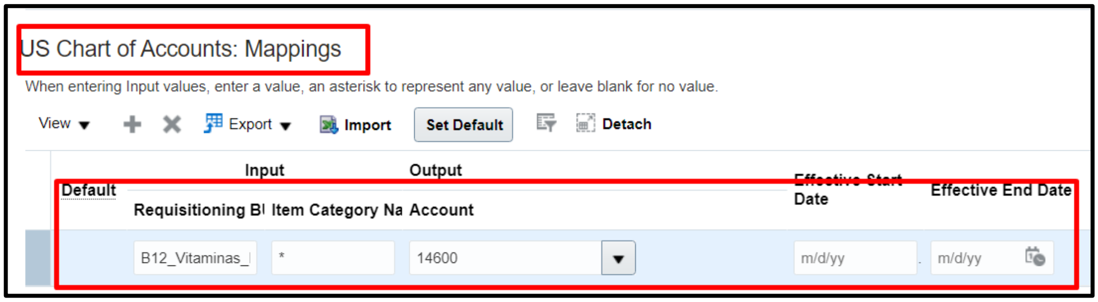
3. Check your input source:



4. Scroll down to "Chart of Accounts", include your Ledger:



5. Scroll down to "your ledger: Mappings", include your account information:



(*) the BU name must be exactly the same

(*) the IO Code must be exactly the same

6. Click on "Save and Close" button.

Repeat these steps for other mapping set names, like:

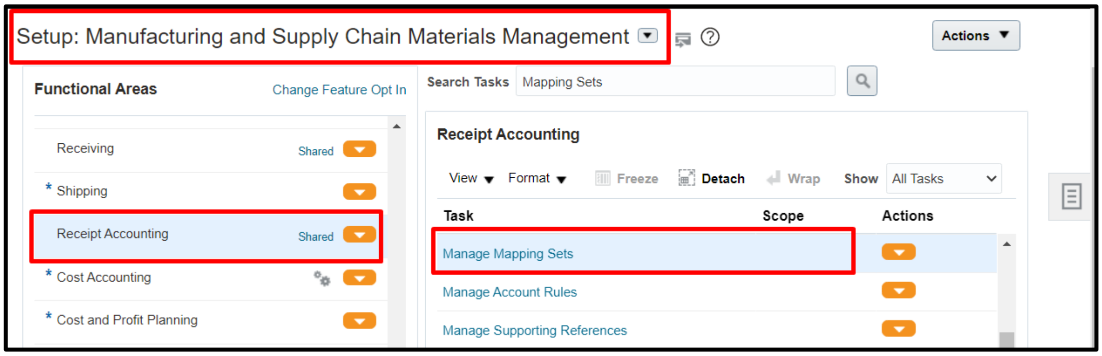
- Expense Accrual Account - Business Unit
- Purchasing Expense Account - Item

END Procurement

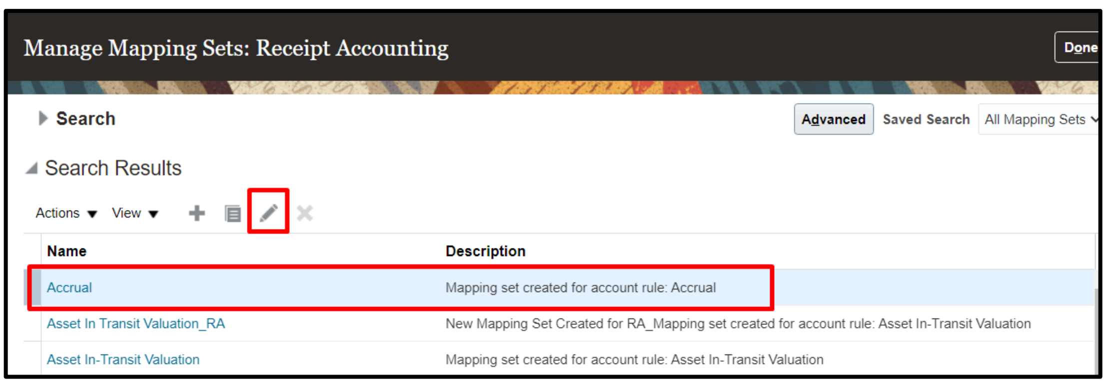
Receipt Accounting

7. Navigate to:

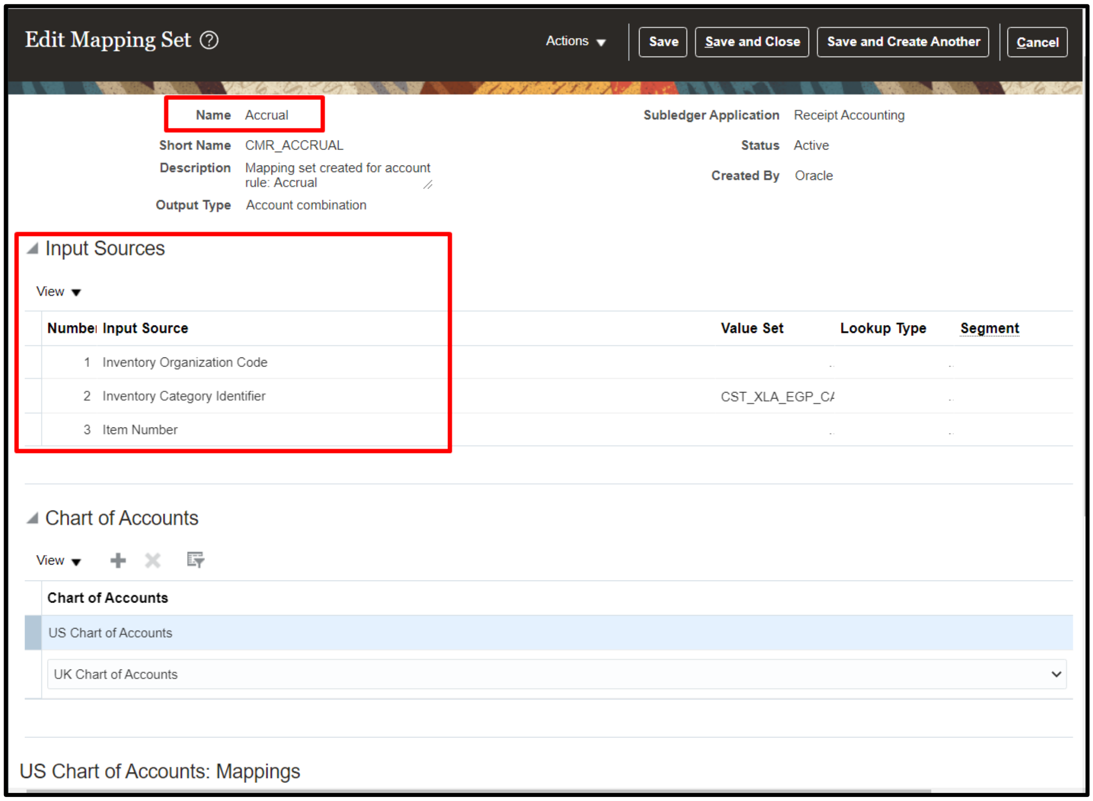
Others → Setup and Maintenance → **Setup:** Manufacturing and Supply Chain Materials Management → **Functional Areas:** Receipt Accounting → **Task:** Manage Mapping Sets



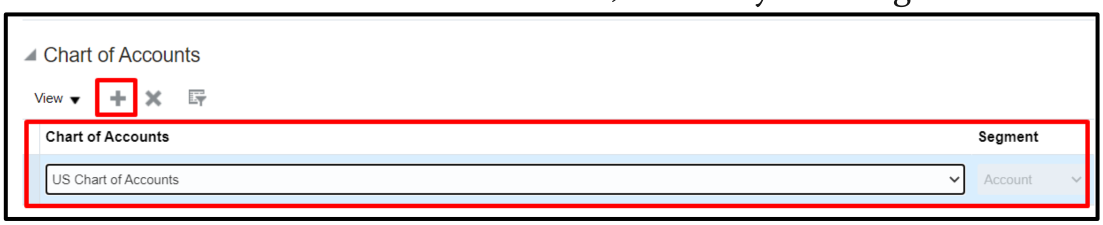
8. Select the name "Accrual", click on "edit":



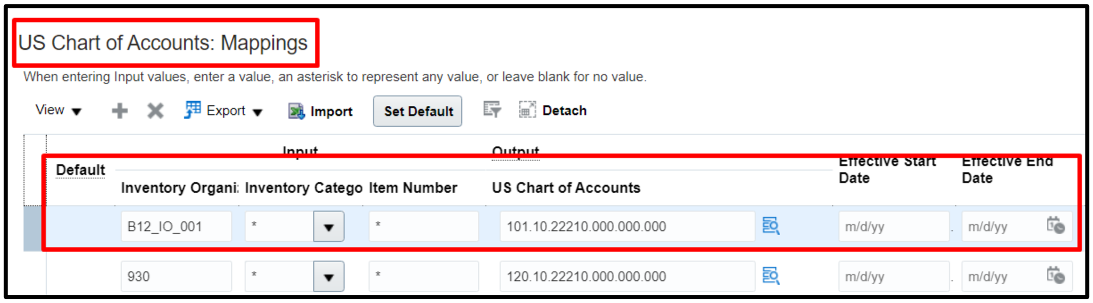
9. Check your input source:



10. Scroll down to "Chart of Accounts", include your Ledger:



11. Scroll down to "your ledger: Mappings", include your account information:



(*) the BU name must be exactly the same

(*) the IO Code must be exactly the same

12. Click on "Save and Close" button.

Repeat these steps for other mapping set names, like:

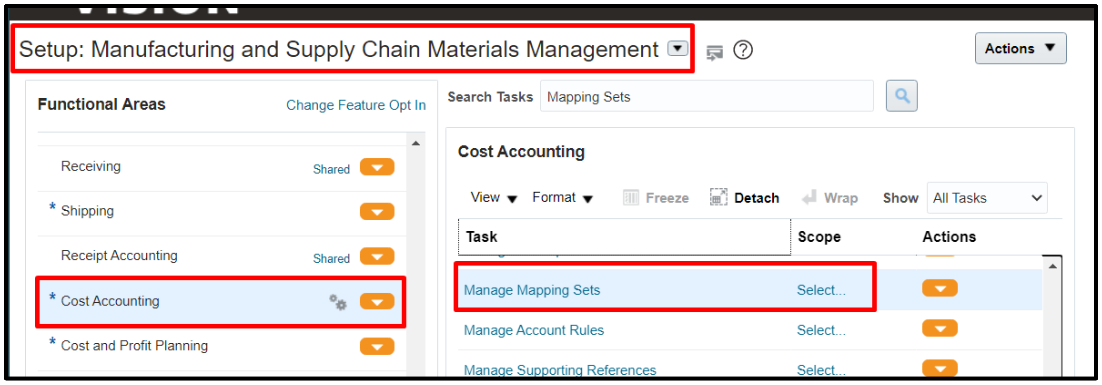
- Expense Accrual
- Expense
- Exchange Variance Adjustment
- Landed Cost Clearing
- Receiving Inspection

END Receipt Accounting

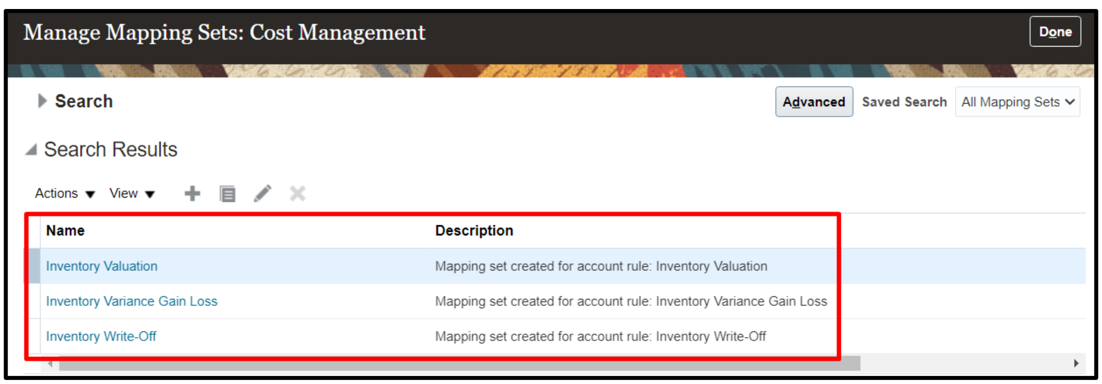
Cost Management

13. Navigate to:

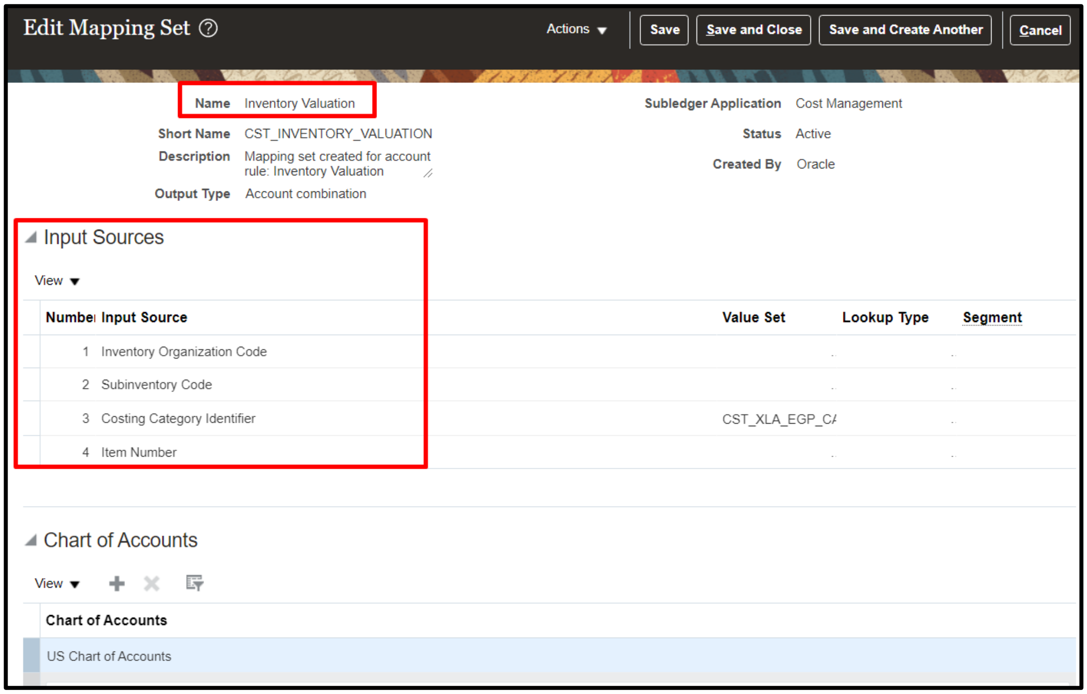
Others → Setup and Maintenance → **Setup:** Manufacturing and Supply Chain Materials Management → **Functional Areas:** Cost Accounting → **Task:** Manage Mapping Sets → **Scope:** Cost Management



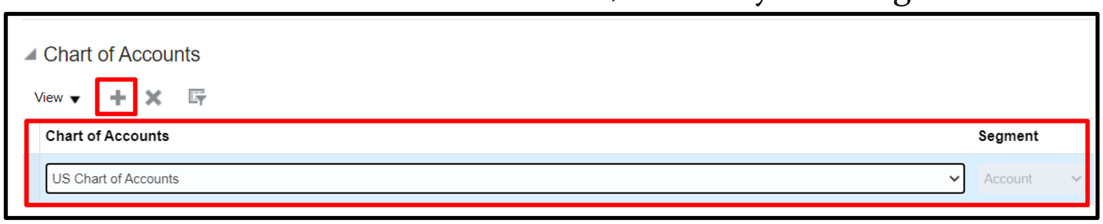
14. Select the name "Inventory", select the first line and click to edit:



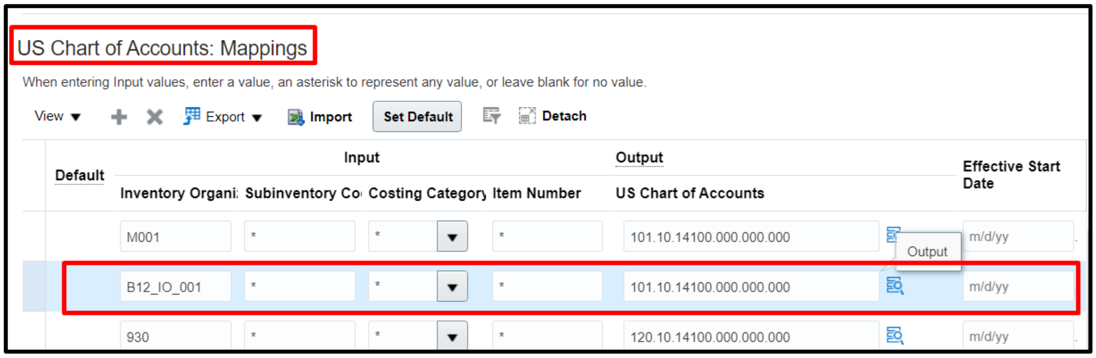
15. Check your input source:



16. Scroll down to "Chart of Accounts", include your Ledger:



17. Scroll down to "your ledger: Mappings", include your account information:



(*) the BU name must be exactly the same

(*) the IO Code must be exactly the same

18. Click on "Save and Close" button.

Repeat these steps for other mapping set names, like:

- Accrual Account – Organization
- Cost Of Goods Sold
- Cost Variance
- Deferred Cost of Goods Sold
- Deferred RMA Gain Loss
- Inventory Valuation
- Inventory Variance Gain Loss
- Inventory Write-Off
- Invoice Price Variance Account – Organization
- Material Account – Subinventory
- Offset
- Receiving Inspection
- Work Order
- WIP Valuation

END Cost Management

END

More Details:

How To create and update Mapping Sets in SLA (Doc ID 2333059.1)
How To Define SLA Setups and Run Create Accounting For Receipt Accounting (Doc ID 2383228.1)
FA:SCM:CST: Cost Management SLA Master KM (Doc ID 2584557.1)