

# **11i Integrating Oracle Process Manufacturing with Advanced Supply Chain Planning**

**Student Guide**

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# Preface

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## Profile

### Before You Begin This Course

Before you begin this course, you should have the following qualifications:

- Thorough knowledge of manufacturing planning.
- Working experience with the following OPM modules:
  - System Administration
  - Inventory Management
  - Formula Management
  - Production Management
  - Material Requirements Planning (MRP)/Master Production Scheduling (MPS) and Forecasting

### Prerequisites

- 11i Oracle Process Manufacturing Foundation (14827GC11) (ILT)
- 11i Oracle Process Manufacturing Material Requirements Planning (14750GC12) (ILT)
- Oracle Advanced Planning and Scheduling (APS) Release 11i (14278GC10) (ILT)

### How This Course Is Organized

*11i Integrating Oracle Process Manufacturing with Advanced Supply Chain Planning* is an instructor-led course featuring lecture and hands-on exercises. Online demonstrations and written practice sessions reinforce the concepts and skills introduced.

## **Related Publications**

### **Oracle Publications**

#### **Title**

Oracle Process Manufacturing System Administration User's Guide, part number A77212-03

Oracle Process Manufacturing Formula Management User's Guide, part number A77221-02

Oracle Process Manufacturing Inventory Management User's Guide, part number A77228-03

Oracle Process Manufacturing Production Management User's Guide, part number A77372-02

Oracle Process Manufacturing MPS/MRP and Forecasting User's Guide, part number A81329-01

Oracle Process Manufacturing Integration with Advanced Planning and Scheduling User's Guide, part number A81002-01

Oracle Advanced Supply Chain Planning and Global ATP Server User's Guide, part number A81011-01

# Typographic Conventions

## Typographic Conventions in Text

Convention	Element	Example
Bold italic	Glossary term (if there is a glossary)	The <b><i>algorithm</i></b> inserts the new key.
Caps and lowercase	Buttons, check boxes, triggers, windows	Click the Executable button. Select the Can't Delete Card check box. Assign a When-Validate-Item trigger to the ORD block. Open the Master Schedule window.
Courier new, case sensitive (default is lowercase)	Code output, directory names, filenames, passwords, pathnames, URLs, user input, usernames	Code output: <code>debug.set ('I', 300);</code> Directory: <code>bin (DOS), \$FMHOME (UNIX)</code> Filename: Locate the <code>init.ora</code> file. Password: User <code>tiger</code> as your password. Pathname: Open <code>c:\my_docs\projects</code> URL: Go to <code>http://www.oracle.com</code> User input: Enter <code>300</code> Username: Log on as <code>scott</code>
Initial cap	Graphics labels (unless the term is a proper noun)	Customer address ( <i>but</i> Oracle Payables)
Italic	Emphasized words and phrases, titles of books and courses, variables	Do <i>not</i> save changes to the database. For further information, see <i>Oracle7 Server SQL Language Reference Manual</i> . Enter <code>user_id@us.oracle.com</code> , where <i>user_id</i> is the name of the user.
Quotation marks	Interface elements with long names that have only initial caps; lesson and chapter titles in cross-references	Select "Include a reusable module component" and click Finish.  This subject is covered in Unit II, Lesson 3, "Working with Objects."
Uppercase	SQL column names, commands, functions, schemas, table names	Use the SELECT command to view information stored in the <code>LAST_NAME</code> column of the EMP table.

Convention	Element	Example
------------	---------	---------

Arrow	Menu paths	Select File-> Save.
Brackets	Key names	Press [Enter].
Commas	Key sequences	Press and release keys one at a time: [Alternate], [F], [D]
Plus signs	Key combinations	Press and hold these keys simultaneously: [Ctrl]+[Alt]+[Del]

## Typographic Conventions in Code

Convention	Element	Example
Caps and lowercase	Oracle Forms triggers	When-Validate-Item
Lowercase	Column names, table names	SELECT last_name FROM s_emp;
	Passwords	DROP USER scott IDENTIFIED BY tiger;
	PL/SQL objects	OG_ACTIVATE_LAYER (OG_GET_LAYER ( 'prod_pie_layer' ))
Lowercase italic	Syntax variables	CREATE ROLE <i>role</i>
Uppercase	SQL commands and functions	SELECT userid FROM emp;

## Typographic Conventions in Navigation Paths

This course uses simplified navigation paths, such as the following example, to direct you through Oracle Applications.

(N) Invoice > Entry > Invoice Batches Summary (M) Query > Find (B) Approve

This simplified path translates to the following:

1. (N) From the Navigator window, select Invoice > Entry > Invoice Batches Summary.
2. (M) From the menu, select Query > Find.
3. (B) Click the Approve button.

### Notations :

(N) = Navigator

(M) = Menu



(T) = Tab

(I) = Icon

(H) = Hyperlink

(B) = Button

## **Typographical Conventions in Help System Paths**

This course uses a “navigation path” convention to represent actions you perform to find pertinent information in the Oracle Applications Help System.

The following help navigation path, for example—

(Help) General Ledger > Journals > Enter Journals

—represents the following sequence of actions:

1. In the navigation frame of the help system window, expand the General Ledger entry.
2. Under the General Ledger entry, expand Journals.
3. Under Journals, select Enter Journals.
4. Review the Enter Journals topic that appears in the document frame of the help system window.

## **Getting Help**

Oracle Applications provides you with a complete online help facility.

Whenever you need assistance, simply choose an item from the Help menu to pinpoint the type of information you want.

### **To display help for a current window:**

1. Choose Window Help from the Help menu, click the Help button on the toolbar, or hold down the Control key and type 'h'.

A web browser window appears, containing search and navigation frames on the left, and a frame that displays help documents on the right.

The document frame provides information on the window containing the cursor. The navigation frame displays the top-level topics for your responsibility, arranged in a tree control.

2. If the document frame contains a list of topics associated with the window, click on a topic of interest to display more detailed information.
3. You can navigate to other topics of interest in the help system, or choose Close from your web browser's File menu to close help.

## **Searching for Help**

You can perform a search to find the Oracle Applications help information you want. Simply enter your query in the text field located in the top-left frame of the browser window when viewing help, then click the adjacent Find button.

A list of titles, ranked by relevance and linked to the documents in question, is returned from your search in the right-hand document frame. Click on whichever title seems to best answer your needs to display the complete document in this frame. If the document doesn't fully answer your questions, use your browser's Back button to return to the list of titles and try another.

# **Course Introduction**

## **Chapter 1**

# Course Introduction

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### Course Objectives

**After completing this course, you should be able to do the following:**

- **Construct Oracle Process Manufacturing data for use in Advanced Supply Chain Planning (ASCP)**
- **Set up and use OPM data**
- **Set up data in other Oracle Applications modules**
- **Implement plans in OPM**

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## Advantages of Using ASCP

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### Advantages of Using ASCP

- **Constrained and optimized planning**
- **Performance management**
- **One global plan**
- **Multiple instances**
- **Mixed-mode manufacturing**
- **Available to promise (ATP), capable to promise (CTP), and capable to deliver (CTD) functionality (in future)**

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### Advantages of Using ASCP with OPM

When you integrate with Oracle Advanced Supply Chain Planning (ASCP), you gain substantial competitive advantage and planning efficiency. The following features contribute to these advantages:

Constrained and optimized planning, which ensures that your plan is feasible and respects all of your constraints

- Performance management when you integrate ASCP with Oracle Business Intelligence System and Oracle Workflow:
  - Easily and quickly evaluate a plan based on its impact on target key performance indicators (KPIs)
  - Manage by exception: receive notifications when corrective actions are required
- Planning for all supply chain activities in one global plan, which reduces inventory and improves responsiveness.
- Collecting data from multiple instances, such as 10.7, 11.0, 11i, and OPM 11i.
- Mixed-mode manufacturing, so you can choose the best method to produce each of your products, and combine all of these methods within the same plant
- Available to promise (ATP), capable to promise (CTP), and capable to deliver (CTD) functionality will be available after OPM becomes integrated with Oracle Order Management.

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## Advantages of Using ASCP

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**Advantages of Using ASCP**

- **Optimization**
  - Inventory turns
  - Plan profit
  - On time delivery
- **Penalty costs**

**%**      **x**           **=**

Penalty factor      Variable      Penalty cost

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### Advantages of Using APCP with OPM

**Optimization:** You can optimize your plans to financial and other enterprise-strategic objectives. Because you can name and save your plans, you can run several plans optimized to different sets of objectives, then use the Planner Workbench graphical user interface to quickly compare key performance indicators and action messages associated with alternative plans.

**Penalty Costs:** ASCP also has some built-in optimization objectives, such as weighing the penalty costs of late orders against expedited production and delivery costs. You can affect the solution by entering penalty factors, applied as a percent of cost. The optimization process attempts to drive costs out of the solution, and drives out the most costly factors first.

### Setting Up OPM Data

- Organizations
- Items
- Warehouses
- Formulas, routings, and effectivities
- Resources
- Master Production Scheduling (MPS) schedules
- Production and sales orders, forecasts, and on-hand inventory
- Plant-warehouse relationships

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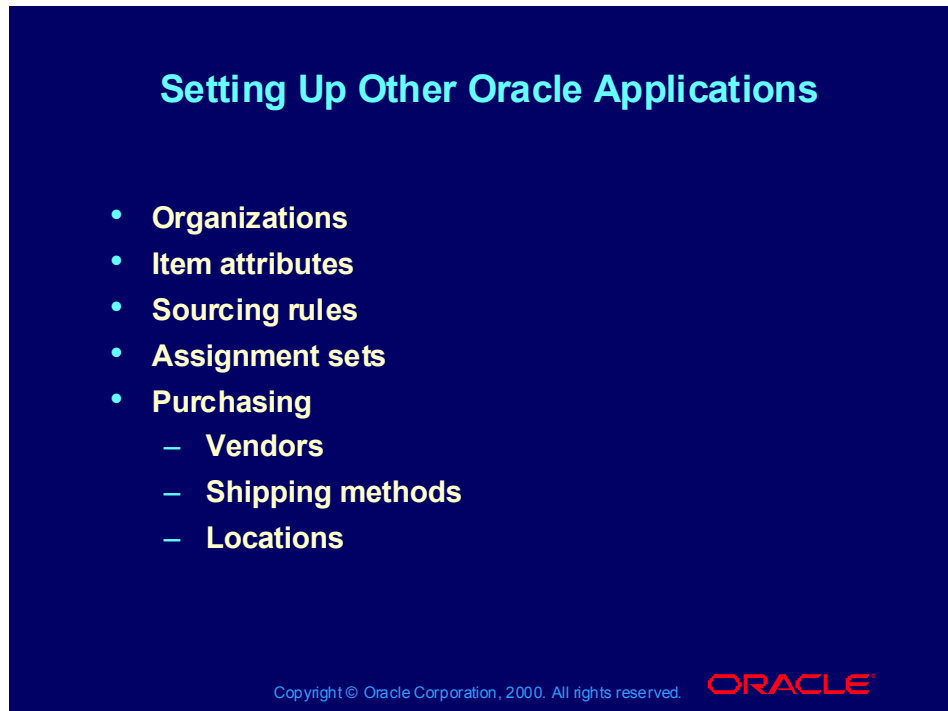
### Setup Requirements for Mapping OPM Data to ASCP

Using APS puts certain restrictions on how you set up OPM data. This course explains the restrictions placed on the above setup data.



## Setting Up Other Oracle Applications

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**Setting Up Other Oracle Applications**

- Organizations
- Item attributes
- Sourcing rules
- Assignment sets
- Purchasing
  - Vendors
  - Shipping methods
  - Locations

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### Oracle Applications Setup Requirements

The Oracle Applications data shown above must be set up for OPM to interface properly with ASCP.

## Describing OPM Functional Changes

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### Describing OPM Functional Changes

- No need to execute Process Material Requirements Planning
- Third-party software for finite scheduling no longer needed
- Planning rules no longer set up in OPM
- All planning activities can occur on a separate server
- No longer restricted to a material plan

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### Planning Changes in OPM

If you have no need for finite scheduling, then you do not need to change your method of planning. You can continue to use the OPM Process Planning modules in release 11i the same way as you have in release 11, unless you want to use the finite scheduling functionality available in the Advanced Planning and Scheduling modules.

If you choose to use ASCP, you should make the following changes:

- Set up your planning rules in ASCP instead of OPM.
- Purchase a separate server for all planning activities. Purchasing a separate server is not mandatory, but it is recommended due to the heavy processing load created with ASCP.
- Create multiple plans using different scenarios, then decide which plan to use.

# **Constructing OPM Data for Use in ASCP**

## **Chapter 2**

# Constructing OPM Data for Use in ASCP

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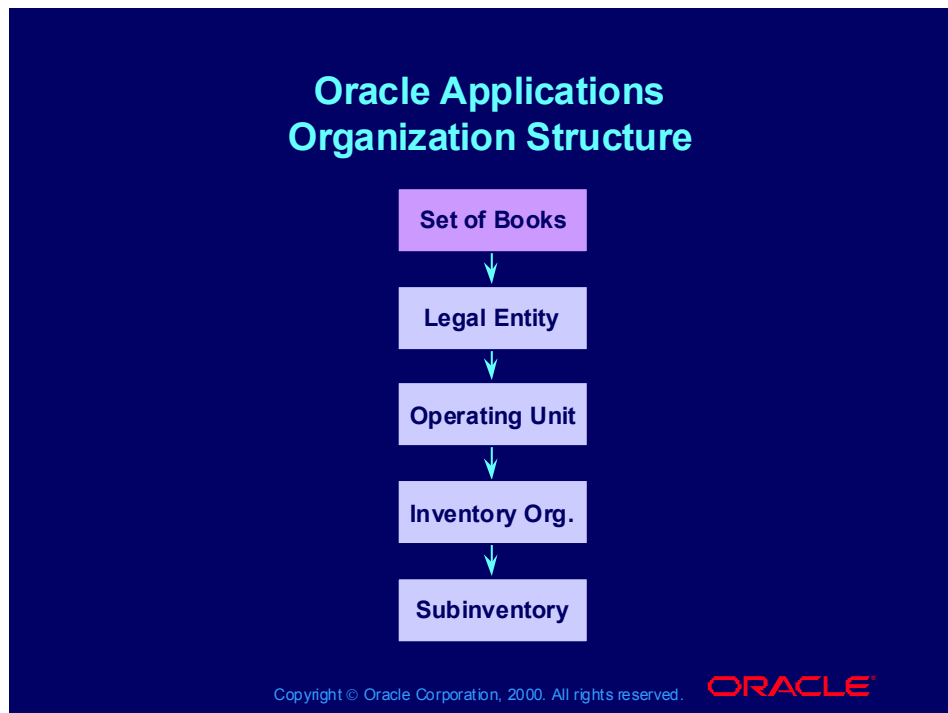
### Objectives

**After completing this lesson, you should be able to do the following:**

- **Structure OPM organizations, plants, and warehouses to meet ASCP needs**
- **Choose units of measure for an item**
- **Enable triggers and profile options**
- **Structure effectivities, formulas, and routings for ASCP needs**

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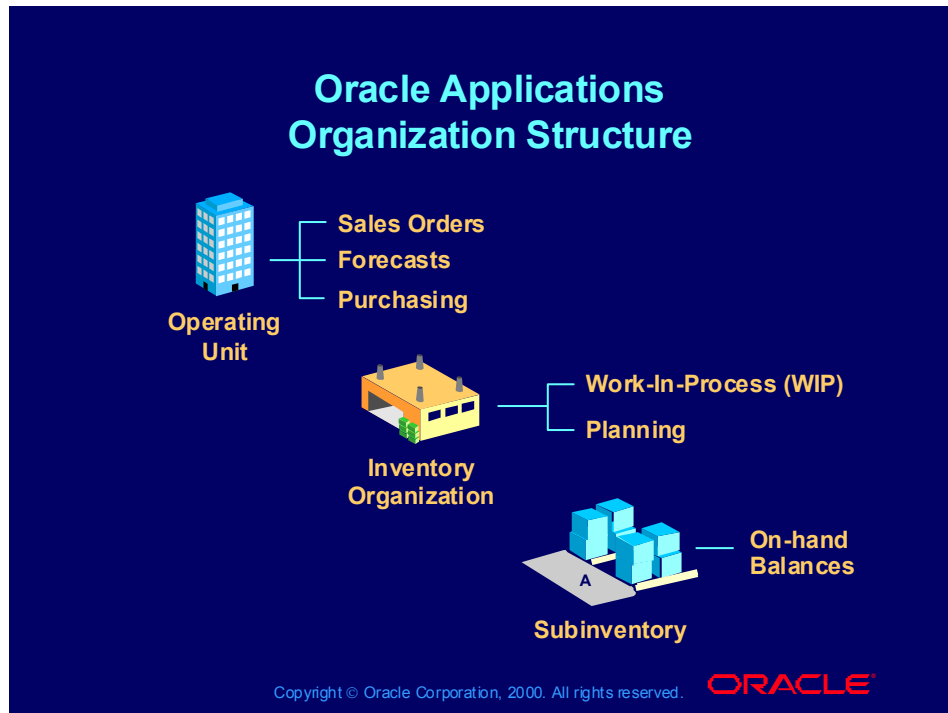


### Defining the Oracle Applications Organization Structure

Before any type of organization is defined in Oracle Applications, you must define a set of books. Once a set of books is defined, you can define your company's legal entities, operating units, inventory organizations, and subinventories.

# Oracle Applications Organization Structure

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## Entering Transactions and Storing Information

Transactions and other information are entered and stored at different levels of the organization structure when using Oracle Applications.

The following information is stored at the operating unit level:

- Sales orders
- Forecasts
- Purchase orders

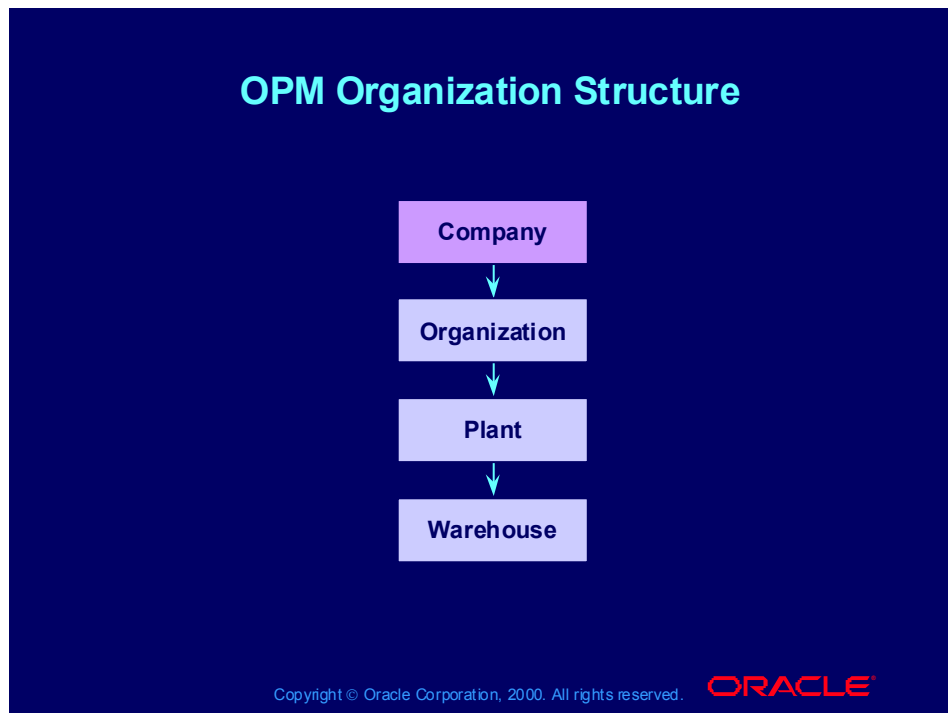
The following information is stored at the inventory organization level:

- Work-in-process
- Planning data

On-hand balances are stored at the subinventory level.

## OPM Organization Structure

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### Defining the OPM Organization Structure

OPM organizations can be companies, parent organizations, staff organizations, inventory organizations, or manufacturing plants.

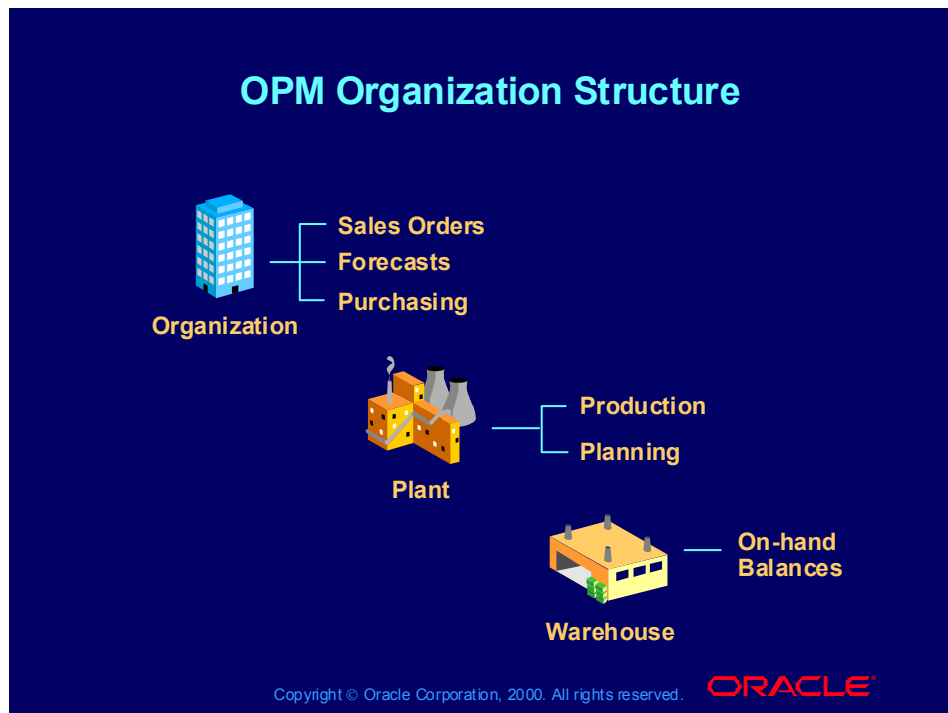
OPM organizations defined as companies must maintain a balanced set of books. A company in OPM equates to a set of books defined in Oracle Applications. The following list shows how other types of OPM organizations map to the Oracle Applications organization structure:

- OPM organizations map to legal entities and operating units
- OPM plants map to inventory organizations (with some modifications)
- OPM warehouses map to inventory organizations and subinventories



## OPM Organization Structure

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### Entering Transactions and Storing Information

Transactions and other information are entered and stored at different levels of the organization structure when using OPM.

The following information is stored at the organization level:

- Sales orders
- Forecasts
- Purchase orders

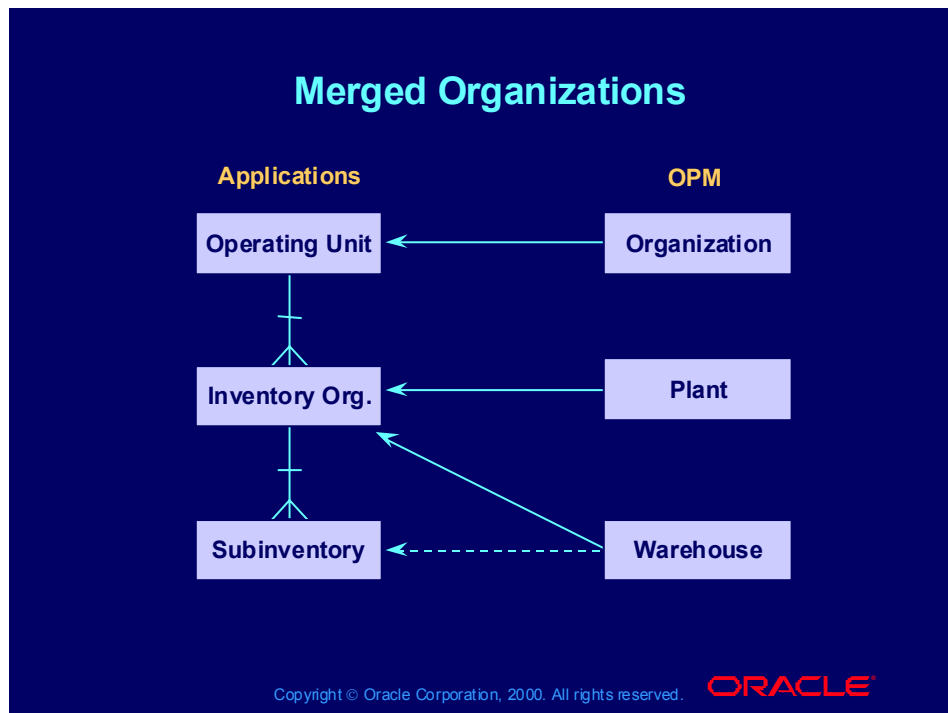
The following information is stored at the plant level:

- Production
- Planning

On-hand balances are stored at the warehouse level.

## Merged Organizations

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### Merging OPM and Oracle Applications Organizations

OPM maintains data in *both* the OPM and the Oracle Applications organization structures. OPM data can then interface with Oracle Applications modules such as Purchasing and Financials. ASCP assumes that the data stored at different organizational levels will be imported into ASCP in the Oracle Applications organization levels, so the OPM organizational structure must merge with the Oracle Applications organization structure.

**Example:** For ASCP to be aware of transfers between OPM warehouses, each OPM warehouse must be defined at the inventory organization level in Oracle Applications. A subinventory is created in ASCP by default.

#### Technical Note

Companies and organizations that are not designated as plants in the OPM Organizations window are considered at the operating unit level in Oracle Applications.

## Merged Organizations

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### Merged Organizations

Define the following to allow the transactional data to merge:

- **Operating Unit = Organization**
- **Inventory Organization = Warehouse**

Transaction	Oracle Applications	OPM
Sales Orders	Operating Unit	Organization
Purchase Receipts	Operating Unit	Organization
Sales Demand	Inventory Org.	Warehouse
Purchase Supply	Inventory Org.	Warehouse

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### Merging Transactional Data

The above table shows the level at which transactional data resides in both Oracle Applications and OPM. In order for the transactional data from both systems to be imported at the same organizational level, you must merge OPM organizations at the operating unit level and warehouses at the inventory organization level.

## Merged Organizations

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### Merged Organizations

- Inventory organization maps to a plant:
  - WIP and OPM Production are initiated at this level.
  - Planning occurs at this level.
- Inventory organization maps to a warehouse:
  - Demand occurs at this level.
  - Planning occurs at this level.



The diagram illustrates the relationship between a Plant and an Inventory Organization. On the left is a stylized icon of a plant with smokestacks, labeled 'Plant'. On the right is a stylized icon of a warehouse, labeled 'Inventory Organization'. A horizontal double-headed arrow connects the two icons, indicating a bidirectional relationship or mapping between the plant and the inventory organization.

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### Merging Transactional Data

OPM production batches and planning functions occur at the plant level. Since the corresponding transactions in Oracle Applications occur at the inventory organization level, you must merge the OPM production and planning data at the inventory organization level.

OPM demand is placed at the warehouse level and planning can occur at the warehouse level as well as at the plant level. Since the corresponding transactions in Oracle Applications occur at the inventory organization level, you must merge the OPM demand and planning data at the inventory organization level.

## Merged Organizations

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**Merged Organizations**

- **Subinventory maps to a warehouse:**
  - On-hand balances are stored at this level.
  - Allocation occurs at this level.
  - Nettability is calculated at this level.

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### Merging Transactional Data

OPM on-hand balances are stored at the warehouse or location level. Stock allocation also takes place at this level and nettability is calculated here as well. Because the corresponding transactions in Oracle Applications occur at the subinventory level, you must merge the OPM on-hand balance, allocation, and nettability data at the subinventory level.


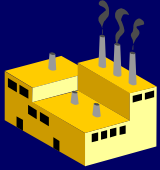
The above data and transactions can also occur at the location level in OPM. The corresponding level in Oracle Applications is the locator level, but ASCP does not plan at the locator level. All OPM location data must therefore be merged into the warehouse and mapped at the subinventory level as well.


## Inventory Organization Characteristics

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### Inventory Organization Characteristics

- **Site locations**
  - Used for vendors and customers
- **Departments**
  - Used to control resources



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### Oracle Applications Inventory Structure

In Oracle Applications, you must define your company work sites as site locations before you can define any of them as inventory organizations. You can also use these site locations to allow the Supply Chain Planning module to determine transportation lead times and capacities.

You can define vendor or customer sites as site locations if you want to maintain them in your system. For example, you may want to manage your product inventory at a customer site so that you can automatically ship the customer more product when their inventory runs low.

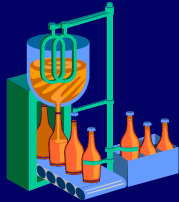
In Oracle Applications, a department is an area within your organization, which consists of resources such as one or more people, machines, or suppliers, where you want to collect costs, apply overhead, and compare load to capacity. You assign a department to each operation in a routing, and assign resources that are available for that department.

## OPM Production Organizational Structure

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### OPM Production Organizational Structure

- **Resources defined at the plant level**
- **Plant-warehouse relationships**
- **Material allocations**
  - **Multiple source warehouses**
  - **Multiple destination warehouses**



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### The Organizational Structure of OPM Production

The following differences exist between production functions in OPM and those in Oracle Applications:

- A work order in Oracle Applications is roughly equal to a production batch in OPM. Both work orders and production batches consume resources.
- In OPM, resources are defined at the plant level, whereas in Oracle Applications they are defined at the department level (part of an inventory organization).
- In Oracle Applications, a work order (created at the inventory organization level) can only draw from resources available in the inventory organization for which the work order was created.
- In OPM, a batch may only access resources for the plant. Plant- warehouse relationships in OPM allow a production batch to draw from materials available outside the warehouse in which the production batch was created.
- In OPM, you can also specify which warehouses you want to pull inventory from in order to complete a production batch. You can define multiple allocation parameters for an item, and thus allocate inventory from multiple warehouses.

### OPM-ASCP Structure

#### **Recommended OPM-ASCP joint implementation structure:**

- **A plant is associated with a warehouse for production purposes (a resource warehouse).**
- **Multiple plants can utilize raw material warehouses.**
- **Multiple plants can supply distribution centers.**
- **There is a one-to-one definition of warehouse to inventory organization.**
- **Plants accessing the same warehouse should be planned together.**

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#### **The Optimal OPM Organization Structure for ASCP**

The following OPM organization structure is recommended in order for OPM data to merge smoothly with ASCP:

- Each OPM production plant owns one warehouse. Production is assumed to take place in this warehouse.
- Multiple production plants can draw raw material inventory from common warehouses to meet their production demand.
- Multiple production plants can supply common warehouses (distribution center).
- Each OPM warehouse is linked to a single inventory organization in Oracle Applications. This happens automatically because a corresponding OPM warehouse is created once the Process Enabled check box for an inventory organization is selected.
- If multiple production plants use the same warehouse as their raw material inventory source, then the production for these plants should be planned together.



### OPM-ASCP Structure

**Recommended implementation of effectivities, formulas, and routings:**

- **ASCP expects organization-specific formulas and routings**
- **Effectivity functionality added to ASCP**
- **One-level circular references added to ASCP**
- **Fixed and linear scaling added to ASCP**

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### Merging Effectivities, Formulas, and Routings with ASCP

ASCP can only reference organization-specific formula effectivities. If an effectivity is global, the interface to ASCP creates one copy of the effectivity for each organization. Since a warehouse is an inventory organization, each one of the formerly global, but now organization-specific, effectivities is mapped to a warehouse. Plant-warehouse relationships identify which warehouses use particular effectivities, and therefore formulas, for production.

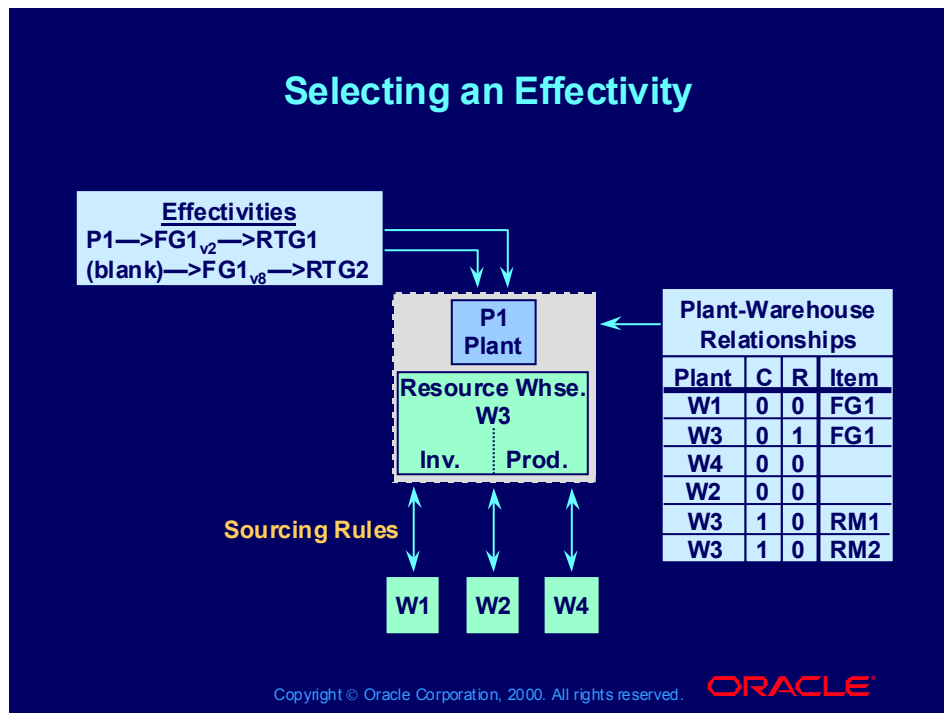
To ensure a smooth merging with ASCP, it is best to be specific when defining the plant-warehouse relationships. Be specific about items, warehouses, and the consumption and replenishment of the items. Global rules create an individual record for the valid combinations, which has a matrix effect, exponentially increasing the amount of data transferred.

ASCP includes the following OPM functionality:

- Effectivities
- Scaling
- One-level circular references

One-level circular references allow the definition of formulas that have a product or by-product listed as an ingredient in the same formula. For example, when making sourdough bread, you save a small portion of the dough to use as a starter for the next batch. Therefore, when defining a sourdough bread formula, the dough is a product, but also an ingredient.

## Selecting an Effectivity



### Selecting an Effectivity

The above diagram assumes the following:

- Item FG1 is stored in the distribution center W1.
- Items RM1 and RM2 are stored in the replenishment warehouses W2 and W4.
- Manufacturing takes place in plant P1 and resource warehouse W3.
- Sourcing transfer rules must be defined to transfer RM1 from W2 to W3, RM2 from W4 to W3, and FG1 from W3 to W1.
- Two effectivities have been defined, one for plant P1 and one global effectivity where the Organization field was left blank.

ASCP can use either the P1 or the global effectivity. Since ASCP can only reference organization-specific formula effectivities, the interface to ASCP creates a copy of the global effectivity for the resource warehouse W3. ASCP determines that the P1 effectivity can be used for W3 because the replenishment for FG1 is defined only for W3.

ASCP selects which effectivity to use based on effectivity rules such as lot sizing and the effectivity date range. If the effectivity rules are the same, then ASCP chooses one based on the effectivity preference number. If there is no difference between the effectivity rules or preferences, ASCP selects the first effectivity it encounters.

### OPM-ASCP Structure

#### Create a resource warehouse:

- Capacity-constrained planning can occur at only one place for a plant.
- The warehouse where production occurs should be designated as the resource warehouse.
- An inventory organization can be assigned to only one plant.

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### Creating a Resource Warehouse

In ASCP, capacity planning occurs at the inventory organization, department, or resource level. OPM needs to perform capacity planning at the plant level, but ASCP does not recognize production plants. To bridge this gap between OPM and ASCP, one warehouse is defined for each production plant that requires capacity planning. These warehouses are called resource warehouses. ASCP recognizes resource warehouses as production facilities that require capacity planning.

### OPM ASCP Structure

#### Define item units of measure (UOMs):

- OPM allows four characters.
- Applications allows three characters.
- UOMs added in OPM are automatically created in Oracle Applications.

#### Define organizations:

- OPM allows four characters.
- Applications allows three characters.

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### Differences in Field Lengths

Units of measure, unit of measure types, and unit of measure conversions added in OPM are automatically created in Oracle Applications by means of a trigger.

You can define item unit of measures in OPM that are four characters long, but the value will be truncated to three characters once the unit of measure is copied into Oracle Applications. If the truncated, three-character unit of measure is not unique, Oracle Applications changes one of the characters so that the unit of measure is unique. This difference in field length also applies for OPM organizations.

### Technical Note

If you need to change the unit of measure for an item, do so from the OPM item window instead of from the item window in Oracle Applications to ensure that the unit of measure is valid for OPM.

### Triggers and Profile Options

#### Triggers:

- **Item master:** GMF\_IC\_ITEM\_MST\_BIUR\_TG
- **UOM:** GMF\_SY\_UOMS\_MST\_BIUR\_TG
- **UOM types:** GMF\_SY\_UOMS\_TYP\_BIUR\_TG
- **UOM conversions:** GMF\_IC\_ITEM\_CNV\_BIUR\_TG

#### Profile Option:

GL\$FINANCIAL\_PACKAGE = 'ORAFIN'

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### Using Triggers and Profile Options to Synchronize Data

The above triggers synchronize the data between OPM and Oracle Applications.  
The profile option allows the validation of financial data to occur.

### Summary

**In this lesson, you should have learned how to:**

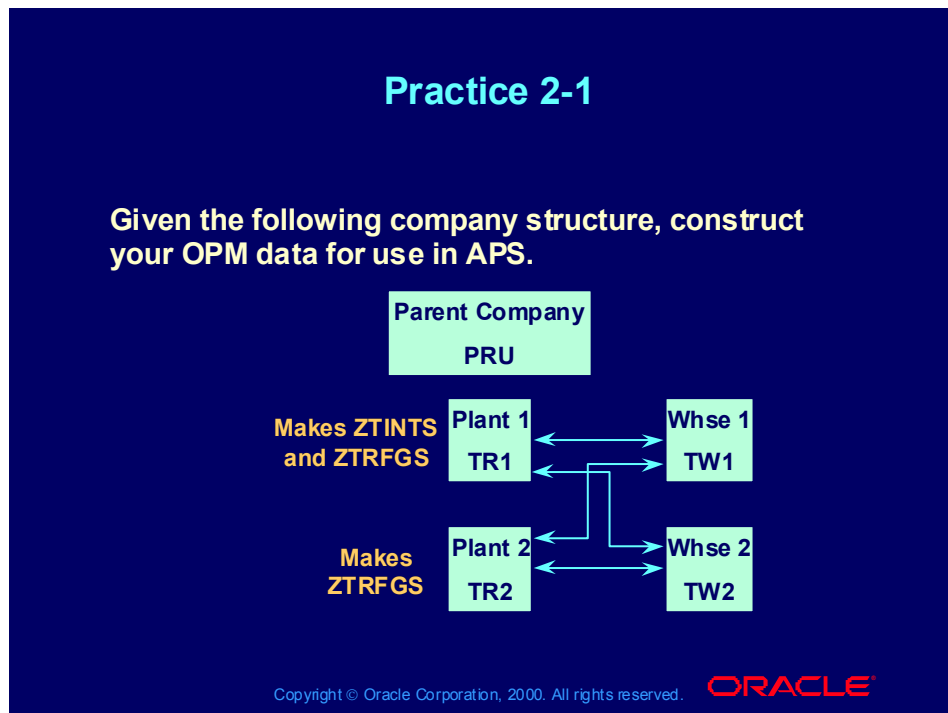
- **Describe the applications organization structure**
- **Describe the OPM organization structure**
- **Define the mapping of organizations from OPM to Oracle Applications**
- **Define the structuring of effectivities, formulas, and routings**
- **Define the needed triggers and profile options**

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## Practice 2-1

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### Practice 2-1

#### Constructing OPM Data for Use in ASCP

Decide how you will model the company structure shown in the above graphic. More details about the company structure follow:

- Warehouse 1 and Warehouse 2 both store ingredients used by both plants as well as the products of both plants.
- Plant 1 supplies ZTINTS to Plant 2.

What OPM organizations must you define?

---

What inventory organizations/warehouses must you define in Oracle Applications? What process organization should you attach to each inventory organization?

---

What resource warehouse must you attach to each plant?

---

How should you set up plant-warehouse relationships for each plant/warehouse combination?

---

## Practice 2-1 Solution

---

**Practice 2-1 Solution**

**Define the following:**

OPM Org.	Resource Warehouse
TR1	TW1
TR2	TW2

Inv Org.	Process Organization
TW1	TR1
TW2	TR2

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### Practice 2-1 Solution

What OPM organizations must you define?

#### **TR1 and TR2**

What inventory organizations/warehouses must you define in Oracle Applications? What process organization should you attach to each inventory organization?

**Define TW1 and TW2 as inventory organizations in Oracle Applications, specifying their respective plants as the process organization for each. This creates OPM warehouses TW1 and TW2 automatically.**

What resource warehouse must you attach to each plant?

**Attach TW1 as the resource warehouse for plant TR1. Attach TW2 as the resource warehouse for plant TR2.**



## Practice 2-1 Solution

---

### Practice 2-1 Solution

Define the following (continued):

Plant = TR1

Warehouse	Consume	Replenish	Warehouse Item
TW1	N	Y	ZTRFGS
TW1	Y	Y	ZTINTS
TW1	Y	N	ZTPKGS
TW1	Y	N	ZTRM1S
TW1	Y	N	ZTRM2S
TW2	N	Y	ZTRFGS
TW2	Y	Y	ZTINTS
TW2	Y	N	ZTPKGS
TW2	Y	N	ZTRM1S
TW2	Y	N	ZTRM2S

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### Practice 2-1 Solution (continued)

How should you set up plant-warehouse relationships for each plant/warehouse combination?

**Be specific about items, warehouses, and the consumption and replenishment of the items when defining the relationships for plants TR1 and TR2. Global rules create an individual record for the valid combinations, thus having a matrix effect, which exponentially increases the amount of data transferred.**

## Practice 2-1 Solution

---

### Practice 2-1 Solution

**Define the following (continued):**  
**Plant = TR2**

Warehouse	Consume	Replenish	Warehouse Item
TW1	N	Y	ZTRFGS
TW1	Y	N	ZTINTS
TW1	Y	N	ZTPKGS
TW2	N	Y	ZTRFGS
TW2	Y	N	ZTINTS
TW2	Y	N	ZTPKGS

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# **Setting Up OPM Data for Use in ASCP**

## **Chapter 3**

### Setting Up OPM Data for Use in ASCP

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## Objectives

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### Objectives

**After completing this lesson, you should be able to do the following:**

- **List commonalities between ASCP and Material Requirements Planning (MRP)**
- **Define OPM organizations, warehouses, items, units of measure, and conversions**
- **Define effectivities, formulas, routings, and resources**
- **Define master production schedules for ASCP**
- **Define plant warehouse effectivities**
- **Develop production calendars**
- **Utilize batches, firm planned orders, sales orders, forecasts, and on-hand inventory**

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### Lesson Topics

This lesson describes the setup steps necessary to allow OPM data to interface with ASCP.

## Elements Common to ASCP and Process Material Requirements Planning

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### Elements Common to ASCP and Process Material Requirements Planning

Both ASCP and Process Material Requirements Planning (Process MRP) use:

- Items
- Warehouses
- Plant-warehouse relationships
- MRP shop days
- MRP shop calendars
- Master Production Scheduling (MPS) schedules
- Formulas
- Forecasts
- Forecast associations

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### Elements Common to ASCP and Process MRP

**Items:** Set up in OPM and synchronized (“synched”) to the Oracle Applications Inventory module; item attributes are then set up in Oracle Applications Inventory for each synched item

**Warehouses:** Provide the “containers” for material in both ASCP and Process MRP; Process MRP uses warehouse rules and warehouse transfer rules to manage material movement between warehouses, while ASCP uses a bill of distribution to enable material to flow through three or more organizations

**Plant-warehouse relationships:** The linkage between production plants and the warehouses to which finished goods are sent; these relationships determine the consumption and replenishment rules among plants, warehouses, and items

**MRP shop days:** The work days and days off (for example, weekends and holidays) included in the MRP calendar, and defined by the beginning and ending times for up to three working shifts within a 24-hour period

**MRP shop calendars:** The dates for which manufacturing work can be scheduled; they must include shop days for which working hours are defined in order for MRP to function

**MPS schedules:** The criteria by which inventory supply and demand appears on displays and reports

**Formulas:** The “recipe” upon which production batches are based; a formula consists of products, ingredients, and, optionally, by-products, and also specifies the quantities of each item

**Forecasts:** A financial plan of expected sales of finished goods to customers

**Forecast associations:** The linking of one or more forecasts to a schedule

### OPM Organizations

**When defining OPM organizations for use with ASCP:**

- Use the OPM-ASCP structure described in the previous lesson to develop the organization schema
- Decide whether to define the organization as a plant:
  - To allow production to occur
  - To control other documents and inventory ownership
- Decide whether to use the Process Operation Control (POC):
  - To allow collection of routing and resource data for production batches

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### Setting Up OPM Organizations for Use with ASCP

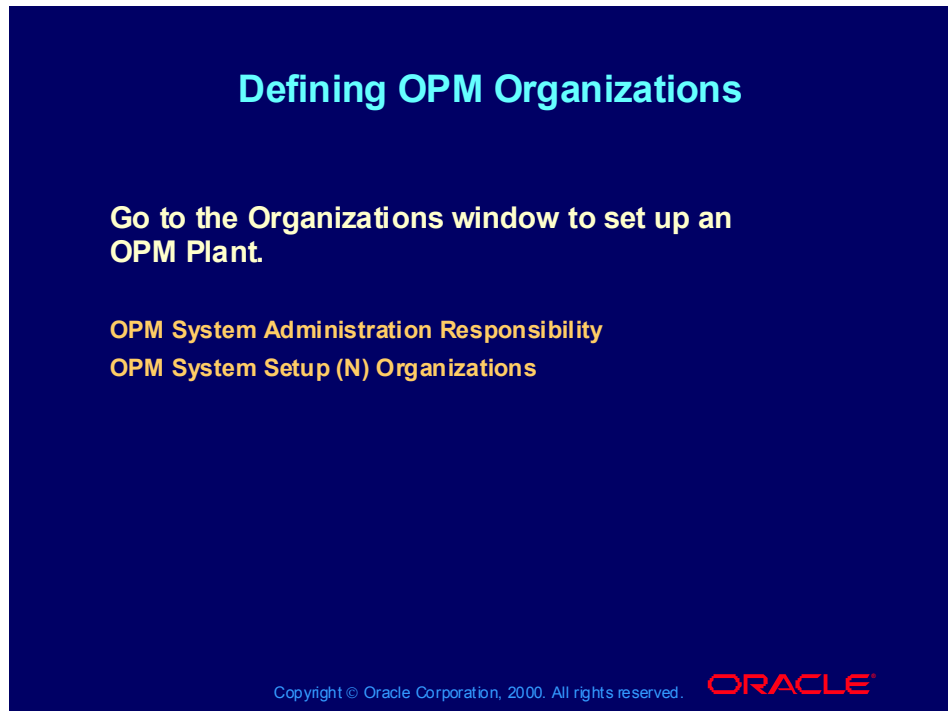
Use the following organization structure suggestions when merging data with ASCP:

- Each OPM warehouse must have a corresponding inventory organization in Oracle Applications.
- If you plan to use the capacity planning function in ASCP, each OPM production plant must own one resource warehouse.
- Multiple production plants can draw raw material inventory from one warehouse to meet their production demand, but you should model this using transfers for tracking purposes.
- Multiple production plants can supply one warehouse (distribution center), but you should model this using transfers for tracking purposes.



## Defining OPM Organizations

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(Help) Oracle Manufacturing Applications > Oracle Process Applications >  
OPM System Administration > OPM System Administration User's Guide >  
OPM System Setup >Editing Organizations  
    ... > Organizations Procedure  
    ... > Organizations Field Reference

### OPM Organizations

#### Resource warehouse considerations:

- Use the resource warehouse for capacity planning.
- Define the warehouse to be used for plant production.
- Allow the definition of a resource warehouse by selecting Manufacturing Plant in the Plant field of the Organizations window.

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### Using the Resource Warehouse for Capacity Planning

Before you define a resource warehouse for a production plant, you must define the OPM organization as a production plant.

### OPM Organizations

#### Oracle Applications inventory organization setup considerations:

- There is a one-to-one relationship with OPM warehouses.
- Set GMF:Financial Package to ORAFIN in releases prior to 11.5.0A (Mini Pack A) for proper cost tracking.
- There are no restrictions for location control usage.

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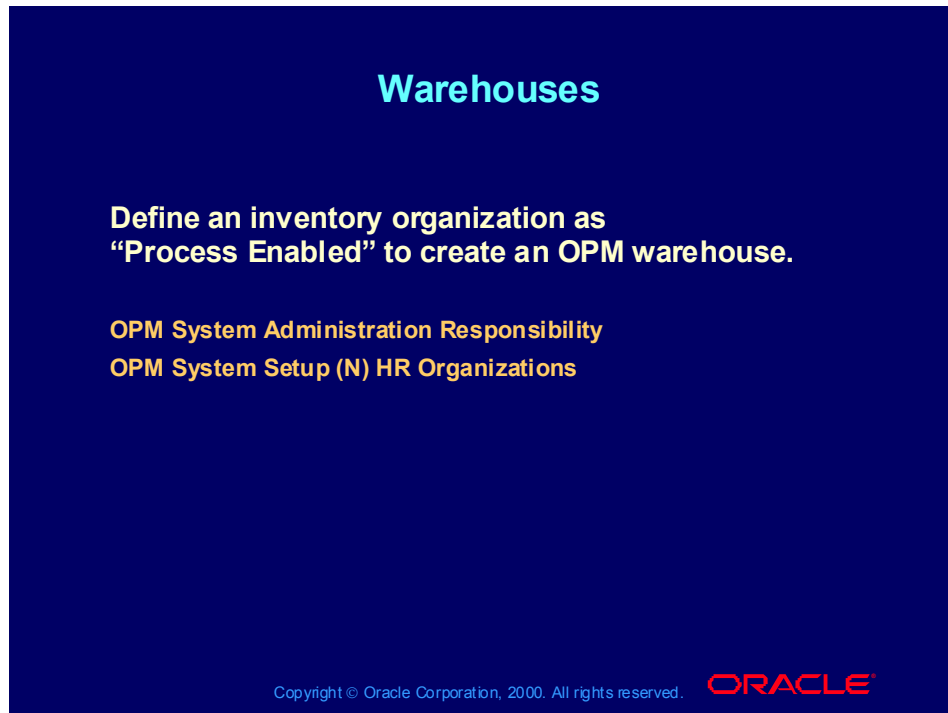
### Setting Up Organizations in Oracle Applications

There are several things you must consider when setting up an inventory organization in Oracle Applications:

- Each OPM warehouse must have a corresponding Oracle Applications Inventory Organization.
- In OPM Releases prior to 11i (Mini Pack A), you need to set the GMF:Financial Package profile option (formerly the GL\$FINANCIAL\_PACKAGE profile value) to ORAFIN.
- ASCP does not consider location even though it is in use within OPM. As a result, you don't have to worry about restrictions on location-controlled items.

## Warehouses

---



(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Inventory > OPM Inventory Management User's Guide > Organizations > Relating Organizational Structures

... > The OPM Warehouse as Inventory Organization

... > Synchronizing OPM and OA Forms

and

(Help) Oracle Manufacturing Applications > Oracle Inventory > OPM Inventory > Setting Up > Inventory Structure > Defining Organization Parameters > Defining Default Inventory Parameters

## Integrating OPM Items to Oracle Applications Items

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### Integrating OPM Items to Oracle Applications Items

#### Understanding the integration:

- The integration requires a standardized item definition in both the OPM and Oracle Applications item masters.
- A trigger synchronizes the two item masters.
- Items are automatically created for all defined Oracle Applications inventory organizations.
- Oracle Applications uses a single UOM.
- ASCP uses lot control information and lot expiration dates for planning purposes.
- Only an item's nettable balance is sent to ASCP.
- Item data is reported in the primary UOM.

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### Integrating OPM Items with Oracle Applications Items

- You need to have a standardized item definition in both OPM and Oracle Applications.
- OPM items are automatically created in Oracle Applications inventory organizations. This means that OPM items can be used within all Oracle Applications inventory organizations. The following are some additional points to consider when defining items for use in OPM and ASCP:
  - Although Oracle Applications only allows the use of one unit of measure per item, you can still use the dual unit of measure functionality in OPM.
  - A trigger (GMF\_IC\_ITEM\_MST\_BIUR\_TG) synchronizes the two item masters to ensure that both OPM and the Oracle Applications contain the same set of items. A resynchronization routine runs to ensure that, as new Oracle Applications inventory organizations are created, all items are added to the new inventory organization.

## Defining UOMs, Types, and Conversions

---

### Defining UOMs, Types, and Conversions

#### Units of measure (UOMs):

- OPM allows a four-character UOM; Oracle Applications only allows a three-character UOM
- The GMF\_SY\_UOMS\_MST\_BIUR\_TG trigger synchronizes the OPM and Applications UOMs.
- UOMs are automatically converted into Oracle Applications format.

#### UOM types:

- The GMF\_SY\_UOMS\_TYP\_BIUR\_TG trigger synchronizes the two systems.

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### Integrating UOMs and Types with Oracle Applications

To ensure the uniqueness of units of measure in both OPM and Oracle Applications, an algorithm verifies that the truncated OPM unit of measure or organization does not match a preexisting Oracle Applications unit of measure. If a unit of measure is not unique, the algorithm searches for a character to substitute that makes the unit of measure unique. As a result of this substitution, the three-character code entered into Oracle Applications from OPM may not be the value you expected to find.

The UOM type trigger GMF\_SY\_UOMS\_TYP\_BIUR\_TG automatically ensures the uniqueness of UOM types that are integrated into Oracle Applications from OPM.

### Technical Note

The unit of measure that OPM uses to designate hours must be the same as the unit of measure in the BOM:UOM for Hours profile option for the ASCP instance. This is necessary for ASCP to consider your resources.

## Defining UOMs, Types, and Conversions

---

### Defining UOMs, Types, and Conversions

#### UOM conversions:

- The **GMF\_IC\_ITEM\_CNV\_BIUR\_TG** trigger synchronizes the OPM and Oracle Applications UOM conversions.
- UOM conversion, UOM, and item are tied together by Oracle Applications:
  - `item_id`
  - `uom_code`

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### Integrating UOM Conversions with Oracle Applications

The UOM conversions trigger automatically ensures the uniqueness of UOM conversions that are integrated into Oracle Applications from OPM. The UOM codes associated with the UOM conversion change due to truncation from four to three characters. The new three-character UOM code is stored in the Oracle Applications UOM conversion table with the corresponding new UOM conversion record.

## Defining Formula Effectivities

---

### Defining Formula Effectivities

#### Effectivity considerations:

- One-to-one relationship between:
  - Effectivities and plants
  - Effectivities and inventory organizations
- Item defines the primary product
- Effectivities enforce:
  - Minimum and Maximum quantities
  - Effective start and end dates
- Formula and routing assignments used
- Preference used to break any ties

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### Integrating Formula Effectivities with Oracle Applications

When an effectivity is defined for a specific plant, any warehouse that is defined for an item with that effectivity will have a single version of the effectivity in ASCP. When more than one of these warehouses are mapped to the same inventory organization, only one effectivity is written to ASCP, since there is a one-to-one relationship between both:

- Effectivities and plants, and
- Effectivities and inventory organizations.

If the effectivity is Global, then it is applied to all plants where the item can be produced.

Effectivities enforce minimum and maximum quantities as well as the effective start and end dates. Formula and routing assignments are used, and Preference 1 is used to break any ties.



### Defining Formulas

#### Formula considerations:

- **ASCP recognizes only one product per formula.**
- **A different formula is reported for co-products with effectivities.**
- **ASCP considers by-products and co-products components with negative quantities.**
- **Linear and fixed scaling are both implemented.**
- **Item quantities are reported in the primary UOM.**

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### Integrating Formulas with Oracle Applications

ASCP can accept only one product per formula. If an OPM formula has multiple effectivities for a product or for co-products, then ASCP views them as different formulas, even though they are all the same. ASCP expects only one product per bill of material (in OPM, a bill of material is a formula), and this causes the co-products and by-products to be reported as components with negative quantities.

#### Technical Notes

- If you have a formula with a product and a co-product, you must define a second effectivity for the co-product.
- If you have a formula with a product and a by-product, you must define a second effectivity for the by-product.

## Defining Routings

---

### Defining Routings

#### Routing considerations:

- Routing quantity uses the base UOM of the effectivity's product.
- OPM step maps to Applications operation.
- OPM activity maps to Applications operation resource sequence.
- OPM routing resource maps to Apps operation resource.

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### Integrating Routings with Oracle Applications

The routing quantity uses the base UOM of the effectivity's product.

An OPM routing maps closely to the Oracle Applications routing. The flexibility that OPM has for a routing quantity is restricted, because the quantity must be in the unit of measure of the product being routed in order to have it scale properly.

The interface manages any necessary UOM conversions, but displays the *converted* quantity and unit of measure instead of the original quantity and unit of measure defined in OPM.

## Defining Routings

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### Defining Routings

- **ASCP uses only primary or auxiliary resources.**
- **Resource usage and count are utilized.**
- **Simultaneous resources are allowed.**
- **Concurrent operation is *not* allowed.**

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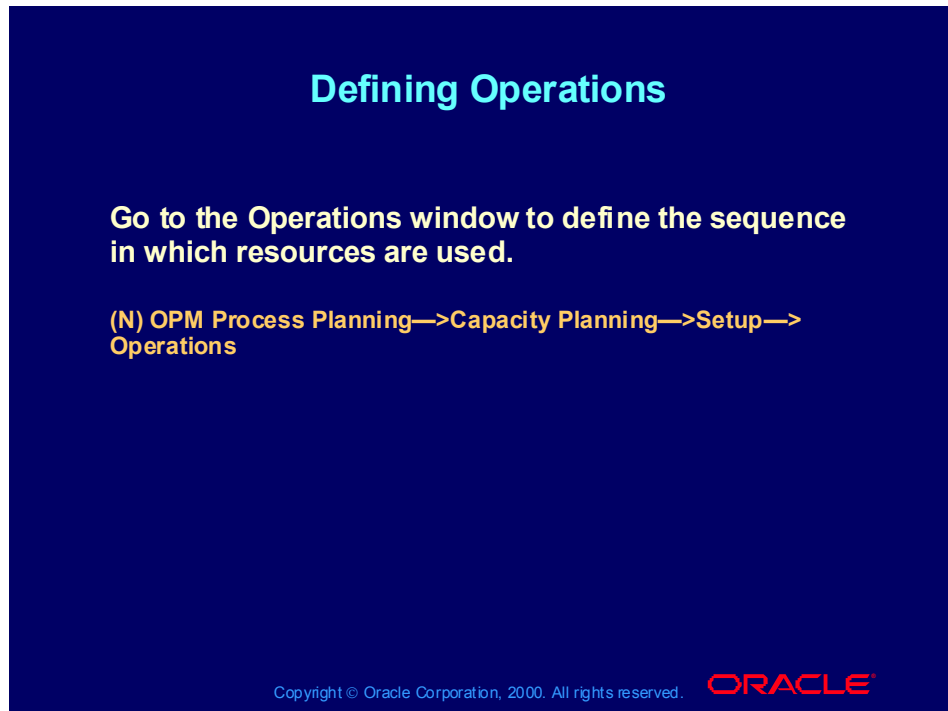
### Integrating Routings with Oracle Applications

With OPM CRP, you have the option of using alternate resources. Resources are assigned a plan type in the Operations window: either primary (1), auxiliary (2), or secondary (0). In ASCP, only the primary and auxiliary resources are used; any secondary resources are ignored.

ASCP uses resource count and usage quantity information. You record resource count and usage quantity information in the Operations window. For example, if two identical blenders are used for mixing, you would enter 2 in the Count field. If the resource can mix 200 gallons per hour, you would enter 200 in the Process Quantity field and 1 in the Usage Quantity field.

## Defining Operations

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(Help) Oracle Manufacturing Applications > Oracle Process Applications >  
OPM Product Development > OPM Formula Management User's Guide >  
Routings Setup > Setting Up Operations  
... > Setting Up Operations Procedure  
... > Operations Field Reference

### Integrating Operations with Oracle Applications

In ASCP, you can use more than one resource at the same time during an operation, but you cannot complete more than one operation in a routing at the *same* time.

You can overlap two operations, but this restricts the OPM functionality that allows concurrent operations and multiple dependent operations. ASCP does not provide a way for you to allow concurrent operations instead of multiple dependent operations (or vice versa). As a result, concurrent operations are not allowed in ASCP.

## Defining Resources

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### Defining Resources

- Define resources at the *plant* level.
- The resource warehouse for the plant indicates the use of capacity planning in ASCP.
- The assigned quantity defines the number of resources available at a specified plant.
- Resource costs transfer to ASCP.
- The time UOM is hour (HR) for all ASCP resources.
- Resources are mapped to a department in an inventory organization.
- Each inventory organization corresponds to a warehouse with one department.

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### Integrating Resources with Oracle Applications

When you complete the OPM Resource Information window, you define a relationship between a plant and the resource. Since ASCP acknowledges the plant using the resource warehouse associated with the plant, ASCP views the resource as having a relationship with a resource warehouse instead of with a plant.

A resource warehouse is mapped to a department in an inventory organization within Oracle Applications. The resource is mapped to a department in an inventory organization using the Resource Information window.

You can use ASCP to develop capacity plans for your resources. The resource warehouse for the plant indicates to ASCP a need to perform capacity planning. The ASCP capacity planning function assumes that all resource capacity is measured in hours. The Assigned Quantity field indicates the number or quantity of the resource used in the specified plant for which you are defining production costs and usage availability. The number you enter depends on how broad a resource categorization you are defining. For example, if you define the resource as “Blender 1” (a specific machine) you would enter 1. If you use three blenders in the production line, and you define the resource as “Blenders” (rather than defining each individual machine), you would enter 3.

The cost of using a resource for one unit of measure (for example, the cost of running a mixer for one hour) that you define in OPM Cost Management is also used by ASCP, but this cost needs to be recorded in the nominal cost value for the resource. ASCP assumes the unit of measure for all resources is an hour.

## Plant-Warehouse Relationships

---

### Plant-Warehouse Relationships

#### Plant-warehouse relationship considerations:

- Global and warehouse items are both valid.
- Consumption and replenishment indicators are enforced.
- Transfers do not require consumption or replenishment indicators.
- Caution: Global rules increase the amount of data transferred (effectivities, formulas, routings, and so on).

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### Integrating Plant-Warehouse Relationships With Oracle Applications

Plant-warehouse relationships are also known as plant-warehouse effectivities. Plant-warehouse relationships specify the warehouses from which a plant consumes each item when it is used as an ingredient in a batch. They also specify the warehouses that a plant replenishes with each item when the item is a product of a batch.

If the Warehouse Item field in the Plant Warehouses window is left blank for a particular warehouse, then any item can be consumed from or replenished to that warehouse. This is called a global rule. The plant-warehouse relationship item consumption and replenishment rules are enforced by ASCP for both global and warehouse items. Setting global rules increases the amount of data transferred since all warehouse item data is transferred, regardless of whether or not the warehouse items are actually consumed or replenished from the warehouse.

You can transfer items between warehouses as long as the item is defined in a plant-warehouse relationship as a global or a specific rule. The consumption and replenishment indicators for the item/warehouse combination can be turned off and the item/warehouse combination can still be considered for transfers.

## Defining Shop Calendars

---

### Defining Shop Calendars

- **Standard Material Requirements Planning (MRP) shop calendar**
- **ASCP shifts must occur during a calendar day.**
- **Shifts not one-to-one with ASCP version**
- **Assigned in the MPS Schedule Parameters window**
- **Shop calendar used to create the ASCP manufacturing and resource calendars**
- **Limit of 10 characters in ASCP**

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### Integrating Shop Calendars with Oracle Applications

To create a shop calendar, you must define shop days, which include the shifts available for the day. The shop days are then used to create the shop calendar. When the calendar is interfaced with ASCP, four relationships are created: the production calendar, weekly buckets, period buckets, and net available resources. The production calendar indicates the days on which planning can occur. The weekly buckets represent the weeks in which planning can occur, and the period buckets represent months. The resources are applied to the shifts, defining the time available for production, which creates the fourth relationship, net available resources.

ASCP expects shifts to occur during a calendar day (12:00 a.m. to 11:59 p.m.), but OPM allows shifts to go past 12 a.m. and into the next day. When an OPM shift overlaps with a shift the next day, one longer shift is created. If a shift engulfs another shift the next day, the engulfed shift disappears. Because ASCP does not account for shift overlaps, it is possible for duplicate shift names to appear within the same day. OPM shop calendars must be defined carefully to avoid shift duplication in ASCP.

During the automatic definition of organization parameters, a calendar must be entered. The system creates a dummy calendar or uses an existing calendar in Oracle Applications. The OPM interface replaces the dummy calendar with the correct shop calendar defined in the MPS Schedule Parameters window.

If the OPM shop calendar name is more than 10 characters long, the name is shortened to only 10 characters in ASCP. The interface ensures that the calendar is unique to ASCP by changing characters if necessary.

## Defining Master Production Schedule Parameters

---

### Defining Master Production Schedule Parameters

#### Master production schedule considerations:

- Defines demands for which to plan
- Interface creates a master demand schedule in ASCP for each schedule and warehouse combination
- Schedule naming convention:
  - Truncated five-digit number/warehouse code (for example: nnnnn/whse\_code)
  - Unique five-character name
- Utilizes plants and calendars from the MPS Schedule Parameters window

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### Using Master Production Schedule Parameters with ASCP

When you define master production schedule parameters, you indicate which plants are included in a schedule, also select the criteria for including various sources of inventory supply and demand. The parameters serve the same purpose in ASCP, and are used to create the ASCP master demand schedule. The ASCP master demand schedule includes all plants linked to a master production scheduling in the Master Production Scheduling (MPS) Schedule Parameters window.

The master production schedule must have a unique, five-character name. The ASCP master demand schedule name consists of the master production schedule name and the warehouse name. For example, a master production schedule named SCHD1 for resource warehouse RSW1 would result in a master demand schedule named SCHD1/RSW1. The naming convention takes the first five characters of the existing schedule number (schedule\_no) and adds a slash mark (/) followed by the warehouse code (whse\_code).

ASCP also uses plants and calendars from the MPS Schedule Parameters window.



## Defining Master Production Schedule Parameters

---

### Defining Master Production Schedule Parameters

- **Sources of demand in the MPS Schedule Parameters window:**
  - **Make to Stock:** If forecasts should be used as a source of demand
  - **Make to Order:** If sales orders should be used as a source of demand
- **Plant Warehouses window:**
  - **Defines items and warehouses from which to pull demand**
  - **Plants need to be linked to an a master production schedule**

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### Using Master Production Schedule Parameters with ASCP

In the Make to Stock field in the MPS Schedule Parameters window, you choose whether to include forecasts as a source of demand.

In the Make to Order field, you choose whether to include sales orders as a source of demand.

The Plant Warehouses window defines the items and warehouses from which to pull the demand for each plant linked to a master production schedule.

## Defining Master Production Schedule Parameters

---

### Defining Master Production Schedule Parameters

**Go to the MPS Schedule Parameters window to  
choose sources of inventory supply and demand.**

**OPM Process Planning Responsibility**

**MPS (N) Setup—>Schedule**

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(Help) Oracle Manufacturing Applications > Oracle Process Applications >  
OPM Process Planning > OPM MPS/MRP and Forecasting User's Guide >  
MPS/MRP Setups > Defining a MPS Schedule  
    ... > Defining a MPS Schedule Parameters Procedure  
    ... > MPS Schedule Parameters Window Field Reference

## Defining Forecasts

---

### Defining Forecasts

- **Link forecasts using the Forecast Schedule Association window:**
- **Forecast associations to multiple schedules are possible.**
- **Caution: If item/warehouse combinations are used in *multiple* schedules, demand will be duplicated.**
- **Only item warehouse/combinations valid in plant-warehouse relationships are used in MPS schedules.**
- **Forecast consumption occurs:**
  - **If Make to Stock and Make to Order are selected in the MPS schedule.**
  - **Using the same method as Process MRP**

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### Integrating Forecasts with ASCP

The setup steps necessary to use forecast consumption for APS are the same setup steps you must complete when using forecast consumption in OPM. After you enter forecast information in OPM and link it to an MPS schedule, ASCP uses that information to create a master demand schedule. Forecast consumption occurs when you perform the data collection. Forecasts used by the MPS schedule are specified in the Forecast Schedule Association window. A forecast can contain any number of items in various warehouses, but the schedule uses only items that are valid for a warehouse to consume according to the Plant Warehouses window.

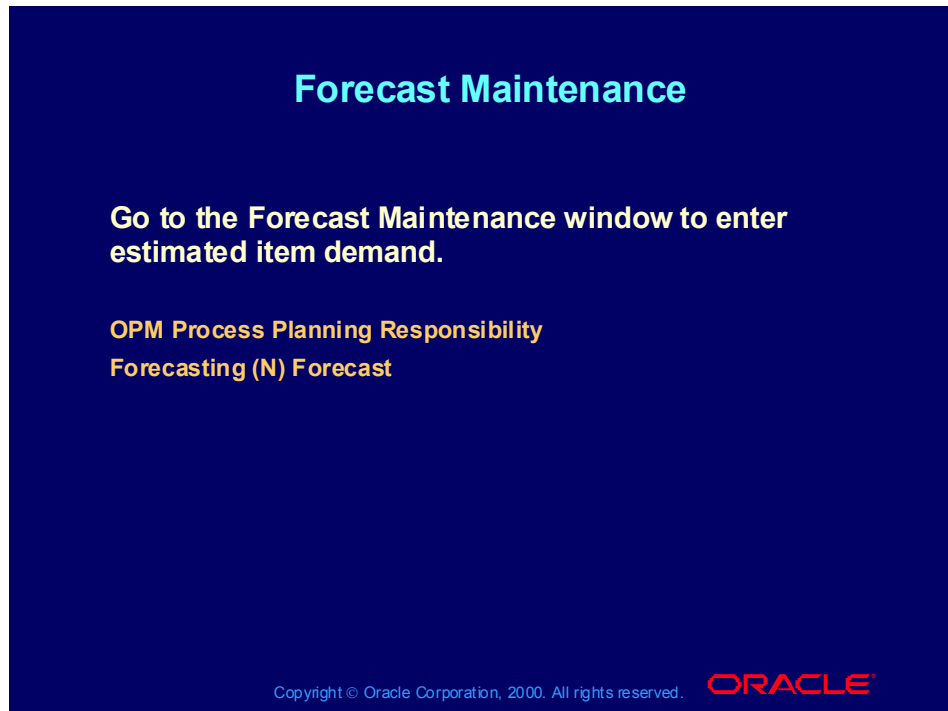
If you want to use forecast information when creating the master demand schedule, navigate to the MPS Schedule Parameters window, and select:

- Include Sales Forecasts in the Make to Stock field
- Include Sales Orders in the Make to Order field

Because one forecast can be used for several MPS schedules, make certain not to *duplicate* the demand for an item in a warehouse.

## Forecast Maintenance

---



(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Process Planning > OPM MPS/MRP and Forecasting User's Guide > Forecasting

... > Forecast Maintenance Window > Forecast Maintenance Window Field References

... > Forecast Maintenance Window Field References

## Forecast Schedule Association

---

### Forecast Schedule Association

**Go to the Forecast Schedule Association window to enter the forecasts used by the MPS schedule.**

**OPM Process Planning Responsibility  
Forecasting (N) Schedule Association**

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(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Process Planning > OPM MPS/MRP and Forecasting User's Guide > Forecasting > Associating a Forecast with a Schedule > Forecast Schedule Association Field References

## Consuming Sales Order Demand

---

### Consuming Sales Order Demand

- MPS considers unshipped sales order lines.
- The MPS schedule selects item/warehouse combinations from among the plant-warehouse relationships.
- **Caution:** Avoid possible duplication of sales order demand by ensuring that a plant is linked to only *one* MPS schedule.

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### Integrating Sales Orders with APS

Demand is pulled from the Order Fulfillment and Order Management modules for the items that you have defined within a plant warehouse relationship. MPS collects unshipped sales order information if:

- Include Sales Orders is selected in the Make to Order field of the MPS Schedule Parameters window
- Sales order lines are scheduled to ship from warehouses listed as plant warehouses in the MPS schedule.

These same criteria apply to the ASCP master demand schedule.

**Caution:** Avoid possible duplication of sales order demand. Ensure that a plant is linked to only *one* MPS schedule. If more than one MPS schedule is linked to a plant, the sales order demand for the plant will be duplicated in *all* of the MPS schedules.

## Viewing Production Orders

---

### Viewing Production Orders

Here are the key batch considerations:

- **ASCP accesses only:**
  - Pending and WIP production batches and firm planned order (FPOs)
  - Plant-warehouse, effectivity-defined item/warehouse combinations
- **Turn on Process Operation Control in the Organizations window to collect routing and resource requirements.**
- **Define the plant resource warehouse to include routing and resource data.**

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### Integrating Production Orders With APS

ASCP views only *pending* OPM production orders (firm planned orders, pending batches, and work-in-process batches):

- As a source of supply and demand
- For items that have an item/warehouse/plant relationship defined in the Plant Warehouses window.

You must turn on Process Operation Control (POC) for a plant, and you must define a resource warehouse for a plant if you want to create capacity plans for that plant. If POC is turned on, ASCP collects the plant's routing and resource requirements once a batch is created. This batch information is transferred to ASCP. If a plant does *not* have a resource warehouse, routing and resource data will not be transferred to ASCP.

## Viewing Production Orders

---

### Viewing Production Orders

Here are some additional batch considerations:

- ASCP views consumption of batch ingredients from a *single* warehouse.
- Item quantities are reported in the primary UOM.

Firm planned order considerations are the same as for a batch except that:

- Routing or resource data will *not* be collected.
- FPOs are *not* scheduled across resources.

Production rules:

- Are not required
- Only assist in the *creation* of batches

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### Integrating Production Orders with ASCP

The ingredients for a batch must come from a single warehouse. ASCP does *not* allow allocation of ingredients from multiple warehouses. OPM works around this constraint issue by using the work-in-process warehouse or the resource warehouse (if available) as the single source of ingredient inventory when the batch has multiple sources or destinations. The work-in-process warehouse or the resource warehouse shows ASCP where it can allocate inventory from.

The quantity of a batch product is reported in the converted primary unit of measure of the item.

ASCP views firm planned orders the same way as batches, except that the firm planned order routing and resource requirements are not considered. FPOs are not scheduled across resources. Routing and resource requirements are considered once a firm planned order is converted into a batch.

Production rules (defined in OPM Inventory) are not required, but they do ensure that batches created meet fixed and variable lead-time requirements.



## Referring to On-hand Inventory

---

### Referring to On-hand Inventory

- **ASCP views item/warehouse combinations from among the plant-warehouse relationships.**
- **Lot expiration removes lot on-hand balances from availability.**
- **ASCP does *not* use the First Expired, First Out (FEFO) rule.**
- **Lot status is used for nettability.**

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### Integrating On-hand Inventory With ASCP

ASCP only views the on-hand inventory of item/warehouse combinations defined for the plant that is attached to the MPS schedule. If a lot has expired, ASCP does *not* consider the lot as available inventory. It also does not use the First Expired, First Out (FEFO) rule, and therefore does not suggest that you use the available lot which is closest to expiring. ASCP observes lot statuses and will not consider a lot for consumption unless the lot status identifies the lot as nettable.

### Summary

**In this lesson, you should have learned how to:**

- **List commonalities between ASCP and MRP**
- **Define OPM organizations, warehouses, items, units of measure, and conversions**
- **Define effectivities, formulas, routings, and resources**
- **Define master production schedules for ASCP**
- **Define plant warehouse effectivities**
- **Develop production calendars**
- **Utilize batches, firm planned orders, sales orders, forecasts, and on-hand inventory**

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# **Setting Up Data in Oracle Applications**

## **Chapter 4**

# Setting Up Data in Oracle Applications

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## Objectives

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### Objectives

**After completing this lesson, you should be able to define the following for use in ASCP:**

- **Organizations**
- **Item attributes**
- **Sourcing rules**
- **Shipping networks**
- **Assignment sets**

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### Lesson Topics

This lesson describes how to set up the Oracle Applications data necessary to run ASCP for OPM.

## Creating Applications Organizations

---

### Creating Applications Organizations

**Create organizations that map to OPM organizations:**

- Choose inventory parameters for each organization code.
- Associate with a set of books (SOB).
- Define the organization as an inventory organization.
- Assign a calendar.
- Assign costing settings.

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### Creating Applications Organizations Automatically

OPM users need to create Oracle Applications inventory organizations that map to OPM warehouses. In order for these organizations to map correctly, you must define organization parameters for the system to use when you are creating the organizations. In the Inventory Parameters tabbed page of the organization Parameters window:

- Define inventory parameters for each organization code that maps to an OPM organization.
- Associate each created organization code with a set of books.
- Assign any calendar to each organization code in the inventory parameters. The correct shop calendar is provided to APS when the master demand schedule is generated.

You must also assign costing settings in the Costing Information tabbed page of the Organization Parameters window.

## Oracle Applications Organization

---



(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Systems > OPM System Administration User's Guide > OPM System Setup > Editing HR Organizations > Editing Organization Parameters  
and

(Help) Oracle Manufacturing Applications > Oracle Inventory > Setting Up > Inventory Structure > Defining Organization Parameters

### Setting Up APS

#### To set up ASCP:

- Query the synchronized item from its inventory organization (OPM warehouse).
- Set up item attributes.
- Set up sourcing rules.
- (Optional) Set up a bill of distribution only if material flows through *three or more* organizations.
- Use the Assignment Set window to link the sourcing rules to the item and organization.

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### Setting Up ASCP

To set up ASCP in the Oracle Applications Inventory module:

- Verify that the OPM item has been synchronized to Oracle Inventory by querying it from within its inventory organization (which corresponds to the OPM warehouse).
- Set up sourcing rules to characterize whether the item is make, buy or transfer.
- Set up item attributes within Oracle Inventory.
- Set up a bill of distribution if the material will flow through three or more organizations.
- Use the Assignment Set window to link the sourcing rules to the item and organization.



### Item Attributes

- **Make or buy**
- **Minimum and maximum order quantity**
- **Fixed days supply**
- **Fixed lot multiplier (EOQ)**
- **Fixed order quantity**
- **Safety stock**
- **MRP Planned**
- **ATP**
- **Planning and demand time fences**

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### Automatically Creating Items

The OPM item master trigger automatically creates items in Oracle Inventory that map to OPM Inventory items. These new items are defined as inventory items within Oracle Inventory.

The following list shows the item attributes that you need to assign to newly created items on each of the tabbed pages indicated.

General Planning tab:

- Make or Buy
- Minimum and maximum order quantity
- Fixed days supply
- Fixed lot multiplier (used to calculate the economic order quantity or EOQ)
- Fixed order quantity
- Safety stock

MPS/MRP Planning tab:

- Planning method: MRP Planned
- Calculate ATP
- Planning time fence
- Demand time fence

### Item Attributes

- Work in process
- Fixed or variable lead time
- Bill of material
- Purchased or Purchaseable
- ATP Components flag set to Material and Resource
- UOM code should be the same as in OPM (the mapped value for the UOM)

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### Automatically Creating Items

Work In Process tab:

Build in WIP

Lead Times tab:

Fixed or variable lead time

Bills of Material tab:

BOM Allowed

Purchasing tab:

- Purchased
- Purchasable

Order Management tab:

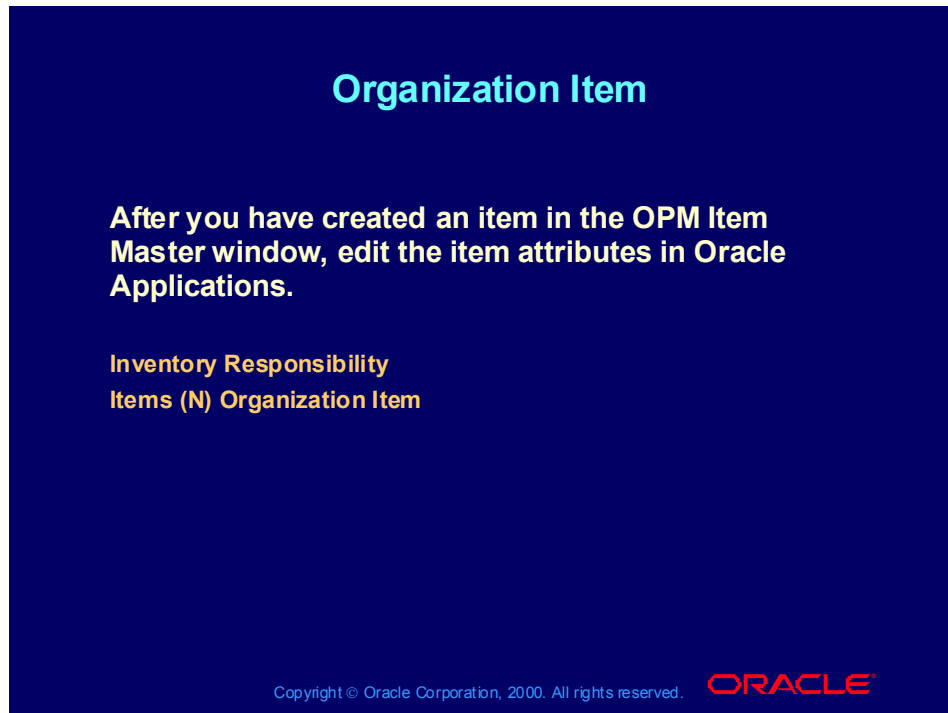
ATP Components: Material and Resource

Main tab:

Primary unit of measure equals the OPM item primary unit of measure  
(**Caution:** You should *not* change this UOM; it is mapped to the UOM value that exists in OPM.)

## Organization Item

---



(Help) Oracle Manufacturing Applications > Oracle Inventory > Items >  
Item Attribute Descriptions by Group

## Organization Item Attributes

---

### Organization Item Attributes

**Verify or set these item attributes:**

- **Main tab:**
  - **Primary unit of measure is the same as in OPM**
  - **Item Status is Active**
- **Inventory tab:**
  - **Inventory is reservable**
- **Bills of Material tab:**
  - **BOM is Allowed**
- **Costing tab**
  - **The Costing Enabled check box is cleared**

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### Setting Organization Item Attributes

Verify the following under the Main tab:

- The primary unit of measure is the same as in OPM. It is important to make certain that the units of measure are set the same in both Oracle Applications and OPM.
- Item Status is Active. The item must be transactable (active).

Inventory tab:

Inventory must be reservable.

Bills of Material tab:

Bill of Material must be allowed even though an OPM formula will be used.

Costing tab:

Turn costing off.

## Organization Item Attributes

---

### Organization Item Attributes

- **Purchasing tab:**
  - **Unit of Issue is correct**
  - **Expense Account number is correct**
- **Receiving tab: no action**
- **Physical Attributes tab: no action**
- **General Planning tab:**
  - **Inventory Planning Method**
  - **Make or Buy**

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### Setting Organization Item Attributes

Purchasing tab:

- The unit of issue for the item is set to the desired unit.
- The expense account number is correct.

Receiving tab: no action required

Physical Attributes tab: no action required

General Planning tab:

- **Inventory Planning Method:**
  - **Not Planned:** if the item is not planned for
  - **Min-Max:** if the item is purchased or made on a minimum/maximum rule
  - **Reorder Point:** if the item is purchased or made on reaching a reorder point
- **Make or Buy:**
  - **Make:** usually manufactured. The Planner Workbench defaults the implementation type to Discrete. The planning process passes demand down from manufactured items to lower-level components.
  - **Buy:** usually purchased. The Planner Workbench defaults the implementation type to Purchase Requisition. The planning process does not pass demand down from purchased items to lower-level components.

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## Organization Item Attributes

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### Organization Item Attributes

- **General Planning tab (continued):**
  - **Safety Stock Method**
    - **Non-MRP Planned**
    - **MRP Planned %**
- **MPS/MRP Planning tab:**
  - **Forecast Control is “Consume and derive”**
  - **Pegging is End Assembly/Hard Pegging**
  - **Calculate ATP on MPS Planning is [3] or [ ]**

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### Setting Organization Item Attributes

General Planning tab (continued):

- **Safety Stock Method:**
  - **Non-MRP Planned:** Calculates safety stock using methods defined in the Enter Item Safety Stocks window. You can use mean absolute deviation or user-defined percentage of forecasted demand.
  - **MRP Planned %:** Calculates safety stock at a defined percentage (Safety Stock Percent) of the average gross requirements for specified number of days.
  - **MPS/MRP Planning tab:**
- Set Forecast Control to “Consume and derive” for products (not for raw or intermediate materials).
- Set Pegging to End Assembly with Hard Pegging.
- You have the option to choose or decline calculating Available to Promise (ATP) on MPS planning.

## Organization Item Attributes

---

### Organization Item Attributes

- **Lead Times tab: no action**
- **Work in Process tab:**
  - **Build in WIP is selected**
  - **Supply Type is Push**
- **Order Management tab:**
  - **Set Check ATP to one of these options:**
    - **None**
    - **Material Only**
    - **Resource Only**
    - **Material and Resource**

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### Setting Organization Item Attributes

- Lead Times tab: no action required
- Work in Process tab:
  - Build in WIP is selected
  - The Supply Type is Push
- Order Management tab:
  - Set Check ATP to
    - None: If there is no check for materials or resources
    - Material Only: If you only want to check for material availability
    - Resource Only: If you only want to check for resource availability
    - Material and Resource: If you want to check for availability of both materials and resources

## Organization Item Attributes

---

### Organization Item Attributes

- Invoicing tab
  - Sales Account number is correct
- Service tab: no action
- Web Option tab: no action

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### Setting Organization Item Attributes

- Invoicing tab:
  - The Sales Account number is correct
- Service tab: no action required
- Web Option tab: no action required



### Sourcing Rules

- **Generic rule definition**
- **Transfers**
  - **Source and destination organization**
  - **Lead time**
  - **Shipping method**
- **Manufacturing**
  - **Destination organization**
- **Purchasing**
  - **Vendor and destination organization**

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### Defining Sourcing Rules

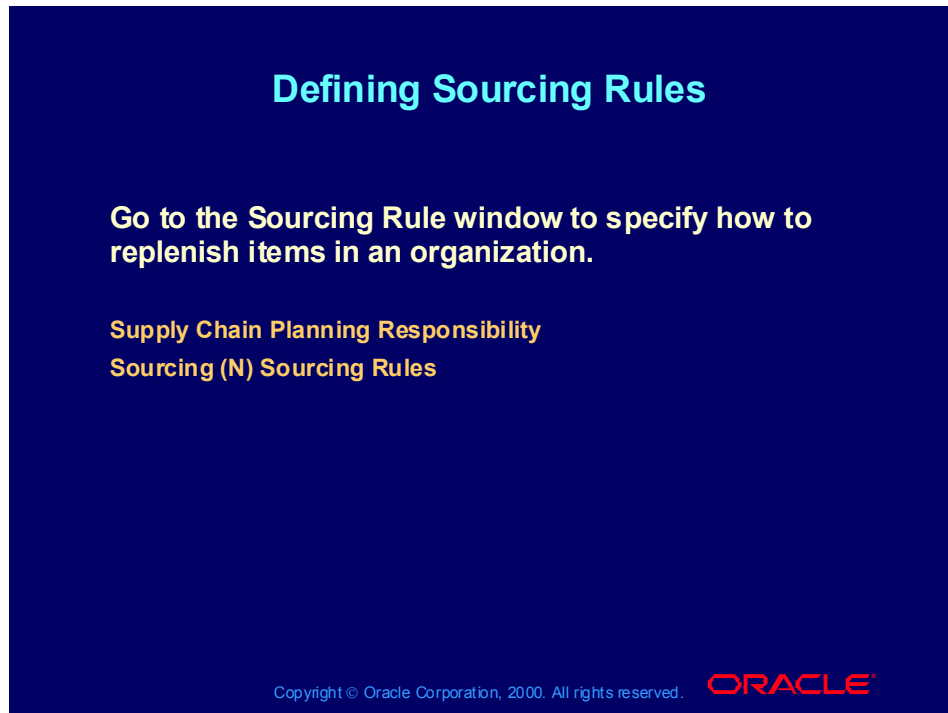
Using sourcing rules, you can define where you receive materials from.

- When you transfer materials from an organization, you need to define the source and destination organization, the lead time, and the shipping method.
- When you manufacture materials, you need to define the organization that receives the manufactured items.
- When you purchase materials, you need to define the vendor that issues and the organization that receives the items.

Sourcing rules and bills of distribution determine the movement of material among organizations. These organizations include supplier, manufacturing, and distribution facilities. The total allocation percentage for all sources within a rank should add up to 100%. The sources with the highest rank (that is, the lowest numerical value) will have the highest priority in allocations. When sources of the highest rank have no more capacity, allocation will be performed for sources in the next highest rank, and so on.

## Defining Sourcing Rules

---



(Help) Oracle Manufacturing Applications > Oracle Master Scheduling/MRP > Supply Chain Planning > Setting Up and Implementing Sourcing Strategies > Defining Sourcing Rules

## Defining Sourcing Rules

---

### Defining Sourcing Rules

**In the Sourcing Rules window, make sure that the Make rule has:**

- **Planning set to Active**
- **Org selected and the organization code displayed**
- **From Date field defined in the Effective Date region**
- **A defined Shipping Organization Make At type has:**
  - **Supplier**
  - **Allocation %**
  - **Rank**

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### Defining Sourcing Rules

On the Sourcing Rules window, make sure that the Make rule has:

- Planning set to Active
- The Org option button selected and the proper organization code displayed
- The From Date field defined in the Effective Date region.
- A Shipping Organization Make At type with a defined:
  - Supplier
  - Allocation %
  - Rank

## Defining Sourcing Rules

---

### Defining Sourcing Rules

In the Sourcing Rules window, make sure that the Buy rule has:

- Planning set to Active
- Org selected and the organization code displayed
- From Date field defined in the Effective Date region
- A defined Shipping Organization Buy From type:
  - Supplier
  - Allocation %
  - Rank

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### Defining Sourcing Rules

In the Sourcing Rules window, make sure that the Buy rule has:

- Planning set to Active
- The Org option button selected and the proper organization code displayed
- The From Date field defined in the Effective Date region
- A Shipping Organization Buy From type with a defined:
  - Supplier
  - Allocation %
  - Rank

## Defining Sourcing Rules

---

### Defining Sourcing Rules

In the Sourcing Rules window, make sure that the Transfer rule has:

- Org selected and the organization code displayed
- From Date field defined in the Effective Date region
- A defined Shipping Organization Transfer From type:
  - Organization
  - Allocation %
  - Rank

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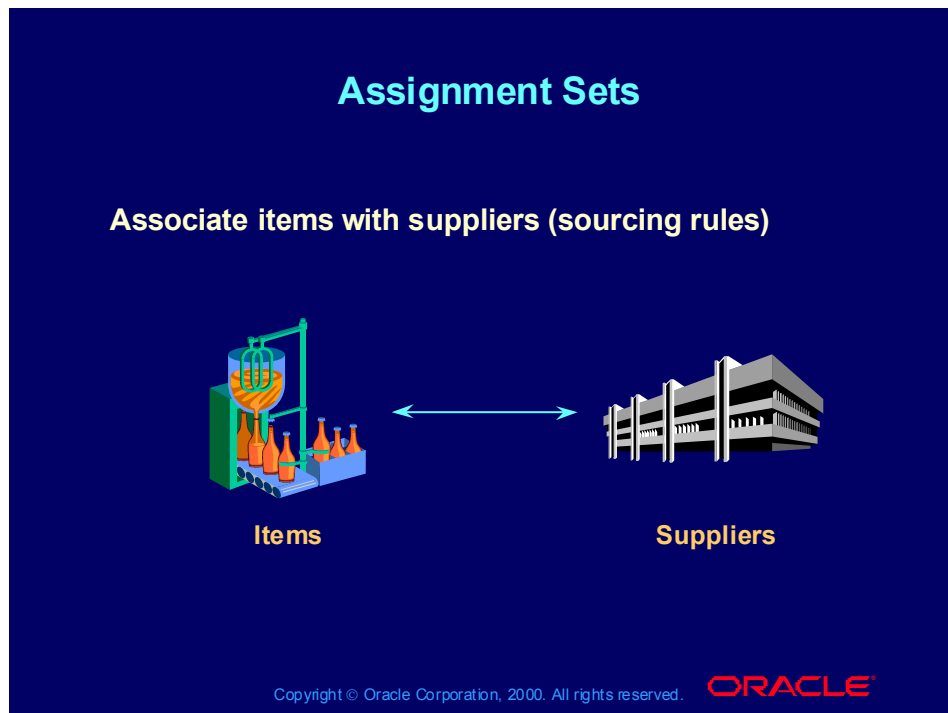
### Defining Sourcing Rules

On the Sourcing Rules window, make sure that the Transfer rule has:

- The Org option button selected and the proper organization code displayed
- The From Date field defined in the Effective Date region
- A Shipping Organization Transfer From type with a defined:
  - Organization
  - Allocation %
  - Rank

## Assignment Sets

---



### Assignment Sets

Supply chains can be different, even for the same item. Items need to be associated with their sourcing rules in an assignment set. In effect, the assignment set creates the sourcing and transfer links between organizations for a particular item.

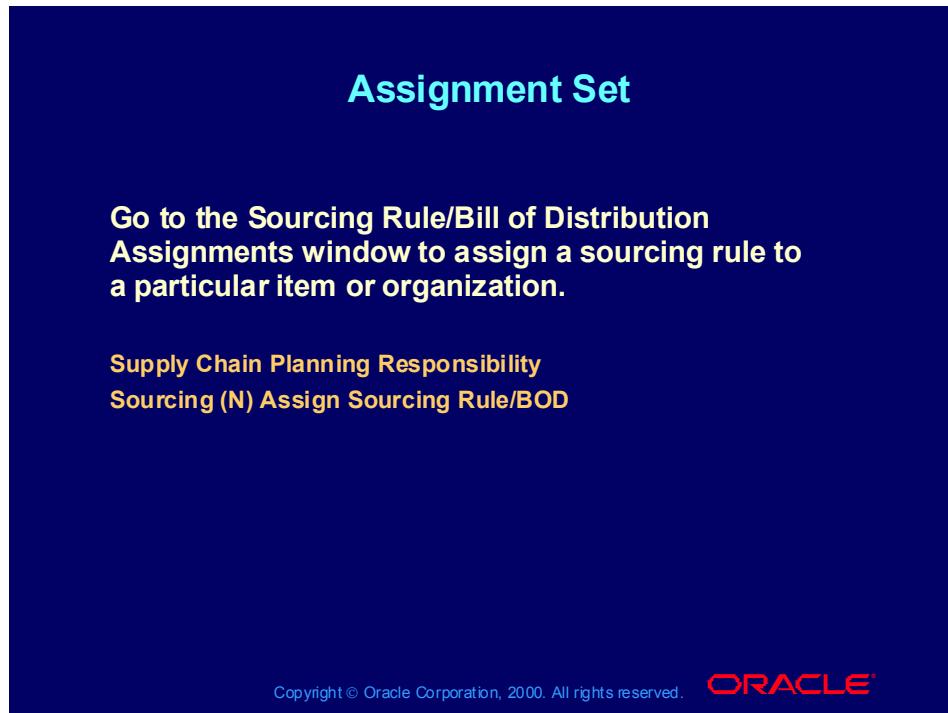
You can model different supply chains by creating alternative assignment sets.

The assignment set to be used for generating a supply chain plan is specified in the planning options for the supply chain plan name. You can name and create several alternative supply chain plans, then use the Planner's Workbench to compare key performance indicators resulting from your alternative plans.

With assignment sets, you can combine many sourcing rules into a group, and source by item or by item/organization.

## Assignment Set

---

A screenshot of the Oracle Assignment Set window. The window has a dark blue background. At the top, the title "Assignment Set" is displayed in a light blue font. Below the title, there is a white text box containing the following instructions: "Go to the Sourcing Rule/Bill of Distribution Assignments window to assign a sourcing rule to a particular item or organization." Below this, the text "Supply Chain Planning Responsibility" and "Sourcing (N) Assign Sourcing Rule/BOD" is displayed in a yellow font. At the bottom of the window, there is a small copyright notice: "Copyright © Oracle Corporation, 2000. All rights reserved." and the Oracle logo in red.

**Assignment Set**

**Go to the Sourcing Rule/Bill of Distribution Assignments window to assign a sourcing rule to a particular item or organization.**

**Supply Chain Planning Responsibility**  
**Sourcing (N) Assign Sourcing Rule/BOD**

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(Help) Oracle Manufacturing Applications > Oracle Master Scheduling/MRP > Supply Chain Planning > Setting Up and Implementing Sourcing Strategies > Assigning Rules and Bills

## Shipping Networks

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### Shipping Networks

**Go to the Shipping Networks window to define the relationships and accounting information that exists between a shipping (from) organization and a destination (to) organization.**

**Inventory Responsibility**

**Setup (N) Organizations—>Shipping Networks**

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(Help) Oracle Manufacturing Applications > Oracle Inventory > Setting Up > Transaction Setup > Defining Inter-Organization Shipping Networks



### Summary

**In this lesson, you should have learned how to define the following for use in ASCP:**

- **Organizations**
- **Item attributes**
- **Sourcing rules**
- **Shipping networks**
- **Assignment sets**

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# **Implementing Plans in OPM**

## **Chapter 5**

# Implementing Plans in OPM

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## Objectives

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### Objectives

**After completing this lesson, you should be able to do the following:**

- **Save planned suggestions**
- **Implement production orders**
- **Reschedule production orders**
- **Implement purchasing suggestions**
- **Cancel batches**

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### Lesson Topics

This lesson describes how you can implement the plans generated by ASCP.

### ASCP Plans

- You can selectively release orders.
- Upon release, a concurrent routine automatically transfers the rows to OPM.
- You can release multiple times for the same plan, thus creating multiple group IDs.

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### Implementing ASCP Plans

The ASCP system calculates planning suggestions (either reschedule orders or the creation of purchasing or production orders) in ASCP, and you can selectively release these ASCP planning suggestions to OPM. For example, you can release suggestions by item or by inventory organization.

When the planning suggestions are released, the purchase orders are sent to Oracle Applications and the production orders are sent to OPM. For OPM, the planner has the option of executing some or all of the planning suggestions by creating either new production orders or rescheduled production order from the suggestions.

You can execute the planning suggestion release process from ASCP multiple times, but not for the same planning suggestions. Once planning suggestions have been released, you can not release them from ASCP again.

## Create Production Orders

---

### Create Production Orders

- You can select any plant in your security schema.
- Choose a group ID from the list of values for the plant you have selected.
- Create batches or FPOs:
  - Manual or automatic document numbering
  - Accept or reject any planned order
  - Change the date or quantity of the firm planned order, if desired
  - Select effectivity if more than one is available

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### Production Orders

The process of creating production batches or firm planned orders (FPOs) from planning suggestions remains the same, regardless of whether the planning suggestion was created in ASCP or OPM. The following list describes the options you have when creating production batches or FPOs from planning suggestions:

- Manual or automatic document numbering
- The ability to reject any firm planned order
- The option of changing the date or quantity of the FPO
- The ability to select which effectivity is used if more than one is available

Any user can create production batches or FPOs from ASCP planning suggestions as long as the plant selected is listed in their security schema (User Organization window). To generate batches or FPOs, select a group ID from the list of values for a valid plant. You receive a group ID when you release a group of orders from ASCP.

## Create Production Orders

---

### Create Production Orders

- **Select One, Many, or All to either convert to batch, convert to FPO, or reject.**
- **Group IDs are supplied by output from a concurrent routine called by ASCP.**
- **The Group ID list of values displays the date of feedback and rows available to process.**

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### Production Orders

You can convert planning suggestions to a batch or firm planned order one at a time, in groups, or all the suggestions in one group ID at once. You also have the option of rejecting the suggestions.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Product Planning > Advanced Planning and Scheduling > Scheduling New Batches From MRP

... > Scheduling New Batches From Suggestions - Procedure

... > Imported Batches - Field References

... > Imported Batches - Buttons



---

## Production Orders

**The Imported Batches window enables you to convert planning suggestions from ASCP into batches or firm planned orders.**

**OPM Process Planning Responsibility**

**Capacity Planning (N) Production Updates—>APS New Batch**

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(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Product Planning > Advanced Planning and Scheduling > Scheduling New Batches From MRP

- ... > Scheduling New Batches From Suggestions - Procedure
- ... > Imported Batches - Field References
- ... > Imported Batches - Buttons

### Reschedule Production Orders

- You can select any plant in your security schema.
- Choose a Group ID from the list of values for the plant you have selected.
- Accept or reject any reschedule order.
- Change the date of the reschedule order, if desired.
- Select One, Many, or All to reschedule.
- Group IDs are supplied by output from a concurrent routine called by ASCP.
- The Group ID list of values displays the date of feedback and rows available to process.

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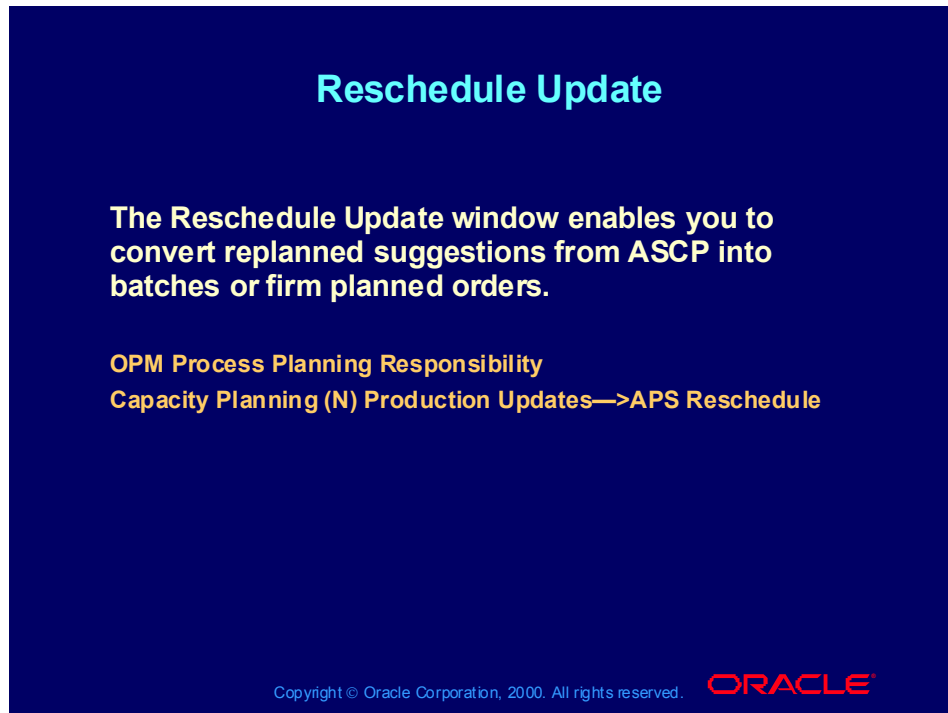
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### Rescheduled Production Orders

As your supply and demand changes, you need to reschedule existing production orders. The Reschedule Update window allows you to reschedule production batches and firm planned orders using the same method you used when releasing planning suggestions the first time.

## Reschedule Update

---



(Help) Oracle Manufacturing Applications > Oracle Process Applications > OPM Product Planning > Advanced Planning and Scheduling > Rescheduling Existing Batches

- ... > Rescheduling Existing Batches - Procedure
- ... > Reschedule Update - Field References
- ... > Reschedule Update - Buttons

## Cancel Production Orders

---

### Cancel Production Orders

- You can select any plant in your security schema.
- Choose a Group ID from the list of values for the plant you have selected.
- Accept or reject any cancellation suggestion.
- Select One, Many, or All to cancel batches or FPOs.
- Group IDs are supplied by output from a concurrent routine called by ASCP.
- The Group ID list of values displays the date of feedback and rows available to process.

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### Cancelled Production Orders

As your supply and demand changes, you may need to cancel existing batches or FPOs. The Imported Batches window allows you to view the cancellation suggestions and accept or reject them. Rejecting the cancellation suggestion schedules the batch or FPO.

## Cancellation Suggestions

---

### Cancellation Suggestions

**The Batch Cancellations window enables you to accept or reject the batch or firm planned order cancellation suggestions from ASCP.**

**OPM Process Planning Responsibility**

**Capacity Planning (N) Production Updates—>APS Cancel Batch**

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(Help) Oracle Manufacturing Applications > Oracle Process Applications > Oracle Process Manufacturing Process Planning > Advanced Planning and Scheduling > Using APS Data in OPM > Accepting or Rejecting Cancellation Suggestions

... > Accepting or Rejecting Cancellation Suggestions - Procedure

... > Batch Cancellations - Field References

... > Batch Cancellation Buttons

### Purchase Orders

- You can create new orders and reschedule existing orders.
- Accomplished in Purchasing
- Upon release, a concurrent routine loads the records.

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### Creating Purchase Orders

APS generates purchasing suggestions that can be approved and converted into purchase orders. The purchasing suggestions are released in ASCP. Once they are released, the new purchase orders are loaded into Oracle Purchasing.

For more information on creating purchase orders from ASCP purchasing suggestions, refer to the *Oracle Purchasing User's Guide*.

### Summary

**In this lesson, you should have learned how to:**

- **Save planned suggestions**
- **Implement production orders**
- **Reschedule production orders**
- **Implement purchasing suggestions**
- **Cancel batches**

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# **Course Summary**

## **Chapter 6**

## Course Summary

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### Course Summary

In this course, you should have learned how to:

- Construct OPM data for use in ASCP
- Set up and use OPM data
- Set up data in Oracle Applications
- Implement plans in OPM

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# Demonstration

## Chapter 7

# Integrating Oracle Process Manufacturing with Advanced Supply Chain Planning Release 11i

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## **Integrating Oracle Process Manufacturing with Advanced Supply Chain Planning Release 11i**

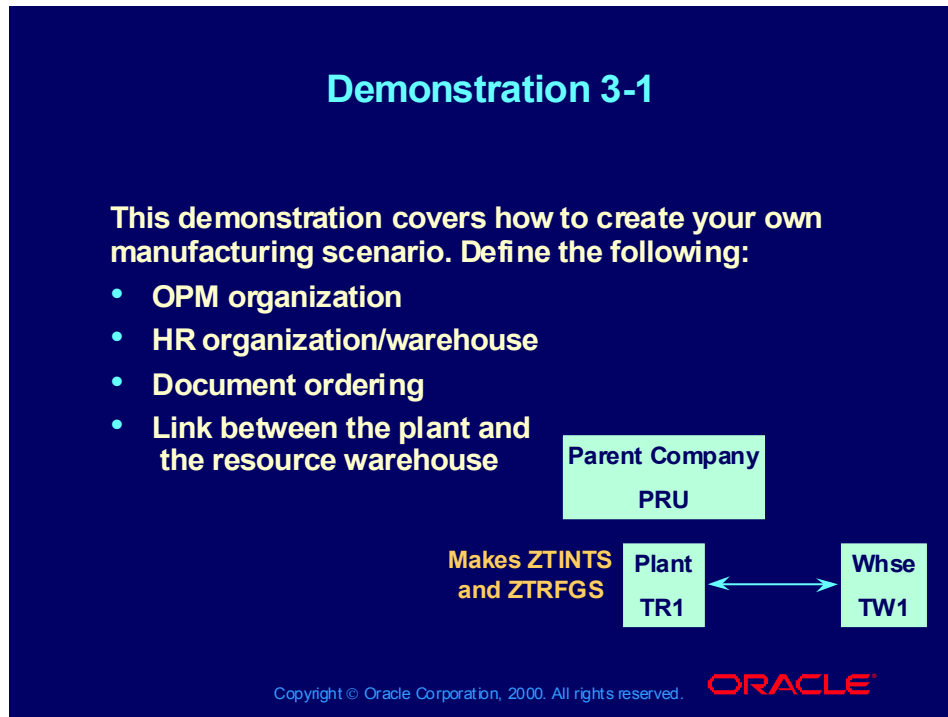
**Demonstration**

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## Demonstration 3-1

---



### Demonstration 3-1

#### Defining a Manufacturing Scenario

Define an OPM organization, HR organization, and document ordering for the scenario shown above. Link the plant to the new warehouse by defining the new warehouse as the resource warehouse for the plant.

## Demonstration 3-1

---

**Demonstration 3-1**

The screenshot shows the 'Organizations' form in Oracle. The form contains the following fields and values:

Field	Value
Organization	TR1
Name	Process Mfg R&D Plant 1
Parent	PRU US OPERATIONS
Company	PRU US OPERATIONS
Plant	Manufacturing Plant
Resource Whse Code	
Process Operation Control	Data Collected
Tax Location	NY New York

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### Create an OPM Organization

(N) OPM System Administration—>OPM System Setup—>Organizations

In this demonstration, the manufacturing plant TR1 is owned by the parent company PRU.



## Demonstration 3-1

---

**Demonstration 3-1**

The screenshot shows the 'Organization' window in Oracle. The 'Name' field is 'TW1-R&D Whse 1'. The 'Type' field is empty. The 'Dates' section has 'From' as '21-JAN-2000' and 'To' is empty. The 'Location' is 'PR-New York' and 'Internal or External' is 'Internal'. The 'Location Address' is '123 Main Street...New York.NY.10001.New York.United States.....'. The 'Internal Address' is empty. The 'Organization Classifications' section has a table with 'Name' and 'Enabled' columns. The first row is 'Inventory Organization' with the 'Enabled' checkbox checked. There are two empty rows below it. A 'Others' button is at the bottom right of the table.

Name	Enabled
Inventory Organization	<input checked="" type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

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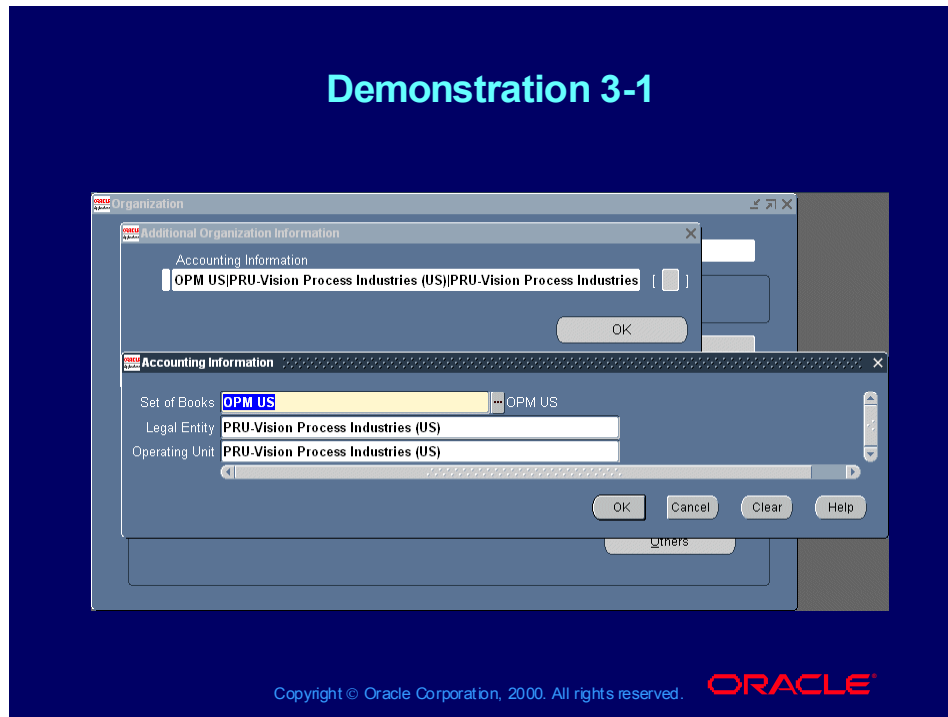
### Create an HR Organization

(N) OPM System Administration—>OPM System Setup—>HR Organizations  
TW1, the resource warehouse for manufacturing plant TR1, was created using the following directions:

- In the Find Organization window, click New.
- Enter the following:
  - Name: TW1
  - Location: PR-New York
- Save your work.
- Enter the Organization Classifications Name : Inventory Organization
- Select the Enabled check box.
- Save your work.
- In the Organization Classifications region of the Organization window, select Inventory Organization in the Name field, then click Others.
- Click OK.

## Demonstration 3-1

---



### Create an HR Organization (continued)

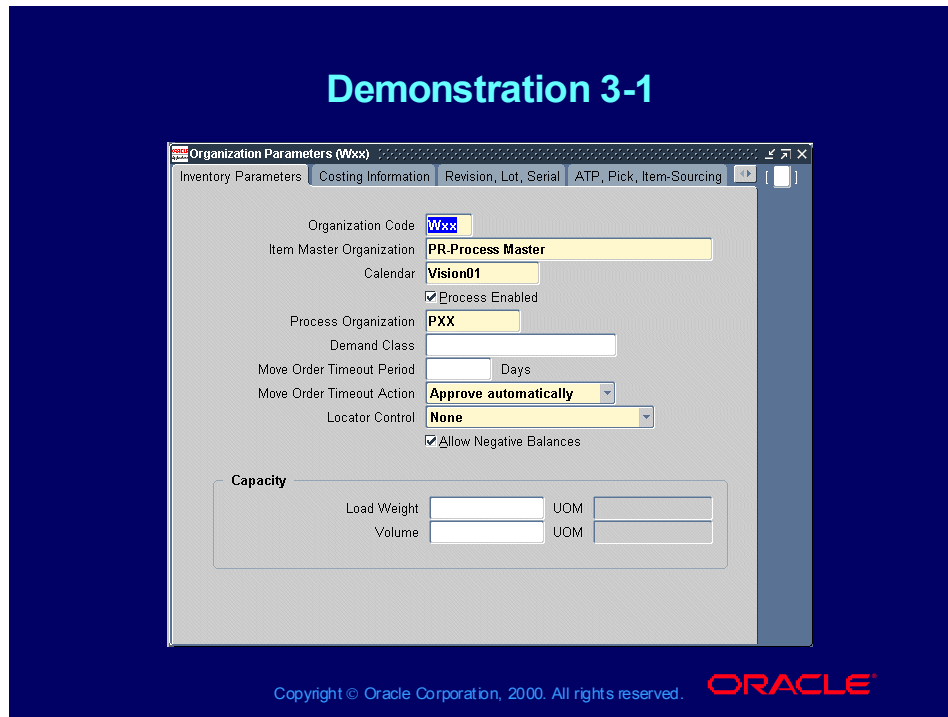
(N) OPM System Administration—>OPM System Setup—>HR Organizations  
(B) Others (B) OK

In the Additional Organization Information window, select Accounting Information.

- Once the Accounting Information field in the Additional Organization Information box appears, press the tab key. The Accounting Information window appears. Complete the following fields:
  - Set of Books: OPM US
  - Legal Entity: PRU-Vision Process Industries (US)
  - Operating Unit: PRU-Vision Process Industries (US)
- Click OK.
- Click OK again and agree to save the changes you have made.

## Demonstration 3-1

---



### Create an HR Organization (continued)

(N) OPM System Administration—>OPM System Setup—>HR Organizations  
(B) Others (B) OK

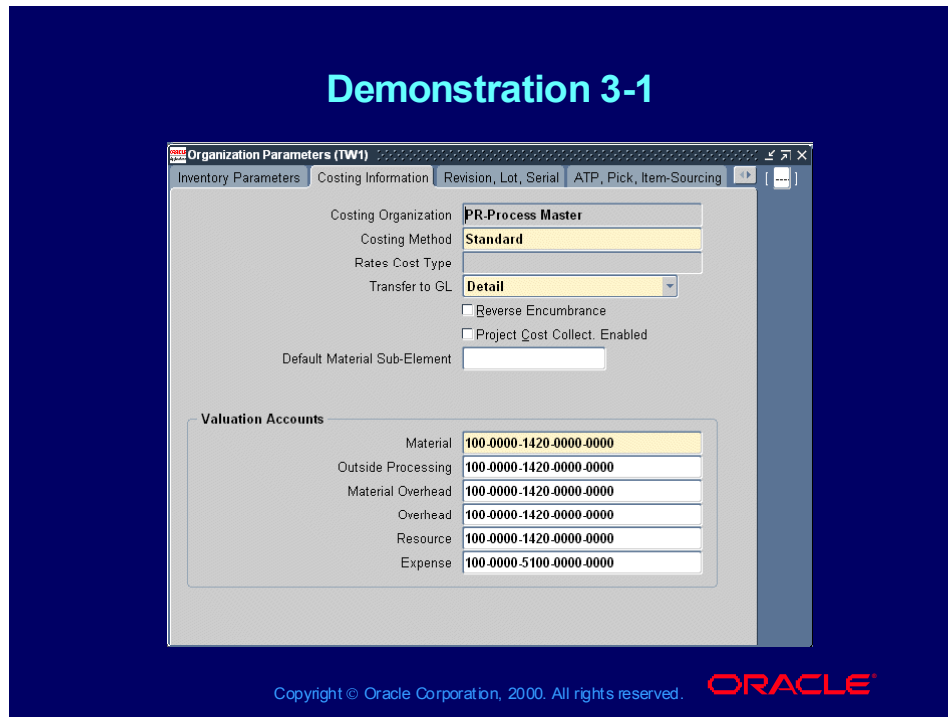
In the Additional Organization Information window, select Inventory Information.

In the Organization Parameters window, under the Inventory Parameters tab, enter the following:

- Organization Code: TW1
- Item Master Organization: PR-Process Master
- Calendar: Vision01
- Select the Process Enabled check box
- Process Organization: TR1

## Demonstration 3-1

---



### Create an HR Organization (continued)

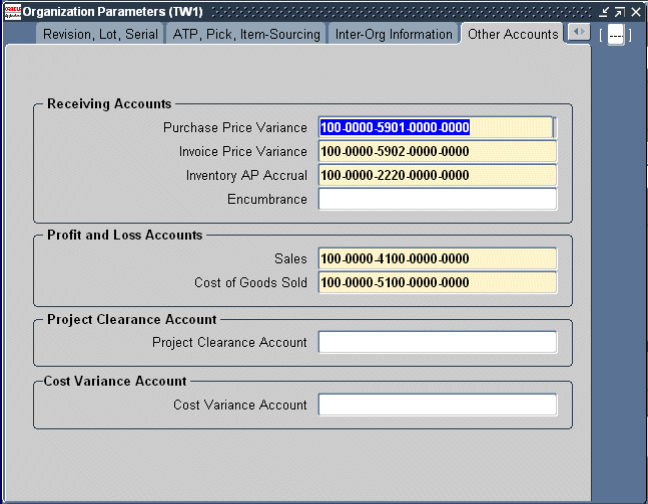
In the Organization Parameters window, under the Costing Information tab, enter the following:

- Costing Method: Standard
- Valuation Accounts, Material: 100-0000-1420-0000-0000

Save your work.

## Demonstration 3-1

**Demonstration 3-1**



Account Type	Account Name	Account Number
Receiving Accounts	Purchase Price Variance	100-0000-5901-0000-0000
	Invoice Price Variance	100-0000-5902-0000-0000
	Inventory AP Accrual	100-0000-2220-0000-0000
	Encumbrance	
Profit and Loss Accounts	Sales	100-0000-4100-0000-0000
	Cost of Goods Sold	100-0000-5100-0000-0000
Project Clearance Account	Project Clearance Account	
Cost Variance Account	Cost Variance Account	

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### Create an HR Organization (continued)

In the Organization Parameters window, under the Other Accounts tab, enter the following:

- Purchase Price Variance: 100-0000-5901-0000-0000
- Invoice Price Variance: 100-0000-5902-0000-0000
- Inventory AP Accrual: 100-0000-2220-0000-0000
- Sales: 100-0000-4100-0000-0000
- Cost of Goods Sold: 100-0000-5100-0000-0000

Save your work.

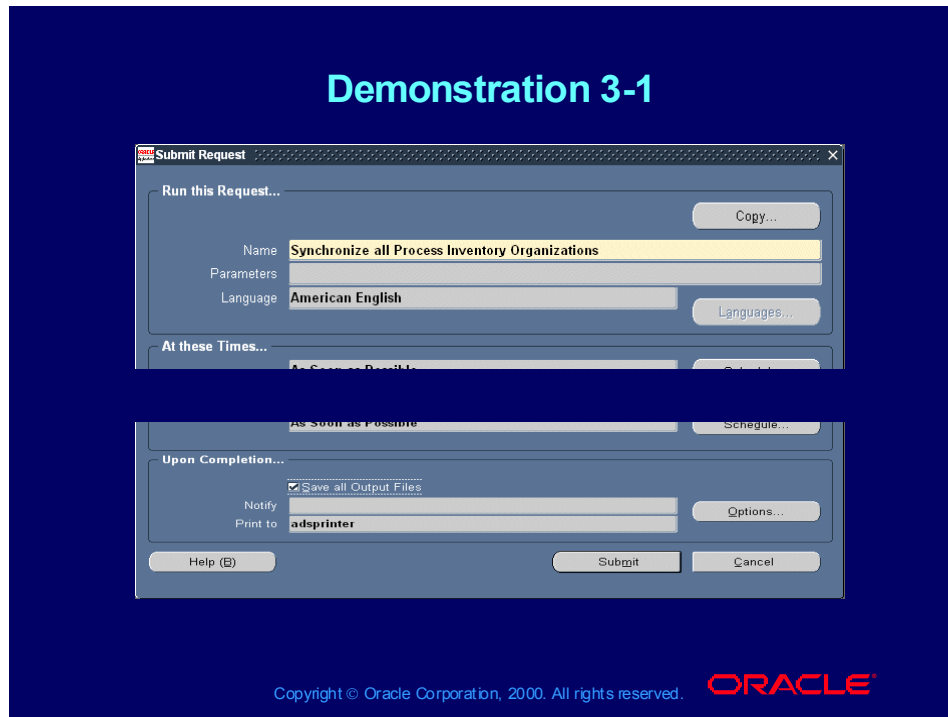
### Define Document Ordering

(N) OPM System Administration—>OPM System Setup—>Document Ordering

Define document ordering for organization TR1 and ADJI, CREI, FCST, FPO, PORD, PPRD, PPUR, PROD, and RECV.

## Demonstration 3-1

---



### Synchronize Process Inventory Organizations

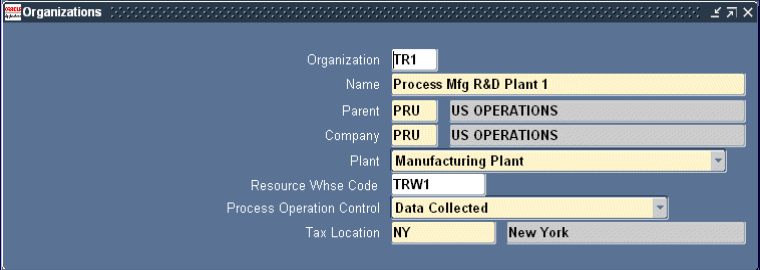
(N) OPM Financials—>Mfg. Acctg Controller—>Reports—>Standard—>Run—>Single Request (B) OK (B) Submit

Select and run the Synchronize All Process Inventory Organizations report.

## Demonstration 3-1

---

**Demonstration 3-1**



The screenshot shows the 'Organizations' form in Oracle. The fields are as follows:

Field	Value
Organization	TR1
Name	Process Mfg R&D Plant 1
Parent	PRU US OPERATIONS
Company	PRU US OPERATIONS
Plant	Manufacturing Plant
Resource Whse Code	TRW1
Process Operation Control	Data Collected
Tax Location	NY New York

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### Link the OPM Organization to the Resource Warehouse

(N) OPM System Administration—>OPM System Setup—>Organizations

Find your plant, TR1.

In the Resource Whse Code field, enter the HR organization/warehouse that you just defined, TW1.

Save your work.

### Technical Note

The resource warehouse appears as TRW1 instead of TW1 in the above screen shot. In previous versions of OPM, warehouses could have four character names and were not required to be linked to an HR organization. In the process of converting data from a previous version of OPM to Release 11i, the warehouse TRW1 was linked to HR organization TW1. This linkage is shown on the next page.

## Demonstration 3-1

---

**Demonstration 3-1**

The screenshot shows the 'Warehouses' form in Oracle. The form contains the following fields and values:

Warehouse	TW1
Description	TW1-R&D Whse 1
Organization	TR1 Process Mfg R&D Plant 1
Region	
Class	
Tax Location	NY New York
Location Control	Non-Location
Consignment	Non-Consignment
Contact	MS LA Mitchell
Phone	
Inventory Organization	TW1

**Default Staging Locations**

Shipping	
Receiving	
Ingredient	
Product	

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### Link the OPM Organization to the Resource Warehouse (continued)

(N) OPM Inventory—>OPM Inventory Control—>Setup—>Warehouse

View the OPM warehouse that was automatically created once you created a process-enabled inventory organization. The Inventory Organization field shows which inventory organization the OPM warehouse is linked to.

(M) Actions—>Address Edit

Enter the address for the warehouse.



### Demonstration 3-2

**Define the following for unconstrained or material-constrained planning:**

- **Formulas**
- **Effectivities**
- **Plant-warehouse relationships**

**In addition to the above steps, define the following for resource-constrained planning:**

- **Resources**
- **Activities**
- **Operations**
- **Routings**

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### Demonstration 3-2

#### **Defining Formulas, Effectivities, and Plant Warehouse Relationships**

Define the formulas and effectivities needed to manufacture your product, then link your plant to the warehouses in its supply chain.

#### **Defining Resources, Activities, Operations, and Routings**

If you want to take into consideration the capacity constraints of your plant resources when creating a plan, you need to define your plant resources, activities, operations, and routings.

## Demonstration 3-2

**Demonstration 3-2**

Formula: ZTRFGS  
Version: 1  
Description: R&D Formula 01  
Comments:  
Formula Class:  
Scaling Allowed: ☒  
Inactive: ☐  
Effective Organization:  
Formula Use:

Seq	Item	Description	Quantity	UOM
1	ZTRFGS	R&D Prd 01	100.000000000	LB

Products: 1    By-products: 0    Ingredients: 2

By-products    Ingredients

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### Defining Formulas

(N) OPM Product Development—>Formula Mgmt—>Formulas

Formulas are defined the same way whether you are using ASCP or not. The following formulas are used for this demonstration:

Formula 1: ZTRFGS, version 1

- Product: ZTRFGS, 100 lb
- Ingredients: ZTINTS, 100 lb and ZTPKGS, 4 ea

Formula 2: ZTINTS, version 1

- Product: ZTINTS, 100 lb
- Byproduct: ZTBYPYR, 10 lb
- Ingredients: ZTRM1S, 60 lb and ZTRM2S, 50 lb

## Demonstration 3-2

**Demonstration 3-2**

Formula: ZTRFGS Version: 1

Description: R&D Formula 01

Formula Use: Production

Product: ZTRFGS

Description: R&D Prd 01

Preference: 1

Organization: TR1 Process Mfg R&D Plant 1

**Quantities**

Standard	100.000000000	UOM	LB
Minimum	1.000000000		
Maximum	99999.000000000		

**Effective Dates**

From	01-AUG-1999
To	30-DEC-2003

Routing Number: ZAPSFG Version: 1

Description: APS Routing for Simple Finished Good

Customer Code:

Customer Name:

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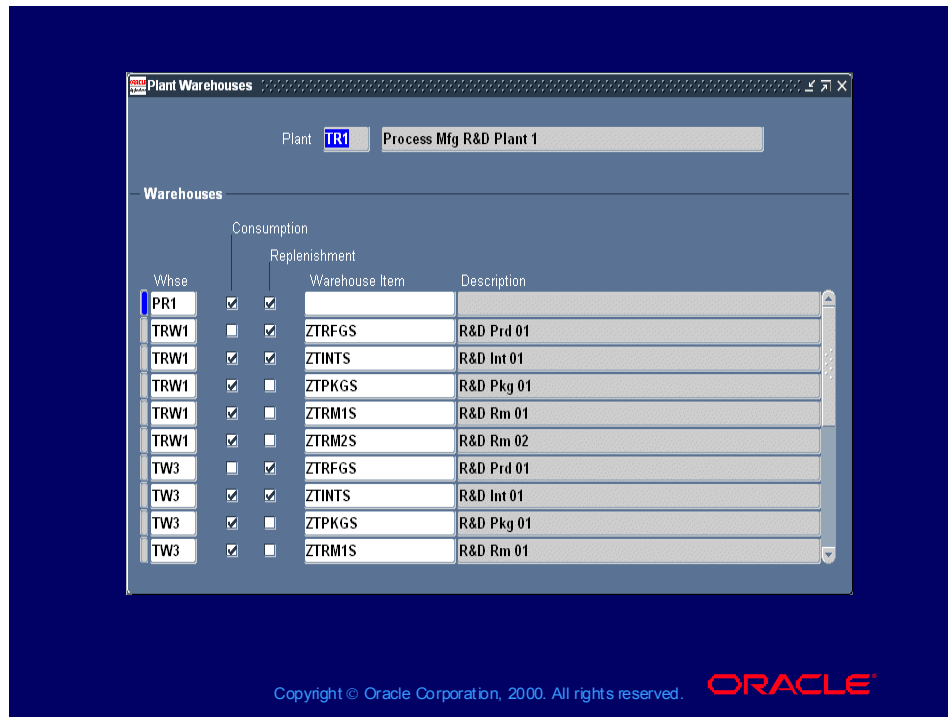
### Defining Effectivities

(N) OPM Product Development—>Formula Mgmt—>Effectivities

Effectivities are also defined the same way whether you are using ASCP or not. You may want to define organization-specific effectivities instead of global effectivities, though, because the interface to ASCP creates organization-specific effectivities for all valid inventory organizations/warehouses if an organization is not specified.

If you want to take resource capacity constraints into consideration when creating a plan, you must attach the routing to the effectivity.

## Demonstration 3-2



### Defining Plant Warehouse Relationships

(N) OPM Process Planning—>MPS—>Setup—>Plant-Warehouse

Define the Plant-warehouse relationship between plant TR1 and warehouse TRW1 as you normally would. Defining the relationship for each item rather than creating a global relationship for all items eliminates the creation of unnecessary data. Global rules create an individual record for the valid combinations, thus having a matrix effect, which exponentially increases the amount of data transferred.

## Demonstration 3-2

---

**Demonstration 3-2**

The screenshot shows the 'Resource Information' window in Oracle. The window contains the following fields and values:

Organization	TR1	Process Mfg R&D Plant 1
Resource	TRMIXER	R&D Mixer
Group Resource	TRMIXER	R&D Mixer
Assigned Quantity	1.000000000	
Available Use/Daily	1.000000000	Usage UOM HRS Hour (Process)
Nominal Cost	6.000000000	
Inactive	<input type="checkbox"/>	
<b>Capacity</b>		
Range	.000000000 - .000000000	
Ideal	.000000000	UOM HRS

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### Defining Resources and Associate Resources with a Plant

These steps are necessary if you want to take resource capacity constraints into consideration when creating a plan.

(N) OPM Product Development—>Formula Mgmt—>Setup—>Resources

Define the resources at your plant as you normally would. The following resources are used in this demonstration:

- TRMIXER
- TRLABOR1
- TRPACK MACH

(N) OPM Process Planning—>Capacity Planning—>Setup—>Plant-Resources

Associate each of your resources with your plant. This association is shown above for the resource TRMIXER and plant TR1.

## Demonstration 3-2

**Demonstration 3-2**

The screenshot shows the Oracle Operations window with the following details:

- Operation: TRMIX
- Description: Mixing Operation
- Operation Class: MIX
- Process Qty UOM: LB

**Resource Details**

Resource	Activity	Process Quantity	UOM	Usage Quantity	UOM
TRMIXER	RUN-TIME	1000.000000000	LB	1.000000000	HRS
TRLABOR1	RUN-TIME	1000.000000000	LB	1.000000000	HRS

Below the table, the following descriptions are listed:

- Resource Description: R&D Mixer
- Activity Description: Run-Time Activity
- Cost Analysis Description: Value Added
- Component Class Description: R&D Machines

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### Creating Activities and Operations

These steps are necessary if you want to take resource-capacity constraints into consideration when creating a plan.

(N) OPM Product Development—>Formula Mgmt—>Setup—>Activities

Define the activities at your plant as you normally would. The following activities are used in this demonstration:

- POST-OP
- RUN-TIME
- SET-UP

(N) OPM Product Development—>Formula Mgmt—>Operations

Define the operations at your plant as you normally would. The following operations are used in this demonstration:

- TRMIX
- TRPACK

## Demonstration 3-2

**Demonstration 3-2**

The screenshot shows the Oracle Routing window with the following fields:

- Routing Number: ZAPSFG
- Routing Version: 1
- Description: APS Routing for Simple Finished Good
- Routing Class: PROC Process
- Routing Quantity: 1000.000000000 UOM: LB

**Routing Steps**

Step	Operation	Description	Step Quantity	UOM
10	TRMIX	Mixing Operation	1000.000000000	LB
20	TRPACK	Packing Operation	1000.000000000	LB

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### Creating Routings

These steps are necessary if you want to take resource capacity constraints into consideration when creating a plan.

(N) OPM Product Development—>Formula Management—>Routings

Define the routings at your plant as you normally would. The routing used in this demonstration is defined as follows:

- Routing Number: ZAPSFG
- Routing Class: PROC
- Routing Quantity: 1000
- UOM: LB
- Step 10, Operation TRMIX, Step Quantity 1000 LB
- Step 20, Operation TRPACK, Step Quantity 1000 LB

## Demonstration 3-2

**Demonstration 3-2**

Routing: ZAPSG  
Version: 1 APS Routing for Simple Finished Good  
Formula: ZTRFGS  
Version: 1 R&D Formula 01

**Routing Details**

Step	Operation	Description	Step Qty	UOM
10	TRMIX	Mixing Operation	1000	LB
20	TRPACK	Packing Operation	1000	LB

**Formula Details**

Step	Type	Line	Item	Description	Quantity	UOM
20	Ingredient	1	ZTINTS	R&D Int 01	100	LB
20	Ingredient	2	ZTPKGS	R&D Pkg 01	4	EA
20	Product	1	ZTRFGS	R&D Prd 01	100	LB

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### Associating Routings with Formulas

(N) OPM Process Execution—>POC—>Formula/Route Assoc

Associate your routing with your formulas. In this demonstration, the routing must be associated with formulas ZTRFGS and ZTINTS.



### Demonstration 3-3

**Define the following to create forecast demand:**

- **MRP shop days**
- **MRP shop calendar**
- **Master production schedule**
- **Forecast**

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### **Creating Forecast Demand**

Shop days are used to define the shop calendar. Define the shop calendar without shift overlaps to avoid shift duplication in ASCP. The calendar is used to define the schedule and the schedule is used to define the forecast.

## Demonstration 3-3

**Demonstration 3-3**

The screenshot shows the 'Shop Calendar' window with the following configuration:

Calendar	Description	Active	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
CURRENT	Current Shop Calendar	<input checked="" type="checkbox"/>	OFF	3SHIFT	3SHIFT	3SHIFT	3SHIFT	3SHIFT	OFF
			Non-Work Day	Regular 3 Shift Day	Regular 3 Shift Day	Regular 3 Shift Day	Regular 3 Shift Day	Regular 3 Shift Day	Non-Work Day

Details

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### Defining Shop Days and a Shop Calendar

(N) OPM Process Planning—>MRP—>Setup—>Shop Days

Define a shop day that includes each shift during the day.

This demonstration uses the 3SHIFT and OFF shop days.

(N) OPM Process Planning—>MRP—>Setup—>Shop Calendar

Specify a shop day for each day of the week.

(N) OPM Process Planning—>MRP—>Setup—>Shop Calendar (B) Details

(M) Actions—>Expand Calendar

The calendar must encompass your planning horizon. For example, if you want to create a plan for the year, you must expand your shop calendar to encompass at least that year.

## Demonstration 3-3

**Demonstration 3-3**

MPS Schedule Parameters

Organization: TR1 Process Mfg R&D Plant 1

Schedule: TR1SCHED

Schedule Description: TR1 MPS Schedule

Indicators Time

Make to Stock: Include Sales Forecasts

Make to Order: Include Sales Orders

Unreleased Blanket Order: Exclude Receipt

Blanket Order Suggestion: Suggest Changes

Active Indicator: Active Schedule

Organization	Calendar	Calendar Description	Time Fence	
			Inner	Outer
TR1	CURRENT	Current Shop Calendar	0	365

Organization Name: Process Mfg R&D Plant 1

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### Defining MPS Schedule Parameters

(N) OPM Process Planning—>MPS—>Setup—>Schedule

Define the MPS schedule parameters for those plants that you want to schedule.

## Demonstration 3-3

**Demonstration 3-3**

The screenshot shows the 'Forecast Maintenance' window. At the top, the 'Forecast' field is set to 'ZTRFGS' and the 'Description' field is 'Forecast for ZTRFGS'. Below this is a section titled 'Forecast Details' containing a table with columns: Item, Org, Whse, Date, Quantity, and UOM. The table lists seven forecast entries for item ZTRFGS, with the last entry (08-DEC-2000) highlighted in yellow and having a quantity of 1200. Below the table is a 'Descriptions' section with fields for Item (R&D Prd 01), Organization (Process Mfg R&D Plant 1), and Warehouse (TW1-R&D Whse 1).

Item	Org	Whse	Date	Quantity	UOM
ZTRFGS	TR1	TRW1	06-NOV-2000	700	LB
ZTRFGS	TR1	TRW1	10-NOV-2000	500	LB
ZTRFGS	TR1	TRW1	14-NOV-2000	1000	LB
ZTRFGS	TR1	TRW1	20-NOV-2000	300	LB
ZTRFGS	TR1	TRW1	24-NOV-2000	800	LB
ZTRFGS	TR1	TRW1	29-NOV-2000	400	LB
ZTRFGS	TR1	TRW1	08-DEC-2000	1200	LB

**Descriptions**

Item: R&D Prd 01  
Organization: Process Mfg R&D Plant 1  
Warehouse: TW1-R&D Whse 1

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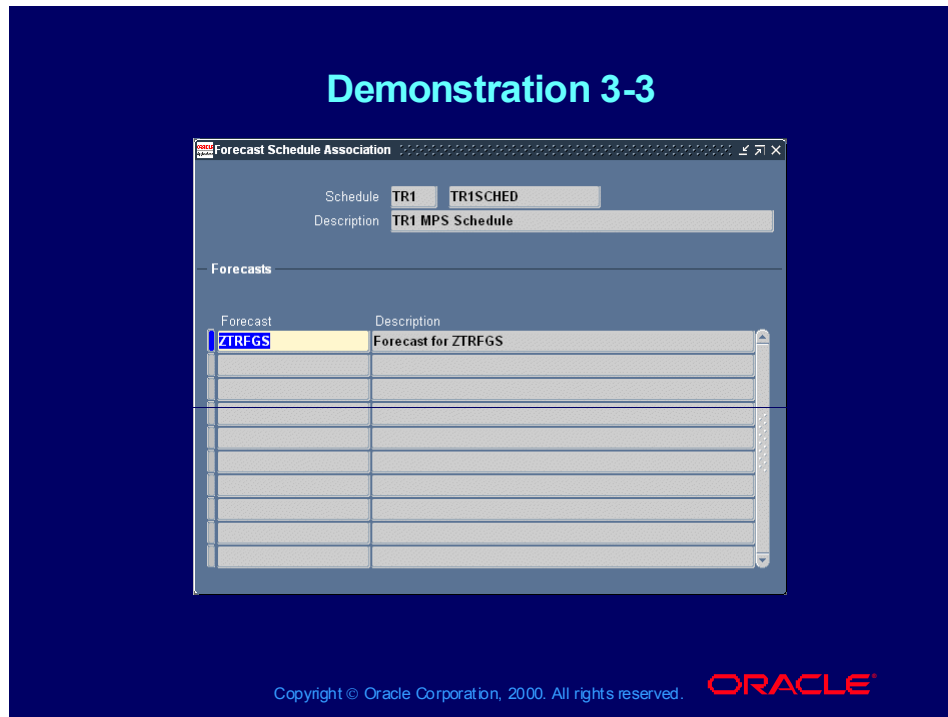
### Defining the Forecast

(N) OPM Process Planning—>Forecasting—>Forecast

Define a forecast for item ZTRFGS.

## Demonstration 3-3

---



### Associating the Forecast With a Schedule

(N) OPM Process Planning—>Forecasting—>Schedule Association  
Enter the forecasts used by the MPS schedule.

## Demonstration 4-1

---

### Demonstration 4-1

**Assign item attributes to newly created items, then define your sourcing rules and assignment sets.**

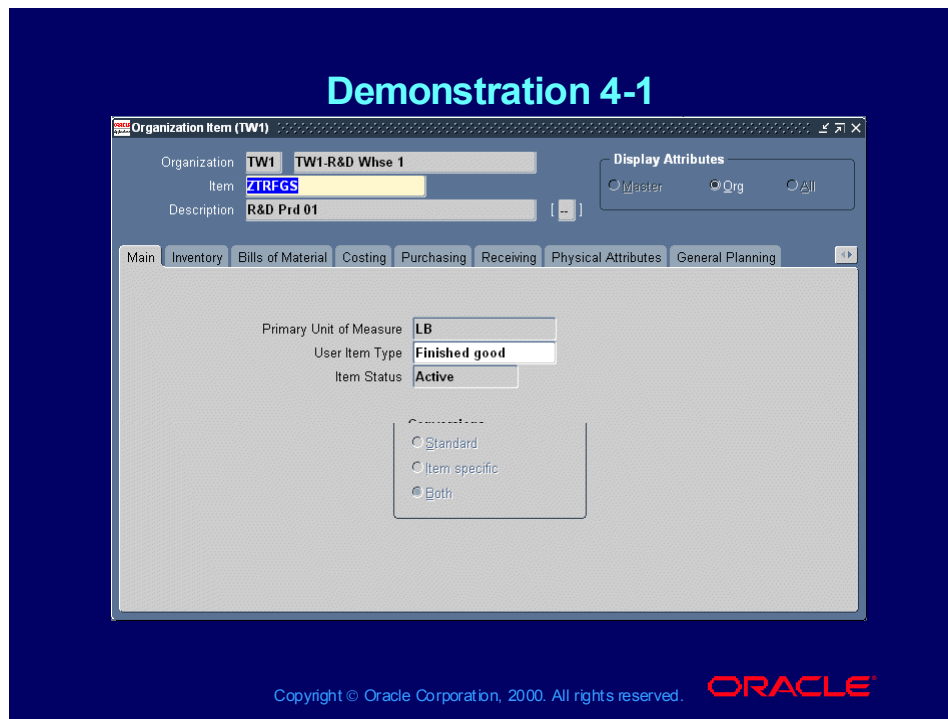
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### **Defining Item Attributes, Sourcing Rules, and Assignment Sets**

The item attributes must be adjusted in Oracle Inventory depending on the characteristics of each item. The sourcing rules define where you receive your materials from, and the assignment set links each item to a sourcing rule.

## Demonstration 4-1



### Defining Item Attributes

(N) Inventory Super User (Process Operations)—>Items—>Organization Items

Look up your items within the TW1 organization. You may need to change the organization to TW1 by navigating to:

(N) Inventory Super User (Process Operations)—>Change Organization)

Adjust the following item attributes as needed:

- Main tab:
  - User Item Type
  - Item Status
- Inventory tab:
  - Inventory Item
  - Stockable
  - Reservable
  - Transactable
- Bills of Material tab:
  - BOM Allowed
- Costing tab:
  - Cost of Goods Sold Account
- Purchasing tab:
  - Purchased

- Purchasable
  - Expense Account
- General Planning tab:
  - Inventory Planning Method
  - Make or Buy
  - Order Quantity fields
  - Safety Stock fields
- MPS/MRP Planning tab:
  - Planning Method
  - Planning Time Fence
- Lead Times tab:
  - Fixed
- Work in Process tab:
  - Build in WIP
  - Supply Type
- Order Management tab:
  - Customer Ordered
  - Internal Ordered
  - Customer Orders Enabled
  - Internal Orders Enabled
  - Shippable
  - OE Transactable
  - Returnable



## Demonstration 4-1

**Demonstration 4-1**

**Sourcing Rule (TST:TW1)**

Name: **TW1.Purch**    ☐ All Orgs    ☒ Planning Active  
Description: **TW1 Purchase Sourcing Rule**    ☐ Org    **TST:TW**    Copy From...

**Effective Date**

From Date: **01-NOV-2000**    To Date:    [ ]

**Shipping Organization**

Type	Org	Supplier	Supplier Site	Allocation % Rank	Shipping Method	Intransit Time
Buy From		Winters Suppl		100 1		

View    Purge    Copy Shipping Orgs From...    Assignment Set...

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### Defining Sourcing Rules

(N) Advanced Supply Chain Planner—>Sourcing—>Sourcing Rules

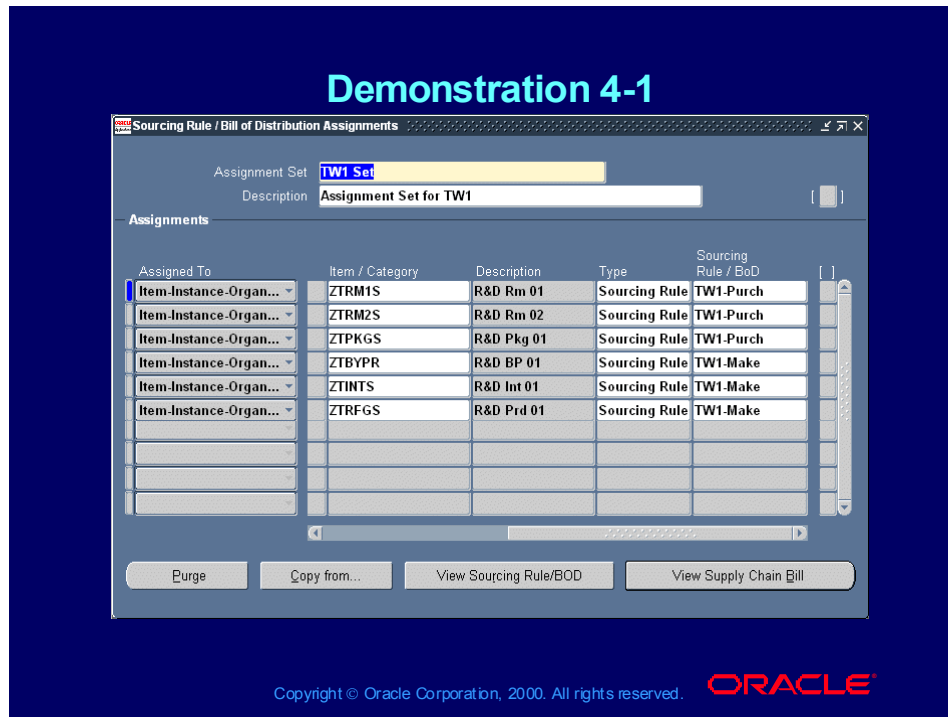
An Organizations window appears.

Select the TST:TW1 organization. If the Sourcing Rules window opens for a different organization, you need to change the organization to TW1 using the following navigation path:

(N) Advanced Supply Chain Planner—>Other—>Change Instance/Organization.

Define a separate sourcing rule for items that are manufactured, purchased, and transferred from another warehouse.

## Demonstration 4-1



### Defining Assignment Sets

(N) Advanced Supply Chain Planner—>Sourcing—>Assign Sourcing Rules  
Create an assignment set that links each item used in a formula to a sourcing rule.

## Demonstration 4-2

---

### Demonstration 4-2

**Perform the following final steps to create a plan in ASCP:**

- **Create a planner**
- **Create an instance**
- **Specify the planning parameters**
- **Create an MRP plan**
- **View your plan**

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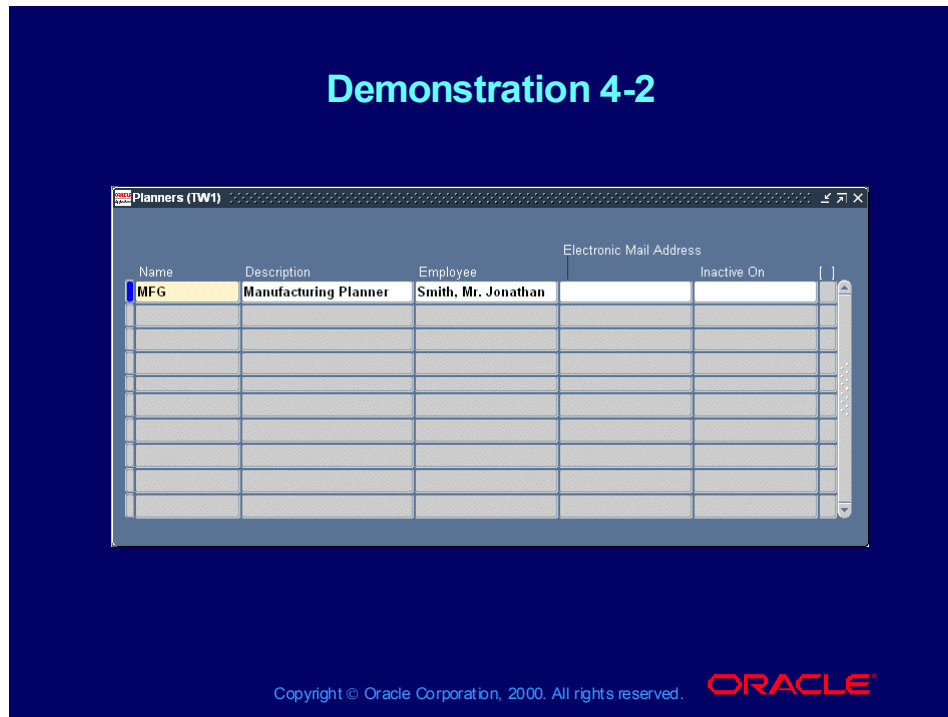
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### **Creating a Plan**

Create a plan in ASCP so that you can implement a plan in OPM in the next demonstration. The above steps are required to create a plan using the data you have entered thus far.

## Demonstration 4-2

---



### Creating a Planner

(N) Manufacturing & Distribution Manager—>Inventory—>Setup—>  
Planners  
Create a planner for your user name.

## Demonstration 4-2

The screenshot displays the 'Application Instances' window. The table contains the following data:

Instance Code	Instance Type	Version	Application Database Link	Planning Database Link
TST	Discrete & Process	11i		

At the bottom right, there is a button labeled 'Organizations'.

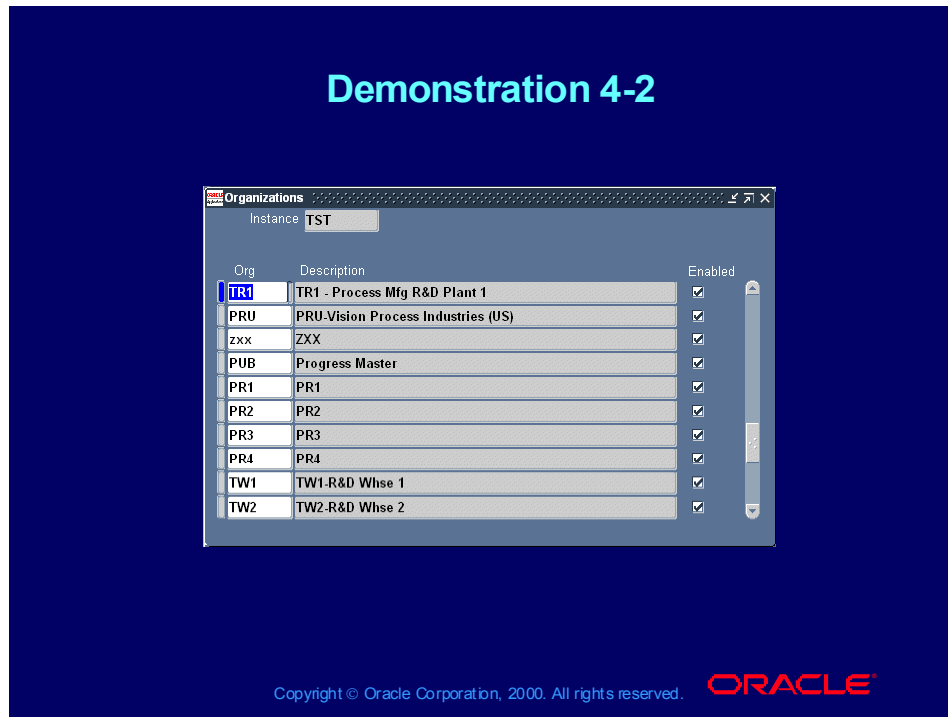
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(N) Advanced Supply Chain Planner—>Setup—>Instances

## Demonstration

## Demonstration 4-2

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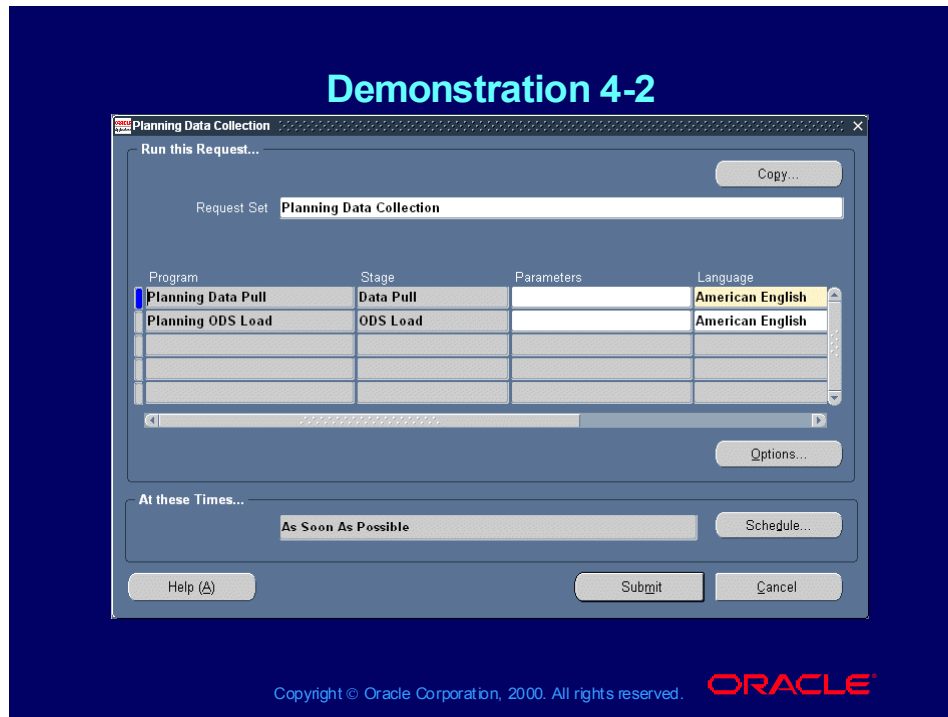
### Enabling Your Organization

(N) Advanced Supply Chain Planner—>Setup—>Instances (B) Organizations

Enable your organization (resource warehouse) for the instance by selecting the Enabled check box next to the organization.

## Demonstration 4-2

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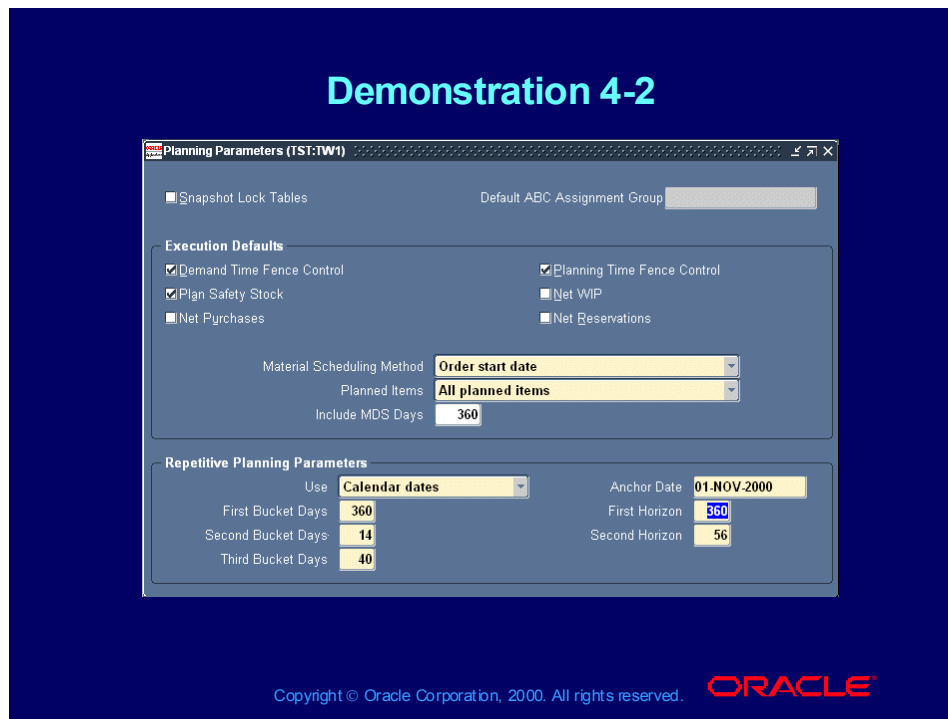


### Running the Collection

(N) Advanced Supply Chain Planner—>Collection—>Data Collection

You must run the data collection before you can set your planning parameters.

## Demonstration 4-2



### Defining Planning Parameters

(N) Advanced Supply Chain Planner—>Setup—>Parameters

An Organizations window appears.

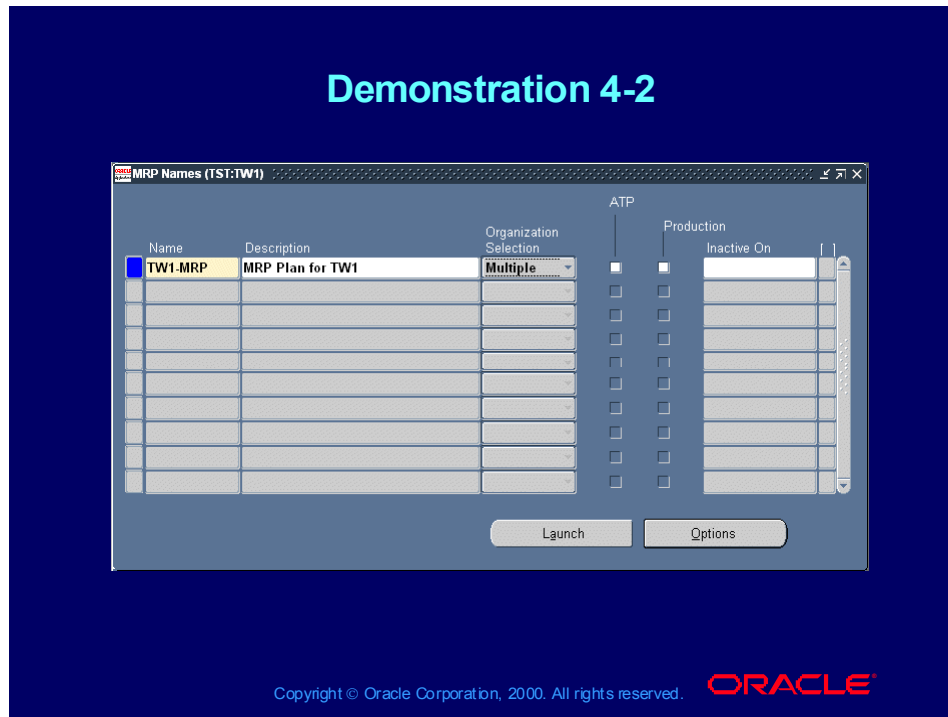
Select the resource warehouse for which you are creating a plan. If the Organizations window does not appear, change the organization to your resource warehouse using the Change Organization window.

Change the parameters as needed for your planning scenario.



## Demonstration 4-2

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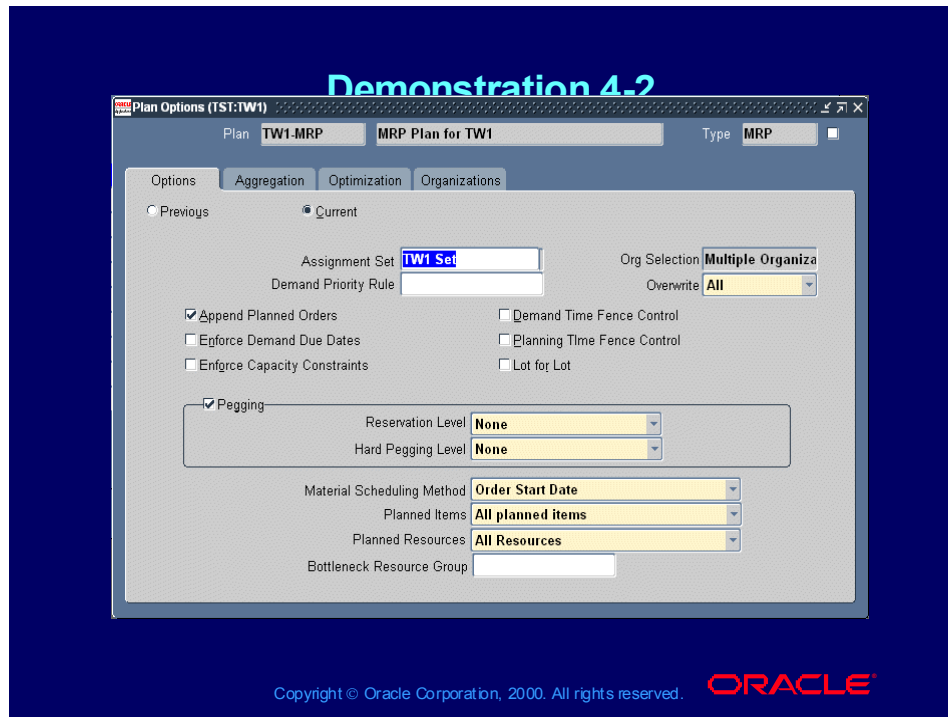
### Creating an MRP Plan

(N) Advanced Supply Chain Planner—>Manufacturing Plan—>Names

Enter the name and description of your plan.

Set the Organization Selection to Multiple in order to include more than one organization in the plan.

## Demonstration 4-2



### Setting Plan Options

(N) Advanced Supply Chain Planner—>Manufacturing Plan—>Names (B)  
Options

Change the values in the Options tabbed page as needed for your plan.

## Demonstration 4-2

**Demonstration 4-2**

Plan Options (TST:TW1)

Plan: TW1-MRP    MRP Plan for TW1    Type: MRP

Options    Aggregation    Optimization    Organizations

Start Date: 01-NOV-2000    End Date: 28-APR-2002

	Days	Weeks	Periods
Bucket Size	365	4	5
Items	Items	Items	Items
Resources	Individual	Individual	Individual
Routings	Routings	Routings	Routings

☐ Plan Capacity

Resource Constraints	No	No	No
Material Constraints	No	No	No

☐ Enable Scheduling

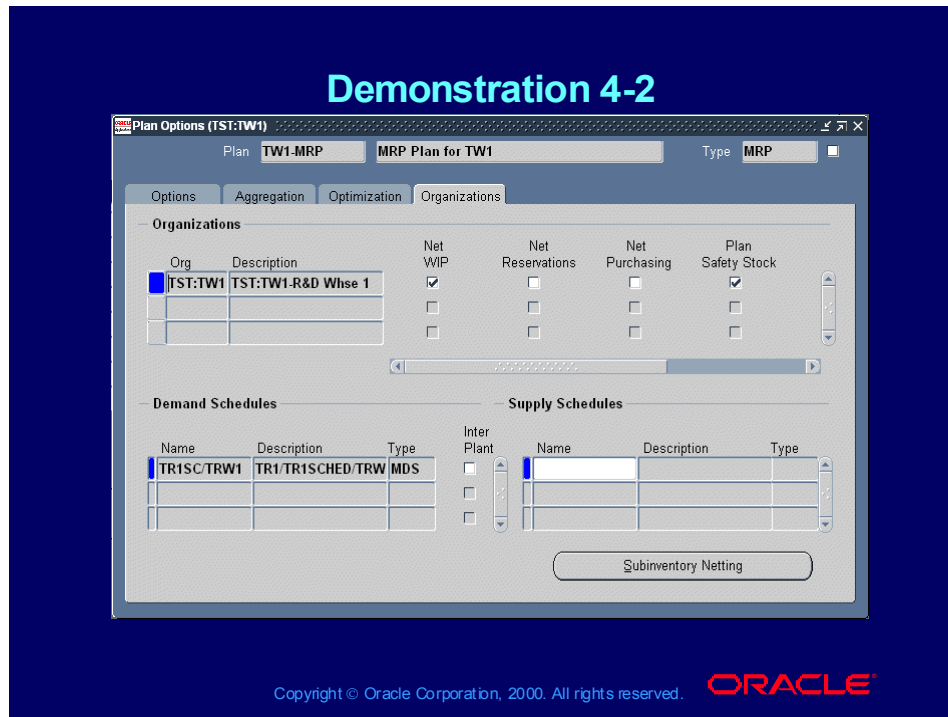
Minutes Bucket Size (in Days)	
Hours Bucket Size (in Days)	
Days Bucket Size (in Days)	365

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### Setting Plan Options (continued)

Change the values in the Aggregations tabbed page as needed for your plan.

## Demonstration 4-2

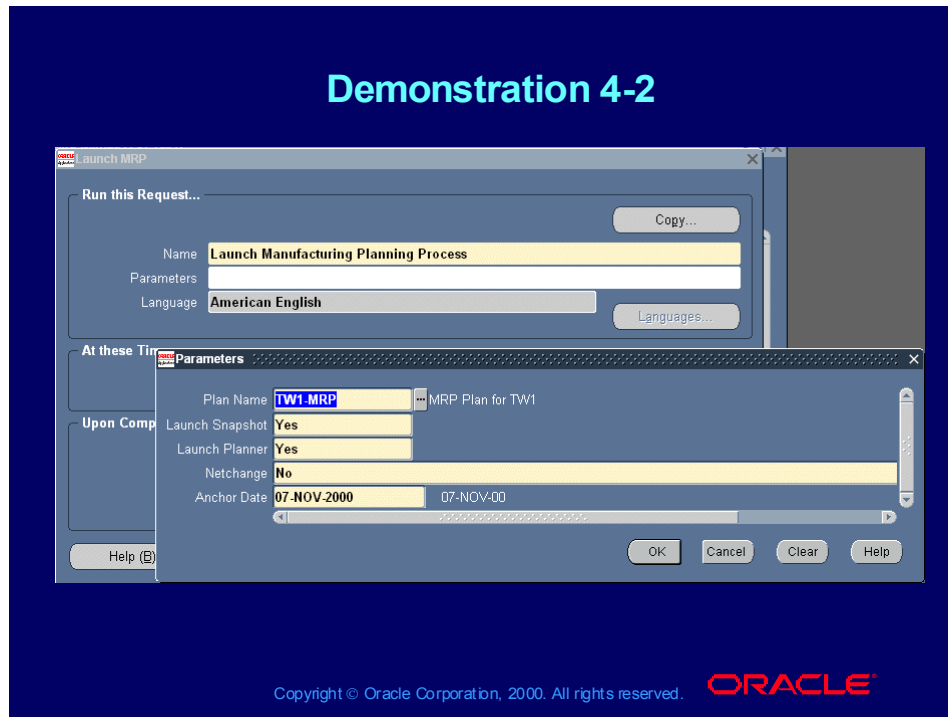


### Setting Plan Options

Select your demand schedule in the Organizations tabbed page.  
Change the values as needed for your plan.

## Demonstration 4-2

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### Launching an MRP Plan

(N) Advanced Supply Chain Planner—>Manufacturing Plan—>Names (B)  
Launch

From the MRP Names window, click the Launch button to launch the plan.

## Demonstration 4-2

**Demonstration 4-2**

Action Type	Plan	Version	Count
Late Sales Orders and Forecasts	TW1-MRP	current	2
Late supply pegged to forecast	TW1-MRP	current	2
Reschedules	TW1-MRP	current	2
Orders with compression days	TW1-MRP	current	2
Recommendations	TW1-MRP	current	3
Discrete Jobs	TW1-MRP	current	3

Exception Counts by Exception Group

Key Indicators Horizontal Plan Vertical Plan Actions Supply Chain

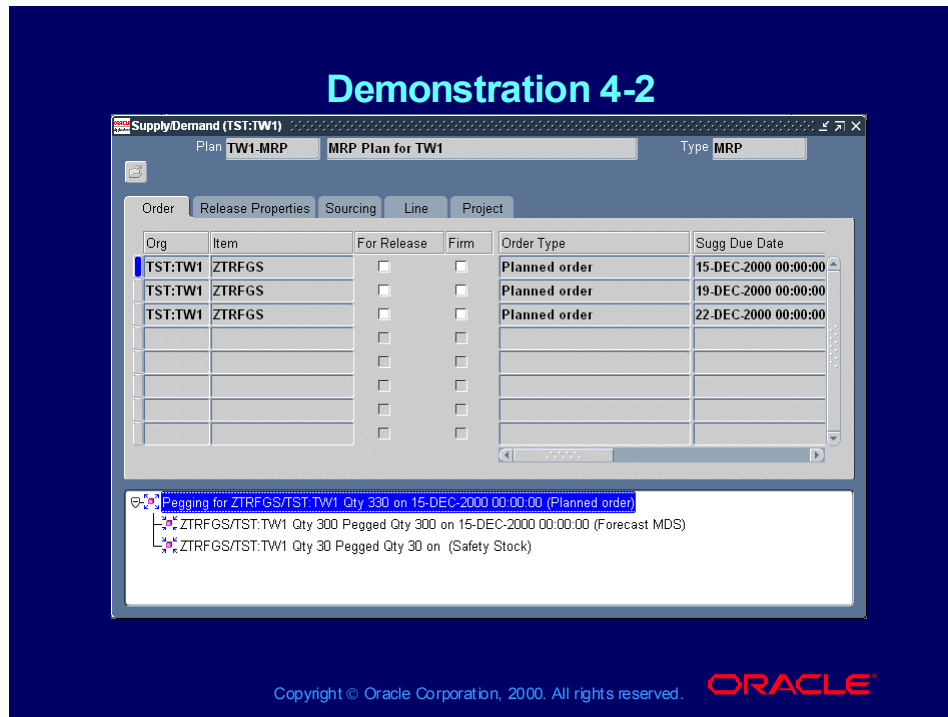
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### Viewing Your Plan

(N) Advanced Supply Chain Planner—>Manufacturing Plan—>Workbench

In the Workbench Actions tabbed page, double-click on an action type to access the Supply/Demand window. You can release a planning suggestion from the Supply/Demand window.

## Demonstration 4-2



### Releasing Planning Suggestions

(N) Advanced Supply Chain Planner—>Manufacturing Plan—>Workbench

Using the Workbench Navigator, drill down to your items. Double-click on an action type to access the Supply/Demand window where you can release a planning suggestion. Select the suggestions that you want to release by checking the For Release check box next to the suggestion, then save your work.

## Demonstration 4-2

**Demonstration 4-2**

Plant Code: **TR1** Process Mfg R&D Plant 1  
Group ID: **16608** Date: **14-DEC-2000 14:07:13**  
Approve as: **Batch**

**Order Details**

Select Warehouse

	Batch / FPO Number	Product	Planned Qty	UOM	Start Date
<input checked="" type="checkbox"/>	TRW1 NEW	ZTRFGS	390	LB	18-DEC-2000 00
<input type="checkbox"/>	TRW1 NEW	ZTRFGS	1060	LB	26-DEC-2000 00
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Description: **R&D Prd 01** Formula: **ZTRFGS** 1  
End Date: **25 DEC 2000 00:00:00** Routing: **ZAPSEFG** 1

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### Creating New Batches

(N) OPM Process Planning—>Capacity Planning—>APS New Batch

For your plant, find the Group ID for the planned orders that previously released. The order details will then appear. Check the Select box next to the order details that you want to convert to batches, then click Convert.



## Demonstration 4-2

**Demonstration 4-2**

The screenshot shows the 'Imported Batches' window in Oracle. At the top, there are fields for Plant Code (TR1), Process Mfg R&D Plant 1, Group ID (16608), Date (14-DEC-2000 14:07:13), and Approve as (Batch). Below this is the 'Order Details' section with a table of batches. A 'Note' dialog box is open, displaying a message about new batch/FPO numbers being assigned.

Select	Warehouse	Batch / FPO Number	Product	Planned Qty	UOM	Start Date
<input checked="" type="checkbox"/>	TRW1	530001	ZTRFGS	390	LB	18-DEC-2000 00:00:00
<input checked="" type="checkbox"/>	TRW1	NEW	ZTRFGS	1060	LB	26-DEC-2000 00:00:00
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

Below the table, there are fields for Description (R&D Prd 01), End Date (02-JAN-2001 00:00:00), and Routing (ZAPSFSG). At the bottom, there are buttons for Reject, Convert, and Cancel.

**Note**  
APP-GMP-84323: New Batch/FPO numbers have been assigned, please make a note of it.

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### New Batch Created

After you convert the planned order to a batch, the new batch number appears. You can view your new batch at (N) OPM Process Execution—>Production Mgmt—>Batches.

