Oracle Process Manufacturing Basics and System Setup Release 11*i*

Student Guide

14515GC10
Production 1.0
July 2000
M011956

ORACLE®

Author

Leanne Vakoc

Publisher

Janine Katter

Copyright © Oracle Corporation, 2000. All rights reserved.

This documentation contains proprietary information of Oracle Corporation. It is provided under a license agreement containing restrictions on use and disclosure and is also protected by copyright law. Reverse engineering of the software is prohibited. If this documentation is delivered to a U.S. Government Agency of the Department of Defense, then it is delivered with Restricted Rights and the following legend is applicable:

Restricted Rights Legend

Use, duplication or disclosure by the Government is subject to restrictions for commercial computer software and shall be deemed to be Restricted Rights software under Federal law, as set forth in subparagraph (c)(1)(ii) of DFARS 252.227-7013, Rights in Technical Data and Computer Software (October 1988).

This material or any portion of it may not be copied in any form or by any means without the express prior written permission of Oracle Corporation. Any other copying is a violation of copyright law and may result in civil and/or criminal penalties.

If this documentation is delivered to a U.S. Government Agency not within the Department of Defense, then it is delivered with “Restricted Rights,” as defined in FAR 52.227-14, Rights in Data-General, including Alternate III (June 1987).

The information in this document is subject to change without notice. If you find any problems in the documentation, please report them in writing to Education Products, Oracle Corporation, 500 Oracle Parkway, Box SB-6, Redwood Shores, CA 94065. Oracle Corporation does not warrant that this document is error-free.

All references to Oracle and Oracle products are trademarks or registered trademarks of Oracle Corporation.

All other products or company names are used for identification purposes only, and may be trademarks of their respective owners.

1

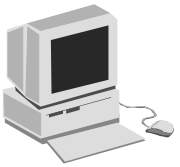
Oracle Process Manufacturing Basics and System Setup Release 11*i*

Copyright © Oracle Corporation, 2000. All rights reserved.

Objectives

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

- **Log in to and navigate through the Oracle Process Manufacturing (OPM) application**
- **Describe OPM responsibilities**
- **Perform the required Oracle Process Manufacturing system setup**
- **Perform optional Oracle Process Manufacturing system setup**



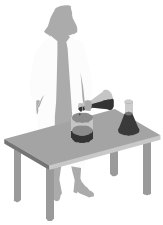
Copyright © Oracle Corporation, 2000. All rights reserved.

ORACLE

Discrete and Process Manufacturing

- **Discrete manufacturing produces distinct items.**

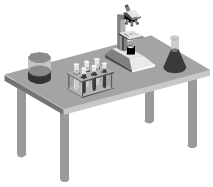
- **Process manufacturing adds value by mixing, separating, forming, and performing chemical reactions.**



Copyright © Oracle Corporation, 2000. All rights reserved.

Characteristics of Process Manufacturing

- Formulas
- Lots, sublots, traceability
- Unit of measure conversions
- Items stored in different units of measure
- Quality tracking
- Inventory status and grading
- Shelf-life management
- Research and development formulation
- Coproducts, by-products, rework, waste, and scrap



1-4

Copyright © Oracle Corporation, 2000. All rights reserved.

2

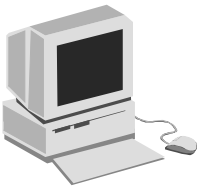
Logging In to and Navigating Oracle Process Manufacturing

Copyright © Oracle Corporation, 2000. All rights reserved.

Objectives

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

- **Log in to Oracle Process Manufacturing (OPM)**
- **Navigate through the menus**



2-2

Copyright © Oracle Corporation, 2000. All rights reserved.

Logging In to OPM

- **The first step in starting Oracle applications is to enter the appropriate URL for your site in an Oracle applications certified browser.**
- **After starting Oracle applications, the first window you see is the sign-on window.**

2-3 Copyright © Oracle Corporation, 2000. All rights reserved.

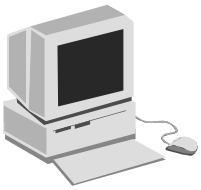
(Help) Oracle Applications User's Guide > Getting Started > Starting Oracle Applications
../ >Starting and Logging On

Navigation

N = Navigator
T = Tab
M = Menu
I = Icon
H = Hyperlink
B = Button
Help = Oracle Applications Help System

Navigating OPM Menus

After you sign on to Oracle applications, a window containing a list of responsibilities appears.



2-4

Copyright © Oracle Corporation, 2000. All rights reserved.

(Help) Oracle Applications User's Guide > Getting Started > Starting Oracle Applications

../ > Choosing a Responsibility

../ > Opening a Form from the Navigator Window

../ > Using the Navigator's Functions Region

../ > Using the Top Ten List

Review Question

The Top Ten lists display your forms numerically, so therefore you can choose them instantly without having to search for them in the navigation list.

True or false?

2-5

Copyright © Oracle Corporation, 2000. All rights reserved.

Review Question Solution

The Top Ten lists display your forms numerically, so therefore you can choose them instantly without having to search for them in the navigation list.

True or False?

Answer: True

If there are forms that you use frequently, you can copy them over to a navigation top-ten list located on the right-hand side of the Navigator window. You can create a different top-ten list for each responsibility that you access.

Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 2-1 Overview

This practice covers the following topics:

- **Logging in to Oracle Applications**
- **Navigating the Forms Menu**

Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 2-1: Logging In to Oracle Applications

Congratulations! You have just been hired by Worldwide Manufacturing Company. Your first task is to log in to the Oracle Process Manufacturing (OPM) application.

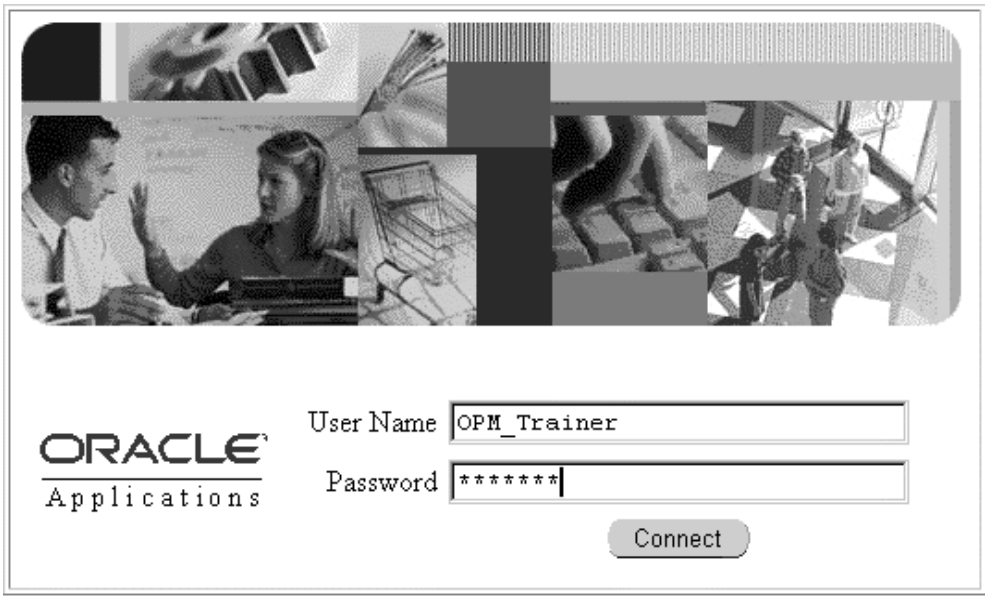
2-8 Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 2-1: Logging In to Oracle Applications

Congratulations! You have just been hired by Worldwide Manufacturing Company. Your first task is to log in to the Oracle Process Manufacturing (OPM) application.

1. Log in to the OPM application, using the username `OPM_TRAINER` and password `WELCOME`.
2. Access the OPM Inventory responsibility. Use the Plus (+) and Minus (-) buttons to expand and collapse the responsibility's submenus.
3. Switch to the OPM System Administration responsibility.

Practice 2-1 Solution



Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 2-1 Solution

Congratulations! You have just been hired by Worldwide Manufacturing Company. Your first task is to log in to the Oracle Process Manufacturing (OPM) application.

Log in to the OPM application, using username `OPM_TRAINER` and password `WELCOME`.

1. Access Oracle Applications.
2. Enter the username `OPM_TRAINER`.
3. Enter the password `WELCOME`.
4. Click Connect.

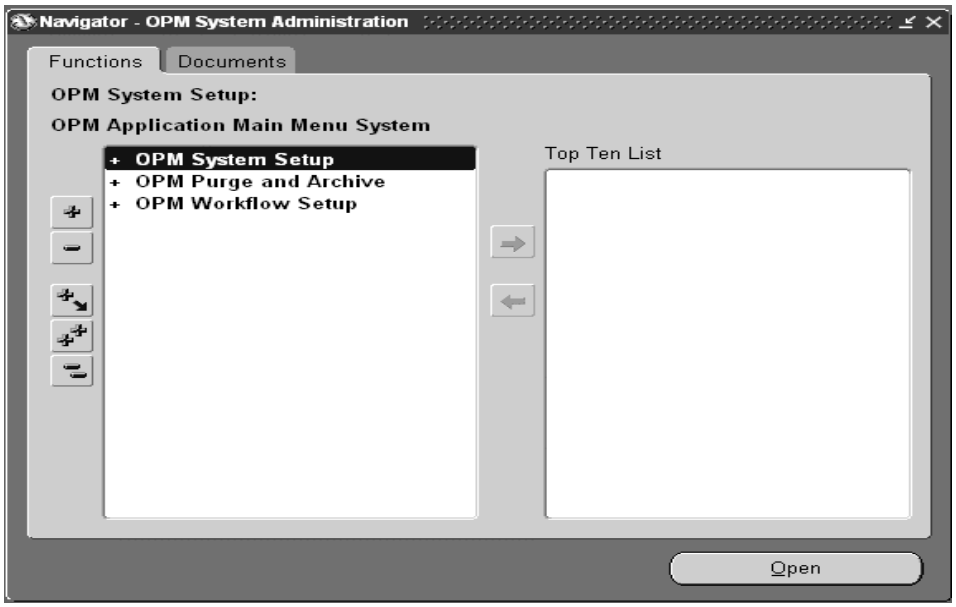
Practice 2-1 Solution

2-10 Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 2-1 Solution (continued)

5. Select the OPM Inventory responsibility.
6. Use the Plus (+) and Minus (-) buttons to expand and collapse the submenus.

Practice 2-1 Solution



2-11

Copyright © Oracle Corporation, 2000. All rights reserved.

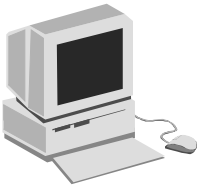
Practice 2-1 Solution (continued)

7. Switch the responsibility to OPM System Administration.

Summary

In this lesson, you should have learned how to:

- **Log in to Oracle Process Manufacturing**
- **Navigate through the menus**



Copyright © Oracle Corporation, 2000. All rights reserved.

3

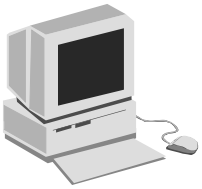
Oracle Process Manufacturing Responsibilities

Copyright © Oracle Corporation, 2000. All rights reserved.

Objectives

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

- **Identify all OPM responsibilities**
- **Explain the integration of OPM responsibilities**
- **Define a new Oracle application user**



3-2

Copyright © Oracle Corporation, 2000. All rights reserved.

OPM System Setup Responsibilities

- Define human resource organizations, organizations, and user organizations
- Establish unit of measure types and units of measure
- Define geography codes, reason codes, document types, and document ordering
- Create text messages to attach later to different documents
- Change session parameters, such as default organization

3-3

Copyright © Oracle Corporation, 2000. All rights reserved.

OPM Inventory Control Responsibilities

- Define items and their characteristics
- Establish controls such as unit of measure conversions, dual units of measure, lots, sublots, locations, quality control grade, and lot status
- Define shelf-life and allocation parameters
- Perform inventory transactions

Copyright © Oracle Corporation, 2000. All rights reserved.

OPM Formula Management Responsibilities

- Define products, coproducts, ingredients, and by-products
- Identify phantoms
- Calculate scrap factors and theoretical yields
- Scale products and ingredients
- Define activities and operations
- Define effectivities for production, costing, and planning
- Define resources and routings

3-5

Copyright © Oracle Corporation, 2000. All rights reserved.

OPM Production Management Responsibilities

- Enter and modify production batches
- Record batch input and output
- Scale production batches
- Associate batch ingredients with routing steps
- Set up and record Work in Process (WIP) details

3-6

Copyright © Oracle Corporation, 2000. All rights reserved.

OPM Physical Inventory Responsibilities

- Manage physical inventory counting and periodic inventory cycle counting
- Define and enter cycle counts
- Define and enter physical inventory
- Alter inventory counts with the results of physical counts and cycle counts

3-7

Copyright © Oracle Corporation, 2000. All rights reserved.

ORACLE

OPM Purchase Management Responsibilities

- Perform receiving transactions, such as receiving purchase orders or stock
- Update receipts to accounts payable
- Manage returns
- Set up vendor classes

3-8

Copyright © Oracle Corporation, 2000. All rights reserved.

OPM Order Fulfillment Responsibilities

- Define pricing structures for automatic order pricing
- Enter new orders, or copy existing profiles and sales orders
- Ship sales orders
- Run order fulfillment reports
- Provide quick responses to customer inquiries

3-9

Copyright © Oracle Corporation, 2000. All rights reserved.

OPM Cost Management Responsibilities

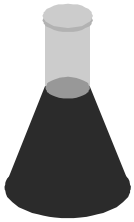
- Establish global costing setup including cost methods, cost calendar, cost components, and cost analysis codes
- Establish the standard and actual cost environments
- Perform standard cost rollups and actual cost calculations
- Update standard and actual costs to the general ledger
- View product cost details

3-10

Copyright © Oracle Corporation, 2000. All rights reserved.

OPM Laboratory Management Responsibilities

- Establish the laboratory formulation environment
- Maintain lab formulas
- Generate the lab spreadsheet
- Perform the lab ingredient search and replace



3-11

Copyright © Oracle Corporation, 2000. All rights reserved.

OPM Quality Control Responsibilities

- Define Quality Control (QC) action messages and grades
- Specify hold reasons and inventory item QC attributes
- Set up test specifications
- Execute the QC cycle, including defining QC samples, testing, recording, obtaining test results, and acting on those results at all levels

3-12

Copyright © Oracle Corporation, 2000. All rights reserved.

OPM Material Requirements Planning Responsibilities

- Define shop days and shop calendars
- Define schedule parameters
- Perform a Material Requirements Planning (MRP) run and list warnings and errors
- View planning information in different ways and ensure tight integration with other responsibilities, thus allowing increased overall efficiency
- Display rule-driven action messages that suggest actions to keep inventory in balance with demand

3-13

Copyright © Oracle Corporation, 2000. All rights reserved.

OPM Master Production Scheduling Responsibilities

- Define buckets of planning information
- Create schedules around user-defined views of the enterprise
- Create rules, time fences, shop calendars, simulation abilities, and multiple views into planning information
- Link production plants to storage warehouses
- List pending inventory transaction activity
- Show aggregate supply and demand information

3-14

Copyright © Oracle Corporation, 2000. All rights reserved.

OPM Financials Manufacturing Accounting Controller Responsibilities

- **Automactically record financial impact of various transactions throughout the enterprise**
- **Provide integration with Oracle Financials**

3-15

Copyright © Oracle Corporation, 2000. All rights reserved.

ORACLE

Review Question

What is a predefined set of data, menus, and forms that defines your particular level of authority while using the system?

1. **Task**
2. **System**
3. **Reason**
4. **Responsibility**

3-16

Copyright © Oracle Corporation, 2000. All rights reserved.

Review Question Solution

What is a predefined set of data, menus, and forms that defines your particular level of authority while using the system?

1. Task
2. System
3. Reason
4. **Responsibility**

3-17

Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 3-1 Overview

This practice covers the following topics:

- **Navigating through different responsibilities**
- **Learning which forms are used for various tasks**

3-18

Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 3-1: Navigate Through Different Responsibilities

Now that you have learned to log in to OPM applications, your next task is to familiarize yourself with the various responsibilities.

Navigate from the Responsibilities window to find the following items. Indicate the entire path to get to that item.

3-19

Copyright © Oracle Corporation, 2000. All rights reserved.

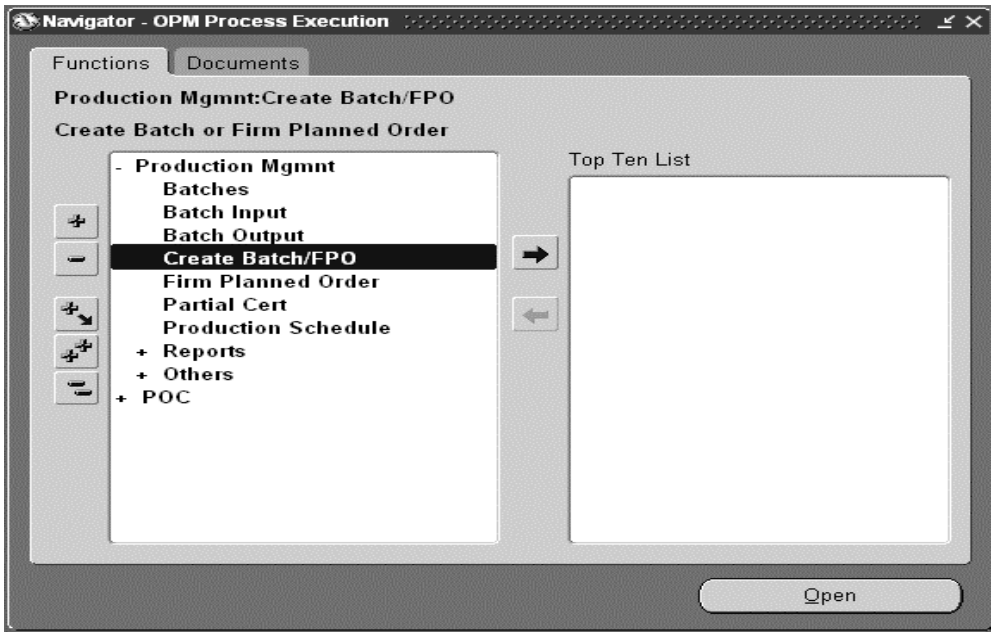
Practice 3-1: Navigate Through Different Responsibilities

Now that you have learned to log in to the OPM application, your next task is to familiarize yourself with the various responsibilities.

Navigate from the Responsibilities window to find the following items. Indicate the entire path to get to that item.

- Create a batch.
- Enter a shop calendar.
- Enter a shipping method.
- Perform a cycle count.
- Enter item technical data.
- Enter burden details.
- Enter customer and vendor samples.
- Enter a text token.
- Enter routings.
- Define a schedule.

Practice 3-1 Solution



Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 3-1 Solution

Now that you have learned to log in to OPM applications, your next task is to familiarize yourself with the various responsibilities.

Navigate from the Responsibilities window to find the following items. Indicate the entire path to get to that item.

- Create a batch.

  OPM Process Execution: (N) Production Mgmt—>Create Batch/FPO
- Enter a shop calendar.

  OPM Process Planning: (N) MRP—>Setup—>Shop Calendar
- Enter a shipping method.

  OPM Logistics: (N) Order Fulfillment—>Setup—>Shipping—>Shipping Methods
- Perform a cycle count.

  OPM Inventory: (N) OPM Physical Inventory—>Cycle Inventory—>Cycle Count
- Enter item technical data.

  OPM Product Development: (N) Laboratory Mgmt—>Setup—>Item Technical Data
- Enter burden details.

  OPM Financials: (N) Cost Management—>Burden Details

Practice 3-1 Solution (continued)

- Enter customer and vendor samples.

  OPM Product Development: (N) Quality Control—>Samples—>Cust/Vend
- Enter a text token.

  OPM Systems: (N) OPM System Setup—>Text Tokens
- Enter routings.

  OPM Product Development: (N) Formula Mgmt—>Routings
- Define a schedule.

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

OPM Integration

Items

Organizations Units of measure

Formulas Activities

Operations Effectivities Transactions

Resources Routings

Prices Costs Production batches

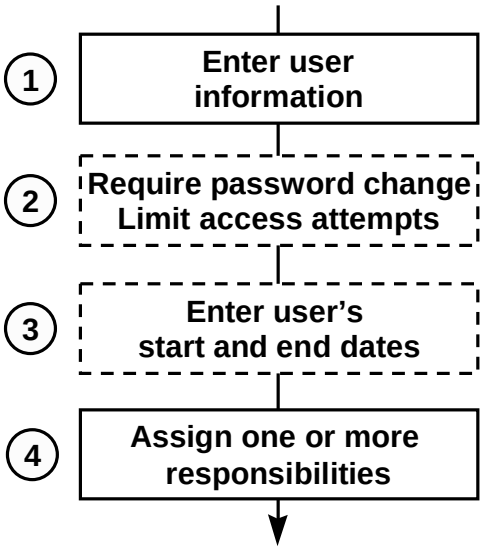
Purchase orders Sales orders Accounts

Customers Suppliers

3-23

Copyright © Oracle Corporation, 2000. All rights reserved.

Defining a New Application User



3-24

Copyright © Oracle Corporation, 2000. All rights reserved.

Defining a New Application User

The slide shows the steps used to define a new application user. You define an authorized user of Oracle Applications by specifying a username and password, and assigning one or more responsibilities to the application user.

Note: Only the first and last steps are required.

Defining Users

To define an authorized user of Oracle applications:

- **Specify a username.**
- **Specify a password.**
- **Assign one or more responsibilities to the application user.**

3-25

Copyright © Oracle Corporation, 2000. All rights reserved.

ORACLE

Defining Users

(Help) Applied Technology > Oracle Applications System Administration > Overview of Oracle Applications Security

../ > Users Window

Navigation

N = Navigator

T = Tab

M = Menu

I = Icon

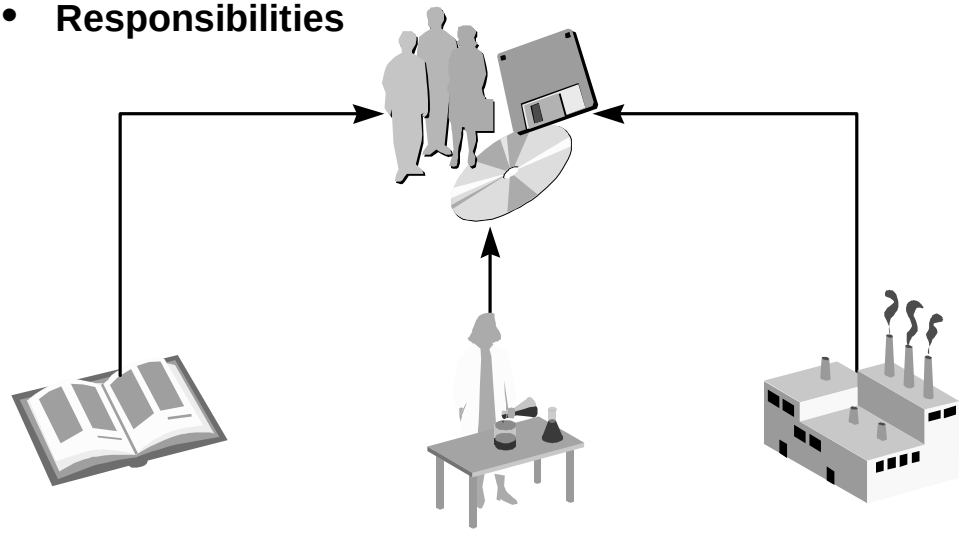
H = Hyperlink

B = Button

Help = Oracle Applications Help System

Setup Considerations

- **Users**
- **Responsibilities**



3-26

Copyright © Oracle Corporation, 2000. All rights reserved.

ORACLE

Practice 3-2 Overview

This practice covers the following topics:

- **Defining users**
- **Assigning responsibilities**

3-27

Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 3-2: Defining Users and Responsibilities

In this exercise, you will perform setup steps to define yourself as a user, and assign yourself authority to access all responsibilities in your plant.

3-28

Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 3-2: Defining Users and Responsibilities

In this exercise, you will perform setup steps to define yourself as a user, and assign yourself authority to access all responsibilities in your plant.

Note: In the following exercises, certain information must follow the instructions given. Please adhere to the naming structure that is provided or you may get lost. The term *xx* is used throughout the practices. When you see this term, enter your terminal number.

Practice 3-2: Defining Users and Responsibilities (continued)

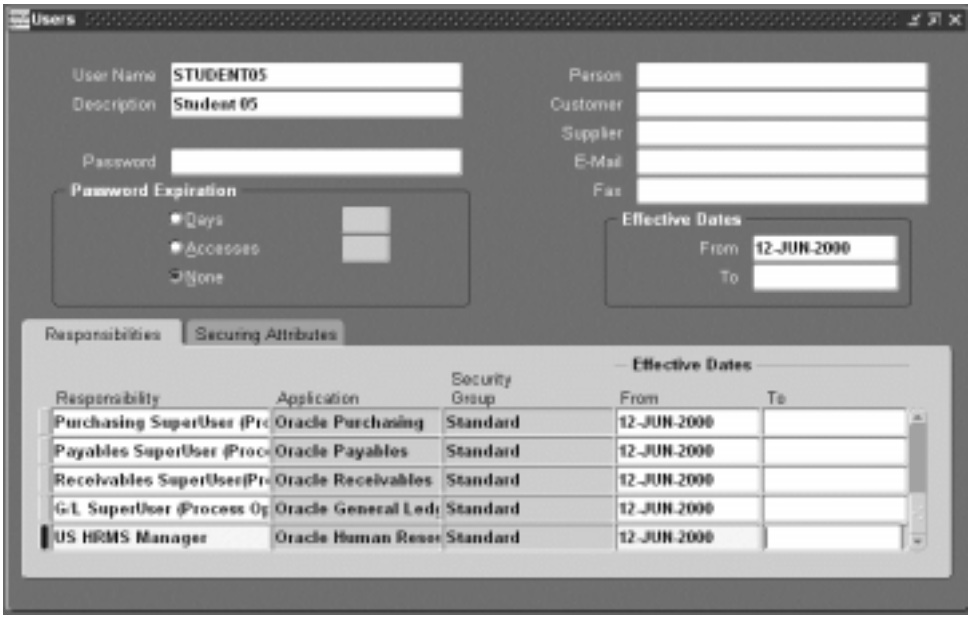
Step 1: Define users and responsibilities

1. Create a new username for yourself using the System Administrator responsibility.
2. For the username, enter `STUDENT`*xx* for username.
3. Enter `ADMIN` as the password value the first time you create a new username. You must change your password after the first use of your new username.
4. Assign yourself the following responsibilities:
   - OPM Inventory
   - OPM Logistics
   - OPM Process Execution
   - OPM Process Planning
   - OPM Product Development
   - OPM Financials
   - OPM System Administration
   - OPM Regulatory Administrator
   - System Administrator
   - Purchasing SuperUser (Process Operations)
   - Payables SuperUser (Process Operations)
   - Receivables SuperUser (Process Operations)
   - G/L SuperUser (Process Operations)
   - US HRMS Manager
5. Enter the Effective Date From for each responsibility as today's date.

Step 2: Test the Username

1. End your session as the default user (`OPM_TRAINER`) and log in under your new username.
2. Change your password to `WELCOME`.

Practice 3-2 Solution



3-30 Copyright © Oracle Corporation, 2000. All rights reserved. ORACLE

Practice 3-2 Solution

In this exercise, you will perform setup steps to define yourself as a user, and assign yourself authority to access all responsibilities in your plant.

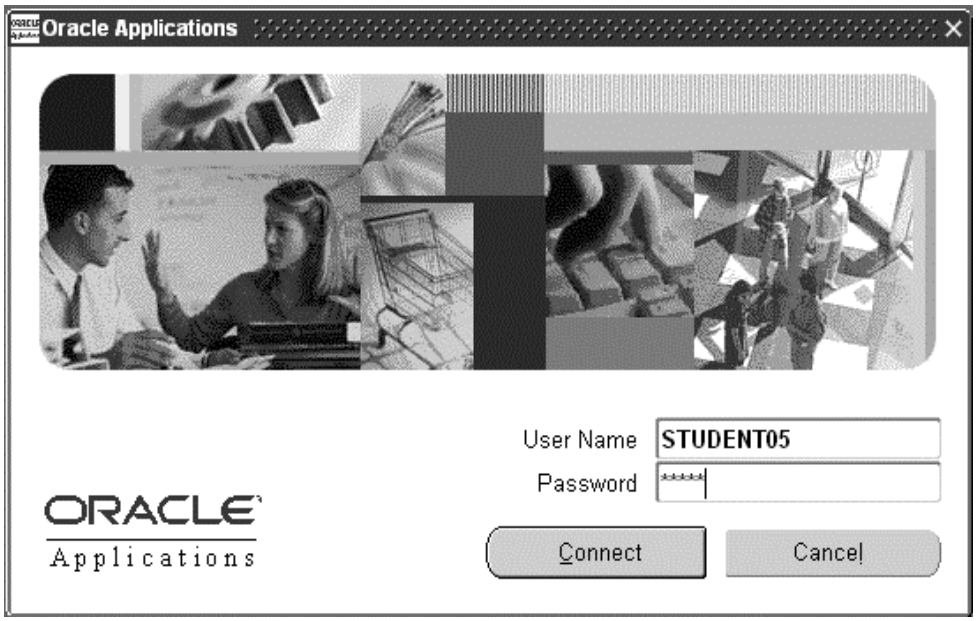
Note: In the following exercises, certain information must follow the given instructions. Please adhere to the naming structure that is provided or you may get lost. The term *xx* is used throughout the practices. When you see this term, enter your terminal number.

Step 1: Define Users and Responsibilities

System Administrator responsibility: (N) Security—>User—>Define

1. Open the User window.
2. Enter the fields as indicated in the practice instructions. Remember, you will have to type in the password a second time to verify it.
3. Save your work.

Practice 3-2 Solution



3-31 Copyright © Oracle Corporation, 2000. All rights reserved. ORACLE

Practice 3-2 Solution (continued)

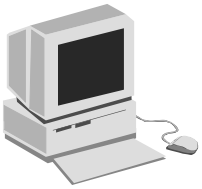
Step 2: Test the Username

1. End your session as the default user, by selecting File—>Log on as Different User from the toolbar.
2. Log on using your username, and change your password to `WELCOME`.
3. Verify that all the responsibilities are available.

Summary

In this lesson, you should have learned how to:

- **Identify OPM responsibilities**
- **Explain the integration of OPM responsibilities**
- **Define a new Oracle application user**

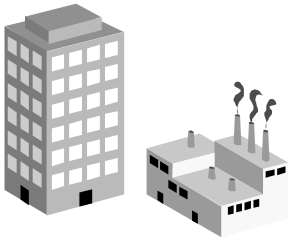


3-32

Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 4-2 Overview

This practice covers defining inventory organizations.



Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 4-2: Defining Inventory Organizations

In this exercise you will set up two inventory organizations, one with location control and one without location control.

Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 4-2 Defining Inventory Organizations (Warehouses)

In this exercise you will set up two inventory organizations, one with location control and one without location control.

Note: *x* is a unique identifier assigned to you by the instructor.

1. Define two warehouses using the following instructions.

   Accounting Information

   Open the Accounting Information folders and setup the following parameters:

   – Set of Books—`OPM US`
   – Legal Entity and Operating Unit—`PRU`

   Inventory Information

   Open the Inventory Information folders and set up the parameters using the following table:

Field Name	Warehouse 1	Warehouse 2
Name	Warehouse 1*x*	Warehouse 2*x*
Internal or External	Internal	Internal

   – Organization Code: *x*W1 for warehouse 1 and xW2 for warehouse 2
   – Item Master Organization: PR
   – Calendar: Vision01
   – Process Enabled: Yes
   – Process Organization: *xx*P1
   – Locator Control: Prespecified Only for *x*W1 (location controlled), and None for *x*W2 (nonlocation controlled)
   – Costing Information folder: Costing Method—Standard, Transfer to GL—Detail, Valuation Accounts:

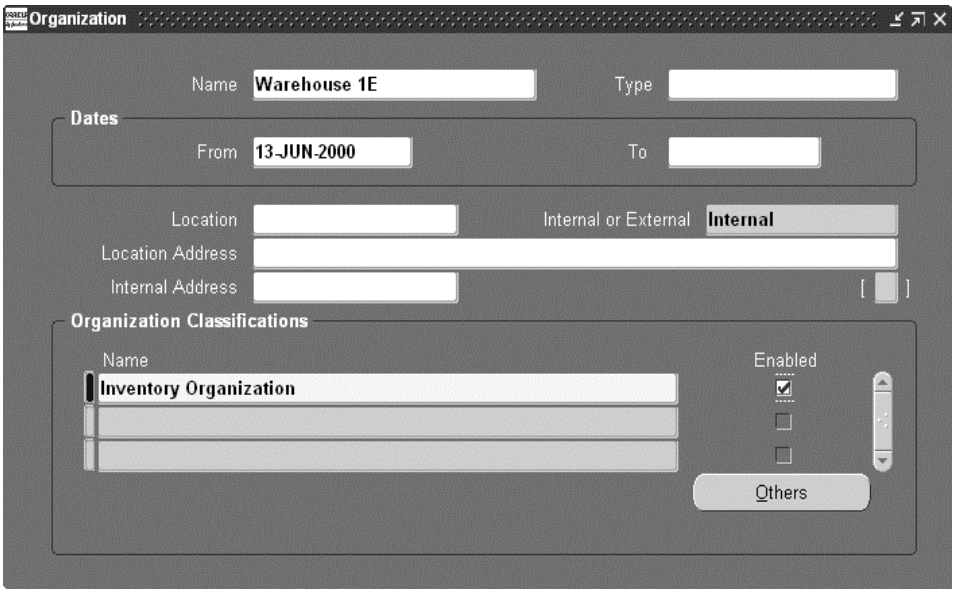
Account Name	Account Number
Material	100-0000-1420-0000-0000

   – Other Accounts:

Account Type	Account Name	Account Number
Receiving	Purchase Price Variance	100-0000-5901-0000-0000
	Invoice Price Variance	100-0000-5902-0000-0000
	Inventory AP Accrual	100-0000-2220-0000-0000
Profit and Loss	Sales	100-0000-4100-0000-0000
	Costs of Goods Sold	100-0000-2220-0000-0000

2. Go to OPM Inventory and look up the newly created warehouses.

Practice 4-2 Solution



Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 4-2 Solution

In this exercise you will set up two inventory organizations, one with location control and one without location control.

Note: *x* is a unique identifier assigned to you by the instructor.

1. Define two warehouses using the following instructions:

   OPM System Administration responsibility: (N) OPM System Setup—>HR Organizations

Field Name	Warehouse 1	Warehouse 2
Name	Warehouse 1*x*	Warehouse 2*x*
Internal or External	Internal	Internal

   Save the organization. Select the Inventory Organization classification and enable it. Save the organization again.

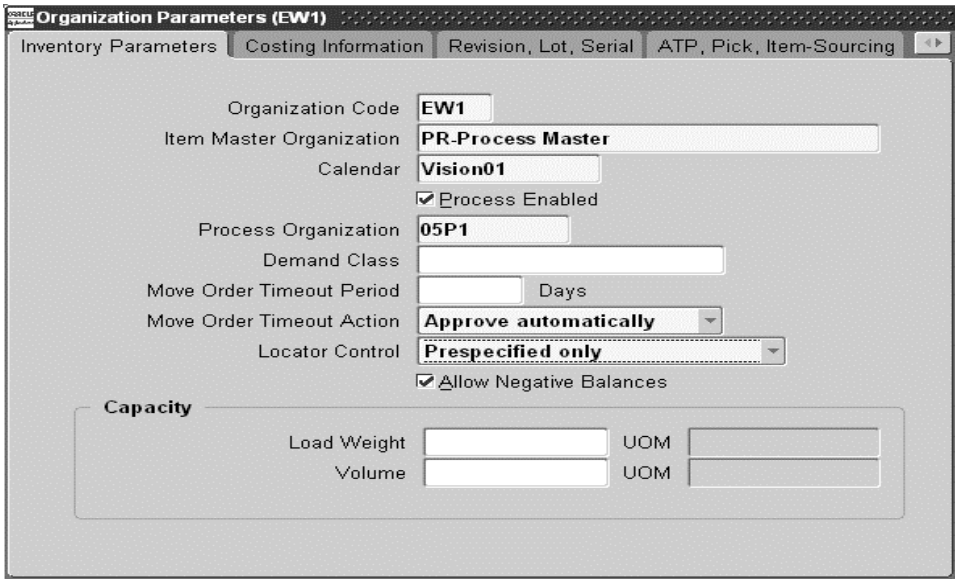
Accounting Information

(N) OPM System Administration—>OPM System Setup—>HR Organizations
(B) Others—>Accounting Information.

Open the Accounting Information folders and setup the following parameters:

- Set of Books—`OPM US`
- Legal Entity and Operating Unit—`PRU`

Practice 4-2 Solution



Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 4-2 Solution (continued)

Inventory Information

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

1. Open the Inventory Information folders and setup the parameters as follows:
   - Organization Code: *x*W1 or *x*W2 (this becomes the warehouse code)
   - Item Master Organization: PR
   - Calendar: Vision01
   - Process Enabled: Yes
   - Process Organization: *xx*P1
   - Locator Control: Prespecified Only for the location controlled warehouse, and None for the nonlocation controlled warehouse
2. Open the Costing Information folder: Costing Method—Standard, Transfer to GL—Detail, Valuation Accounts:

Account Name	Account Number
Material	100-0000-1420-0000-0000

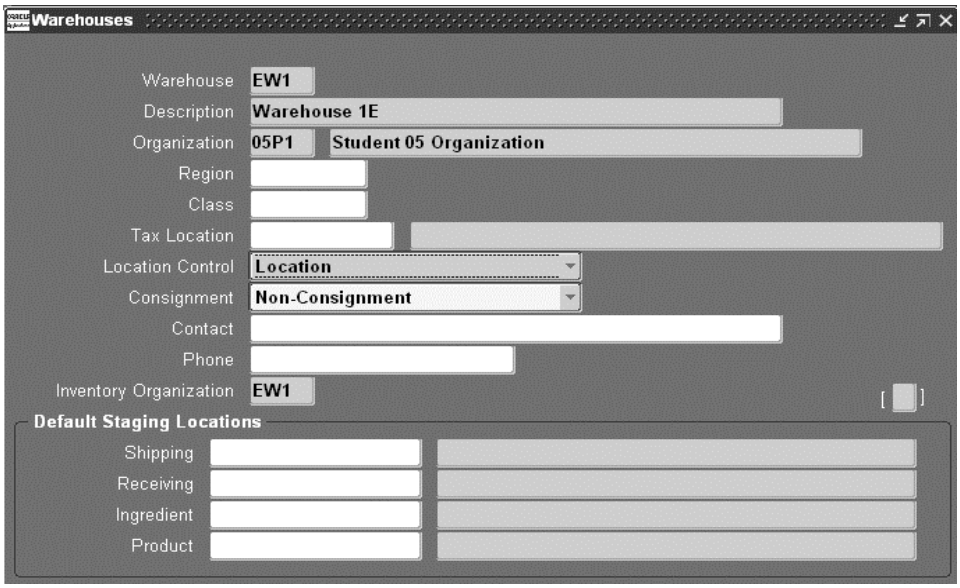
Practice 4-2 Solution (continued)

3. Open the Other Accounts:

Account Type	Account Name	Account Number
Receiving	Purchase Price Variance	100-0000-5901-0000-0000
	Invoice Price Variance	100-0000-5902-0000-0000
	Inventory AP Accrual	100-0000-2220-0000-0000
Profit and Loss	Sales	100-0000-4100-0000-0000
	Costs of Goods Sold	100-0000-2220-0000-0000

4. Save your work.

Practice 4-2 Solution



Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 4-2 Solution (continued)

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

5. Go to OPM Inventory and look up the newly created warehouses *x*W1 and *x*W2.
6. Use Query to find your newly created warehouses.

Defining Tax Location Codes

Use can use the Tax Location Codes window to define the jurisdictions that you can use to apply taxes to your customers or warehouses. Go to the Tax Location Codes window to set up tax locations.

(N) OPM Logistics—>Order Fulfillment—> Setup—>Tax—>Tax Location Codes

4-26

Copyright © Oracle Corporation, 2000. All rights reserved.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > Oracle Process Manufacturing Logistics > OPM Order Fulfillment User's Guide > Tax Setup > Defining Tax Location Codes

../ > Defining Tax Location Codes Procedure

../ > Tax Location Codes Field Reference

The system profile option `OP$GEMMSTAX` determines whether the system will require Tax Location Codes.

Third party software may be used to calculate taxes.

Defining Geography Codes

Use Geography codes to reference geographical areas on purchase orders, customer receipts, and other documents that contain addresses. Go to the Geography Codes window to set up geography codes.

(N) OPM Systems—>OPM System Setup—> Geography Codes

4-27

Copyright © Oracle Corporation, 2000. All rights reserved.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > Oracle Process Manufacturing Systems > OPM System Administration User's Guide > OPM System Setup > Editing Geography Codes

../ > Geography Code Procedure

../ > Geography Code Field Reference

Defining Unit of Measure Types and Units of Measure

TYPE	Mass	Volume	Length	Count	Time	Package
BASE	LB	GL	FT	EA	HR	CASE
	KG	L	M	DOZ	MIN	PAL
	TON	ML	IN		SEC	DRM
	MTON	FOZ	YD		DAY	
	OZ					

Copyright © Oracle Corporation, 2000. All rights reserved.

Defining Unit of Measure Types

The first step in setting up units of measure (UOM) is to define UOM types on the UOM Type window.

(N) OPM Systems—>OPM System Setup—> Unit of Measure Types

4-29

Copyright © Oracle Corporation, 2000. All rights reserved.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > Oracle Process Manufacturing Systems > OPM System Administration User's Guide > OPM System Setup > Editing Unit of Measure Types

../ > UOM Type Procedure

../ > UOM Type Field Reference

Defining Units of Measure

Use the Unit of Measure window to add and maintain Units of Measure (UOM) definitions.

(N) OPM Systems—>OPM System Setup—> Units of Measure

4-30

Copyright © Oracle Corporation, 2000. All rights reserved.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > Oracle Process Manufacturing Systems > OPM System Administration User's Guide > OPM System Setup > Editing Units of Measure

../ > Units of Measure Procedure

../ > Units of Measure Field Reference

The first Unit of Measure entered for a given type becomes the base for that UOM Type.

You can create as many units of measure as are needed.

Converting Between Units of Measure

UOM type = Mass

Reference (base) unit of measure

Mass	Conversion
LB	1 LB = 1 LB
KG	1 KG = 2.205 LB
TON	1 TON = 2000 LB
MTON	1 MTON = 2205 LB
OZ	1 OZ = .0625 LB

Convert all UOMs within a UOM type to the reference UOM

4-31

Copyright © Oracle Corporation, 2000. All rights reserved.

Setup Considerations

TYPE	Mass	Volume	Length	Count	Time	Package
BASE	LB	GL	FT	EA	HR	CASE
	KG	L	M	DOZ	MIN	PAL
	TON	ML	IN		SEC	DRM
	MTON	FOZ	YD		DAY	
	OZ					

Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 4-3 Overview

This practice covers the following topics:

- **Defining unit of measure types**
- **Defining units of measure**

Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 4-3: Defining Unit of Measure Types and Units of Measure

In this exercise, you will define the unit of measure types and units of measure needed for your plant if they are not already defined.

4-34

Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 4-3: Defining Unit of Measure Types and Units of Measure

In this exercise, you will define the unit of measure types and units of measure needed for your plant if they are not already defined.

Step 1: Unit of Measure Types

OPM needs to know what dimensions you will be using to measure your inventory items.

1. Look up each of the following UOM types to make sure that each of them exists in the database. Create any that are missing.

   Note: Select one person to create any missing UOM types.

Unit of Measure Type	Description
CNT	Count
LGTH	Length
MASS	Mass (Weight)
TIME	Time
VOL	Volume, liquid

Practice 4-3 (continued)

Step 2: Units of Measure

As you create, use, or move inventory, OPM will need to know how the items are measured (by pounds, gallons, feet, and so on).

1. Look up each of the following UOM codes to make sure that each unit of measure exists in the database, and that it is the base unit of measure for the specified UOM type.

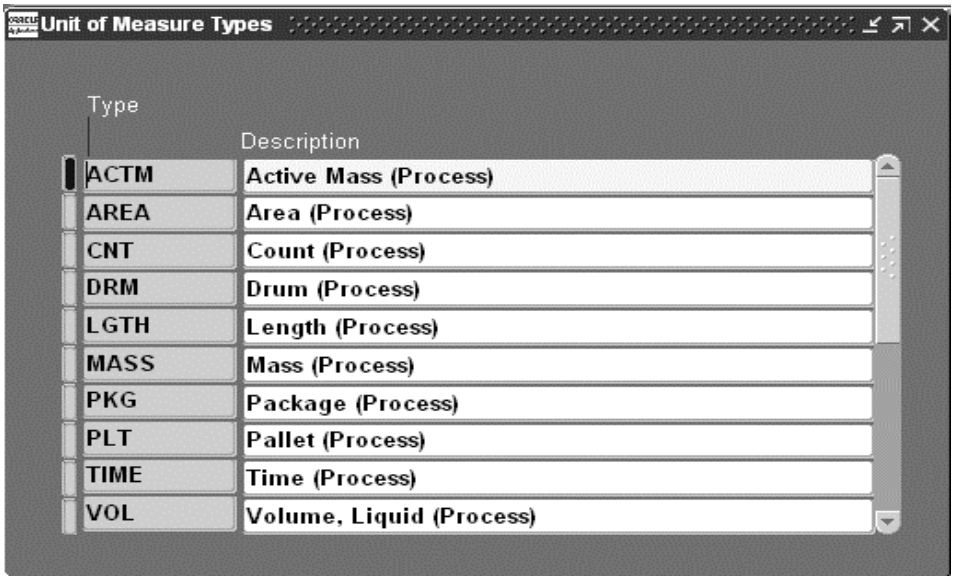
UOM Code	Description	Type	Reference UOM	Conversion Factor
EA	Single Unit	CNT	EA	EA to EA 1:1
FTP	Foot	LGTH	FTP	FTP to FTP 1:1
GL	Gallon	VOL	GL	GL to GL 1:1
HRS	Hour	TIME	HRS	HRS to HRS 1:1
LB	Pound	MASS	LB	LB to LB 1:1

2. The following units of measure will be used by the Worldwide Manufacturing Company. Look up the following UOM codes in the database. Add them if they do not exist.

UOM Code	Description	UOM Type	Reference UOM	Conversion	Conversion Factor
KGM	Kilogram	MASS	LB	KGM to LB	1:2.204623001
LT	Liter	VOL	GL	LT to GL	1:.264172875
MTP	Meter	LGTH	FTP	MTP to FTP	1:3.280829131
MNS	Minute	TIME	HRS	MNS to HRS	1:.016666667
PLT	Pallet	PLT	PLT	PLT to PLT	1:1

Note: If you need to add any of the above units of measure to the database, select a different person in the class to add each of the missing units of measure. Units of measure are global variables, and all students in the class access a single database. Each new UOM code is immediately available to everyone in class.

Practice 4-3 Solution



4-36 Copyright © Oracle Corporation, 2000. All rights reserved. ORACLE

Practice 4-3 Solution

In this exercise, you will define the unit of measure types and units of measure needed for your plant if they are not already defined.

Step 1: Unit of Measure Types

(N) OPM System Setup—>Unit of Measure Types

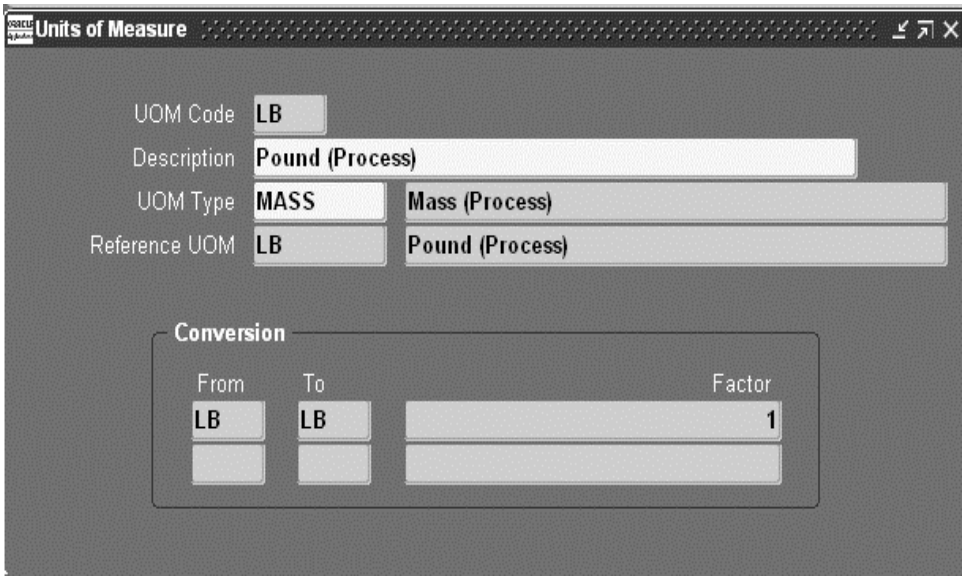
OPM needs to know what dimensions you will be using to measure your inventory items.

1. Look up each of the following UOM types to make sure each of them exists in the database. Create any that are missing.

   Note: Select one person to create any missing UOM types.

Unit of Measure Type	Description
CNT	Count
LGTH	Length
MASS	Mass (Weight)
TIME	Time
VOL	Volume, liquid

Practice 4-3 Solution



4-37

Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 4-3 Solution (continued)

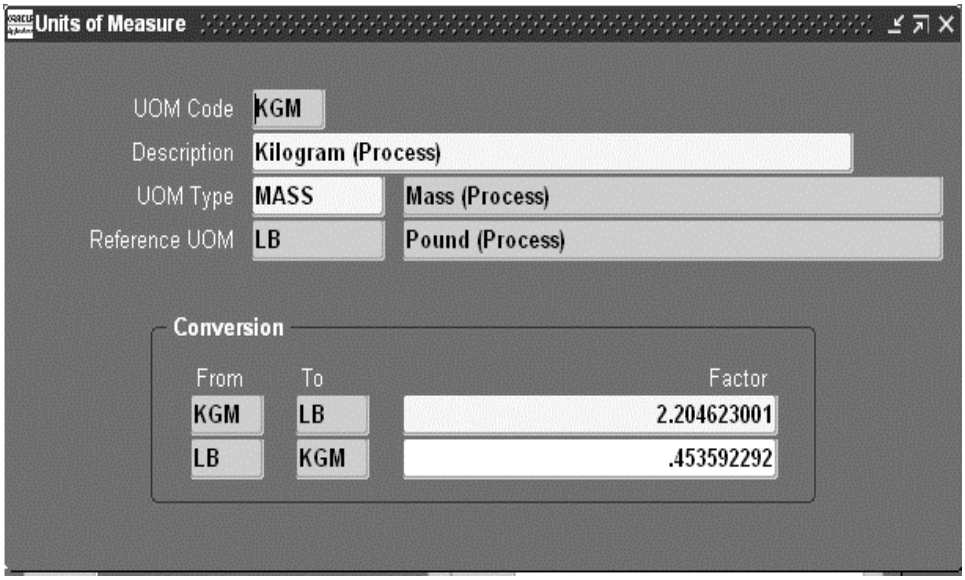
Step 2: Units of Measure

(N) OPM System Setup—>Units of Measure

1. From the menu, select View and then Find. Use the Find Units of Measure window to look up each of the following UOM codes to make sure that each unit of measure exists in the database, and that it is the base unit of measure for the specified UOM type.

UOM Code	Description	Type	Reference UOM	Conversion Factor
EA	Single Unit	CNT	EA	EA to EA 1:1
FTP	Foot	LGTH	FTP	FTP to FTP 1:1
GL	Gallon	VOL	GL	GL to GL 1:1
HRS	Hour	TIME	HRS	HRS to HRS 1:1
LB	Pound	MASS	LB	LB to LB 1:1

Practice 4-3 Solution



Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 4-3 Solution (continued)

2. The following units of measure will be used by the Worldwide Manufacturing Company. Look up the following UOM codes in the database. Add them if they do not exist.

UOM Code	Desc	UOM Type	Ref UOM	Conversion	Conversion Factor
KGM	Kilogram	MASS	LB	KGM to LB	1:2.204623001
LT	Liter	VOL	GL	LT to GL	1:.264172875
MTP	Meter	LGTH	FTP	MTP to FTP	1:3.280829131
MNS	Minute	TIME	HRS	MNS to HRS	1:.016666667
PLT	Pallet	PLT	PLT	PLT to PLT	1:1

Defining Reason Codes

Reason codes provide information about increases or decreases in inventory. They are used to flag transactions and attach reasons to them. Go to the Reason Codes window to set up reason codes.

(N) OPM Systems—>OPM System Setup—> Reason Codes

4-39 Copyright © Oracle Corporation, 2000. All rights reserved.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > Oracle Process Manufacturing Systems > OPM System Administration User's Guide > OPM System Setup > Editing Reason Codes

../ > Reason Code Procedure

../ > Reason Code Field Reference

Certain inventory transactions require a valid reason code.

You can define as many reason codes as are needed.

Reason codes can be used for sorting and reporting.

Identifying Document Types

OPM documents are categorized by type, each recording different kinds of information related to different transactions. Go to the Document Types window to set up document types.

(N) OPM Systems—>OPM System Setup—> Document Types

4-40 Copyright © Oracle Corporation, 2000. All rights reserved.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > Oracle Process Manufacturing Systems > OPM System Administration User's Guide > OPM System Setup > Editing Document Types

../ > Document Types Procedure

../ > Document Types Field Reference

Establishing Document Ordering

Use the Document Ordering window to determine the document number assignment for each type of document. Go to the Document Ordering window to set up document ordering.

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

4-41

Copyright © Oracle Corporation, 2000. All rights reserved.

(Help) Oracle Manufacturing Applications > Oracle Process Applications > Oracle Process Manufacturing Systems > OPM System Administration User's Guide > OPM System Setup > Editing Document Ordering

../ > Document Ordering Procedure

../ > Document Ordering Field Reference

Practice 4-4 Overview

This practice covers the following topics:

- **Defining reason codes**
- **Defining document types**
- **Defining document ordering**

Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 4-4: Defining Reasons Codes and Document Information

In this exercise, you will define the reason codes that explain why inventory was increased or decreased, the document types you plan to use, and the numbering sequence that you will use for each document type.

Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 4-4: Defining Reason Codes and Document Information

In this exercise, you will define the reason codes that explain why inventory was increased or decreased, the document types you plan to use, and the numbering sequence that you will use for each document type.

Step 1: Reason Codes

Reason codes are mandatory for some Oracle Process Manufacturing functions because they provide information about why the inventory was increased or decreased.

1. Create the following reason codes for Worldwide Manufacturing if the codes do not already exist.

   Note: Use the drop-down list in each field to determine the correct entry for the Type and Flow fields.

Code	Type	Flow	Description
BEG	Increases	Inflows	Create Beginning Balance
ADJ	Increases and Decreases	Exclude	Count Adjustment
DMG	Decreases	Outflows	Damaged
RTRN	Increases	Inflows	Customer Return

Practice 4-4 (continued)

Step 2: Define Document Types

For record-keeping and reporting purposes, Oracle Process Manufacturing numbers all documents such as purchase orders and production batches. Your next task is to define the various types that will be used by Worldwide Manufacturing.

1. Scroll through the list of document types and verify that the document types in the following table exist:

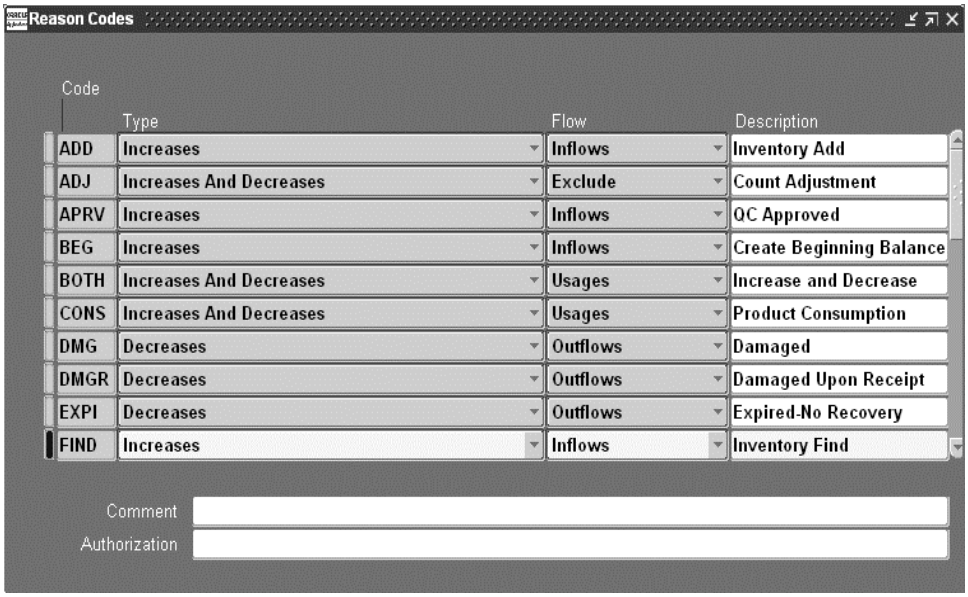
Document Type	Description
FPO	Firm Planned Order
JRNL	Inventory Quantities Document Sequencing
OPOP	Sales Order Profiles
OPSO	Sales Orders
OPSP	Shipment
PBPO	Blanket Purchase Orders
PROD	Production Batch
PORD	Purchase Order
RECV	Receiving

Step 3: Define Document Ordering

Your last task is to set up a numbering system for the various documents that will be used by Worldwide Manufacturing.

1. For each of the document types defined in the previous exercise, set each document to automatic numbering except for PORD, RECV, and PBPO in the Assignment Type field. Use the list of values to select the correct document type and to select your organization, *xx*P1.
2. Enter a last assigned-number that will cause each document to begin with number 1.
3. Enter a format size for each document of 6.
4. Save the document ordering for each document type.

Practice 4-4 Solution



4-45 Copyright © Oracle Corporation, 2000. All rights reserved. ORACLE

Practice 4-4 Solution

In this exercise, you will define the reason codes that explain why inventory was increased or decreased, the document types you plan to use, and the numbering sequence that you will use for each document type.

Step 1: Reason Codes

(N) OPM System Setup—>Reason Codes

Reason codes are mandatory for some Oracle Process Manufacturing functions because they provide information about why the inventory was increased or decreased.

1. Create the following reason codes for Worldwide Manufacturing if the codes do not already exist.

   Note: Use the drop-down list in each field to determine the correct entry for the Type and Flow fields.

Code	Type	Flow	Description
BEG	Increases	Inflows	Create Beginning Balance
ADJ	Increases and Decreases	Exclude	Count Adjustment
DMG	Decreases	Outflows	Damaged
RTRN	Increases	Inflows	Customer Return

Practice 4-4 Solution

Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 4-4 Solution (continued)

Step 2: Define Document Types

(N) OPM System Setup—>Document Types

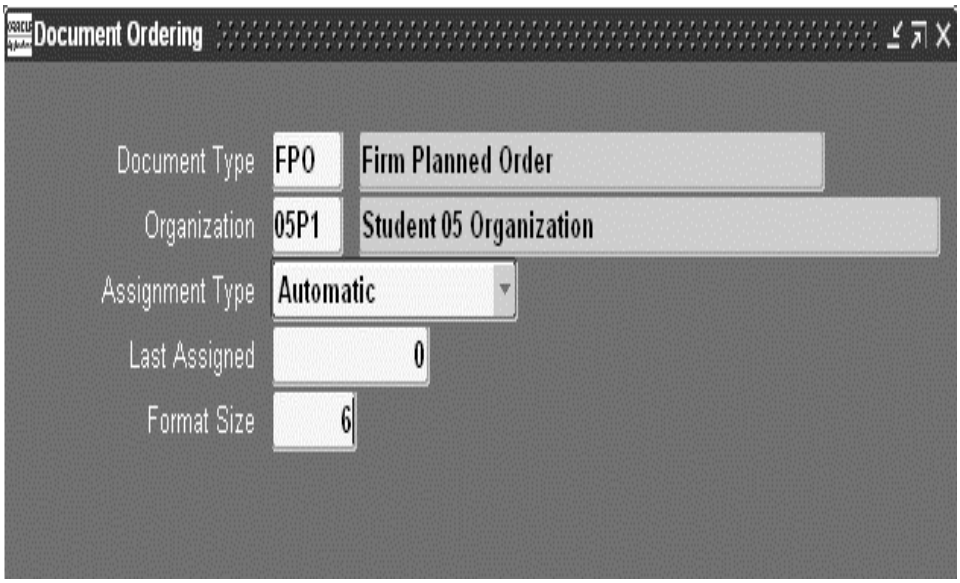
For record-keeping and reporting purposes, Oracle Process Manufacturing numbers all documents such as purchase orders and production batches. Your next task is to define the various types that will be used by Worldwide Manufacturing.

1. Scroll through the list of document types and verify that the document types in the following table exist:

Document Type	Description
FPO	Firm Planned Order
JRNL	Inventory Quantities Document Sequencing
OPOP	Sales Order Profiles
OPSO	Sales Orders
OPSP	Shipment
PBPO	Blanket Purchase Orders
PROD	Production Batch
PORD	Purchase Order
RECV	Receiving

Note: If you need to add one of the above document types, select File and then New from the menu. This creates a row in which you can add a new document type. Save your work.

Practice 4-4 Solution



Copyright © Oracle Corporation, 2000. All rights reserved.

Practice 4-4 Solution (continued)

Step 3: Define Document Ordering

(N) OPM System Setup—>Document Ordering

Your last task is to set up a numbering system for the various documents that will be used by Worldwide Manufacturing.

1. For each of the document types defined in the previous exercise, set each document to automatic numbering except for PORD, RECV, and PBPO in the Assignment Type field. Use the list of values to select the correct document type and to select your organization, *xx*P1.
2. Enter a last assigned-number that will cause each document to begin with number 1.
3. Enter a format size for each document of 6.
4. Save the document ordering for each document type.

Summary

In this lesson, you should have learned how to:

- **Define HR organizations**
- **Define organizations and user organizations**
- **Define inventory organizations**
- **Establish tax location codes**
- **Establish geography codes**
- **Define unit of measure types and units of measure**
- **Specify reason codes**
- **Identify document types**
- **Establish document ordering**

4-48 Copyright © Oracle Corporation, 2000. All rights reserved.