Oracle Supply Chain Management

Agenda of various Modules

Implementation Steps for Fusion Inventory

S.No	Description	Task	Value
1	Create Implementation users for Enterprise Structure Configuration	Create Implementation users	Display Name : a01_Imp_User User Name : a01_Imp_User Password : Oracle123
2	Roles for a01	Roles tabbed region	ALL USERS Application implementation Consultant IT Security manager Employee
3	Configure Offerings		
4	Create Implementation Project		
5	Manage Enterprise HCM Information. The start date must point to 1/1/1951 so that any employee record, who has joined in the year 1960 can even be pulled into the system. Ensure People Group Flexfield is populated.	Manage Enterprise HCM Information	This is a one time definition of the top Enterprise. To be done only in the beginning of enterprise structure configuration..
6	Create Locations 0, 1 and 2	Manage Locations	Name & Code : a01_loc_0 a01_loc_1 a01_loc_2 Location set : Common set Fill Address
7	Create legal Jurisdictions. It has three 1) Identifying , 2) Income-Tax and 3) Transaction Tax	Manage Legal Jurisdictions	Name " a01_Legal_Juri Territory : US Legislative Category : Federal tax Reg. Code : LE Reg. No. Legal Rep. Unit Reg. Code : LRU Reg. No. Legal Function : Income Tax Control
8	Create Legal Authorities for Paying and Reporting Taxes	Manage Legal Authorities	Tax Authority Type : Reporting

			Legislative categories : Transaction Tax
9	Create our Legal Address	Manage Legal Address	a01_legal_Addr1
10	Manage Legal Entity	Manage Legal Entity	Name & identifier : a01_LE Legal Employer Payroll Sta. Unit : DONOTUSE4
11	Manage Legal Entity HCM Information. Select the LE in scope before the task.	Manage Legal Entity HCM Information	Under Position Synchronization, put a tick on Jobs and Positions = Yes and submit. In payroll statutory unit tabbed region associate LDG
12	Manage Chart Of Accounts Value Sets	Manage Chart Of Accounts Value Sets	a01_CO , Ind , Char, Length :2 a01_Dept , Ind , Char, Length :3 a01_Acct , Ind , Char, Length :4
13	Manage Accounting Calendars. It self validates , upon saving.	Manage Accounting Calendars	Name : a01_Acctg_Cal Budgetary Control Only : NIL Monthly, Adj period at year end
14	Manage Chart Of Account Structures. For Application General Ledger…Manage Structures. Attach the respective value sets.	Manage Chart Of Account Structures	Name : a01_COA Segments : a01_Company….. Primary Bal. Seg a01_Dept…. Cost centre a01_Account….. Natural Account
15		Manage Structure Instances button	Instance Code : a01_COA_Instance Dynamic Insert allowed.
16		Deploy Flexfield button	Concurrent runs.
17	Manage Chart Of Accounts Value Sets…. query all value sets. Segmental qualifiers Summary = No, Allow budgeting = Yes , Allow Posting = Yes for all accounts of Company and department	Manage Chart Of Accounts Value Sets Manage Values Button	CO : 10,11 Dept : 100, 101 Acct : 1000, 1 ,2 , 3

18	For natural Accounts.. Segmental qualifiers Summary = No, Allow budgeting = Yes , Allow Posting = Yes. Account type as per last column.	Manage Chart Of Accounts Value Sets Manage Values Button	1000 – Asset 1001 – Liability 1002 – Expense 1003 – Owners Equity
19	Manage Primary Ledgers	Manage Primary Ledgers	Primary Ledger : a01_Ledger COA : a01_COA Cal : a01_Acctg_Cal Cur : USD Convention : Standard Accrual
20	Specify Ledger Options	Manage Primary Ledgers	Specify Retained earnings Account and language. Save
21	Assign Legal Entities…Select and Add	Assign Legal Entities	Scope is selected as a01_LE
22	Assign Balancing Segment Values to Legal Entities: a01_Ledger	Assign Balancing Segment to Legal Entities:	Ledger and LE are tied.a01_ledger is tied to a01_LE
23	Review and Submit Accounting Configuration: a01_Ledger	Review and Submit Accounting Configuration:	Submit. Create Accounting process is submitted.
24	Manage Primary Ledgers	Manage Primary Ledgers	Look at the status "confirmed" with a tick mark for our Ledger
25	Open the first period. On the left pane in bottom search for "period"	Open first period	Choose our Ledger. Submit the concurrent for say Nov-15, if that is your current month. Verify on the scheduled process
26	Manage Business Units	Manage Business Units	Create a01_BU1..Location : a01_Loc1 ,
27	Assign Business Unit Business Function. Upon saving the BU roles get provisioned to the BU	Assign Business Unit Business Function	Scope : Select and add : a01_BU1 Business functions : Materials Management Requisitioning Receiving Primary ledger : a01_ledger

			Below legal entity …Enabled Legal entity : a01_LE
28	Manage Business Unit Set Assignment. Here use the common set for procurement. Other modules may use a different Reference Data sets for their functionality.	Manage Business Unit Set Assignment	We use Common set for the three Reference data Objects Locations, Jobs and Departments. Do not modify others.
29	Manage Business Units..Go to Actions…Manage Service providers	Manage Business Units	View the service providers
30	View Service clients	View Service clients	View Service Clients
31	Manage Job	Manage Job	a01_JM1 Code 7001Level : 7001
32	Manage Department	Manage Department	a01_Dept
33	Manage Positions. They are date effective names. It must show your above jobs. If not, change the start date to point to Enterprise start date	Manage Positions	a01_JMM1 Code 4001
34	Manage Users	Manage Users	a01_emp1
35	Assign Roles to a01-emp1 user	Security Console	**Provision all rolls to this user**. Application Implementation Consultant IT Security manager Employee Product Data Steward Inventory Manager Supply Chain Application Administrator Supply Chain Integration Specialist Supply Chain Operations Manager Supply Chain controller Supply Chain Planning Applications Administrator

			Receiving agent Warehouse Manager Custom Human Specialist role Procurement Manager Shipping Agent
36	Item Org Creation	Manage Item Organizations	
37	Manage Facility Shifts. Inventory orgs allows 24 hour transactions, irrespective of the 8 hours of work defined here.	Manage Facility Shifts	
38	Manage facility workday Patterns	Manage facility workday Patterns	
39	Manage facility Schedules	Manage facility Schedules	
40	Inventory org Creation - Master and two Child orgs	Manage Inventory Organizations	
41	Tie org to Locations	Manage Locations	
42	Create Sub Inventories. Provide location for every sub Inv	Manage Subinventories and Locators	
43	Manage Carriers	Manage Carriers	
44	Manage Transit Times	Manage Transit Times	
45	Manage Data Access for Users. Provide access for both the child orgs for Inventory Manager , Receiving agent & Warehouse Manager roles.	Manage Data Access for Users	
46	Category Sets and Categories in E Business		
47	Catalogs and Categories in Fusion		
48	Manage Item Status	Manage Item Statuses	
49	Manage Life cycle Phases	Manage Lifecycle Phases	
50	Transaction Reasons	Manage Inventory Transaction Reasons	
51	Costing Setups		
52	Item Class Creation	Manage Item Classes	
53	Item Creation		
54	Miscellaneous Receipt		
55	Push to Costing and cost the transaction		

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	Basic Procurement Setup		
56	Specify Supplier Numbering		
57	Manage Procurement Agent		
58	Manage Freight Terms Lookup		
59	Manage Procurement Document Numbering		
60	Manage Common Options for Payables and Procurement		
61	Configure Requisitioning Business Function		
62	Configure Procurement Business Function		
63	Manage Mapping Set for Material Charge Account		
64	Supplier Creation		
	Inventory Controls		
65	Serial Control		
66	Lot Control		
67	Org Controlled and Master Controlled attributes		
68	Revision Numbers		
69	Revision Control and Locator Control		
70	Sub Inventory Restriction		
71	Locator Restriction		
72	Material Status Control		
	Inventory Material Transfers		
73	Miscellaneous Receipt		
74	Miscellaneous Issue		
75	Review completed Transactions		
76	Transaction Source		
77	Transaction Types		
78	Account alias Transfer		
79	Sub Inventory Transfers		
80	Picking Rules		
81	Movement Requests		
82	Item Transaction Defaults		
83	Inter org transfers - direct		
84	Inter org Transfers - Intransit		
	Inventory Replenishments		
85	Min Max Setup for Org Level sourcing		
86	Print Min-Max Planning Report		
87	Process Supply Chain orchestration		
88	Basics of Shipping in E Business		
89	RSR , PSGR and RR in E Business		
90	4 Methods of Pick Release in E Business		
91	Ship Confirm Rule in E Business		
92	RSR , PSGR and Ship Confirm rule in Fusion		
93	Pick wave, Movement Requests and Auto Pick Confirm process in Fusion		

94	Ship Confirmation		
95	Receipt of Material in Destination org		
96	Min Max Planning for Supplier Sourcing		
97	Min Max Planning for sub Inventory sourcing		
98	Min max Planning for sub Inventory sourcing with Transfer Orders		
	Inventory Accuracy		
99	ABC Analysis		
100	Cyclic Counting		
101	Physical inventory		
	Inventory Fundamentals		
102	Item Defining Attributes		
103	Status Attributes		
104	Asset Item and Expense Item		
105	Asset and Expense Sub Inventories		
106	Sub Inventory features like nettable, Depreciable, Quantity tracked		
107	Attribute groups		
108	Status codes		
109	Item Types		
110	Item Relationships		
111	Units of Measure - Primary and Secondary		
112	Use of Categories in Purchasing		
	PO Receiving		
113	Direct , Standard and Inspection Receipt Routing		
114	Corrections		
115	Return to supplier		
116	Substitute receipts		
117	Unordered receipts		
118	Process all lines together		
119	Print Receipt Traveller		
120	Include closed POs for receipts		
121	Allow routing override		
122	Blind Receiving		
123	Other controls in receiving parameters		
124	Setting Payabes-Invoice Options		
125	Open periods of GL and AP		
126	Create a ERS invoices upon receipt with summary level as pay site and Receipt		
127	Debit memo on RTS		

Fusion Procurement Work Sheet

S.No	Description	Task	Value
	1. Procurement		
1	Create a custom Human Resourse Specialist role	Manage Data Role and Security Profiles	Grant View All privilage for all
2	Create Implementation users for Enterprise Structure Configuration	Create Implementation users or Security Console	Display Name : a01_Imp_User
3	Roles for a01	Add Roles	ALL USERS Application Implementation Consultant IT Security Manager Employee a01_Human Resource Specialist
4	Import User and Roles	ESS Job Import User and Role Application Security Data	
5	Login with a01_imp		
6	Configure Offerings		Check all for Procurement
7	Manage Enterprise HCM Information. The start date must point to 1/1/1951 so that any employee record, who has joined in the year 1960 can even be pulled into the system. Ensure People Group Flexfield is populated.	Manage Enterprise HCM Information	This is a one time definition of the top Enterprise. To be done only in the beginning of enterprise structure configuration..
8	Create Locations	Manage Locations	a01_loc_0 , 1 and 2
9	Create Locations Madras Residence and Bombay Residence	Manage Locations	They are for SSP for emp 2 and 3
10	Create our Legal Address	Manage Legal Address	a01_legal_Addr1
11	Manage Legal Entity	Manage Legal Entity	
12	Manage Legal Entity HCM Information. Select the LE in scope before the task.	Manage Legal Entity HCM Information	
13	Manage Chart Of Accounts Value Sets	Manage Chart Of Accounts Value Sets	a01_CO , Ind , Char, Length :2
			a01_Dept , Ind , Char, Length :3

			a01_Acct , Ind , Char, Length :4
14	Manage Accounting Calendars. It self validates , upon saving.	Manage Accounting Calendars	Name : a01_Acctg_Cal
			Budgetary Control Only : NIL
			Monthly, Adj period at year end
15	Manage Chart Of Account Structures. For Application General Ledger…Manage Structures. Attach the respective value sets.	Manage Chart Of Accounts Structures	Name : a01_COA
			Segments :
			a01_Company….. Primary Bal. Seg
			a01_Dept…. Cost Centre
			a01_Account….. Natural Account
16	Manage Structure Instances		Instance Code : a01_COA
17	Deploy Flexfield		Concurrent runs.
18	Manage Chart Of Accounts Value Sets…. query all value sets and add values	Manage Chart Of Accounts Value Sets	CO : 10,11 Dept : 100, 101 Acct : 1000, 1 ,2 , 3
19	Manage Primary Ledgers	Manage Primary Ledgers	Primary Ledger : a01_Ledger
			COA : a01_COA
			Cal : a01_Acctg_Cal
			Cur : USD
			Convention : Standard Accrual
20	Specify Ledger Options	Manage Primary Ledgers in FSM	Specify Retained earnings Account and language. Save
21	Assign Legal Entities…Select and Add		Scope is selected as a01_LE
22	Assign Balancing Segment Values to Legal Entities: a01_Ledger		
23	Review and Submit Accounting Configuration: a01_Ledger		Submit. Create Accounting process is submitted.
24	Manage Primary Ledgers	Manage Primary Ledgers	Look at the status "confirmed" with a tick mark for our Ledger
25	Manage Business Units	Manage Business Unit	Create a01_BU1..Location : a01_Loc1 ,
26	Assign Business Unit Business Function. Upon saving the BU roles get provisioned to the BU	Assign Business Unit Business Function	Scope : Select and add : a01_BU1
			Business functions :

			Materials Management
			Requisitioning
			Receiving
			Primary ledger : a01_ledger
			Below legal entity …Enabled
			Legal entity : a01_LE
27	Manage Business Unit Set Assignment. Here use the common set for procurement. Other modules may use a different Reference Data sets for their functionality.	Manage Business Unit Set Assignment	We use Common set for the three Reference data Objects Locations, Jobs and Departments. Do not modify others.
28	Manage Business Units..Go to Actions…Manage Service providers	Manage Business Unit	View the service providers
29	View Service clients	Manage Business Unit	View Service Clients
30	Manage Facility Shifts. Inventory orgs allows 24 hour transactions, irrespective of the 8 hours of work defined here.	Manage Facility Shifts	Name : a01_facility_Shift
31	Manage facility workday Patterns	Manage Facility Workday Patterns	Name : a01_Work_Day_Pattwern
32	Manage facility Schedules	Manage Facility Schedules	Name : a01_Schedule
33	Manage Inventory Organisation	Manage Inventory Organizations	Name : a01_Master_Org / Code a010
34	Create two Child orgs in the same page	Manage Inventory Organisation	Name : a01_Inv1 / Code a011
			Name : a01_Inv2 / Code a012
35	Tie org to locations for all the three orgs	Manage Locations	
36	Create sub Inventories for both Child Orgs	Manage Subinventories and Locators	
37	Manage Job	Manage Job	a01_JM Level : 1001
			a01_AM Level : 1002
			a01_DM Level : 1003
38	Manage Department	Manage Departments	a01_Dept
39	Manage Positions. They are date effective names. It must show your above jobs. If not, change the start date to point to Enterprise start date	Manage Positions	a01_JMM
			a01_AMM
			a01_DMM

40	Create users	Manage users	a01_emp1 2 and 3 with respective jobs. Associate Madras and Bombay residence locations for emp2 and 3
41	Assign Positions and Managers for Employees 1 2 and 3	My Client Groups - Person Management	
42	Assign Roles to all the 3 Procurement Requestors.		Provision all rolls to the first user.
			Application Implementation Consultant
			IT Security Manager
			Employee
			Advanced Procurement Requester
			Inventory Manager
			Receiving agent
			Warehouse Manager
			a01_Human Specialist
			Procurement Manager
			Accounts Payables...Manager , Specialist and Supervisor.
			Product Data Steward
			Supplier Manager
			Supplier Administrator
			General Accountant
			General Accounting Manager
43	Login as a01_emp1		
44	Specify Supplier numbering	Specify Supplier Numbering	Specify the start number of Suppliers
45	Manage task Configuration for Procurement	Manage Task Configurations for Procurement	Seeded tasks for approvals. No need to change. Change notification, if required.
46	Manage sub Ledger Accounting options	Manage Subledger Accounting Options	Query for your ledger. Expand your ledger . Click on Update option. Against Transaction Account Defenitionfield..Choose Purchasing TAB Default Accounting.
47	Manage Payment Terms	Manage Payment Terms	Add our reference Data set

48	Create Carrier	Manage Carrier	
49	Manage Freight terms	Manage Freight Terms Lookup	
50	Manage Purchase Profile Options	Manage Purchasing Profile Options	All profiles are of lesser importance
51	Manage Procurement Document Numbering	Manage Procurement Document Numbering	PR and Purchase Agreement Numbers are BU specific. PO numbers are Legal Entity Specific
52	Manage Purchasing Line Types	Manage Purchasing Line Types	Ensure Goods and Fixed Price services are there. Set it to 3 way- Receipt
53	Manage Document Styles	Manage Document Styles	Manage document Style
54	Manage Lifecycle Phases	Manage Lifecycle Phases	A01_Production
55	Manage item statuses	Manage Item Statuses	Retain the def statuses of Active and inactive
56	Manage Common Options for Payables and Procurement. First select the scope.	Manage Common Options for Payables and Procurement	
57	Configure requisitioning Business Function	Configure Requisitioning Business Function	
58	Configure Procurement Business Function	Configure Procurement Business Function	
59	Ensure Data Governance and Data consolidation are disabled in Opt In Features of Product Management Offering		
60	Creation of a template for Item Creation	Manage Item Classes	Creation of a template for Item Creation
61	Item Creation in PIM	Create Item In Product mgmt - Product Information Mgmt	
62	Failure on creation of a Purchase Requisition		Charge and Variance Accounts are missing
63	Explanation of Procure to Pay Business Process highlighting Charge , Accrual and Variance accounts		
64	Setting Manage Mapping set for Cost management for PR creation for Asset Item	Manage Mapping Set in FSM (Cost Management)	Specify Material Charge Account and Invoice Price Variance Account
65	Creation of a Purchase requisition		

66	Demonstrating the 6 ways of approval of a PR (Auto Approval , Approval by a worker , Approval Group , Job level , Supervisory level and Position level approvals.)	Manage Requisition Approvals	
67	Various menthods of populating the Charge account in a Purchase Requisition		For Asset and Expense Items into Asset and Expemce Sub Inventories
68	Manage Supplier Registration Approvals`	Manage Supplier Registration Approvals	
69	Manage Supplier Profile Change Approvals	Manage Supplier Profile Change Approvals	
70	Manage Supplier Spend Authorization Approvals	Manage Supplier Spend Authorization Approvals	
71	Create a Prospective supplier. It will not have a Site		Create from Configure procurement Business Function
72	Supplier creation and failure on site creation.		Procuremenrt Agent setup is missing
73	Create Procurement Agent and complete Site Creation	Manage Procurement Agents	Make a01_emp1 as the Procurement Agent
74	Convert Prospective Supplier into spend Authorised Supplier		
75	Failure on creation of a Purchase Order		Accrual Account is missing
76	Setting Manage Mapping set for Cost management for PO creation (Accrual account)		
77	Manage Purchasing Document Approvals	Manage Purchasing Document Approvals	
78	Creation of a standard Purchase order		
79	Setting and testing of PR-CPA-SPO		
80	Setting and testing of PR-BPA-SPO for auto create of PR into PO		
81	Touchless Buying		

82	Direct , Standard and Inspection Receipt Routing		
83	Corrections		
84	Return to supplier		
85	Substitute receipts		
86	Unordered receipts		
87	Process all lines together		
88	Print Receipt Traveller		
89	Include closed POs for receipts		
90	Allow routing override		
91	Blind Receiving		
92	Other controls in receiving parameters		
93	Setting Payabes-Invoice Options		
94	Open periods of GL and AP		
95	Create a ERS invoices upon receipt with summary level as pay site and Receipt		
96	GRN Number in Invoice Number		
97	Debit memo on RTS		
98	Setting up of Costing		
99	Demo of Costing transactions		
	2. Self Service Procurement		
100	Create Categories a01_Desktop and a01_Laptop	Manage Functional Area Catalogs	Attach images
101	Create a01_Desktop and a01_Laptop and a01_Visiting_Card items. Do not assign them to child orgs and associate the respective Categories	Product Information Management - Create Items	

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102	Create a BPA for all the above three items		
103	Create Catalog Administrator legal user	Manage users	a01_cat_admin
104	Assign Catalog Administrator Role	Security Console	Procurement Catalog Administrator and Application Implementation Consultant Roles
105	Login at Catalog Admin		
106	Make Cat Admin as a Procurement Agent	Manage Procurement Agents	
107	Create Catalog Category Hierarchy	Catalog - Manage Catalog Category Hierarchy	Create a hierarchy of Browsing and Item Categories below the root
108	Create Local Catalogs for Desktop and Laptop	Catalogs - Manage Catalogs	
109	Create Content Zones	Catalogs - Create Content Zones	Create a requisition and procurement Content Zones for Cat Admin
110	Create Information Template Descriptive Flex Fileds	Manage Information Template Descriptive Flexfields	
111	Create Information template	Catalogs - Manage Information Templates	
112	Manage Public Shopping Lists	Catalogs - Manage Public Shopping Lists	
113	Manage Purchasing News	Catalogs - Manage Purchasing News	a01 Please visit our company website for optimizing the spend , before processing your demand.
114	Manage Smart Forms	Catalogs - Manage Smart Forms	
115	Manage Supplier Content Map Sets	Catalogs - Manage Supplier Content Map Sets	
116	Create Content Zones	Catalogs - Create Content Zones	Create Senior Office and Junior Officer Content Zones
117	Set Requisitioin Preferences for a01_Madras Location		
118	Create Requisition from emp2 for Description based item		

119	Observe Auto Creation of PO.upon approval		
120	Change Requisitioin Preferences to a01_loc_0 Location		
121	Create Requisition for inventory Item		
122	Observe Auto Creation of PO.upon approval		
123	Receive Requisition		
124	Correct Receipts		
125	Return Receipts		
	3. Sourcing		
126	Add Sourcing Manager Role to first employee	Sourcing Project Collaborator	Add also Procuement Contracts Administrator and Category Manager Roles
127	Manage Procurement Agent for PRC00.instructor	Manage Procurement Agent	
128	Manage Negotiation Styles	Manage Negotiation Styles	Create a style for RFQ , RFI and Quote
129	Create Cost factors	Manage Cost Factors	Create Storage and Transportation Costs
130	Create Attribute List	Negotiations - Manage Attribute Lists	Create first Resolution (1920*1200 1680*1050 1024*768 and Warrenty (5 Years , 4 and 3) and the Second attribute Colour of Item as optional
131	Create Cost Factor Lists	Negotiations - Manage Cost Factor Lists	Create Storage and Transportation Cost factor lists
132	Create a Negotiation template	Negotiations - Manage Negotiation Templates	Fill Technical and Commercial Requirements and Suppliers
133		Manage Supplier Negotiation Approvals	
134		Manage Supplier Negotiation Award Approvals	

		Single Stage RFQ		
135	Create a Single Stage Negotiation		Add two lines	
136	Create Techinal and Commercial Evaluatioin teams			
137	Create Requirements			
138	Approve Negotiation and Publish			
139	Accept Invitation for the first Supplier from email.			
140	Login as supplier and accept Invitation	Also go to Supplier Portal and acknowledge participation		
141	Send a message from Supplier Portal			
142	Reply Back as the Sourcing officer			
143	First Supplier will respond by filling the Requirements and Lines			
144	Review the response by Sourcing officer			
145	Respond by Second Supplier with slightly less price			
146	Create a Surrogate response for the third supplier			
147	View Responses			
148	Monitor Negotioation for Respoinses and Savings by Supplier			
149	Create an amendment and get responses from all the three			
150	Extend , Pause and Close Negotioation			
151	Open Scoring and send message to Collaboration Team.			
152	Score the requirements.			
153	View Automatic Award Recommendations			
154	Award Negotioation.and Submit for approval			
155	Complete the award by creating PO.			

	Two Stage RFQ		
156	Create a 2 Stage RFQ template with technical and Commercial sections		
157	Create a two stage RFQ with Line attributes		
158	Upon approval it will become Active and Locked		
159	Submit a response from both the suppliers		
160	View respoinse History as Sealed		
161	Close the negotioation		
162	Unlock stage - technical		
163	Analyse negotional and view Responses		
164	Look at the technical Requiremrnts		
165	Price will not be visible on thje Lines		
166	Unseal Stage Technical		
167	Buyers and Suppliers can view responses of technical stage		
168	Complete Stage - Technical		
169	Unlock Commercial stage		
170	Buyes can only see the responses		
171	Unseal Commercial stage		
172	Award negotiation - Choose the Supplier		
173	Submit for Approval		
174	Award Approved (Unsealed)		
175	Complete Award and create a Approved PO		
	Request For Information (RFI)		
176	Create a RFI template		
177	Create a RFI negotiation and approve		
178	Submit response from Supplier		
179	Analyse the negotiation		
180	Close and Complete RFI		

	Reverse Auction			
181	Create a Auction Negotiation Style			
182	Creatre a Reverse Auction negotiation			
183	Add Lines , submit and approve			
184	Respond from First Supplier			
185	Provide the following Proxy Decrement Amount = 25 Response price = 470 Proxy Minimum = 400 and. Submit the response			
186	Respond from Secod Supplier with a Response price only as 440			
187	Analyse the negotiation and find the Best Transformed price as 440-25 = 415			
188	Submit a second response from 2nd Supplier as 410. The Best Response price will not go below 400.			
189	Analyse the neg and award the Contract.			
190	Approve negotiation			
191	Complete by Creating SPO			

4. Procurement Contracts

192	Create Legal User p01_emp1 with the requisite roles for Procurement Contract			Application Implementation Consultant
				IT Security Manager
				Employee
				Supplier Contract Administrator
				Supplier Contract Team Member

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			Business Practices Director
			Procurement Manager
			Supplier Manager
			Product Data Steward
193	Similarly Create user p01_emp2 with AIC , IT secu Mgr and Employee roles		
194	Run the ESS job : Import User and Role Application Security Data		
195	Run the ESS job : Import User and Role Application Security Data		
196	Login with p01_emp1		
197	Enable Contract Terms in Offerings		Offerings - Enterprise Contract - Procurement Contract
198	Create Administrator Role for c01_emp1	Manage Resources	Action - Create. Search for c01_emp1 Add as a resource. Role : Contract Administrator
199	Check in Manage Users - The Resource		
200	Make p01_emp1 as Procurement Agent	Manage Procurement Agent	
201	Create Supplier p01_sup_1		
202	Create Item p01_item1		
203	Enable Procurement Contract Management	Assign Business Unit Business Function	
204	Make US1 Business Unit as Project and Task Owning Org	Manage Project Organization Classifications	Search for US1 Business Unit and Clasify
205	Make the Default BU for CRM as US1 Business Unit	Manage Common CRM Business Unit Profile Options	
206	Specify Supplier Contract Management Business Function Properties	Specify Supplier Contract Management Business Function Properties	

207	Create document sequence p01_Contracts for Application Enterprise Contracts	Manage Document Sequences	Module : Contract Documents for a BU Determinat with an initial value. Under Assignment : Authoring Category Name as US1 Business Unit
208	Create document sequence p01_Clause Sequence for Application Enterprise Contracts		Module : Contract Documents for a BU Determinat with an initial value. Under Assignment : Clause Sequence Categoryry as US1 Business Unit
209	Manage Contract Party Roles	Manage Contract Party Roles	
210	Manage Contract Role Sources	Manage Contract Role Sources	
211	Create two lines with Source as Item , Buy and Free Form Buy	Manage Contract Line Types	Create two Lines as buy Line with the first as Item_Buy and another with Free_Form_Buy.
212	Create p01_Contract_type for above two optioins	Manage Contract Types	
213	Create p01_Contract_Clause	Manage Contract Clause Types	
214	Set Approvals for Contracts Clause , Contracts and Terms Template.Search for ContractClauseApproval, ContractsApproval and TemplateApprovalHumanTask	Manage Task Configurations for Customer Relationship Management	Note down the Respective Approval Groups as ClauseApprovalGroup, ContractApprovalGroup and TemplateApprovalGroup Change it to p01_emp2
215	Set the Approvers for all the three above as p01_emp2	Manage Approval Groups	
216	Manage Contract Risks	Manage Contract Risks	
217	Create two Sections in Terms Library		p01_Section_Warrenty p01_Section_Insurance
218	Creating two Clauses with text and Instructions		p01_Clause and p01_Alternate_clause
219	Get them approved by p01_emp2		
220	Create Terms Template and submit for approval		Type : Structured
221	Create a Question and Activate.		p01_Evaluation. Prompt : On a scale from 1 to 10, how do you rate this class?
222	Create Constant		Constant Value = 6

223	Create Rule and Activate the rule		p01_Rule1 Type : Clause Selection.. Description : Question related to scaling the value. Results : If the answer is greater than 6..choose Clause 2
224	Mention the Template in the Rule.	Check for the Rule in Terms Template	
225	Create the First Contract		
226	Populate Lines		
227	Run Contract expert		
228	Delete Warranty Clause		
229	Auto Create PO Lines		
230	Validate and correct errors		
231	Submit for approval		
232	Auto Create Purchase orders		
233	Create Contract using Wizard		
	5. Supplier Qualification		
234	Create New Business Unit with RDS = US1BUSET	Manage Business Unit	s01_business_unit
235	Enable Material Management , Requisitioning, Receiving and Procurement Functions	Assign Business Unit Business Function	
236	Create Location s01_loc_1 and 2	Manage Locations	Create Two locations
237	Create Master and Child org	Manage Inventory organizations	S010 and S011
238	Tie org to Locations	Manage Locations	Tie both the master and Child org to their respective locations
239	Create three Legal Users	Manage Users	s01_emp1 , s01_emp2 and s01_emp3
240	Assign four roles to all the users	Security Console Add the three common roles for all the three users along with Supplier Qualification roles	Application Implementation Consultant
			IT Security Manager
			Employee
241	Login as s01_emp1		Supplier Qualification

242	Make all the three users as Buyers	Manage Procurement Agent	
243	Set the Requisitioning Business Function	Configure Requisitioning Business Function	
244	Set the Procurement Business Function	Configure Procurement Business Function	
245	Add s01_Supplier	Manage Supplier Type Lookup	
246	Add s01_Small_Business	Manage Business Classification Lookup	
247	Add a Category	Manage Supplier Products and Services Category Hierarchy	
	Questions to be Duplicated	**From Originals Questions**	
248	s01_ Code of Conduct	Code of Conduct	
249	s01_ Compliance Review	Compliance Review	
250	s01_Disclose Fin Info?	Disclose Fin Info?	
251	s01_ Public Company?	Public Company?	
252	s01_Employee Count	Employee Count	
253	s01_CFY Revenue	CFY Revenue	
254	s01_ISO 14001 Certification	ISO 14001 Certification	
255	s01_Forbes Sustainability List - Top 100?	Forbes Sustainability List - Top 100?	
256	s01_Office Recycling	Office Recycling	
	Qualification Areas to be duplicated	**From originals Qualification Areas**	
257	s01_Environmental Sustainability	Environmental Sustainability	
258	s01_Financial Viability	Financial Viability	
259	s01_Compliance	Compliance	
	Model to be Duplicated	**From Original Model**	
260	s01_Compliance for Sourcing Eligibility	Compliance for Sourcing Eligibility	
261	Manage Supplier Spend Authorization Approvals	Manage Supplier Spend Authorization Approvals	Use PRC00.Instructor as approver

262	Manage Rule Sets		
263	**Create a new Rule set s01_SR1**	Make emp 2 as Internal Responder	**Do not duplicate.**
264	**Create a Spend Authorised Supplier**	Configure Procurement Business Function	Take a copy of the URL from Configure Procurement Business Function
265	Change the Business Classification and answer the questionaire	Vision's Spend Authorised Supplier registration URL is as below	
266		https://adc3-zpvx-fa-ext.oracledemos.com/fscmUI/faces/PrcPosRegisterSupplier?prcBuId=300000046987012&busRel=rD9W%2Fp06FSo0iMYvikoUUe4HBkAWwwbbCQ%3D%3D&_afrLoop=111170714058707&_afrWindowMode=0&_afrWindowId=null&_adf.ctrl-state=10pz6d987m_280&_afrFS=16&_afrMT=screen&_afrMFW=1440&_afrMFH=767&_afrMFDW=1440&_afrMFDH=900&_afrMFC=8&_afrMFCI=0&_afrMFM=0&_afrMFR=96&_afrMFG=0&_afrMFS=0&_afrMFO=0	
267	Use this sample IBAN Number during Registration	IBAN Number	GB98MIDL07009312345678
268	Submit for approval		
269	Observe the creation of new initiative to qualify the Supplier		
270	Approve by PRC00.Instructor		
271	Respond to Internal qustionaire by (a01_emp2)		
272	Manage qualifications by admin		
273	Manage Assessment by Admin		
274	Observe that the Initiative is completed on all the 4 (Supplier Response, Internal response, Qualifications and Assessments)		
275	**Create a new initiative for a Model which has both Internal and Supplier Questionaire**		
276	Make emp2 as Internal Responder and emp3 as Evaluation Team member		
277	Launch the initiative		

278	Respond to the questionaire from Supplier Portal		
279	Respond to the Internal query from emp 2 login		
280	Evaluate the initiative from the evaluator's login (emp3)		
281	Since it is a re-qualification…assessment is not necessry.		
282	Observe that the Initiative is completed on all the 3 (Supplier Response, Internal response and Qualifications)		
	6. Supplier Portal		
283	Configure Supplier Registration and Profile Change Request	Configure Supplier Registration and Profile Change Request	
284	Change Supplier Profile Change Request as **Approval Required** for the desired profiles		
285	Manage Supplier Profile Change Approvals	Manage Supplier Profile Change Approvals	Make PRC00.Instructor as the approver for Supplier profile change Requests.
286	Login to supplier Portal and change the Business Classification profile. (Extend the end date of certification)		
287	Submit for approval		
288	Approve by PRC00.Instrucctor from bell notification		
289	Observe the warning message vanished in manage Profile of Supplier Portal		
290	Create a Supplier with Pay On Receipt Enabled.	Make the contact as Supplier User	Reset the password and change the User name…as desired
291	Create a PO		
292	Observe the population of PO in Manage Orders in Supplier Portal	Orders - Manage Orders	In Supplier Portal

293	Manage schedules	Orders - Manage Schedules. Click on the hyperlink on the PO and see all the shipment schedules.	Click on the Inbuilt Intelligence on the right by clicking on **View Details** Button. Observe the In-Transit shipments (For ASN and ASBN), Receipts and invoices
294	Create a partial receipts in PRC00.Instructor login. Note down the GRN number. Oberve the receipt details in Supplier Portal.		Observe the partial receipts in View Details of PO in Supplier Portal
295	Run **Send Pay On Receipt** ESS job for the GRN number In PRC00.Instructor login	Orders - Manage Schedules. Click on the hyperlink on the PO and see all the shipment schedules in Supplier Portal	
296	Observe the creation of Invoice in Supplier Portal		Observe Invoice details in View Details of PO
297	Create a Blanket Purchase Agreement		
298	Observe the population of BPA in Manage Agreements	Agreements - Manage Agreements	In Supplier Portal
299	Create Advanced shipment Notice (ASN) and submit	Shipments - Create ASN	In Supplier Portal
300	Go to Manage Shipments and View Details	Shipments - Manage Shipments	In Supplier Portal
301	Receive the ASN in PRC00.Instructor login.. Note down the GRN number		
302	Run **Send Pay On Receipt** ESS job for the GRN number of ASN Receipt	Orders - Manage Schedules. Click on the hyperlink on the PO and see all the shipment schedules.	Observe Invoice details in View Details of PO
303	Create Advanced Shipment cum Billing Notice.	Shipments - Create ASBN	
304	Tax details to be populated by the Supplier	Shipments - Manage Shipments to view the crearted ASBN.	
305	Receive the ASN. Note down the GRN number	In PRC00.Instructor login	
306	Observe the creation of invoice in Supplier Portal. No need to run Send Pay On Receipt		Observe Invoice details in View Details of PO
307	View receipts in Supplier Portal	Shipments - View Receipts	
308	Enable Debit Memo on RTS	Manage suppliers	Under Sites - Purchasing tabbed region

309	Make a Retrun for one of the GRN in PRC00.Instructor login with Create Debit Memo enabled		
310	Observe the creation of Debit Memo in Supplier Portal. No need to run any ESS jobs		Observe Invoice details in View Details of PO
311	View Returns in Supplier Portal	Shipments - View Returns	
312	Add Contract terms in the PO. Add Deliverables and submit for approval in PRC00.Instructor login	Query the Po in manage orders and create the change order	
313	Observe the population of Deliverables in Supplier Portal	Deliverables - Manage Deliverables	
314	Consigned Inventory	Observe all activities of Consigned Inventory like Consigned receipts, Transfer to regular and Consumption Advise in Supplier Portal	Supplier contact to be created with User Login…and perform all activites fo Consigned Inventory
315	Invoices and Payments.	Create Invoice for the delivered item and Create invoice without Po	Take the help of Financial Team
316	Negotiations	Covered during Sourcing	
317	Auctions from Seller	Covered during Reverse Auction	
318	Qualifications	Covered during Supplier Qualification Management	
319	Manage Products	Procuts - Manage Products	Supplier can add the Products and Services
320	Manage Profile	Covered in the beginning for supplier Profile Change requests	Company Profile - Manage Profile

Fusion Order Management Work Sheet

S.No	Description	Task	Remarks
1	Log in into Vision Demo Database		
2	Use Rapid Implementation for General Ledger		Create zip file for Chart Of Accounts and zip file for Ledger , LE and BU
3	Rapid Implementation - Upload Chart of Accounts	Upload Chart Of Accounts	Signout and signin after completion of three ESS jobs.
4	Create Locations s01_loc_0 , s01_loc_1 and s01_loc_2	Manage Locations	
5	Rapid Implementation - Upload Ledger, Legal Entities, and Business Units	Upload Ledger, Legal Entities, and Business Units	Signout and signin after completion of four ESS jobs.
6	In FSM Actions - Go to Offerings - Procurement - Opt in Features - Features		Enable Customer Sales Order Fulfillment
7	In FSM Actions - Go to Offerings - Order Management - Opt in Features - Features		Enable drop ship and Order Holds
8	Provide Location for BU	Manage Business Unit	
9	HCM Info for legal Entity	Manage Legal Entity HCM Information	
10	Create a Legal user	Manage Users	Create a Legal user s01_emp. Customise springboard with needed icons after loggging in
11	Manage Business Unit Set Assignments. Query in FSM	Manage Business Unit Set Assignment	Set these Reference data set objects of Customer Account Relationship and Customer Account site with the value ENTERPRISE
12	Create Inventory orgs A010 , A011 and A012	Manage Inventory Organizations	Schedule = Operations. Make the first child org as Manufacturing Plant
13	Tie org to Locations	Manage Locations	
14	Create Sub Inventories for both the child orgs	Manage Subinventories and Locators	Create one FGS and one STAGE Sub Inventories for every child org.
15	Refer column G and add roles to user		

16	Import User and Role Application Security Data	Import User and Role Application Security Data	Run this ESS Job. Run also LDAP
17	Provide Data Access for all the above roles except Vision Roles	Manage Data Access for Users	Vision Roles need not be given data access
18	Manage Carriers	Manage Carriers	Create for both the orgs.
19	Manage Transit Times	Manage Transit Times	From 2nd to 1st child
20	Manage Inter org parameters	Manage interorganization Parameters	Make it Intransit with Transfer Orders required
21	In Manage Item Class provide Function security and Data Security	Manage Item Classes	Only if Public is not enabled
22	Create a Default Template	Manage Item Classes	For Finished Goods
23	Create Item a01_std_order		Product information Management in Product Management
24	Keep a stock of 10000 in A010	Supply Chain Execution - Inventory Management	Create Miscellaneous Transaction
25	Verify ours orgs in Planning	Supply Chain Planning - Plan Inputs	In Manage Planning Source Systems verify and enable our orgs for Collections in OPS
26	Create Customer	Create Customer	
27	Collect data for Org , Items, Customer and On Hand with Collecton Type as Targetted.	Supply Chain Planning - Plan Inputs - Collect Planning Data	Choose Org, Items and Customer under Reference Data and On Hand under Supply Planning Data
28	Create a infinite Availability based ATP rule for both our child orgs	OM - GOP - Manage ATP Rules	Add it at Org level
29	Collect data for Order Orchestration Reference Objects with Collection type as Targetted.	Supply Chain Planning - Plan Inputs - Collect Planning Data	Choose Order orchestration Reference Objects in Reference data
30	Set the below order Profiles DOO_CURRENCY_CONVERSION_TYPE, DOO_DISPLAY_CURRENCY	Manage Administrator Profile Values	Corporate and USD
31	Set Default Price periodicity UOM Class , IVO	Manage Pricing Parameters	Set the IVO as your Master Org

32	Make our user as buyer for our BU	Manage Procurement Agents	Student, scm01 with full access for our BU a01_business_unit
33	Set values for OM Parameters	Manage Order Management Parameters	
34	Add a01_high for the lookup ORA_QP_REV_POTENTIAL_VALUES	Manage Pricing Lookups	
35	Create a Pricing Segment a01_Pricing_Segment for the look up ORA_QP_CUST_PRICING_SEGMENTS	Manage Pricing Lookups	
36	Set a customer profile for our Customer	Pricing Administration - Manage Customer Pricing Profiles	
37	Create a mapping for our pricing profile to pricing segment	Pricing Admin – Manage Pricing Segments	map a01_high to a01_pricing_segment
38	Create a Pricing Strategy for our Business Unit and USD.	Pricing Administration - Manage Pricing Strategies	Approve the strategy
39	Map our a01_Pricing_Segment to a01_Pricing_Strategy	Pricing Admin - Manage Pricing Strategy Assignments	At Header sales order all - Add a line for our a01_Pricing_Segment and map it to a01_Pricing_strategy
40	Create a price List for all items and for a01_std_order and Approve	Pricing Administration - Manage Pricing list	All items price of 1 and a01_std_price of 2
41	Associate our price list to Pricing Strategy	Pricing Administration - Manage Pricing Strategies	Add a01_Price_List to a01_pricing_strategy
42	Run the ESS job Refresh and Start the Order Promising Server	Under Scheduled Process	Run for all parameters
43	Create a Sales Order and progress it to Awaiting Shipping		
44	Create Release Sequence Rule	Manage Release Sequence Rules	
45	Create Pick Slip Grouping Rule	Manage Pick Slip Grouping Rules	
46	Create Pick Wave Release Rule	Manage Pick Wave Release Rules	
47	Create Ship Confirm rule	Manage Ship Confirm Rule	
48	Create Shipping Parameters	Manage Shipping Parameters	

49	Launch Pick Release	Supply Chain execution - Shipments - Manage Shipment Lines	Query for Sales Order - Actions - Pick Release
50	Ship Confirm	Click on Shipment Number - Ship Confirm button	Yes on Warning Message
51	Observe Send Shipment Advice ESS job is running	ESS Job	Sales Order line progress to Shipped and then to Awaiting Billing
52	Enable Returnable in Item Attributes		
53	Create a Return Order for the above shipped order		Line struck as Receiving parameters are not specified
54	Set the receiving parameters and recover the order	Manage Receiving Parameters	Line progresses to Awaiting Receiving
55	Send Recipt Confirmation to Sales Order upon RMA	Send Receipt Confirmation	Line progresses to Delivered.and then to Awaiting Billing
56	Add IVO in Manage Receivables System Options	Manage Receivables System Options	
57	Open GL and Receivables Period		
58	Import AutoInvoice	Import Autoinvoice ESS Job	
59	Observe the Line Status as closed in Sales order		Both Invouce and Credit Memo Created
60	Update / Close Sales Order	Update or Close Sales Orders	Put Header in parameters. Header gets closed
61	Create Bank	Manage Banks	
62	Create Bank Branch	Manage Bank Branches	Routing = 9 Digit number
63	Manage Bank Accounts	Manage Bank Accounts	
64	Manage Receivables Activities	Manage Receivables Activities	Check the auto created Earned and unearned discounts
65	Create a Receipt Class for a Direct Receipt of Payment from Customer	Manage Receipt Classes and Methods	Name = b01 Cleared Receipt Class , No Remittence, Clearance = Direct, Remittence Bank Account
66	Create a Receipt for the invoice and Credit Memo	Receivables - Account Receivable - Create Receipt	In Add Open Receivables add the Credit Memo also by searching on the Credit Memo Transaction number.

67	Create Accounting in Accounts Receivable		
68	Create the Trial Balance	General Ledger Trial Balance Report	
	OM Activities . Every Business process below will be explained in detail during the training. Tasks will not be mentioned here.		
69	High Level Reservation for Lot Controlled Items		
70	Serial Generation at Inventory Pick		
71	Serial Generation at Sales Order Issue		
72	Inspection Before Despatch		
73	Two Variants during Shipping		
74	Back Ordering at Staging Area		
75	Defaulting Rules		
76	Processing Constraints		
77	Substitute Item		
78	Dozen UOM Test	d0151_std_order	
79	Tiered Highest Price	d0152_Tiered_Higest	
80	Tiered All Tiers Price	d0153_Tierd_All_Tiers	
81	Tiered Block Price	d0154_Tiered_Block	
82	Discount Simple	d0155_Discount	
83	Extended Warrenty	d0156_Extended_Warrenty	
84	Buy 1 Get 1 Free		
85	Holds & Releases		
86	Credit Check		
87	Extended Flex Fields in OM		
88	Kit Item (Laptop , Carry Case and Extended Warranty)		
89	Ship Set and Fullfillment Set		
90	Sales Order Approvals		
91	No Scheduling DOO Customisation		
92	No Reservation DOO Customisation with a demo		

93	Line Split in Sales Order with Manual Reservation		
94	Drop Ship Process		
95	Back to Back Buy - GOP		
96	Back to Back Transfer - GOP		
97	Back to Back Make - GOP		
98	Drop Ship Using GOP		
99	Configurator		
100	Manage Document Sequences for SO Numbering		

E Biz Inventory Agenda

E Biz Inventory Management Fundamentals

Inventory Basics

1. Location and Calendar creation
2. Inventory Org Creation – Accounting Info, Inventory Info, Receiving Info
3. Change working org
4. Create item
5. Miscellaneous Receipt
6. Open Accounting Periods
7. Miscellaneous Receipt
8. Create Sub Inventory
9. Material Balances
10. On Hand Availability – On Hand Quantity
11. Item – Item Search
12. Material Transactions
13. Transactions – Material Transactions
14. Transactions – Transaction Summaries

Controls

1. Serial Control
2. Lot Control
3. OCA – MCA
4. Revision Numbers
5. Revision Controls
6. Locator Control
7. Sub Inventory Restrictions
8. Locator Restrictions
9. Material Status Control

Material Transfers

1. Misc. Receipt
2. Misc. issues
3. Transaction Source
4. Transaction Type
5. Account Alias Transfers
6. Sub inventory Transfers
7. Move Orders
8. Item Transaction Defaults
9. Inter org Transfers – Direct
10. Inter Org Transfers – Intransit

Replenishments

1. Min Max Planning
2. Re-Order Point Planning
3. Kanban Replenishment
4. Replenishment Counting
5. Periodic Automatic Replenishment

Accuracy

1. ABC Analysis
2. Cyclic Counting
3. Physical inventory

Inventory Fundamentals

1. Units Of Measure
2. Asset / Expense Items
3. Item Defining Attributes
4. Status Attributes
5. Status Code
6. Pending Status
7. Status Attributes with Sets value
8. Item Types
9. Templates
10. Item Relationships
11. Customer items
12. Manufacturer's part Numbers
13. Cross References
14. Item Information
15. Catalogue Groups
16. Organisation Copy
17. Organization Access
18. Org Hierarchy
19. Delete Items
20. Build Positions
21. Multi Org Quantity

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E Biz Purchasing Agenda

E Biz Purchasing Fundamentals

1) An introduction to Procure to Pay Process

2) Creation of a branched enterprise structure with new OU, IMO and INV.

3) Creation of new Responsibilites and users for demonstrating hierarchical approval.

4) Creation of Jobs, Positions, Employment and Hierarchy.

5) Setting the OU for Purchasing – Preliminary Setups (Financial Options and Purchasing Options)

6) Detailed setups (Approval Groups, Approval Assignments, etc..)

7) Routing the requisition through the hierarchy and demonstrate the approval process (Approve, Approve and Forward, Forward, Reject, Re-assign and Request Information)

8) Document type options (Approver can modify, Can Change Forward to, Security & Access, etc..)

9) Vacation Rules

10) Supervisor Hierarchy

11) Approvals Management Engine.

12) Creation of a new Buyer and associated setups.

13) Return and split the requisition.

14) Auto and Manual creation of RFQ from Auto Create area.

15) Bid, Std and Catalogue RFQs and Quotes and approvals.

16) Supplier Creation

17) Supplier Merge

18) Supplier List

19) Supplier Item catalogue.

20) Requisition Templates.

21) Creation of 6 Purchase orders (CPA,SPO,PPO,SR,BPA and BR)

22) Comparision of POs

23) Procurement Process

24) Defaults flow into various Purchasing docs.

25) Receiving (Direct, Standard and Inspection)

26) Supplier Returns and Corrections.

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27) Advanced Receiving (Express, Cascade, Unordered, Blind, Substitute, etc.. in Receiving Options)

28) Retro Active pricing.

29) Pay on Receipt [Evaluated Receipt Settlement(ERS)]

30) Debit Memo on RTS.

31) Purchasing Options

32) Automatic Document Creation – 2 Ways [SR,ASR,ASL and (Blanket & Quotation)]

33) Min Max to Blanket Release

34) Advanced pricing in Purchasing [SR,ASR,ASL and CPA]

35) Consigned Inventory.

36) Vendor Managed Inventory.

37) Payables Accounting Process

38) Purchasing Accounting

39) Procure to Pay Life Cycle

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E Biz Order Management Agenda

E Biz Order Management Fundamentals

OM Setups:

Creation of an OM Responsibility
Creation of an Operating Unit, IMO and INV
OM – Preliminary Setups (System Options and Item validation Organisation)
Profile Class
Order & Line Transaction types creation.
Setting profiles qp:ivo and oe:ivo
Price list creation with PTE and SSC profile settings.
Customer Creation.
Document Sequencing.
Creation of a Sales Order.
Creation of an Item with proper attributes
Item on a Price List
Item on Sales Order.
Item on a warehouse

Basic Pricing:

Price for all items, Item Category and Item Numbers, UOM Conversion and
Exclusive price
Price Break Header – Point – Unit price
Price Break Header – Range – Unit price
Price Break Header – Range – Block price

Advanced Pricing:

Discount Modifies
Coupon Issue
Item Upgrade
Ask For promotions
Buy one Get one free
Freights and Special Charges
Advanced Pricing in Purchasing

Order Entry:
Defaulting Rules
Processing Constraints
Version History
Scheduling/Reservation
CSR/Schedulers
Auto Schedule
Below will be demonstrated in Vision's Responsibility as Purchasing is involved
Drop Shipment
Assemble To order (ATO)
Pick To order (PTO)
Back to Back Order
Available To promise (ATP)
Point of Sale (POS)
Related Items
Item Orderability
Credit Check
Sales Person
Sales Credit
Holds / Releases
Copy/Cancel
Manual Split
Mass Change
Blanket Sales Agreement
Return Material Authorisation (RMA)

Shipping Execution:
Basics of Shipping Execution
Shipping Entities (Detail, Delivery, Stop and Trips)
Grants & Rolls
Shipping Parameters
Launch Pick Release
Release Rule
Release Sequence Rule
Pick Slip Grouping Rule
Picking Rule
4 ways of launching Pick Release
Ship Confirm Process
Shipping Rule
Interface Trip Stop
Closing of Sales Order and send data to Interface table of AR
Shipping of Items with various Item Controls
Internal Sales order

E Biz Manufacturing Agenda

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Manufacturing training (BOM, WIP and Product Costing)

1) Create Engineering Items a1_e1 to a1_e10
2) Create engg bills a1_e2 and a1_e1
3) Indended Bills
4) Copy Bills
5) Common Bills
6) Items where used and Resource where used.
7) Substitutes and Reference Designators.
8) Document creation, Publishing and attachments
9) ECO.
10) Resources, Departments, Standard Operations and Routings.
11) Options and Mutually exclusive Bills with included items.
12) Cost Types
13) Standard Cost Roll up with
    Cost of Material, Material Overhead, Resource and Overhead costs.
14) Job Costing with variance analysis (charging and relieving) and WIP Value Summary.
15) Close Discrete jobs.
16) Lead Time Management with Cumulative Manufacturing Lead Time and Cumulative Total Lead Time.
17) Material Supply Types (Push, Operation Pull, Assembly Pull, Phantom, Supplier and Bulk)
18) Resource Charge types (Manual, WIP Move, PO Move and PO Receipt),
19) Count Point, Auto Charge and Back Flush
20) Move transactions, WIP Material and Completion transactions.
21) Shop Floor Statuses.
22) Simulation and creation of a Job.
23) Material and Resource modifications in a released job.
24) Moving assemblies with Lot and serial controlled FGs and its components.
25) Work orderless completions.
26) Assemble to order process with OM to WIP integration (ATO Model and Star items)
27) Pick to order process (PTO Model)
28) Packing and Unpacking of Kits with non-standard jobs.
29) Outside Processing Jobs in a Manufacturing Collaboration.

E Biz iProcurement Agenda

Oracle R12.x iProcurement.

1)   iProc Responsibility creation
2)   iProc User creation
3)   Operating unit creation
4)   Master Inventory Org Creation
5)   Setting Financial Options
6)   Setting Purchasing Options
7)   Approval Groups
8)   Approval Assignments
9)   iproc employee creation
10) Supplier and Supplier User Creation
11) Purchasing Category Creation
12) Item creation with the above categories
13) Information template
14) Smart Forms
15) Category Hierarchy
16) Local Content
17) Store Creation
18) Global Blanket Purchase Agreement
19) Three ways of populating item in iProc store
20) Base Descriptors and Category Descriptors
21) Information Content Zone
22) Setting user Preferences
23) Compare items before check out
24) Create requisitions on Check out.
25) Requisition Changes
26) Requestor Initiated changes to PO
27) Copy Req to Shopping Cart
28) Cancel Requisitions
29) Creating Non-Catalogue Requisitions
30) Change Delivery Info
31) Change Delivery and Billing Info
32) Splitting Cost across charge accounts Adding Attachments
33) Enable Supplier authoring in Global BPA.
34) Enable Catalog administrator authoring
35) Receive items in iProc
36) Processing Corrections
37) Processing Returns
38) Manage Life Cycle Tracking

E Biz Sourcing Agenda

Sourcing

1. Sourcing Administrator, Approver and Buyer with user creation
2. Sourcing branched enterprise structure creation.
3. Supplier user creation
4. Sourcing admin setups like Reusable Attribute Lists, Cost factors etc,
5. Negotiation Style, Template and events
6. Create an RFQ and respond in a Auction
7. Approve and Publish RFQ
8. Pause, Restart and extend a negotiation
9. Supplier Lock Out
10. Score requirements
11. Use of Live console to monitor a negotiation
12. Response analysis on a negotiation
13. Award Negotiation
14. Generate a PO from Sourcing
15. Two stage RFQ with Technical and Commercial bids
16. Unlocking and unsealing the technical stage
17. Unlocking and unsealing the Commercial stage
18. Award by Quote
19. Reverse auction
20. Multiple rounds of negotiation with auto price decrementation
21. Analyse and award an Auction
22. EMD Setups
23. EMD Transactions
24. Auto Create to Sourcing RFQ

E Biz ASCP

Intro to ASCP

1. What is an ASCP Plan
2. Supply Chain Modeling setups
3. Planning Server Setups
4. Unconstrained Plan
5. Enforce Demand Due dates Plan (EDD)
6. Enforce Capacity Constraints Plan (ECC)
7. Pegging
8. Product Costing
9. Lead Time Management
10. Penalty factors
11. Optimised Plan

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