

(23D) Oracle SCM Cloud Product Management Implementation

Oracle Supply Chain Management (SCM) Cloud

DURATION

5 Days

MODULES

22 Lectures

COURSE CODE

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Course Overview

(23D) Oracle SCM Cloud Product Management Implementation

What You Will Learn

Overview (Product Development and Product Hub)

- Lesson Objectives
- Topics
- Oracle Product Lifecycle Management (PLM)
- Product Lifecycle Management Cloud
- Ideation to Commercialization – Process Flow
- Product Development Overview (Design Products)
- Product Development Process Flow
- Product Hub Overview (Manage Product Master Data)
- Product Hub Process Flow
- Combined Process Flow
- Product Structure Differences
- Topics
- Common Product Features
- Product Development Features
- Product Hub Features
- PD vs PH
- Topics
- Change Management in Product Development (PD)
- Change Management in Product Hub (PH)
- Product Development Scenario: RadTech
- Scenario Solutions: RadTech
- Product Development & Product Hub: TimeBands
- Scenario Solutions: TimeBands

- Product Hub: DigiGlobe
- Scenario Solutions: DigiGlobe
- Practice Scenario
- Practice: From Design to Publish
- Topics
- Key Terms
- Topics
- Oracle Cloud Resources
- Oracle Video Hub
- Lesson Objectives

Product Management Navigation

- Lesson Objectives
- Topics
- Springboard
- Global Area
- Navigator
- Settings and Actions
- Show Date/Time According to User Time Zone
- Oracle Home Page
- Access Product Development and Product Hub
- Topics
- PLM Dashboard
- Change Orders Dashboard
- Searches Dashboard
- Practice: Navigating Product Management
- Topics
- Use Embedded Help
- Use the Help Portal
- Practice: Accessing Help
- Lesson Summary

Initial Implementation

- Lesson Objectives
- Topics
- Setup and Maintenance Work Area
- What are the Components of Setup and Maintenance?
- Configure the Product Offerings Using Opt In
- Setup and Maintenance Tasks
- Implement PD and PH
- Topics
- What are Units of Measure?
- Examples of UOM
- Add a Unit of Measure
- UOM Classes

- Topics
- Locations
- What are Organizations?
- What are Definition and Reference Organizations ?
- Item Organizations: Master-Child Relationship
- Implementation Guidelines
- Create Organizations
- Create Item Organizations and Assign them to a Master Organization
- Topics
- Item Lifecycle Phases: Introduction
- Lifecycle Phases: Additional Details
- Item Classes: Lifecycle Phases
- Manage Lifecycle Phases
- Lifecycle Phase Types
- Enable or Disable Lifecycle Validation for Structures
- Topics
- Root Item Class Definition: Lifecycle Phases
- Default Lifecycle Phase
- Root Item Class Definition: Security (Public and Private)
- Practice: Implementing the Root Item Class
- Lesson Summary

Configure Item Classes

- Lesson Objectives
- Topics
- What is an Item Class?
- Important Concepts of Item Classes
- Use of Item Classes for Administrative Purpose
- Set Up Item Classes
- Item Class Inheritance
- Manage Item Classes
- Best Practice!
- Topics
- Add Item Classes
- Create Item Classes
- Item Classes: Basic Information
- Topics
- Item Properties
- View Hierarchy of Item Classes
- Item Classes: Item Management > Generate Item Numbers
- Rule Generated: Create a Rule Set
- Rule Generated: Number and Description from Rules
- Item Classes: Item Management > Description and Enable NIR
- NIR Definition Workflow
- Item Classes: Security Tab (Private Classes)

- Manage Security Actions for Item Classes
- Item Classes: Transactional Attributes Tab
- Types of Item Attributes: Main and Operational
- Manage Operational Attribute Groups
- Types of Item Attributes: EFFs and DFFs
- Item Classes: Pages and Attribute Groups Tab
- Item Classes: Lifecycle Phases Tab
- Item Classes: Templates and Formats Tab
- Manage Templates and Import Formats for Item Classes
- Enforce Quantity for Reference Designators
- Practice: Creating Item Classes
- Practice: Adding an Item Lifecycle Phase (Optional)
- Lesson Summary

Configure Change Order Types

- Lesson Objectives
- Topics
- Change Management Overview
- Engineering Change Process (Product Development)
- Commercialization Change Process (Product Hub)
- Predefined Change Order Types
- Configure Change Order Type: Basic Setup
- Configure Change Order Type: Policy Setup
- Configure Change Order Type: Autocomplete on Cancel
- Configure Change Order Type: Number Generation
- Configure Change Order Type: Workflow Configuration
- Configure Change Order Type: Approval Status
- Automatic Promotion and Demotion
- Workflow Status Types
- Configure Change Order Type: Entry and Exit, Promotion and Demotion
- Configure Change Order Type: Participant Details
- Add Reviewers to Change Workflows
- Configure Change Order Type: Additional Workflow Controls
- Configure Change Order Type: Add Controls for Roles
- Configure Change Order Type: Propagation Rules (Commercialization Change Orders Only)
- Change Order Creators
- Change Order Header Attributes
- Change Order Attribute Groups
- Create a New Status
- Configure Change Reasons
- Configure Change Priorities
- Practice: Adding a Change Order Type
- Topics
- Change Order Approval Workflow: Options
- User Defined Approvals

- Rule Based Approvals
- Rule Based Approvals: Add Approvers
- Rule Based Approvals: Approval Groups
- Rule Based Approvals: Tasks
- Rule Based Approvals: Rules
- Set Approval to Rule Based
- Practice: Creating an Approval Rule
- Topics
- Use Application Composer Scripts for Automation
- Application Composer and Scripting
- Use Rules with Change Orders
- Create Rule Sets
- Add Rules to the Rule Set
- Topics
- Entry and Exit Criteria
- Define Required Global Fields for Entry and Exit Criteria
- Define Type-Specific Required Fields
- Apply Entry and Exit Criteria
- Practice: Adding a Change Order Entry or Exit Rule
- Topics
- Approval with Signature Password
- Configure Commenting Options
- Change Order History
- Change Order History: Configure Audit Trail
- Change Order History: Set Attributes
- Topics
- Configure New Item Request Type
- Configure New Item Request Type: Workflow
- Enable the Automated New Item Request Process
- New Item Request Number Generation
- Enable Item Class for NIR
- Create Definitions
- Required Definition Values
- Lesson Summary

Configure Extra Attributes

- Lesson Objectives
- Topics
- What are Extra Attributes?
- Descriptive Flexfields (DFFs)
- Extensible Flexfields (EFFs)
- EFF (Attribute Group) Security
- Global vs Context Sensitive
- Validators
- Topics

- Where To Manage Item Flexfields
- Extra Attributes (Flexfields) by Setup Task
- Item Attribute Groups and Attributes (EFFs)
- Create Item Attribute Groups and Attributes (EFFs)
- Item Class Pages and Attribute Groups Tab (EFFs)
- Assign Groups and Attributes for Item Classes (EFFs)
- Assign Attributes to Product Development Only (EFFs)
- Deploy Attributes (EFFs)
- Practice: Adding Item Attributes
- Practice: Creating a PD Functional Item Page (optional)
- Practice: Adding Attributes to an Item Class for PD Only (optional)
- Manage Item Descriptive Flexfields
- Manage Item Revision Descriptive Flexfields (DFFs)
- Manage Structure Component Descriptive Flexfields (DFFs)
- Manage Item Relationship Descriptive Flexfields (DFFs)
- Topics
- Extra Attributes (Flexfields) by Setup Task
- Create Change Order Attribute Groups and Attributes (EFFs)
- Create Change Order Extensible Flexfields (EFFs)
- Associate Contexts (Attribute Groups) to a Change Type
- Change Types and Inheritance
- Deploy Attributes (EFFs)
- Permission to Edit Extended Attributes (EFFs)
- Practice: Adding Change Order Extensible Flexfields
- Change Order and NIR Contextual Descriptive Flexfields (DFFs)
- Global vs Contextual Flexfields
- Change Order and NIR Line (Affected Object) DFFs
- Add Change Line Descriptive Flexfields to a Context (DFFs)
- Save the Context Segments to a Value Set
- Practice: Adding Change Order Descriptive Flexfields
- Topics
- Manage Trading Partner Item Descriptive Flexfields (DFFs)
- Lesson Summary

Product Development Specific Setup

- Lesson Objectives
- Topics
- Create Root Document Class
- Assign Root Document Class
- Add Document Subclasses
- Practice: Enabling Document Management
- Topics
- View Reports
- Create a Dashboard
- Copy Key Information

- Configure Reports for Product Management Objects
- View Reports Tutorial Videos
- Topics
- Update Product Line
- Add New Product Lines
- Topics
- Manufacturer Parts Overview
- Lookup: Manufacturer Status
- Lookup: Manufacturer Part Status
- Lookups: Approve Manufacturer List Status
- Practice: Adding a Contextual Descriptive Flexfield for a Manufacturer Part
- Practice: Creating an Item AML tab Descriptive Flexfield (Optional)
- Lesson Summary

Product Hub Specific Setup

- Learning Objectives
- Item Setup Tasks in Product Hub
- Manage Item Profile Options
- Manage Advanced Item Profile Options
- Manage Item Statuses
- Manage Item Types
- Define Item Completeness Score
- Lesson Summary

Product Development Navigation

- Lesson Objectives
- Topics
- Business Process
- Product Development Objects Overview
- Access Product Development
- Topics
- The Product Development Overview Tab
- Quick Search
- Multiple Items Search
- Tasks Panel Drawer
- Manage Delete Groups
- Manage Objects (Advanced Search)
- Add Fields to Advanced Search
- Compare Search Results
- Audit Results Panel Drawer
- Clipboard Panel Drawer
- Reports and Analytics Drawer
- Topics
- Information Tiles
- My Favorite Items

- My Worklist
- My Changes
- Item Audit Trail
- Practice: Navigating Product Development
- Lesson Summary

Item Design in Product Development

- Lesson Objectives
- Topics
- Design Process
- Innovation Management Concept Design
- Practice: Starting a Design
- Topics
- Item and Document Objects
- Create an Item Instance
- Create a Document Instance
- Edit Items and Documents
- View Items and Documents
- Lifecycle Phases in Product Development
- Item Tabs
- Document Tabs
- General Information Tab
- Revision Field
- Find Attributes
- Attachments Tab
- Topics
- Structure Definition
- Structure Tab
- Edit a Structure
- Structure Comments
- Reference Designators
- Add Reference Designators
- Expandable Side Panel
- Additional Information
- Attachments
- Approved Manufacture List (AML)
- Additional Attributes
- Substitute Components
- Topics
- AML Review
- AML Example
- AML Tab (Not on Documents)
- Topics
- Changes Tab
- Quality Tab

- Relationships Tab
- Team Tab
- Item Grading (Item Only)
- Where Used
- Topics
- Actions Menu
- Generate Reports
- Download Attachments
- View Reports
- Item Audit Trail
- Practice: Creating Items and Documents
- Practice: Running an Item Audit
- Lesson Summary

Structure Design in Product Development

- Lesson Objectives
- Topics
- Manufacturer Parts Overview
- Manufacturer Objects
- Manufacturer Tabs
- Manufacturer Security Tab
- Create a Manufacturer
- Create Manufacturer Directly from the AML Tab
- Create Manufacturers through Import (step 1)
- Create Manufacturers through Import: CSV File (step 2)
- Create Manufacturers through Import: Process (step 3)
- Create Manufacturers through Import: Progress (step 4)
- Practice: Creating a Manufacturer
- Topics
- Manufacturer Part
- Manufacturer Part: Tabs
- Manufacturer Part Security
- Create a Manufacturer Part
- Assign an Existing Manufacturer Part on a Structure Item
- View the AML
- Assign a New Manufacturer Part on a Structure Item
- Search for Manufacturers by Registry ID
- Manufacturer Object Statuses
- Manage Manufacturer Parts with Excel (part 1)
- Manage Manufacturer Parts with Excel: REST APIs (part 2)
- Manage Manufacturer Parts with Excel: Using the Add-in (part 3)
- Practice: Creating a Manufacturer Part
- Topics
- Work with Structures
- Quantity, UOM, and Sequence

- Expandable Side Panel
- Add Reference Designators
- Structure Actions Menu
- Structure View Menu
- Create New Item or Document within a Structure
- Duplicate
- Delete Item
- Export to Excel
- Add Existing Items or Documents
- Copy and Paste
- Search Structure
- Compare Structures
- Item Structure Report
- Accessing the Item Structure Report
- Download Attachments from Structure
- Practice: Creating a Structure
- Create a Structure Using Save As
- Copy and Paste a Structure
- Practice: Creating a Structure using Copy and Paste
- Cost Fields
- Cost Rollup
- Lesson Summary

Engineering Change Management in Product Development

- Lesson Objectives
- Topics
- Change Management Overview
- Change Type Functions
- Change Process
- Find Changes
- My Changes
- Change Order and Change Request Tabs
- General Information Tab
- Affected Objects Tab
- Table View
- List View
- Affected Object List View Summary of Changes
- Change Operations
- Tasks
- Attachments Tab
- Workflow Tab
- Impact Analysis Tab
- Relationships Tab
- Security Tab
- History

- Create a Change Order or Change Request
- Assigned To = Change Analyst
- Actions Menu
- Change Order Details Report
- Practice: Creating a Change Order
- Topics
- Change Control Business Process
- Redlining
- Change the Revision
- Redline Affected Objects
- Redline Affected Object Attributes and Tabs
- Revision Specific Lifecycle Phases
- Modify the Structure
- Add Reference Designators
- Edit Reference Designator Details in Side Panel
- Edit Substitute Components in Side Panel
- Add a Manufacturer Part
- Revision Specific Attachments
- Check Out Attachments
- Fill Actions
- Effective Date
- Undo Structure Redlines for Change Affected Objects
- Undo Redlines for AML on Change Affected Objects
- Resolve Revision Conflicts
- Resolve Revision Conflicts: Scenario
- Cancel Change Line
- Move Change Lines
- Cancel Change Order
- Download Redlined Attachments
- Practice: Redlining a Change Order
- Topics
- Workflow
- Workflow Status Types (Draft – Approval)
- Workflow Status Types (Scheduled – Canceled)
- Interpret Workflows
- Advance a Change Order
- Tiles and Notifications
- Audit a Change Order
- Add Approvers
- Approve a Change Order
- Remove Approvers Without Terminating Workflow
- Monitor Revision Effective Dates
- Relate a Change Order to a Project
- Create a Work Item in a Project
- Practice: Routing a Change Order
- Lesson Summary

New Item Requests in Product Development

- Lesson Objectives
- New Item Request Overview
- New Item Request (NIR) Process
- Trigger the NIR Process
- Access the NIR
- Access the NIR Definitions
- Complete a Definition
- Approve the NIR
- Video: Use New Item Requests in Product Development
- Lesson Summary

Product Hub Navigation

- Lesson Objectives
- Topics
- Access Product Hub
- Product Hub Workspace: Infolet Examples
- Tasks Panel Drawer
- Search, Clipboard, and Reports Tabs
- Practice: Navigating Product Hub
- Topics
- Search Items and Business Objects in Product Hub
- Use Regional Area Search
- Advanced Search
- Add Fields to Advanced Search
- Use Local Area Search
- Browse Item Class and Catalogs
- Use Global Search
- Practice: Searching for Items
- Lesson Summary

Work with Items in Product Hub

- Lesson Objectives
- Topics
- Item Terminology: Attributes, Description, Revision
- Item Terminology: Structures, Catalogs, Packs
- Item Terminology: Associations and Relationships
- Topics
- Create Items
- Create Multiple Items
- Create from Copy
- Edit Items: Main Attributes
- Edit Items: Unit of Measure
- Edit Items: Specifications

- Edit Items: Structures
- Edit Items: Attachments
- Edit Items: Associations
- Edit Items: Categories
- Functional Catalogs
- Functional Catalog Triggers
- Edit Items: Quality Objects
- Edit Items: History
- Topics
- Item Relationships
- Define Related Item Relationships
- Define Trading Partner Item Relationships
- Trading Partner Items and Approved Manufacturer List (AML)
- Define Trading Partner Items
- Create Trading Partners
- Define GTIN Item Relationships
- Define Cross-Reference Relationships
- Define Spoke System Item Relationships
- Practice: Creating Multiple Items
- Topics
- Structure Example
- Structure Definition
- Setup Tasks for Structures
- Define Structure Types
- Item Structures
- Product Structure: Create as New
- Product Structure: Add Components
- Product Structure: Replace Components
- Product Structure: Add Substitute Components
- Product Structure: Reference Designators
- Product Structure: Where Used
- Product Structure: View Summary
- Product Structure: View Change Orders
- Product Structure: Create from Copy
- Product Structure: Create from Common
- How Structures and Components Are Validated
- Practice: Creating a Structure with Existing Items
- Practice: Creating a Structure with New Items
- Topics
- Overview of Packs
- Hierarchy of Packs
- Pack Types
- Pack Type Details
- Item Attribute Rollup
- Create Packs
- Practice: Creating a Pack

- Lesson Summary

Work with New Item Requests

- Objectives
- Topics
- Overview of New Item Request
- Business Benefits of New Item Requests
- New Item Request Process View
- User Privileges
- Topics
- New Item Request Tasks
- Create New Item Request
- Create an NIR from an Item
- Manage New Item Requests
- New Item Request: Define Attribute Values
- Mark Complete
- New Item Request: Inspect Action Log
- New Item Request Notifications Summary
- Practice: Creating New Item Requests
- Summary

Work with Commercialization Change Orders in Product Hub

- Lesson Objectives
- Topics
- Overview of Commercialization Change Orders
- Change Order Process Overview
- Item Changes Supported by Change Orders
- Configure Change Order Type: Propagation Rules
- Topics
- Create a Change Order
- Create a Change Order: Add and Edit Items
- Create a Change Order: Edit Attributes
- Create a Change Order: Tasks
- Create Change Order: Attach Files
- Change Order: Reviewing the Workflow Summary
- Relationships Tab
- Security Tab
- Propagate the Change Order to Other Organizations
- Propagate
- History
- Change Order: Use Save As to Create a Change Order
- View Changes from Manage Change Orders
- View Change Order: Change Order Report
- Change Order Notifications
- Practice: Creating and Approving a Commercialization Change Order

- Lesson Summary

Create Catalogs

- Learning Objectives
- Topics
- What are Catalogs and Categories?
- Example of Catalogs and Categories
- Common Terms for Catalogs
- Types of Catalogs
- Functional Catalogs
- Functional Catalog Triggers
- What You Can Do With Catalog Management ?
- Topics
- Create a Catalog
- Search Catalogs
- View Catalogs
- Add Categories
- Add Categories: Create a New Category
- Edit Catalog Definition
- Edit Category Details
- Add Existing Categories
- Sharing a Category
- Copying a Category
- Practice: Creating Catalogs
- Topics
- Introduction to Catalog Data Security
- How to Enable Catalog Data Security ?
- Enable Data Security
- Catalog Data Security Details
- Example of Category Level Data Grants
- Summary

Mass Update and Product Rules in Product Hub

- Learning Objectives
- Topics
- Why might you Need to Mass Update Items?
- Mass Change Types for Items
- How to Perform Mass Changes ?
- Mass Assign Items to Organizations
- Mass Assign Items to Catalog Categories
- Mass Assign Items to Supplier Organizations
- Mass Migrate Items to a Different Item Class
- Mass Create Structures from Common
- Mass Reassign Catalog Categories
- Mass Unassign from Catalog Category

- Edit Item Attributes in a Spreadsheet
- Edit Item Attributes
- Practice: Managing Mass Item Changes
- Topics
- What are Item Rules ?
- What can you do With Item Rules?
- Information About Rules
- Assignment Rule Set
- Validation Rule Set
- Severity of Validation Rules
- Composite Rule Set
- Blending Rule Set
- Topics
- Create Rule Sets
- Add Rules to the Rule Set: Item Rule Details (Validation)
- Add Rules to the Rule Set: Item Rule Details (Assignment)
- Assign Items to Catalogs Using Item Rules
- Assign Catalog Categories Using Variables
- Activate Rule Sets
- Using Rules to Generate Numbers and Descriptions (Assignment)
- Item Rule Syntax
- Practice: Creating Assignment Rules
- Topics
- Analyze Item Rules Impact (Part 1)
- Create a Rule Impact Analysis (Part 2)
- Run the Analysis (Part 3)
- Review the Analysis (Part 4)
- Summary

Audit Trail and Import Data in Product Hub

- Learning Objectives
- Topics
- What is Audit Trail?
- How does Audit Trail Functionality Benefit You?
- Audit Trail Terminology
- Overview of Audit History
- Topics
- Setup an Audit Policy
- How to Manage Audit Policy
- Synchronize Audit Policy for New EFFs
- Data Changes Log for Business Objects
- Topics
- Create and Publish Data Audit History
- Create and Publish Data Audit History Report
- What is the Best Practice for Audits ?

- Practice: Managing Audit Policies
- Practice: Creating and Publishing Audit History Reports
- Topics
- Import Data in Product Hub
- Overview of Item Import Process
- Item Import Flow
- Topics
- Steps to Import Item Data
- Define Spoke Systems (Create the Trading Community)
- Manage Spoke System Options
- Create Item Batches
- What are the Item Batch Types?
- Edit Item Batch: Import Options
- Edit Item Batch: Data Quality Options
- Edit Item Batch: Structure and Pack Options
- Edit Item Batch: New Item Request Options
- Edit Item Batch: Change Order Options
- Load Data in an Item Batch
- Use Import Maps to Import Item Data
- Create Import Maps
- Example Import Map
- Transform Source Data
- Manage Item Batches
- View Item Batch Details
- In Progress Items
- In Progress: Data Quality Results
- Manage Messages and Errors
- Manage Imported Items
- Practice: Creating Item Batches
- Summary

Manage Supplier Products

- Learning Objectives
- Topics
- Product Hub Portal: Supplier Product Management
- Supplier Products Import Process
- Topics
- Setup Tasks to Manage Supplier Products
- Setup Spoke System
- Setup Default Catalog
- Setup Catalog Category Mappings
- Expose Item Extensible Attributes
- Setup Item Data Security
- Setup Import Map: Assign import map to supplier
- Setup Import Map: Generate smart spreadsheets

- Practice: Setting up Supplier Product Uploads
- Topics
- Manage Products by Suppliers: An Overview
- Create and Edit Products
- Create Products Using Templates
- Create Products Using Templates: Smart spreadsheets
- Upload Products Using Data Files
- Review Data File Upload Errors
- Create Product Upload Schedules
- Monitor Product Upload Schedules
- Practice: Uploading Supplier Products in Product Hub Portal
- Topics
- Manage Products by Product Data Stewards: An Overview
- Review Supplier Uploads
- Import Supplier Products
- Request More Information for Products
- Reject Supplier Products
- Blend Supplier Product Data
- Work with Product Notifications
- Practice: Importing Supplier Products into Product Hub
- Summary

Manage Publication in Product Hub

- Learning Objectives
- Topics
- What is Publication Framework?
- Overview of Publication
- How does Publication Benefit You ?
- Publication Terminology
- Publication Process Flow
- Topics
- Define a Spoke System
- Configure a Spoke System
- Configure Item Publication Criteria
- Item Entities Definitions
- Publication Criteria for Item Classes
- Publication Criteria for Catalogs
- Publication Criteria for Trading Partner Items
- Topics
- Define the Publication Schedule
- Define the Schedule for Publication
- Create Notification
- Generate the Payload
- Customize the Payloads
- Oracle WebCenter Content Access
- XML Output Format

- Practice: Managing the Publication Process
- Summary