How to create an organization in Oracle EBS by copying an existing one

This guide shows you how to create an organization in Oracle EBS (E-Business Suite) by copying an existing model organization. You create an interface record, launch the Organization Copy concurrent request, track it to completion, and then verify the new organization. The example copies organization 809 (RSR_3) to create organization 810 (RSR_4).

Prerequisites

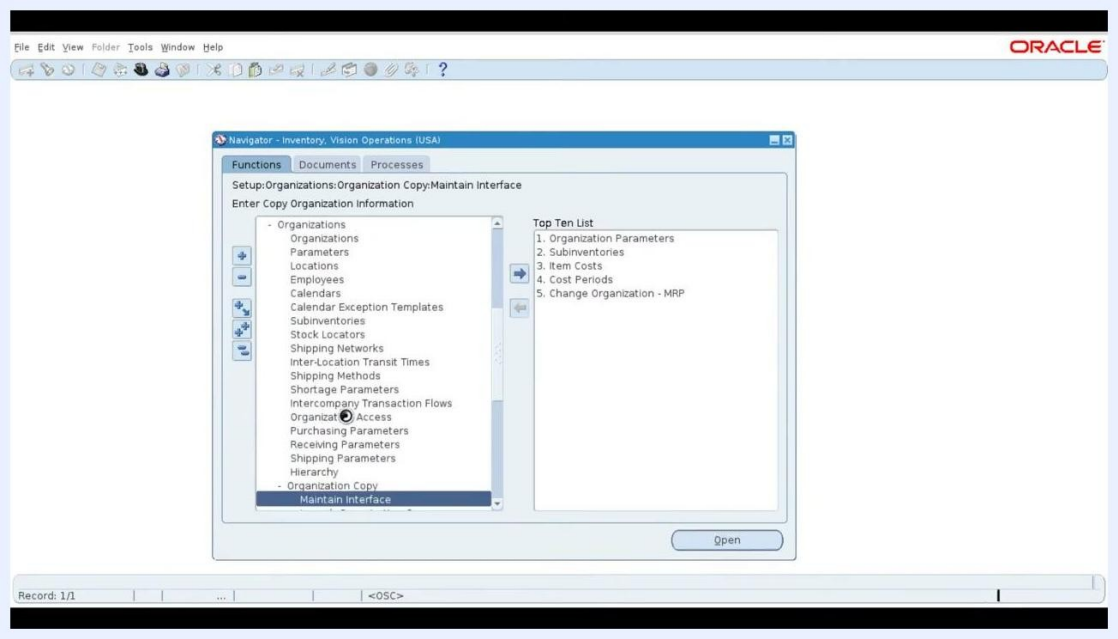
Before you begin, make sure you have the following:

- Access to Oracle E-Business Suite, with the **Navigator - Inventory, Vision Operations (USA)** window open.
- An existing model organization to copy from. This example uses organization code 809 (RSR_3).
- A location that already exists for the new organization. This example uses Cmalur. You can check available locations in the list of values.
- An unused organization code for the new organization. This example uses 810, the next code after 809.

Create the interface record

1. Open the Maintain Interface form

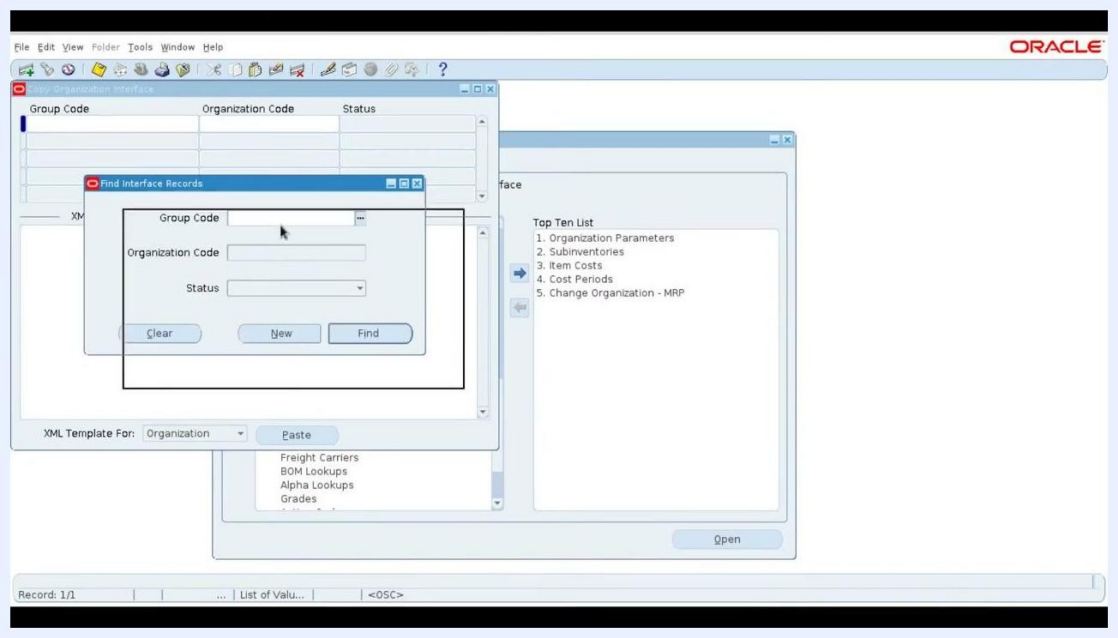
In the left pane of the Navigator, find the **Transaction Menu** and scroll down to expand **Setup**. Expand **Organizations**, then **Organization Copy**. Select **Maintain Interface** and click **Open**.



Navigator window showing the Transaction Menu with Setup > Organizations > Organization Copy > Maintain Interface highlighted

2. Start a new interface record

The **Find Interface Records** dialog appears. Click **New**, or press Alt + N, to create a new interface record. All fields in this form are mandatory.



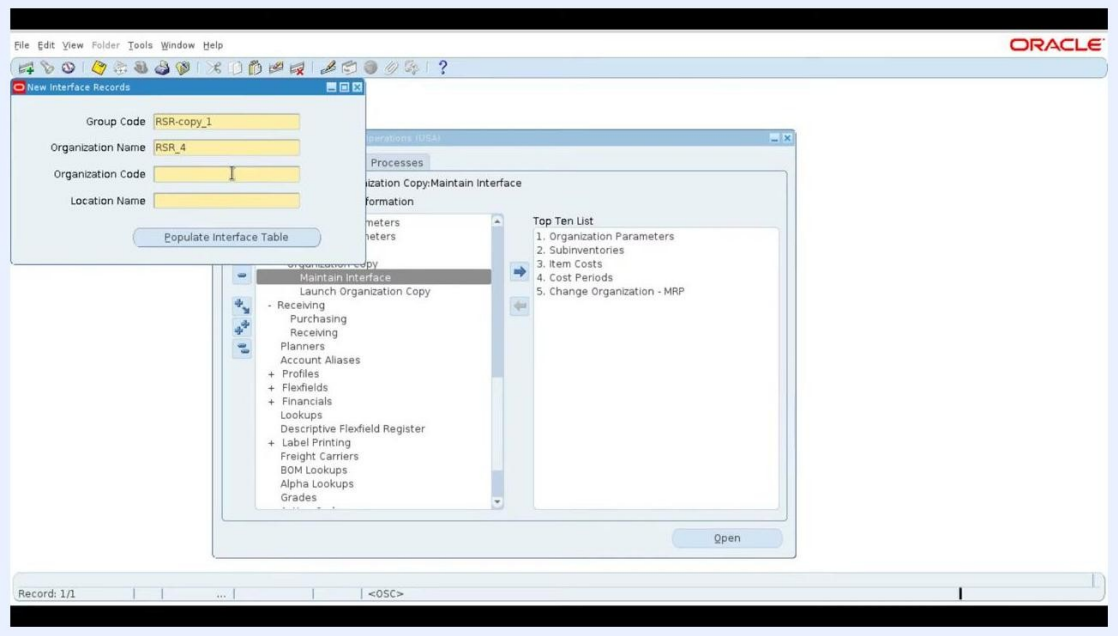
Find Interface Records dialog with fields for Group Code, Organization Code, and Status

3. Enter the group code and organization name

In the **New Interface Records** window, fill in the first two fields. Leave **Organization Code** and **Location Name** blank for now.

- **Group Code:** RSR-copy_1

- **Organization Name:** RSR_4



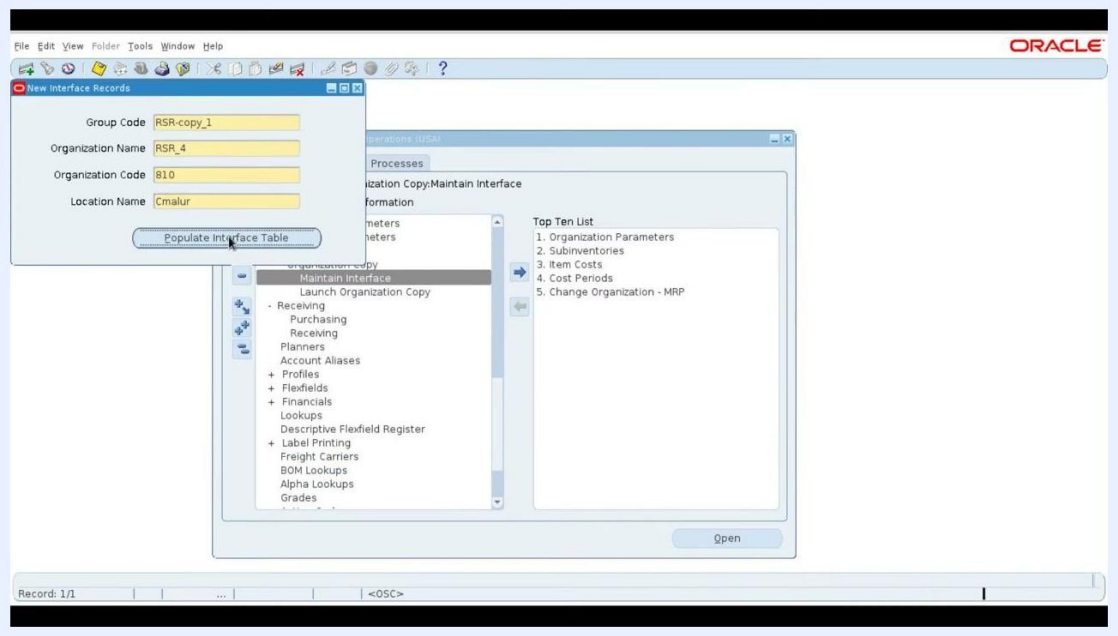
New Interface Records dialog with Group Code 'RSR-copy_1' and Organization Name 'RSR_4' being entered

4. Enter the organization code and location name

Complete the remaining fields in the **New Interface Records** window:

- **Organization Code:** 810 (the next available code after 809)

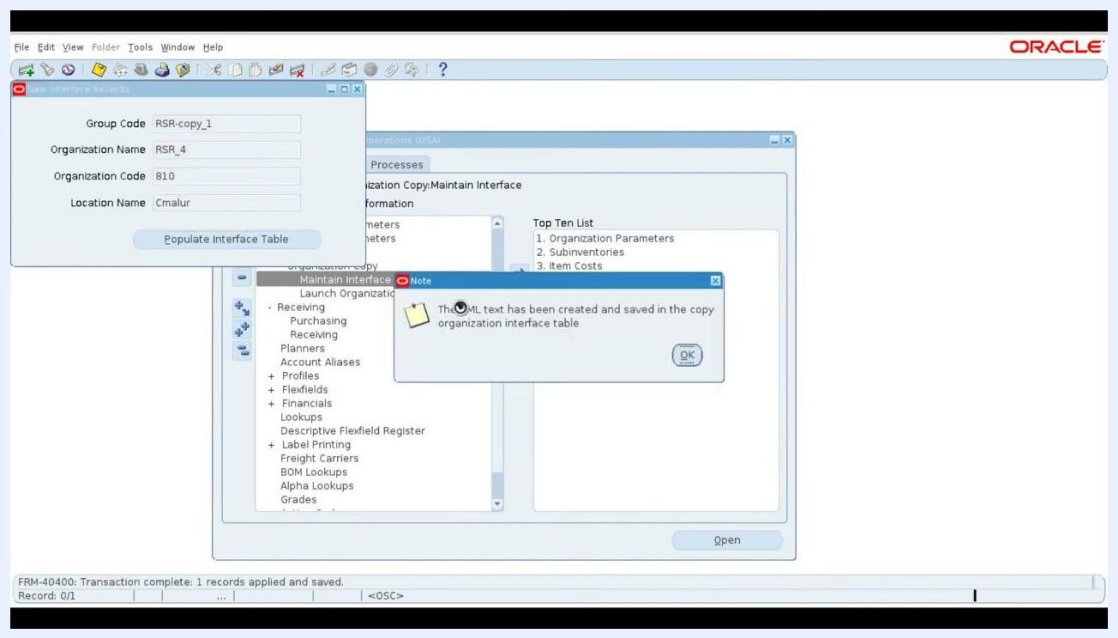
- **Location Name:** Cmalur (check the list of values to confirm this location exists)



New Interface Records dialog with Group Code 'RSR-copy_1', Organization Name 'RSR_4', Organization Code '810', and Location Name 'Cmalur' filled in

5. Populate the interface table

Click **Populate Interface Table**. A note appears stating "The XML text has been created and saved in the copy organization interface table." Click **OK** to acknowledge the message.



Confirmation note: 'The XML text has been created and saved in the copy organization interface table.' with the New Interface Records dialog in the background

6. Close the New Interface Records form

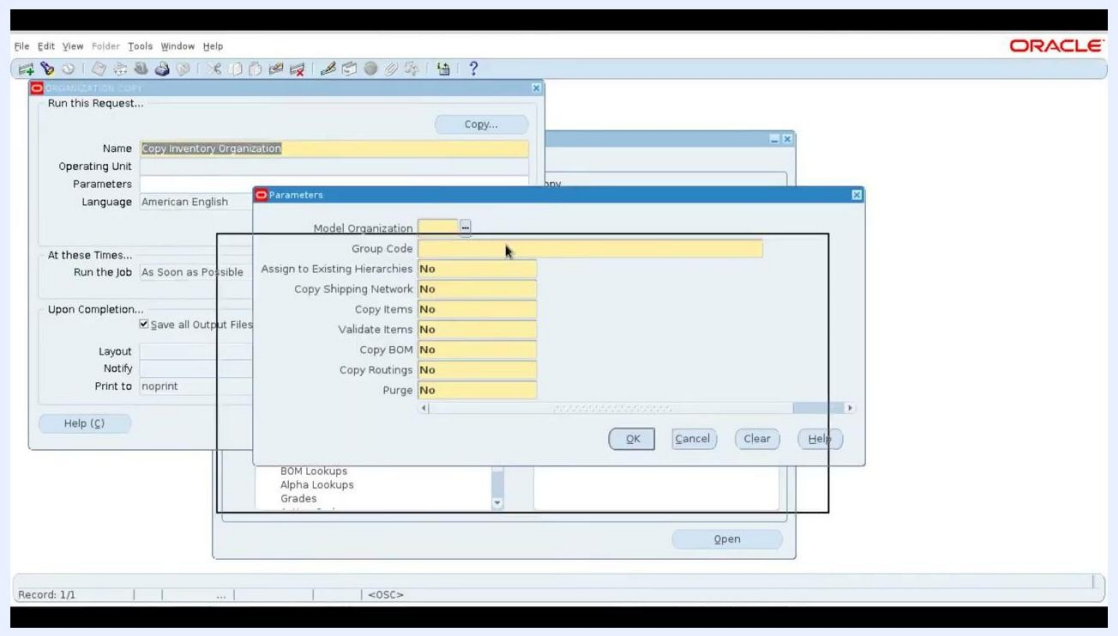
After you confirm the note, close the **New Interface Records** form to continue.

Launch Organization Copy

7. Open Launch Organization Copy

In the main Navigator window, go to **Setup > Organizations > Organization Copy > Launch Organization Copy**. Select **Launch Organization Copy** and click **Open**.

The **Organization Copy Request** form opens. This form does not ask for the new (destination) organization name or code. It only requires the model organization and the group code.



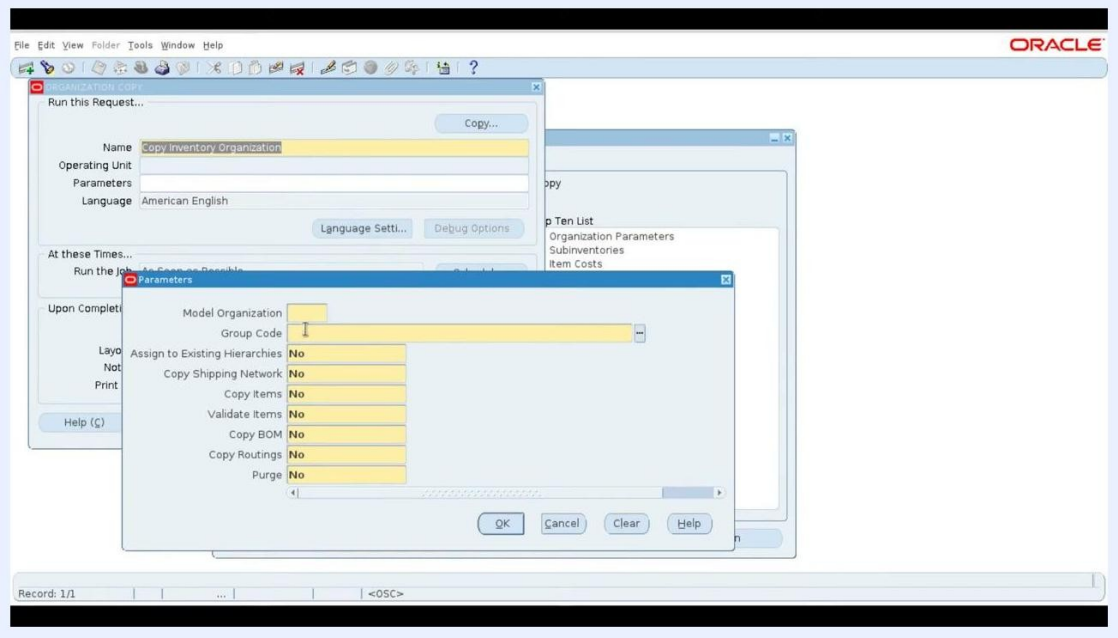
Navigator window with 'Launch Organization Copy' highlighted under Setup > Organizations > Organization Copy

8. Open the Parameters dialog

In the **Organization Copy Request** form, click to open the **Parameters** dialog. The dialog displays these fields:

- **Model Organization**
- **Group Code**
- **Assign to Existing Hierarchies**
- **Copy Shipping Network**
- **Copy Items**
- **Validate Items**
- **Copy BOM**
- **Copy Routings**
- **Purge**

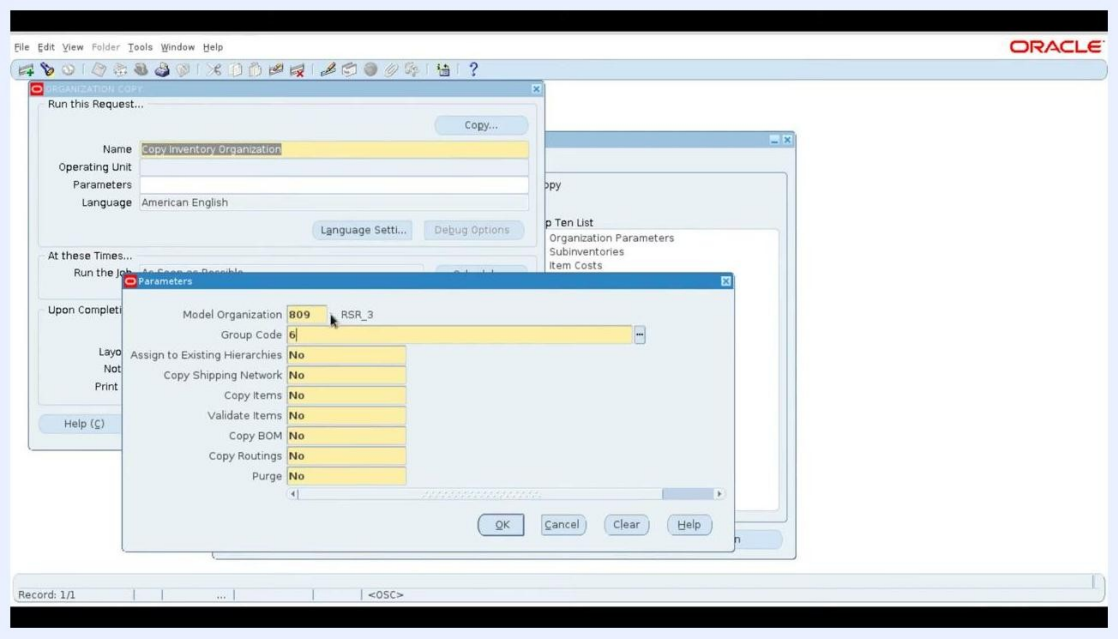
All options default to No.



Parameters dialog open, showing empty Model Organization and Group Code fields, all options set to 'No'

9. Enter the model organization

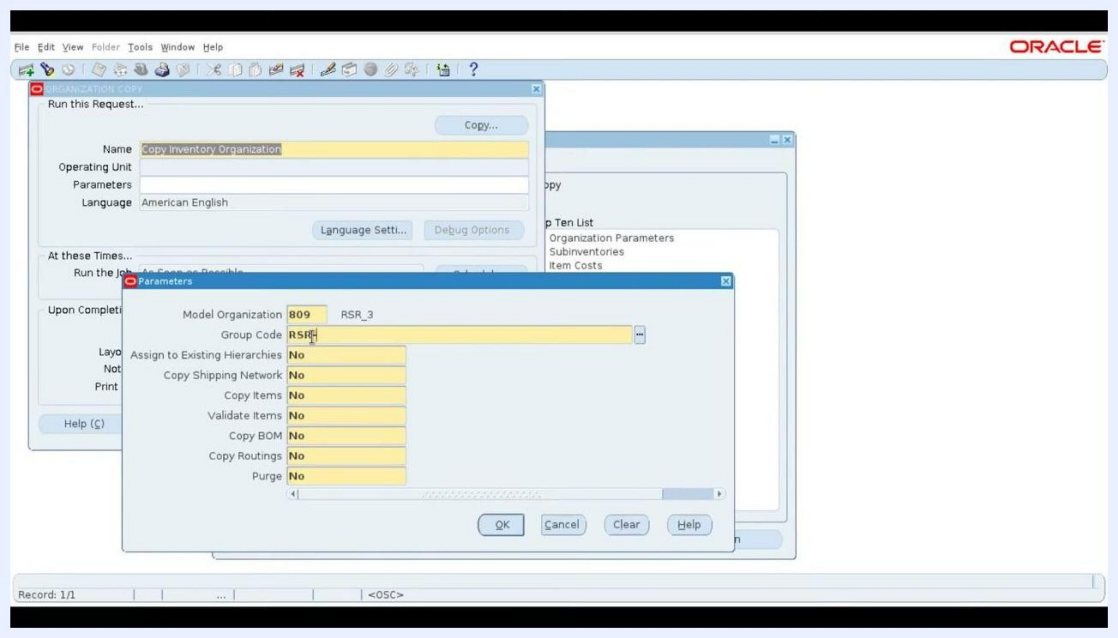
In the **Model Organization** field, enter 809, which corresponds to RSR_3. The system automatically populates the organization name as RSR_3.



Model Organization field filled with '809', name 'RSR_3' auto-filled, Group Code being entered

10. Enter the group code

In the **Group Code** field, enter RSR-copy_1. Press Tab to auto-fill the remaining details.



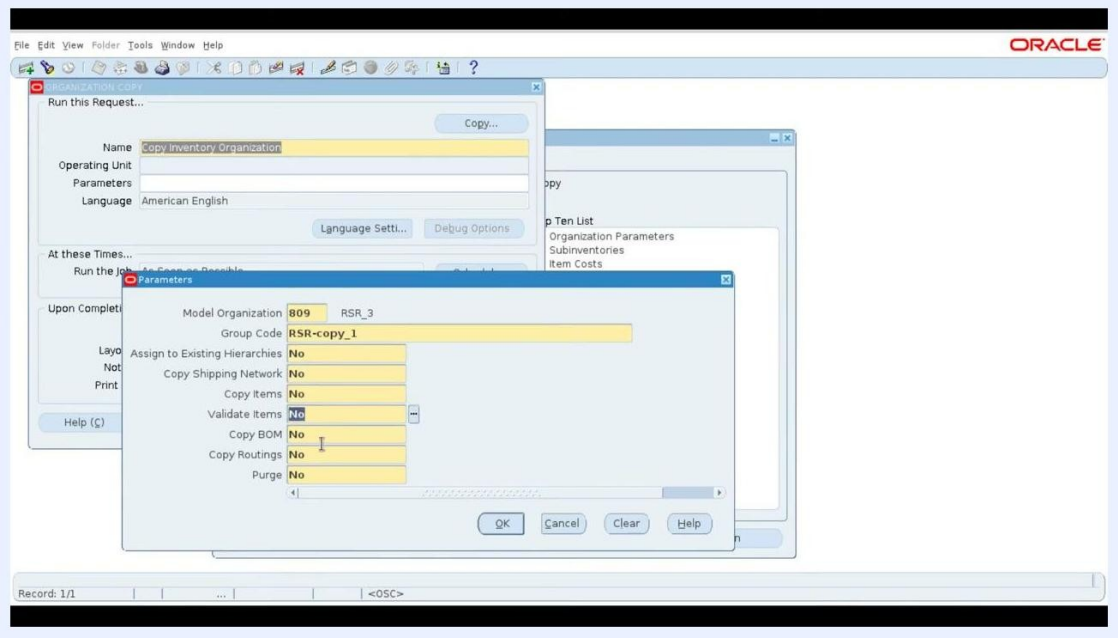
Group Code field filled with 'RSR-copy_1', all other options still set to 'No'

11. Verify the copy options

For this example, keep all copy options set to No. You can change these options later as needed.

- **Assign to Existing Hierarchies:** No
- **Copy Shipping Network:** No
- **Copy Items:** No
- **Validate Items:** No
- **Copy BOM:** No
- **Copy Routings:** No

- **Purge:** No



All parameters filled: Model Organization '809 RSR_3', Group Code 'RSR-copy_1', all options set to 'No'

12. Confirm the parameters

Click **OK** to confirm your entries and close the **Parameters** dialog.

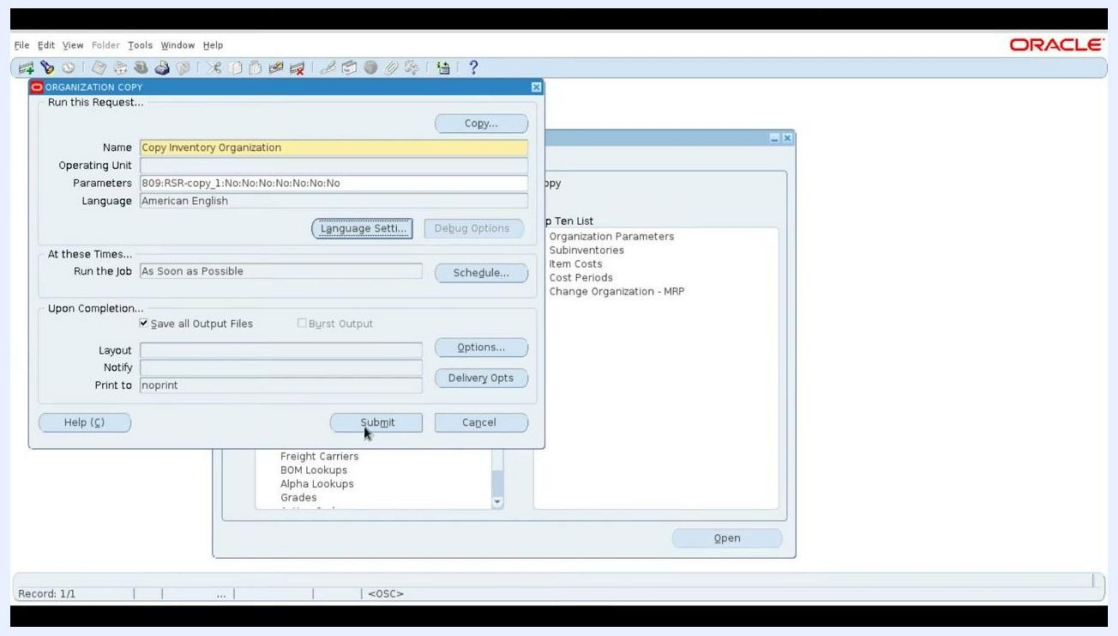
Submit the Organization Copy request

13. Review the request window

After you close the **Parameters** dialog, check the **ORGANIZATION COPY** window. It should show these values:

- **Name:** Copy Inventory Organization
- **Parameters:** 809:RSR-copy_1:No:No:No:No:No:No:No
- **Language:** American English
- **Run the Job:** As Soon as Possible
- **Save all Output Files:** checked
- **Print to:** noprint

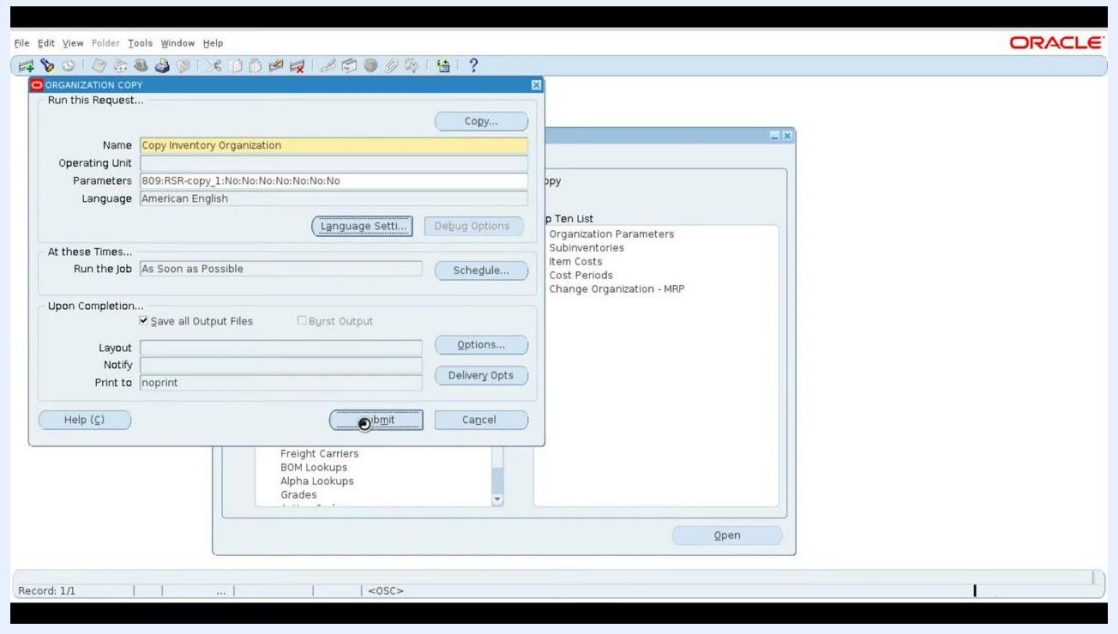
Position the cursor over the **Submit** button.



Organization Copy window with all fields filled and cursor over Submit button

14. Submit the concurrent request

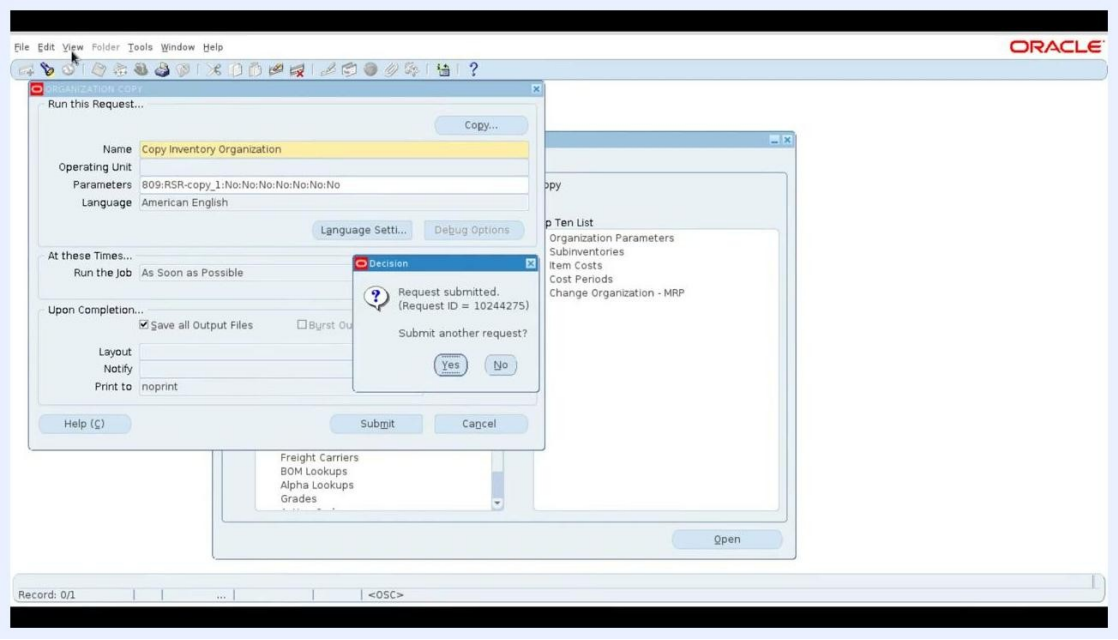
Click **Submit** to submit the Organization Copy as a concurrent request.



Submit button being clicked in Organization Copy window

15. Read the confirmation dialog

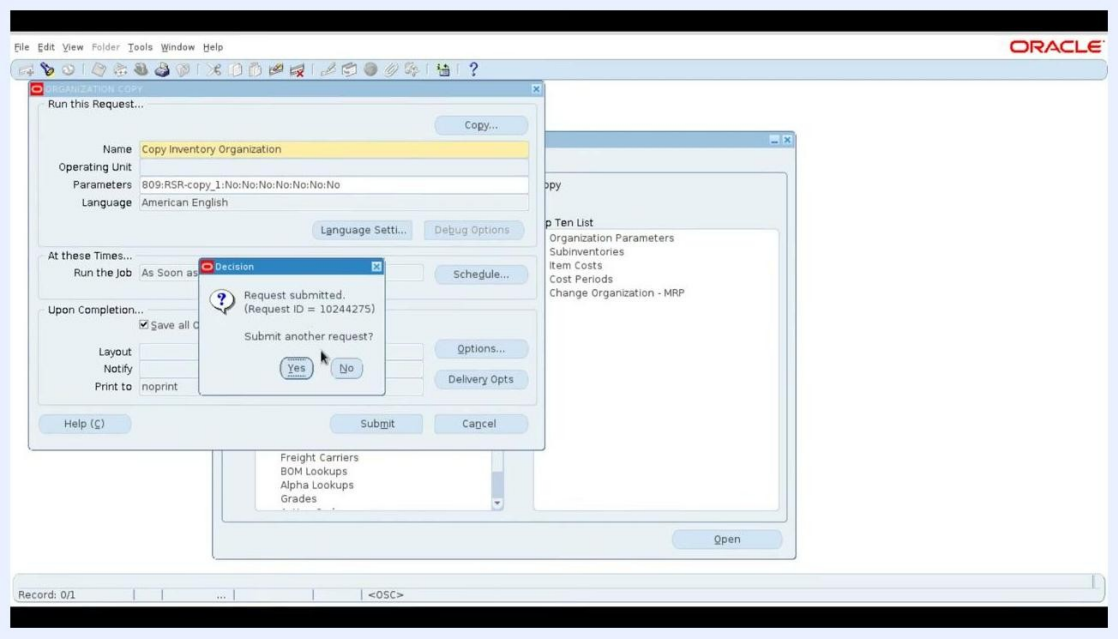
A **Decision** dialog appears with the message Request submitted. (Request ID = 10244275). It asks "Submit another request?" and offers **Yes** and **No** options.



Decision dialog showing Request submitted with Request ID and Yes/No options

16. Close the dialog

Click **No**. This closes the dialog and returns you to the **Organization Copy** window.

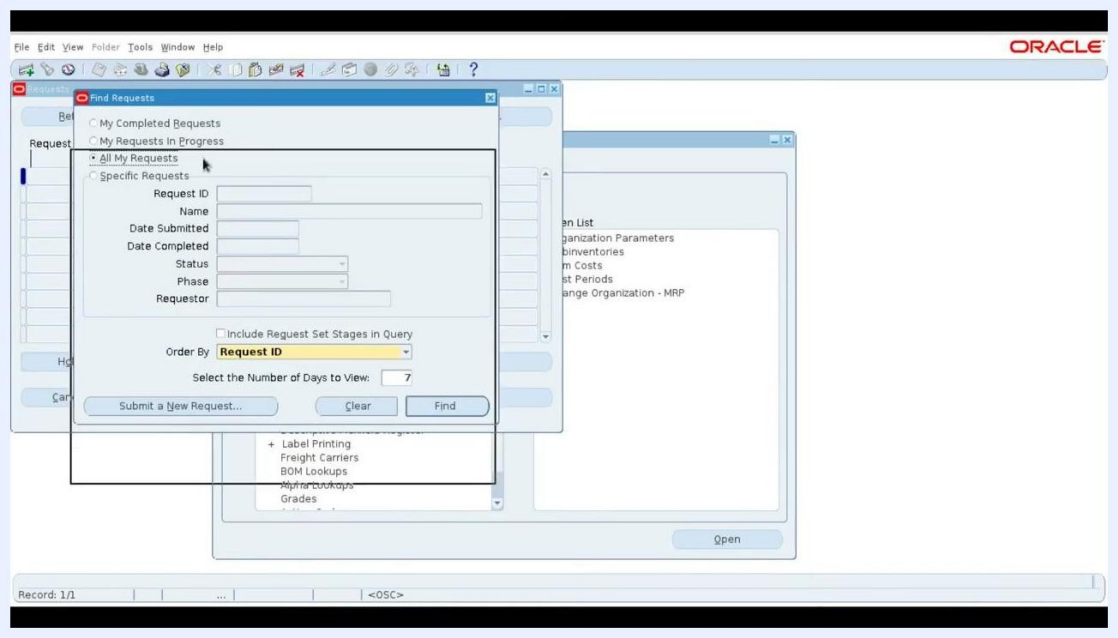


Cursor over No button in Decision dialog, Request submitted message visible

Track the concurrent request

17. Open the Requests window

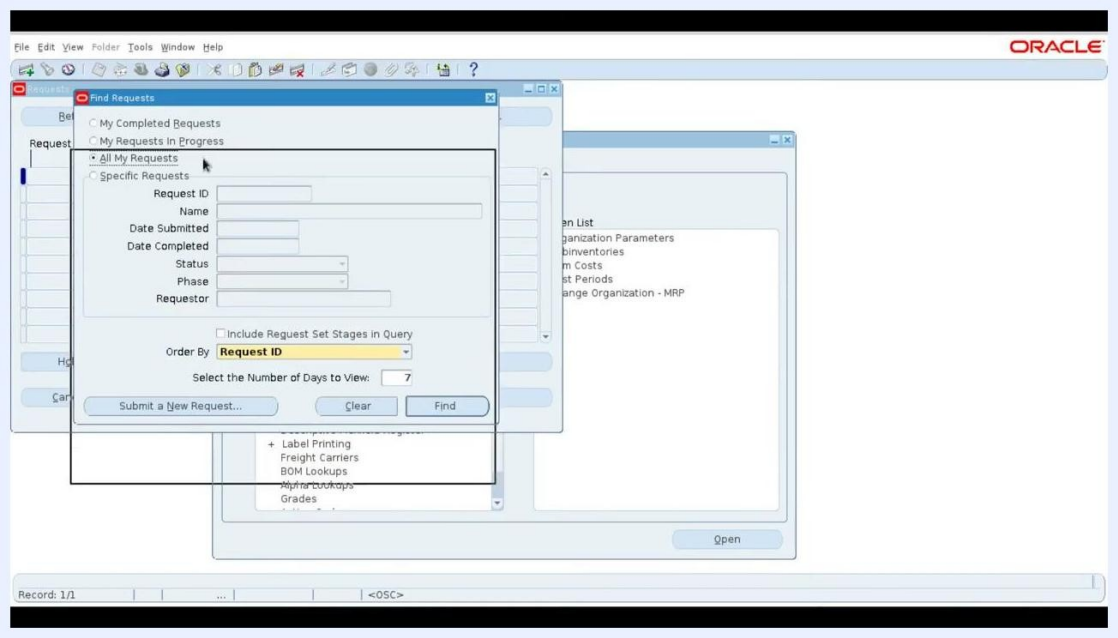
In the menu bar, click **View** and select **Requests**. You can also press Alt+V, then R.



View menu open with Requests option highlighted in Oracle Applications

18. Select All My Requests

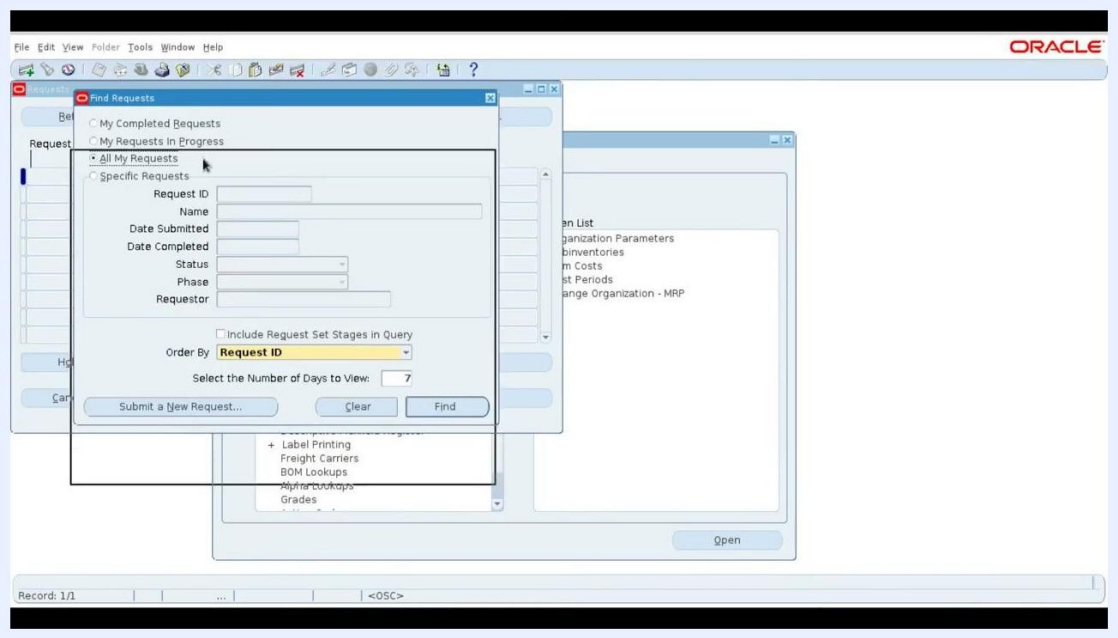
In the **Find Requests** dialog, select **All My Requests** to view every request you have submitted. You can also search by a specific Request ID.



Find Requests dialog with All My Requests selected and search fields visible

19. Find your requests

Click **Find**. The system lists all requests that match your criteria, and you can review the status of your Organization Copy request, such as completed or running.



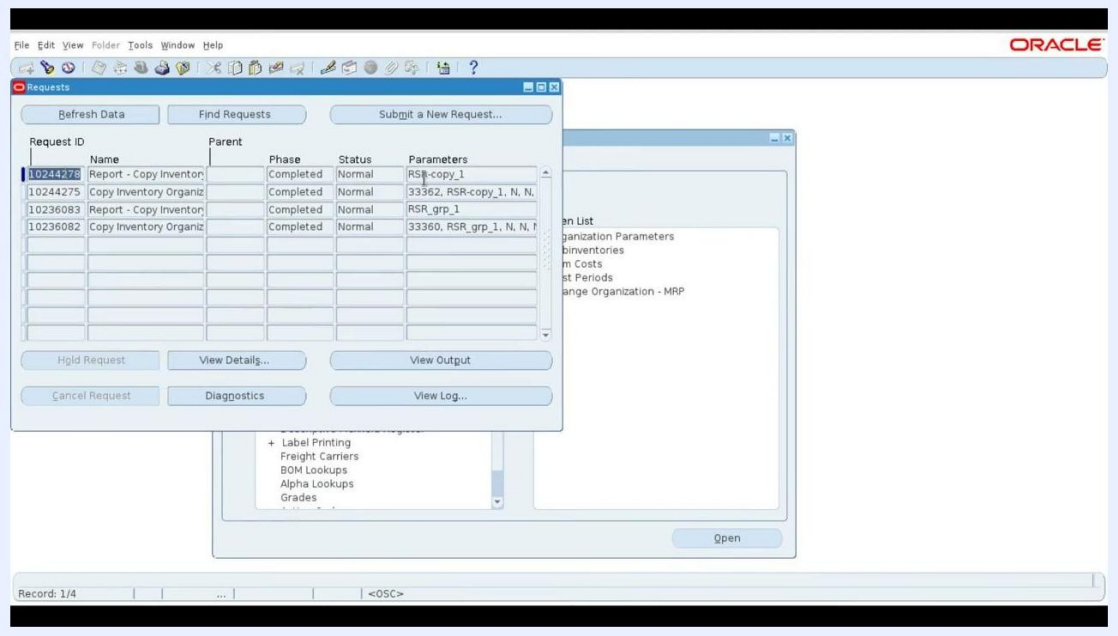
Find Requests dialog with All My Requests selected and Find button being clicked

20. Review the request status

In the **Requests** window, locate your request by Request ID (for example, 10244278). Confirm these details:

- **Phase** is Completed.
- **Status** is Normal.
- The **Parameters** column shows the group code (for example, RSR-copy_1).

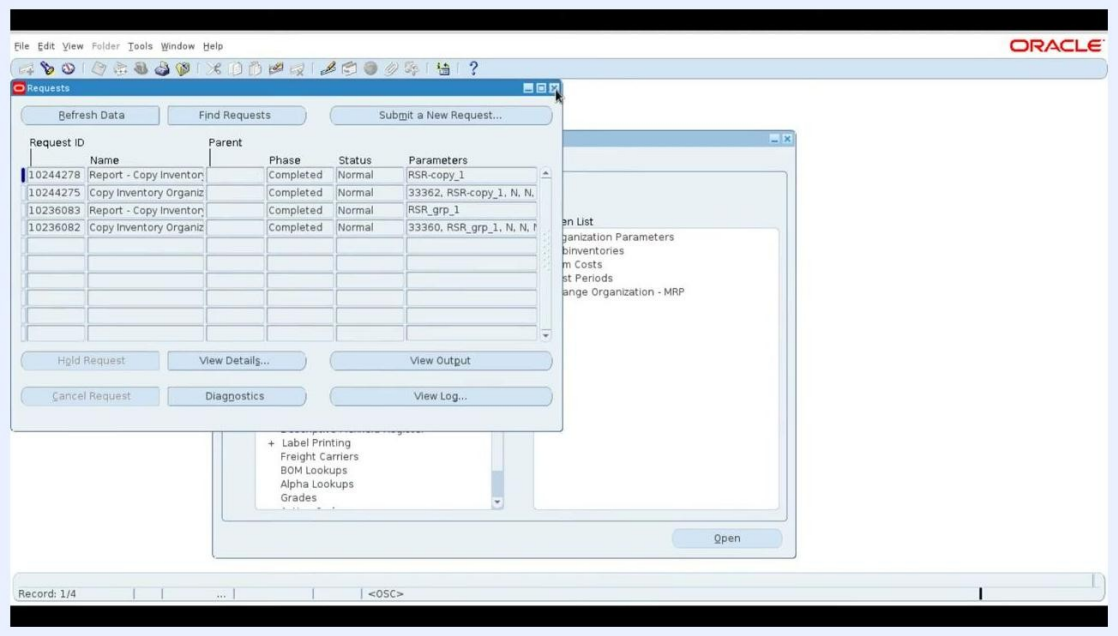
This confirms that the Organization Copy process finished successfully.



Requests window showing completed Organization Copy requests with status and parameters

21. Close the Requests window

Click the close button (X) in the upper right corner, or press Ctrl+F4. You return to the main Oracle Applications Navigator.

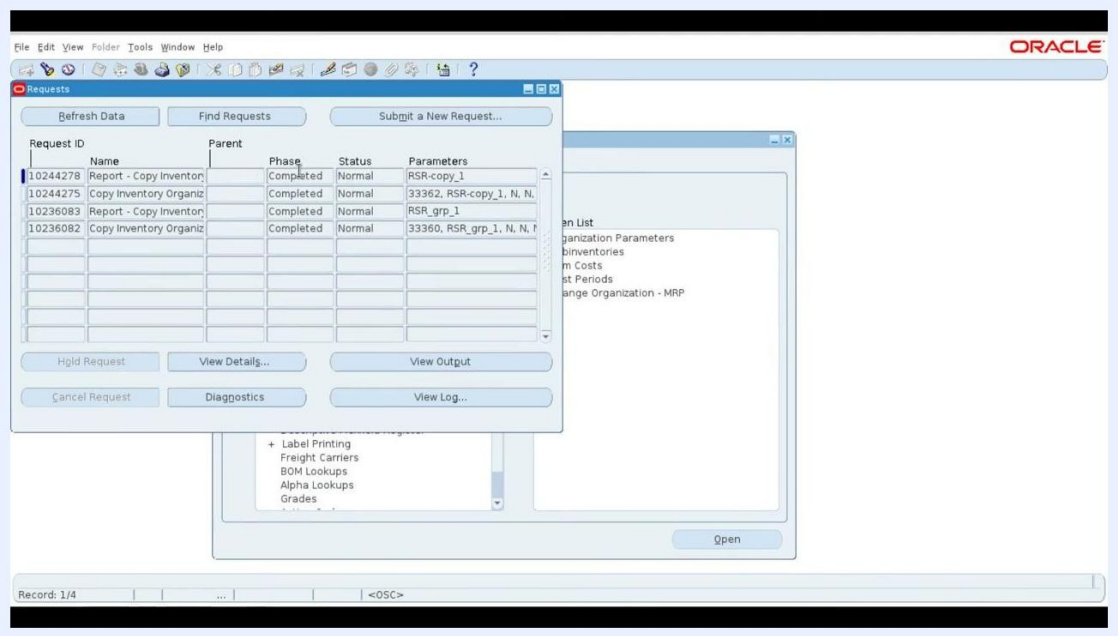


Requests window being closed, returning to main Navigator screen

Find the new organization with Change Organization

22. Open Change Organization

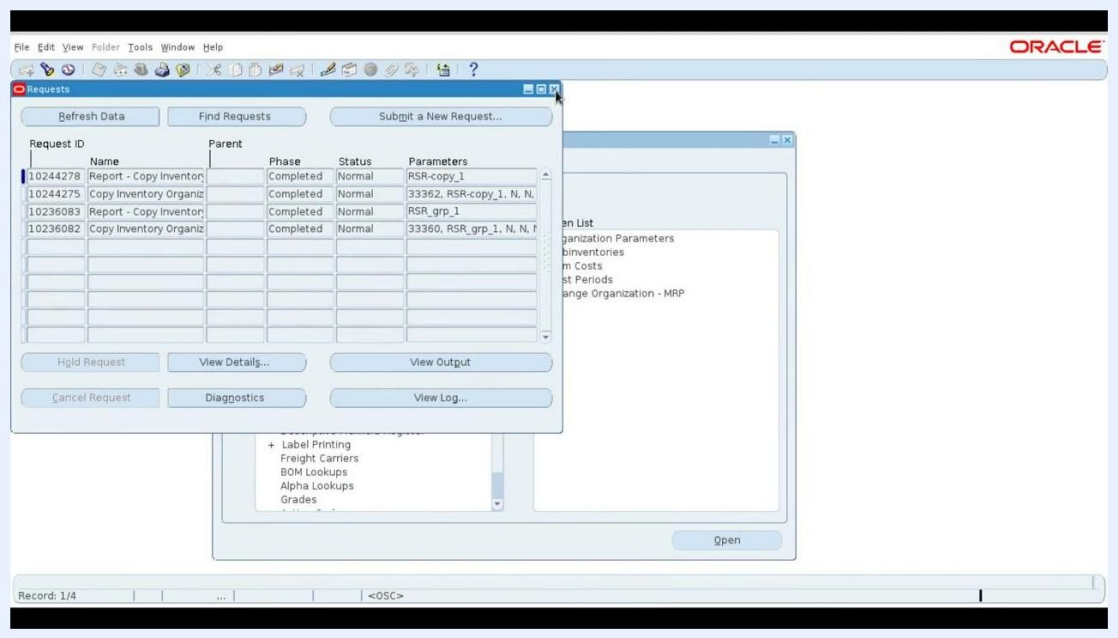
In the Navigator, under the **Setup** section, select **Change Organization - MRP**. Click **Open**.



Navigator window with Change Organization - MRP selected and Open button visible

23. Filter by code prefix

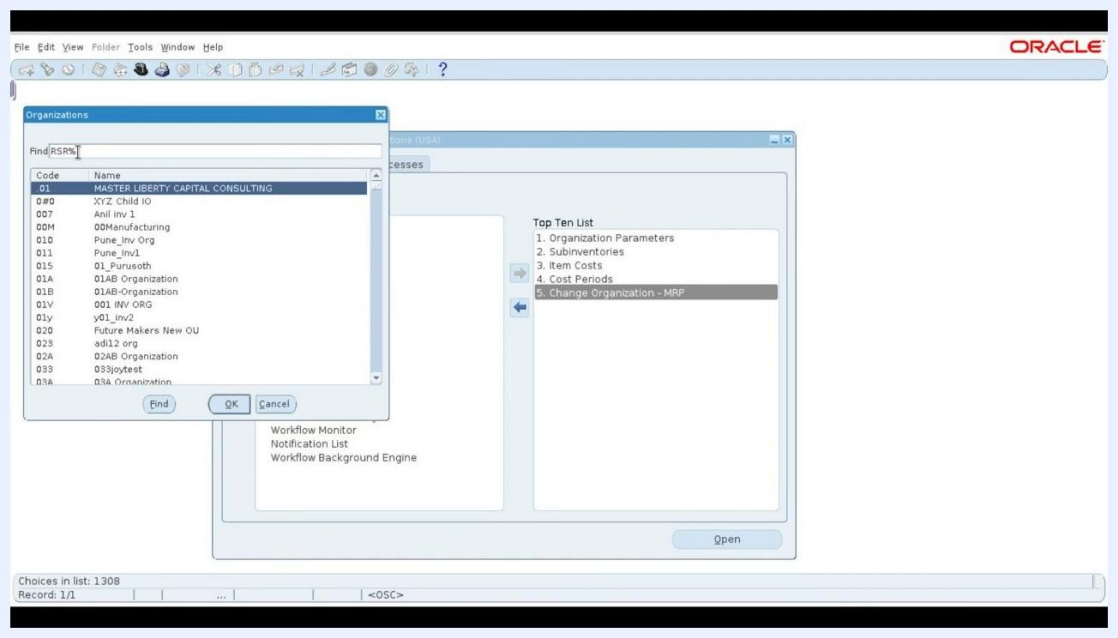
In the **Organizations** search dialog, enter RSR% in the **Find** field to filter organizations by code prefix. Click **Find** to display the matching organizations.



Organizations search dialog with RSR% entered in Find field and list of organizations displayed

24. Select the new organization

In the search results, find the organization with Code 810 and Name RSR_4. Select it and click **OK**.

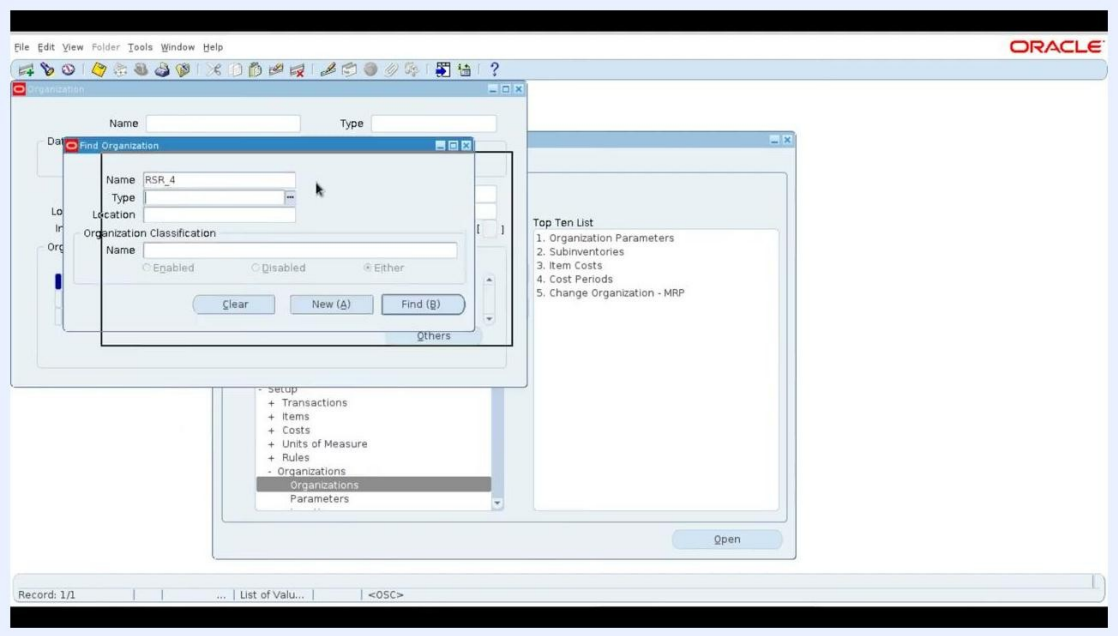


Organizations search dialog with RSR_4 organization highlighted in the results

Verify the new organization

25. Open the Organizations form

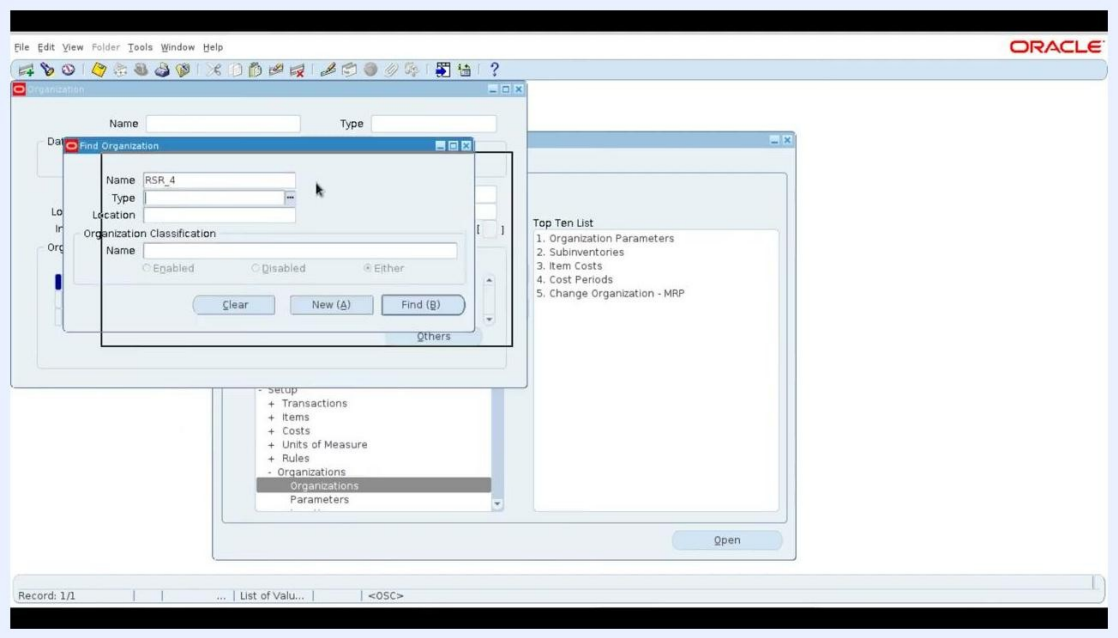
In the Navigator, go to **Setup > Organizations** and select **Organizations**. Click **Open** to access the organization details form.



Navigator window with Setup > Organizations > Organizations selected

26. Search for the organization by name

In the **Find Organization** dialog, enter RSR_4 in the **Name** field. Leave the other fields blank unless you want to filter the search further. Click **Find** to display the organization details.



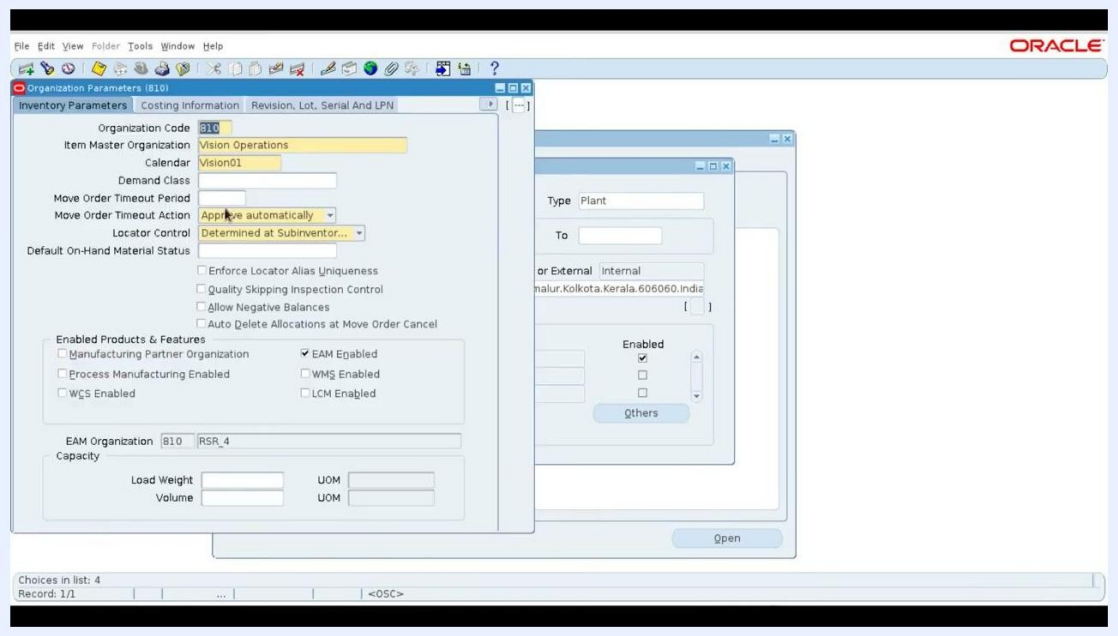
Find Organization dialog with RSR_4 entered in Name field and Find button visible

27. Review the main organization details

In the **Organization** window, confirm the following:

- **Name** is RSR_4 and **Type** is Plant.
- The **From** date is 21-NOV-2019.
- **Location** is Cmalur.
- **Location Address** is Block No:632, Atlantic city, Atlants, Cmalur, Kolkota, Kerala, 606060, India.
- **Internal or External** is Internal.

- **Inventory Organization** is listed under Organization Classifications and is enabled.



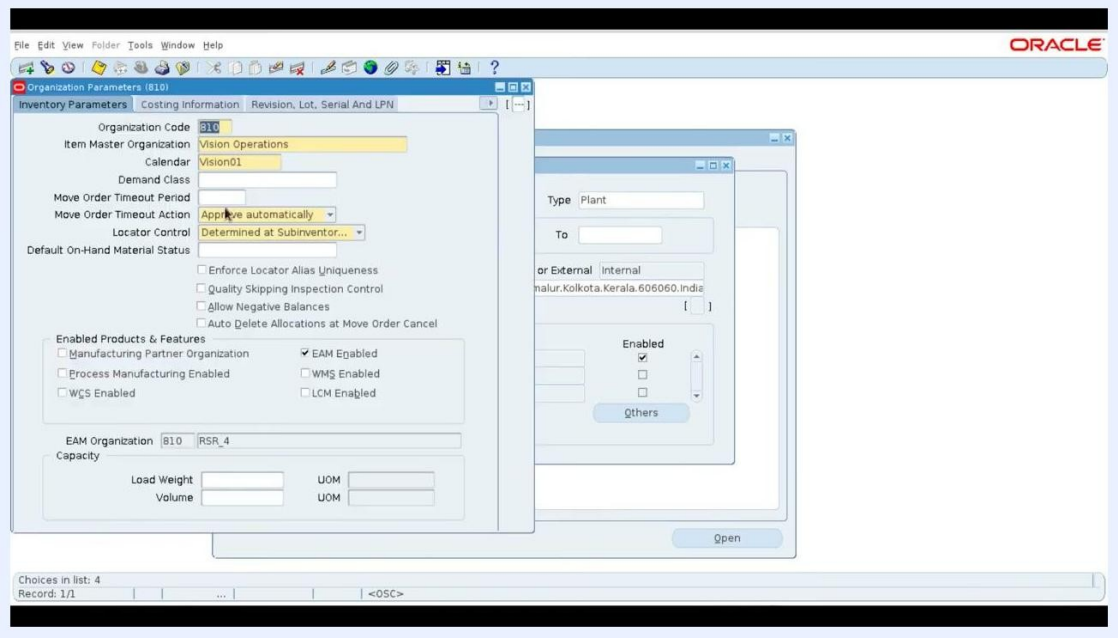
Organization window showing RSR_4 details, including name, type, dates, location, address, and enabled inventory organization classification

28. Open additional organization information

Click **Others** in the **Organization** window. The **Additional Organization Information** dialog lists these sections:

- **Additional Information**
- **Accounting Information**
- **Customer/Supplier Association**
- **Inventory Information**
- **Receiving Information**

Select **Accounting Information** to continue the verification.



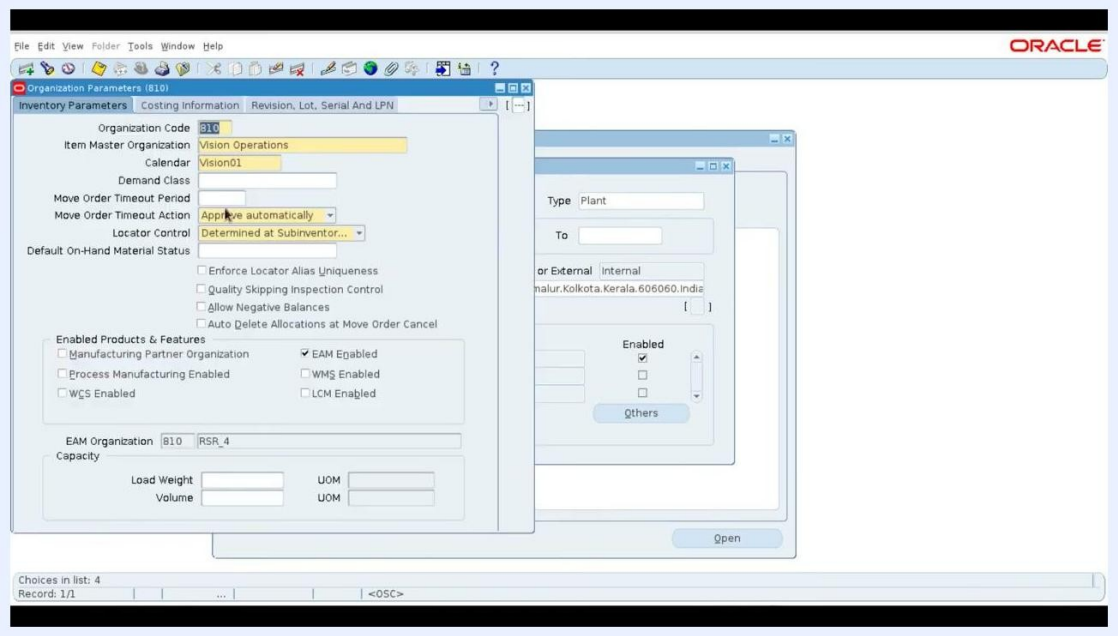
Additional Organization Information dialog with Accounting Information selected

29. Verify the inventory parameters

In the **Organization Parameters** window, confirm these details:

- **Organization Code:** 810
- **Item Master Organization:** Vision Operations
- **Calendar:** Vision01
- **Move Order Timeout Action:** Approve automatically
- **Locator Control:** Determined at Subinventor...
- **EAM Organization:** 810, RSR_4
- **EAM Enabled:** checked under Enabled Products & Features

Confirm that these parameters match those of the source organization (for example, organization 809).



Organization Parameters window showing inventory parameters for organization code 810, RSR_4

30. Review costing information and valuation accounts

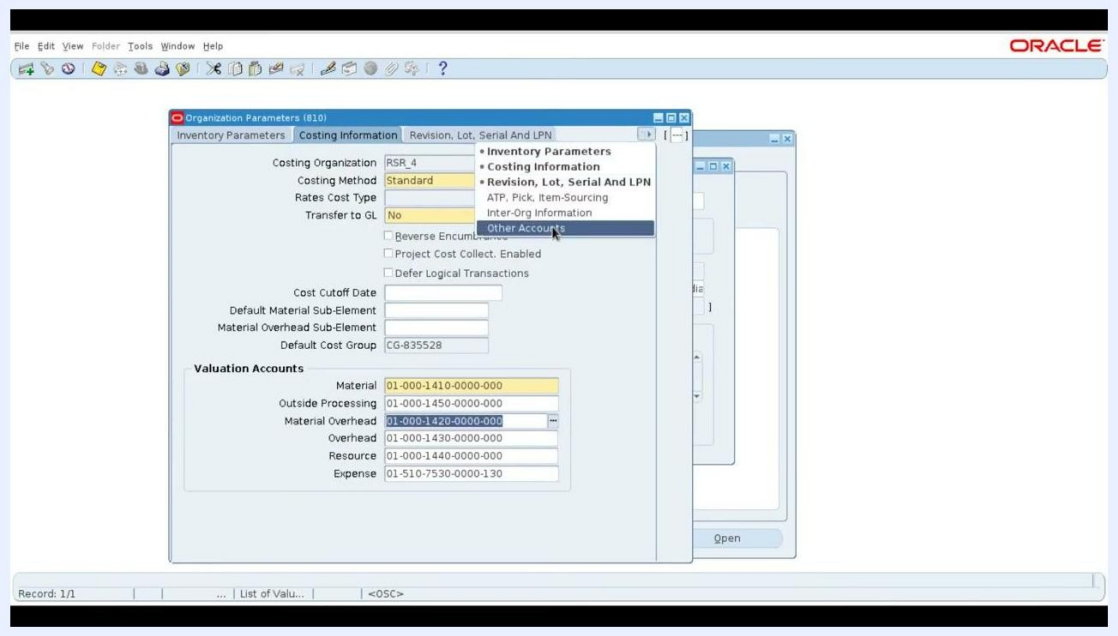
Switch to the **Costing Information** tab in the **Organization Parameters** window and confirm these values:

- **Costing Organization:** RSR_4
- **Costing Method:** Standard
- **Rates Cost Type:** blank
- **Transfer to GL:** No
- **Default Cost Group:** CG-835528

Under **Valuation Accounts**, verify these account codes:

- **Material:** 01-000-1410-0000-000
- **Outside Processing:** 01-000-1450-0000-000
- **Material Overhead:** 01-000-1420-0000-000
- **Overhead:** 01-000-1430-0000-000
- **Resource:** 01-000-1440-0000-000
- **Expense:** 01-510-7530-0000-130

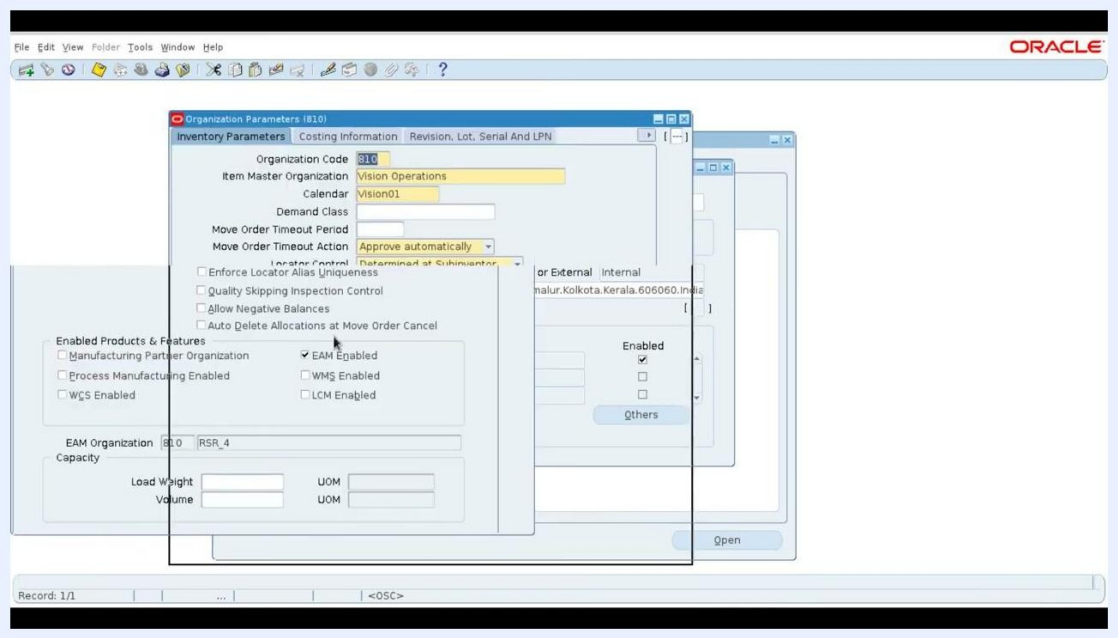
You can use the navigation menu to review other account sections if needed.



Costing Information tab with valuation accounts and costing details for RSR_4

31. Close the organization details window

When you finish verifying the details, click the close (X) button in the upper right corner of the **Organization** window. This completes the verification of the new organization.



Organization window for RSR_4 being closed after verification

Summary

You now know how to create an organization in Oracle EBS by copying an existing one. You created an interface record, launched the Organization Copy request with model organization 809 (RSR_3), and tracked the request to a Completed phase with Normal status. You then confirmed that the details, parameters, and accounts were copied to the new organization, 810 (RSR_4).