How to create an item class in Oracle Fusion

This guide shows you how to create an item class in Oracle Fusion Cloud Product Data Management (PDH). You configure item number generation, description generation, and security for the class. Then you create an item in the new class and assign it to organizations.

Prerequisites

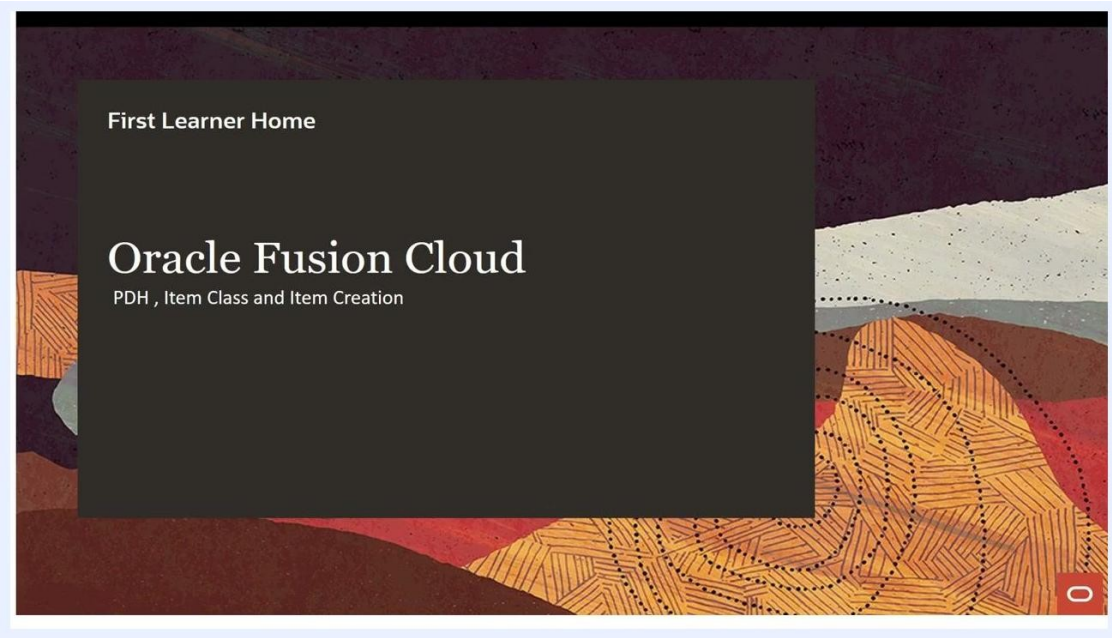
- You need the **Product Manager** privilege or a job role that includes it.

About the item class hierarchy

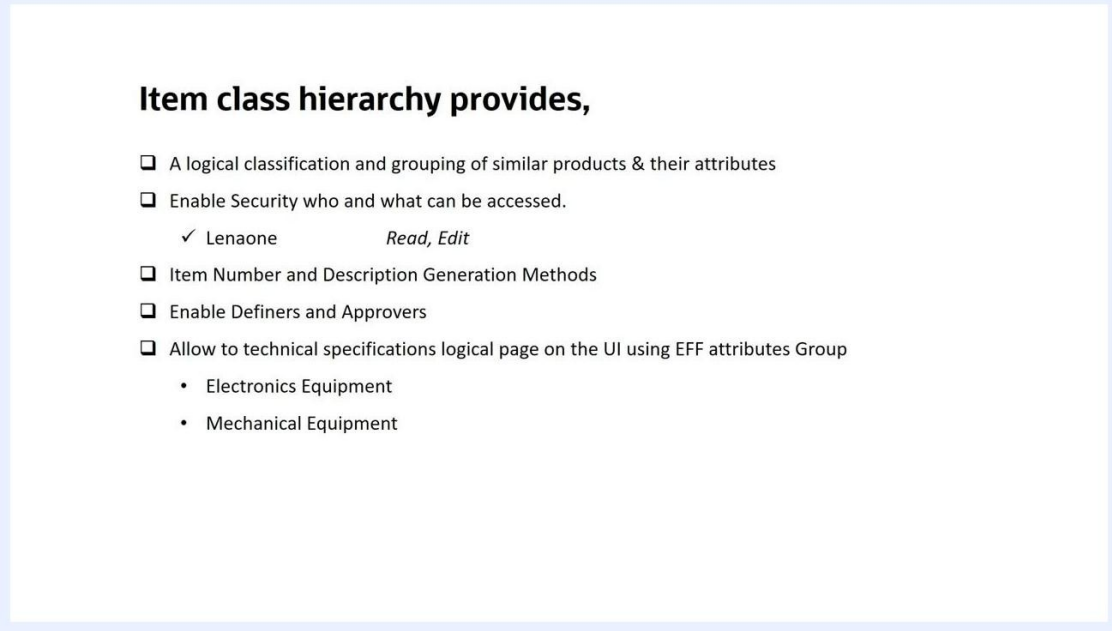
Before you create an item class in Oracle Fusion, it helps to know what the item class hierarchy provides:

- Logical classification and grouping of similar products and their attributes.
- Security controls that specify who can access what.
- Item number and description generation methods.
- Definers and approvers for item classes.
- Access to technical specification logical pages in the UI through Extensible Flexfield (EFF) attribute groups.

Example item classes include Electronics Equipment and Mechanical Equipment.



Title slide showing "Oracle Fusion Cloud: PDH, Item Class and Item Creation" with "First Learner Home" heading

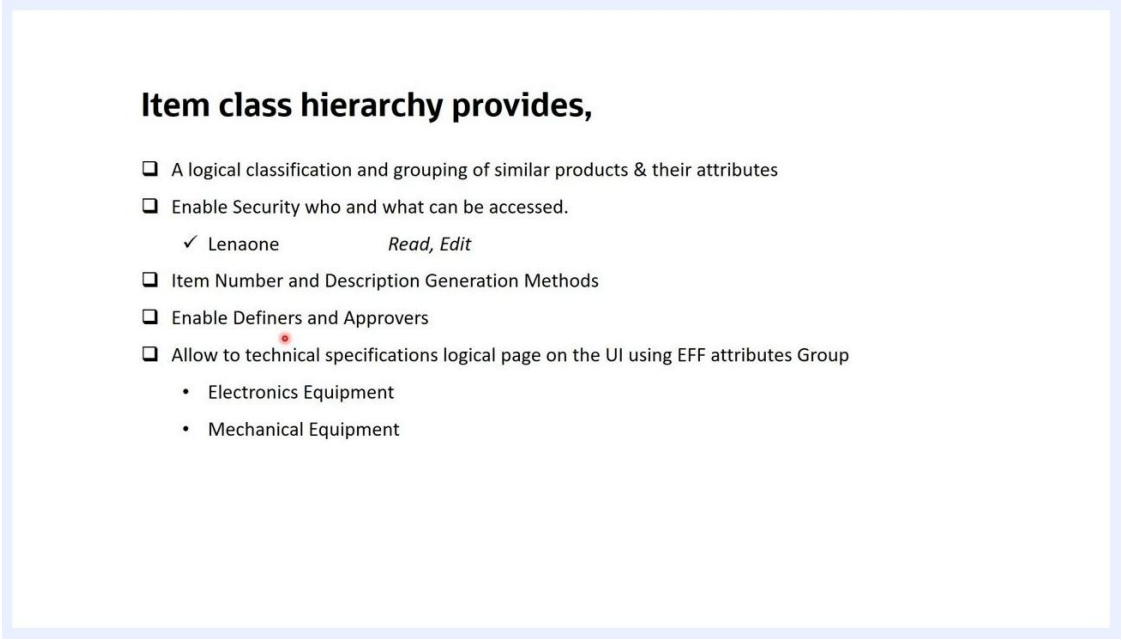


Slide listing what the item class hierarchy provides: classification, security, item number and description generation, definers and approvers, and technical specification access

Open the item class setup

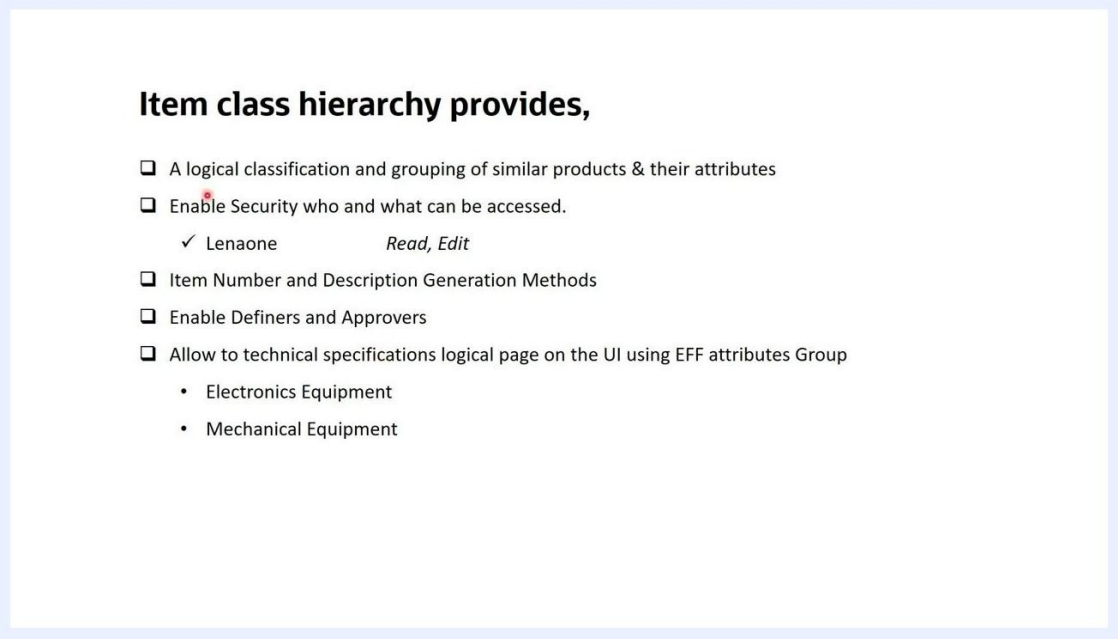
Step 1: Open Setup and Maintenance

Sign in to Oracle Fusion Cloud. On the home page, select the **Setup and Maintenance** app tile. You can also reach it from the **My Enterprise** menu.



Oracle Fusion Cloud home page with the Setup and Maintenance app tile and the navigation bar

Alternatively, click your user icon or the settings menu in the top right corner. In the dropdown, under the Personalization section, select **Setup and Maintenance**.

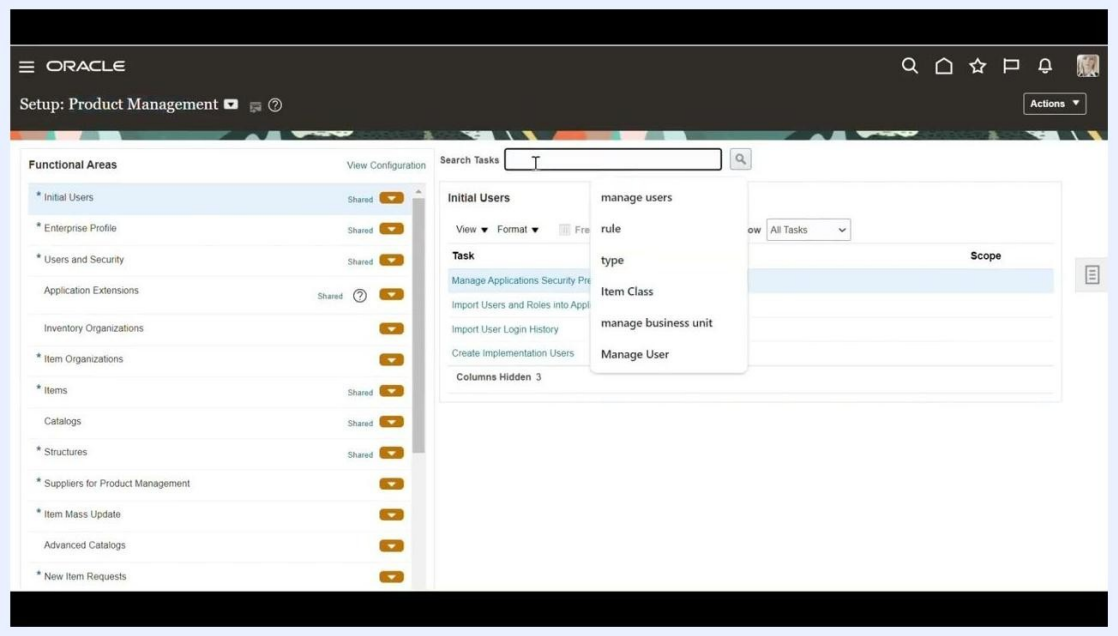


Settings and Actions dropdown with the Setup and Maintenance option highlighted

Step 2: Search for the Item Class task

1. On the **Setup: Product Management** screen, find the **Search Tasks** bar at the top.
2. Type Item Class.

3. Select **Item Class** from the dropdown suggestions to open item class management.



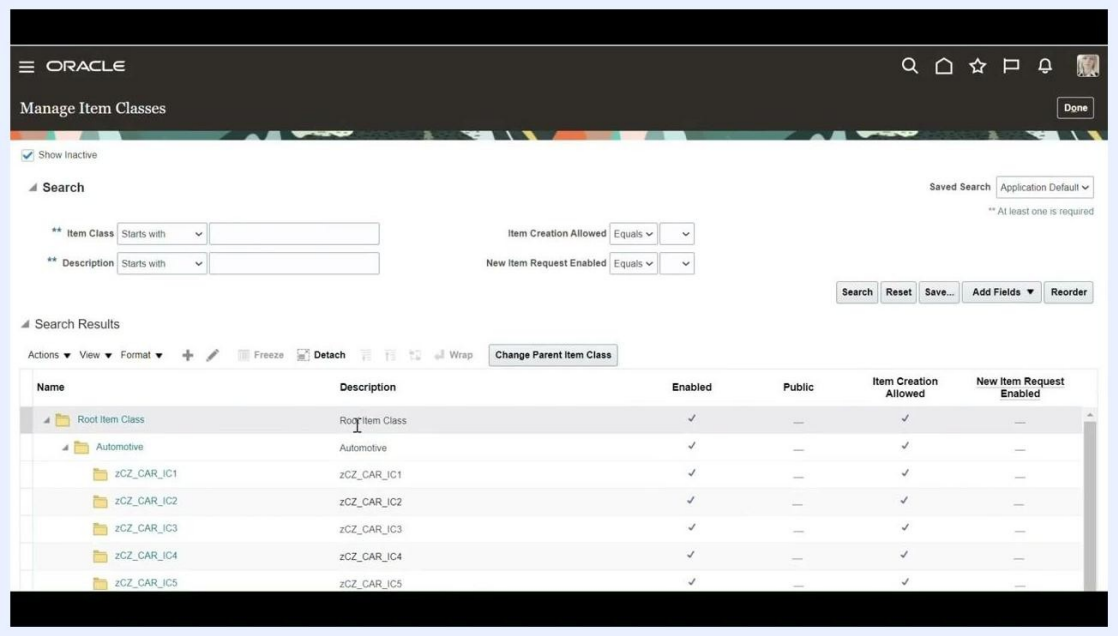
Setup: Product Management screen with Item Class selected in the Search Tasks dropdown

Create the item class

Step 3: Review the existing hierarchy

The **Manage Item Classes** page shows a hierarchical list of existing item classes. The hierarchy typically starts with a **Root Item Class**. Under it, you may see sub-classes such as Automotive and custom classes (for example, zCZ_CAR_IC1 and zCZ_CAR_IC2).

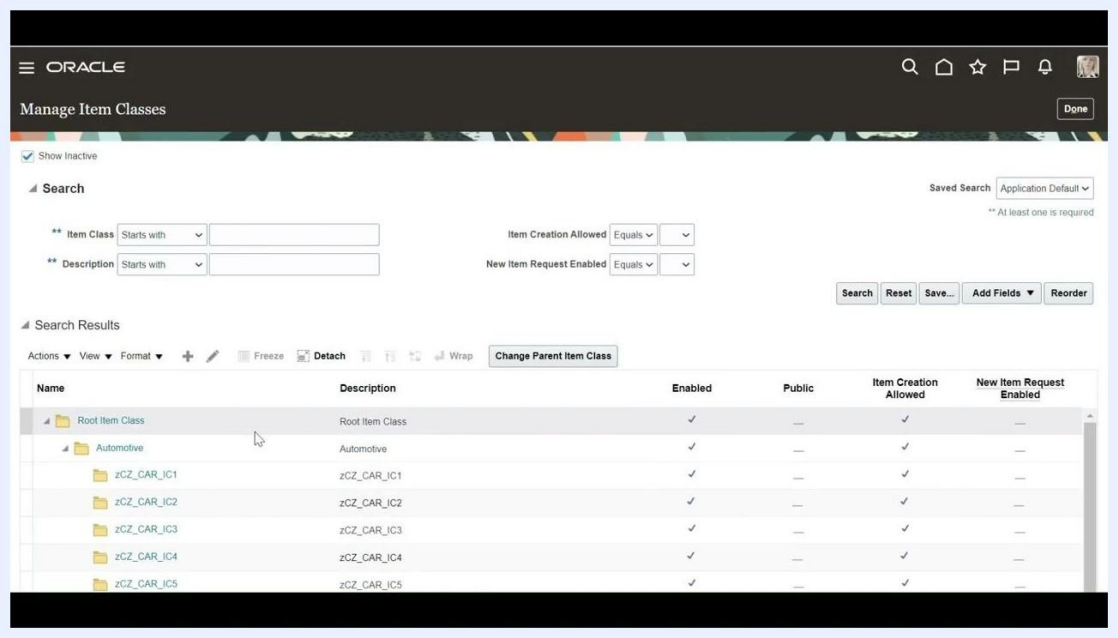
Each item class shows the **Enabled**, **Public**, **Item Creation Allowed**, and **New Item Request Enabled** columns.



Manage Item Classes screen showing the hierarchy with Root Item Class, Automotive, sub-classes, and status columns

Step 4: Select the parent class

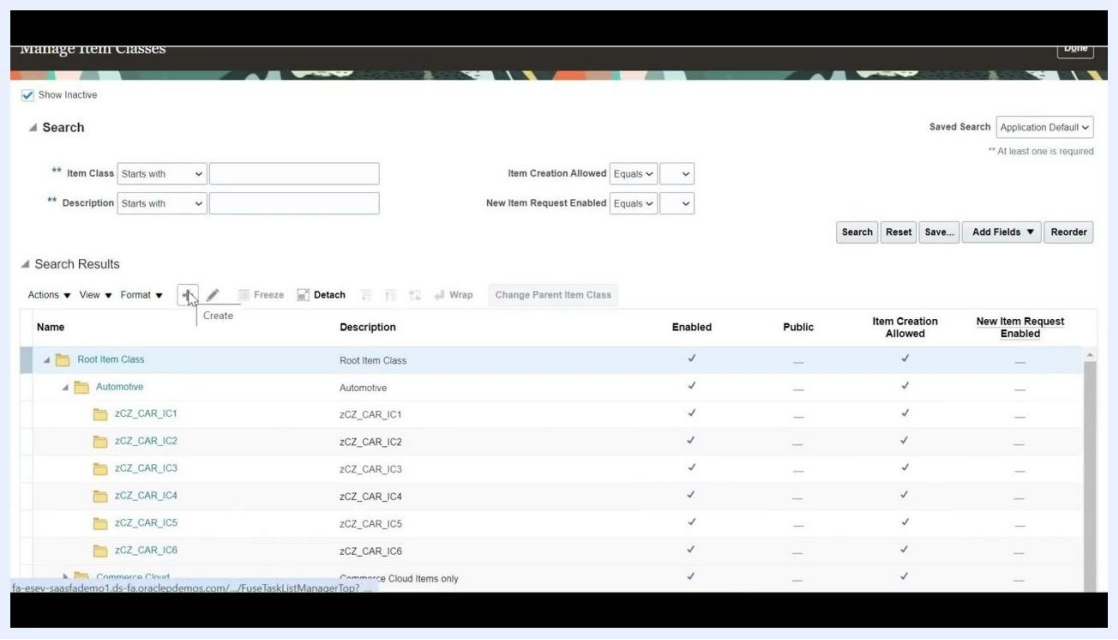
Click **Root Item Class**, or your preferred parent class, to highlight it. Your new item class is created as a child of the selected parent.



Manage Item Classes screen with Root Item Class selected as the parent

Step 5: Start creating the item class

Click **Create** (the plus icon) above the search results table. The **Create Item Class** dialog opens.



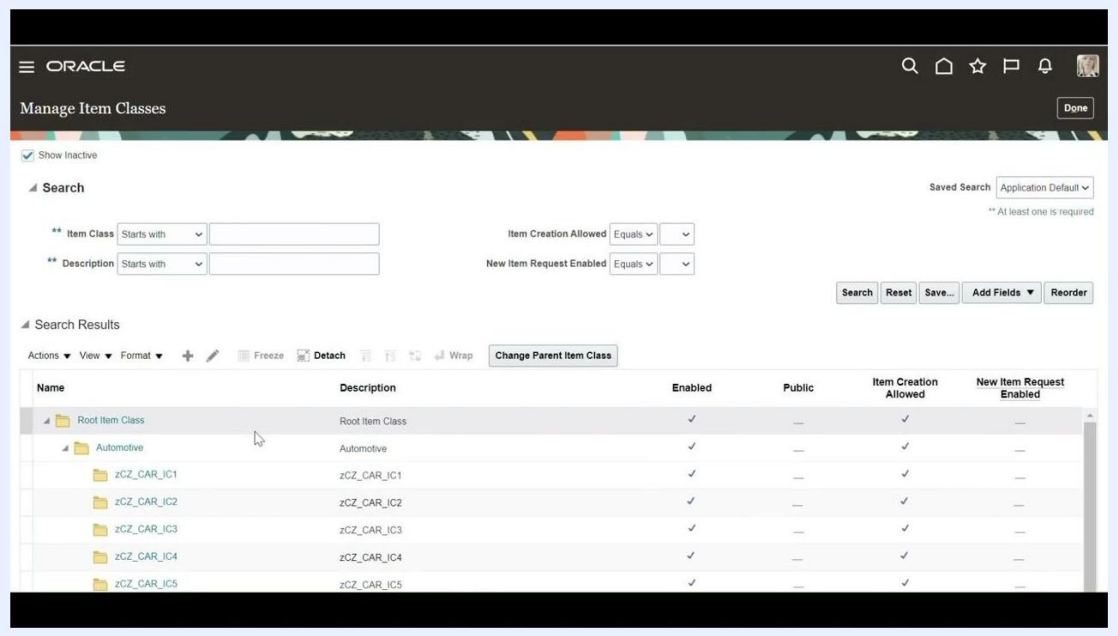
Manage Item Classes screen with the Create plus icon button highlighted above the item class list

Step 6: Enter the item class details

In the **Create Item Class** dialog, complete these fields:

- **Parent Item Class:** Filled in automatically (for example, Root Item Class).
- **Item Class:** Enter My Demo2 Class.
- **Internal Name:** Enter My_Demo2_Class. The internal name must be unique.
- **Description:** Enter My Demo2 Class.

Optionally, choose whether to make the class public. Then click **Save and Add Details** to continue configuring the class, or **Save and Close** to finish the basic creation.



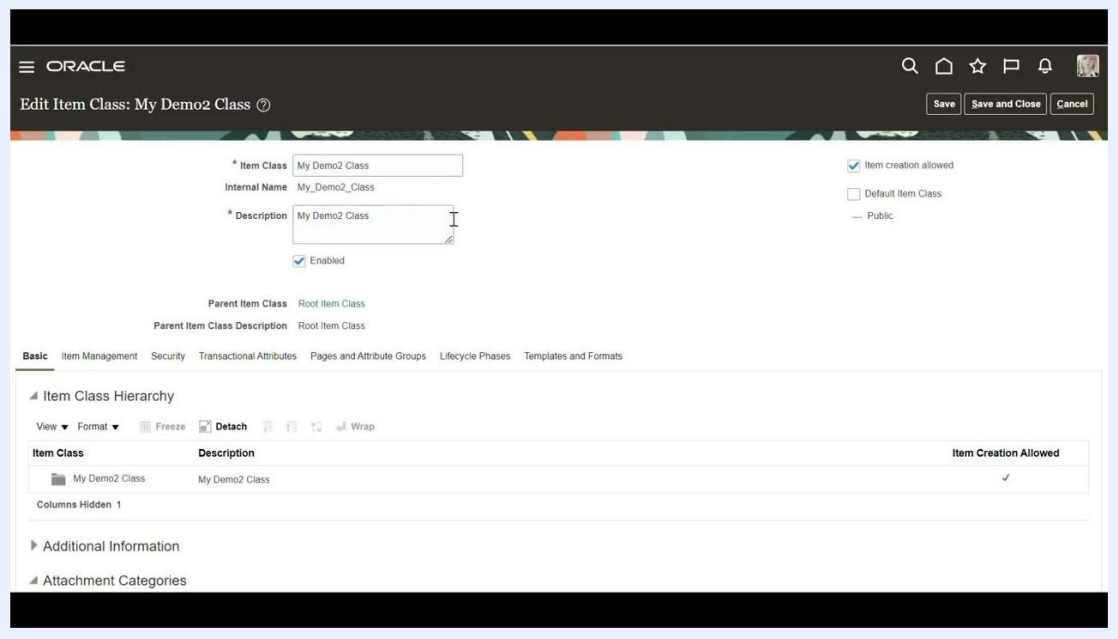
Create Item Class dialog with Item Class My Demo2 Class, Internal Name My_Demo2_Class, and Description My Demo2 Class entered

Step 7: Confirm the new item class

The **Edit Item Class** page opens for your new class. Confirm these values:

- **Item Class:** My Demo2 Class
- **Internal Name:** My_Demo2_Class
- **Description:** My Demo2 Class
- **Enabled:** Checked
- **Item creation allowed:** Checked
- **Parent Item Class:** Root Item Class

The page also has tabs for further configuration: Basic, Item Management, Security, Transactional Attributes, Pages and Attribute Groups, Lifecycle Phases, and Templates and Formats.



Edit Item Class screen showing My Demo2 Class details, enabled status, and item creation allowed

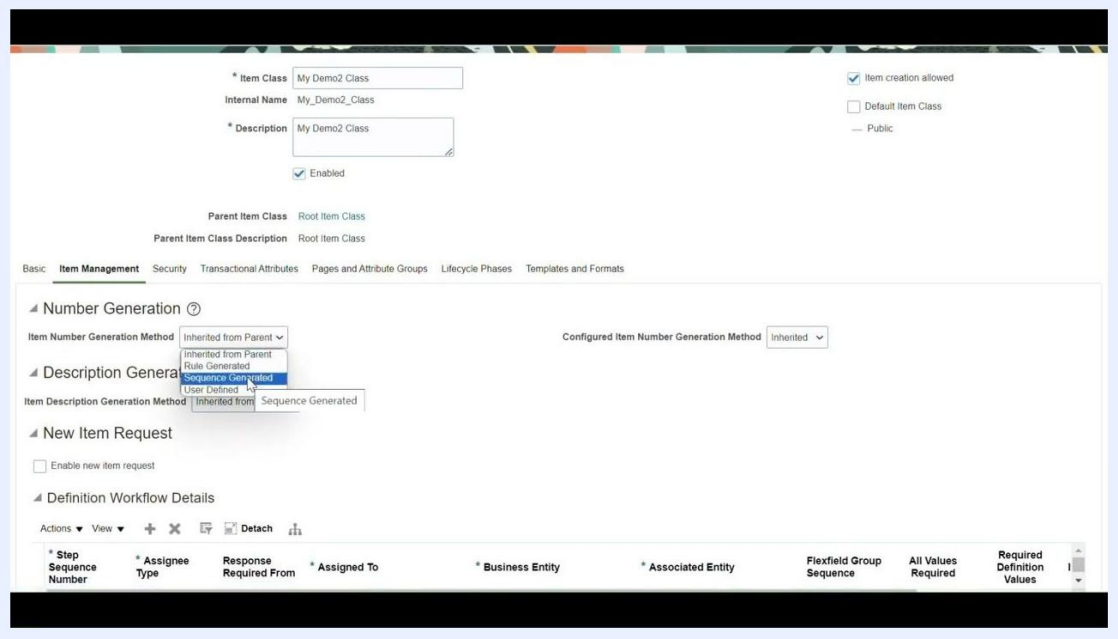
When **Item creation allowed** is checked, you can create items directly under the class. Parent classes such as Root Item Class typically don't allow item creation; only child classes do. In this example, My Demo2 Class is a child of Root Item Class and allows item creation.

Configure item management

Step 8: Set the item number generation method

1. Open the **Item Management** tab.
2. Under **Number Generation**, open the **Item Number Generation Method** dropdown.
3. Select **Sequence Generated**.

The available options are Inherited from Parent, Rule Generated, Sequence Generated, and User Defined. Sequence Generated numbers new items in this class automatically and sequentially.



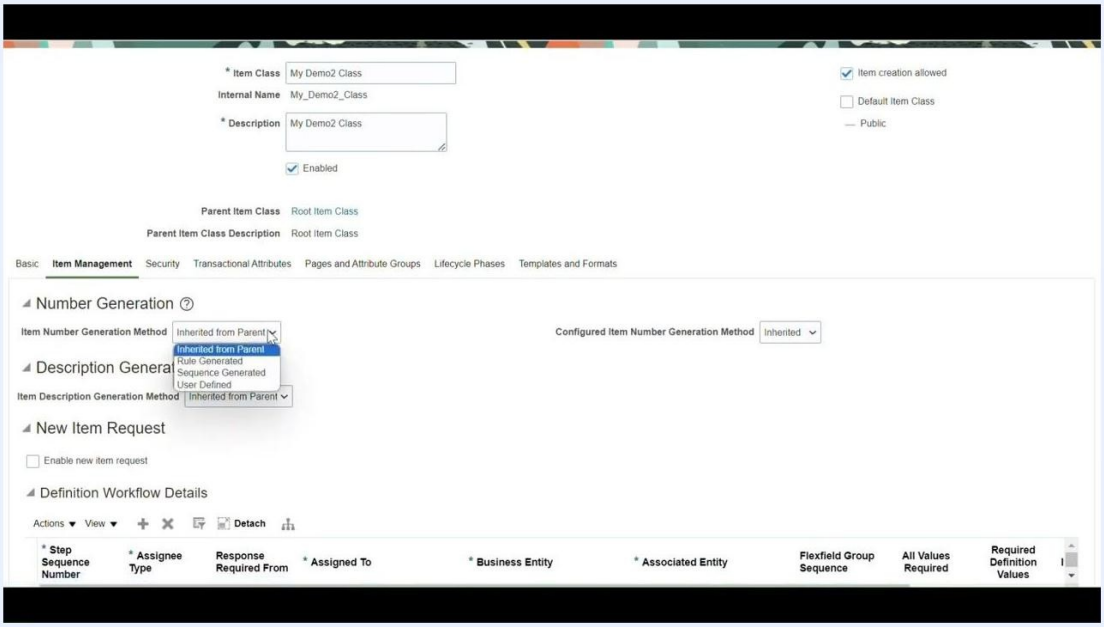
Item Number Generation Method dropdown with Sequence Generated selected and the options Inherited from Parent, Rule Generated, Sequence Generated, and User Defined

Step 9: Configure the sequence details

Enter the following values, and confirm that **Item Number Generation Method** is still **Sequence Generated**:

- **Starting Number:** 100001
- **Prefix:** DM
- **Increment by:** 1

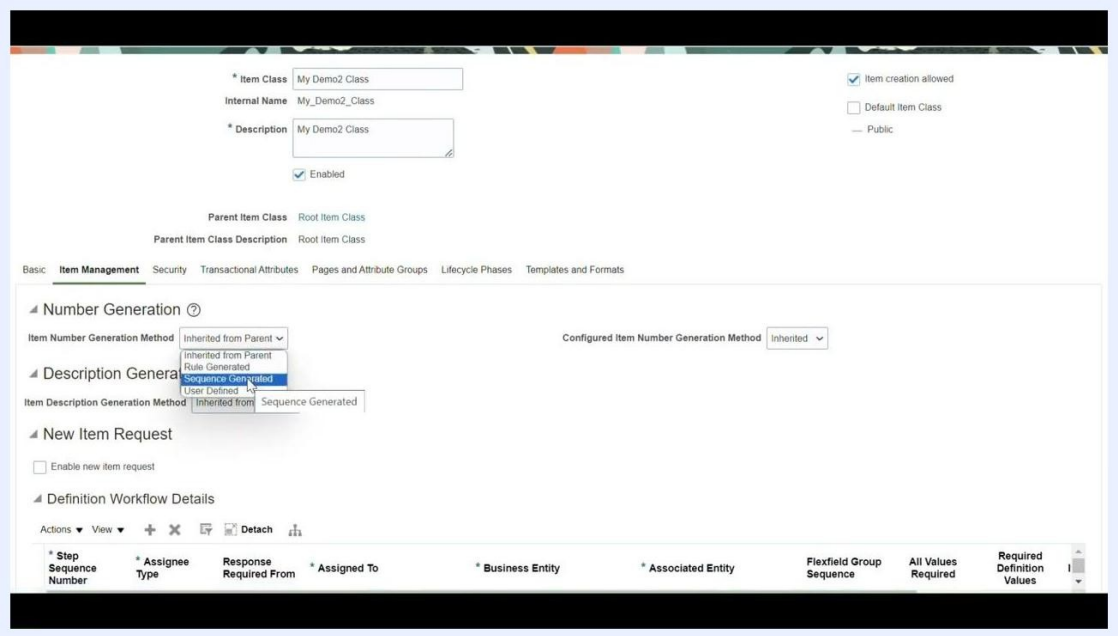
- **Suffix:** Leave blank unless you need a specific suffix.



Number Generation section with Sequence Generated, Starting Number 100001, Prefix DM, Increment by 1, and a blank Suffix

Step 10: Set the description generation method

Under **Description Generation**, open the **Item Description Generation Method** dropdown. Select **User Defined** so users can enter item descriptions manually.



Description Generation section with User Defined selected for Item Description Generation Method

Step 11: Enable new item requests (optional)

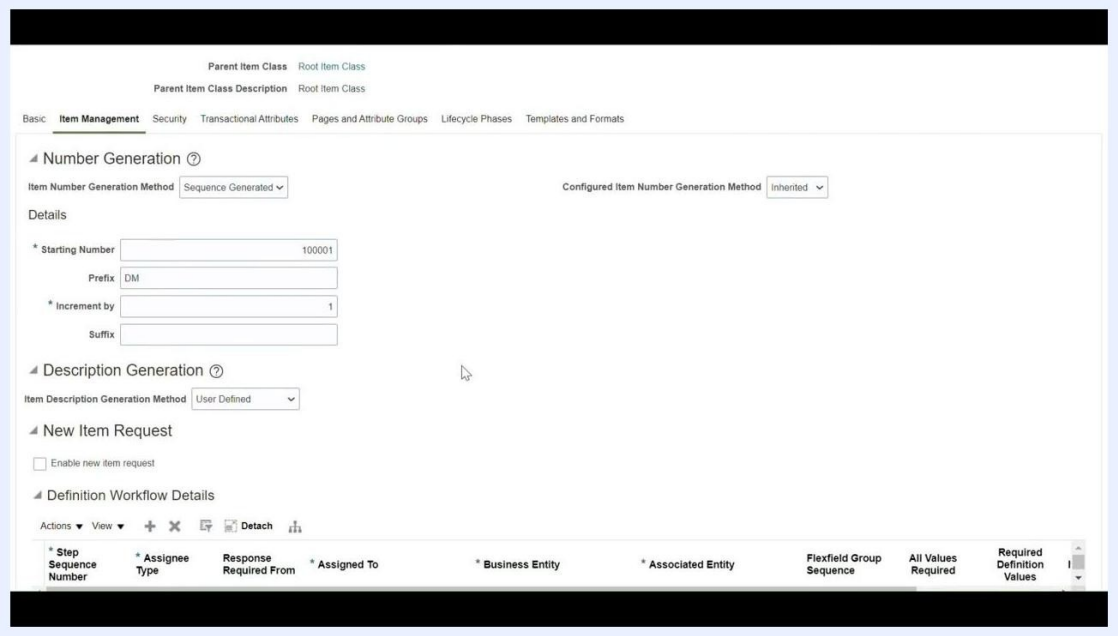
If you want to enable new item requests for this class, select the **Enable new item request** check box.

Set up security for the item class

Step 12: Grant access to a group

1. Open the **Security** tab to manage access permissions for the item class.
2. In the **Principal** column, select **Group**.
3. In the **Name** field, start typing the group name (for example, "Product Manager") and select the group from the list.
4. Set the **Organization** as needed (for example, 002).
5. Set **Item Class** to My Demo2 Class.
6. Enter the **Start Date** (for example, 5/11/24).

7. Leave **End Date** blank unless you want to limit access to a specific period.

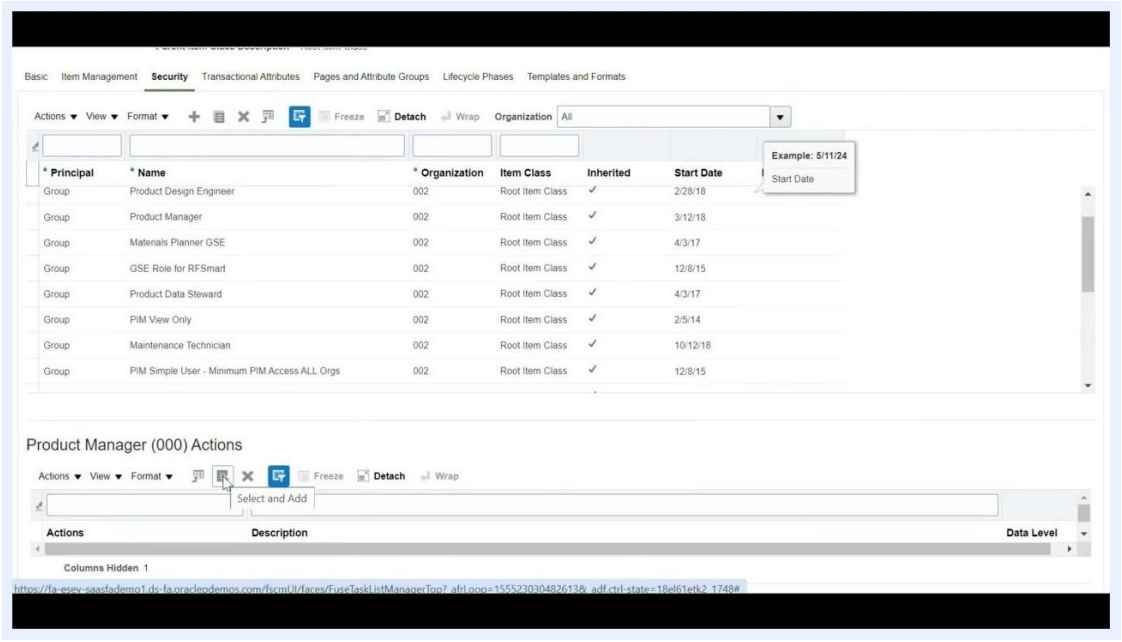


Security tab with the group Name field being typed and a dropdown listing groups such as Product Manager and Product Data Steward

Step 13: Review the group actions

Use the **Actions** menu to add, edit, or remove group access. You can give a group all accesses or define particular permissions for each group.

The lower section, for example **Product Manager (000) Actions**, lets you specify detailed actions and descriptions for the selected group.



Security tab listing groups with access, including Product Manager and Product Data Steward, with the Product Manager (000) Actions section below

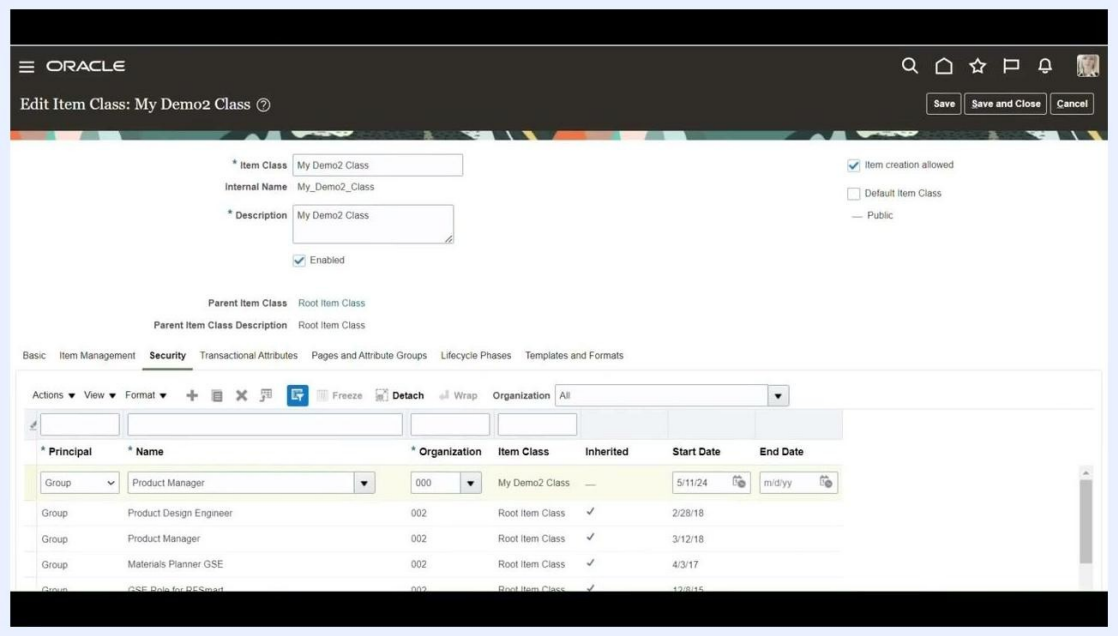
Step 14: Assign specific permissions to the group

In the **Select and Add: Actions** dialog, review the list of available actions. Scroll through the **Actions** column to find permissions such as:

- Maintain Item Lead Times Group
- Maintain Item MRP and MPS Group
- Maintain Item Revision
- Maintain Item Structure
- View Item Attribute
- View Item Basic
- View Item Structure
- Delete
- Read
- Update

Select the permissions the group needs, for example Read, Update, Delete, View Item Attribute, View Item Basic, and View Item Structure. Confirm that the **Description** and **Data Level** columns show the correct access (for example, "Allows access to" and "Item").

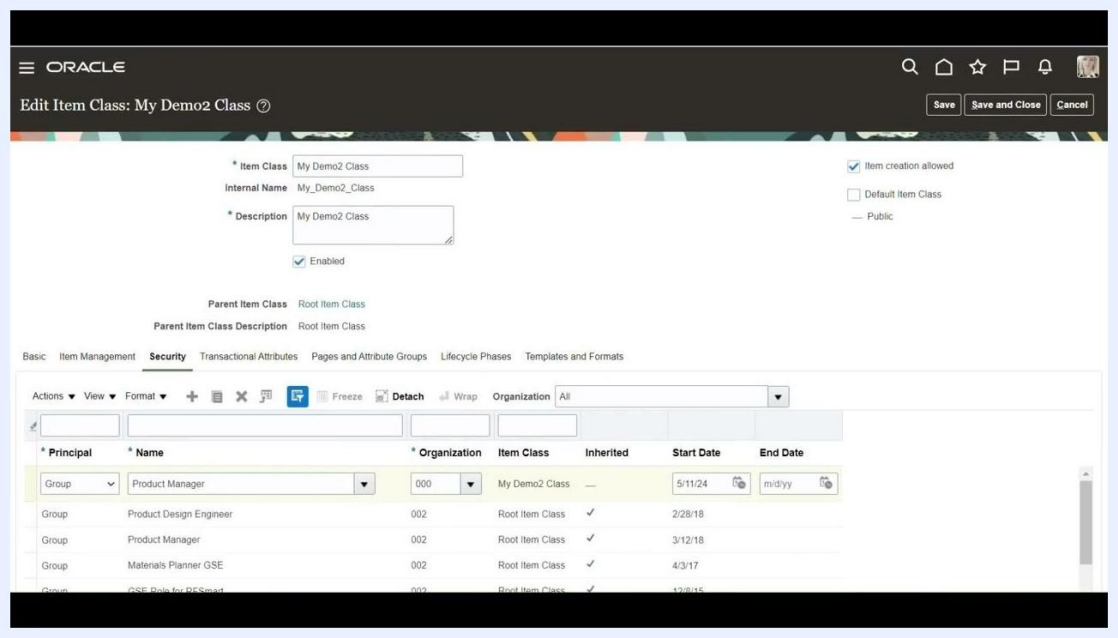
Click **OK** to confirm. The permissions now appear under the **Product Manager (000) Actions** section of the Security tab.



Select and Add: Actions dialog listing permissions such as Maintain Item Structure, View Item Attribute, Delete, Read, and Update, with several selected

Step 15: Save the item class configuration

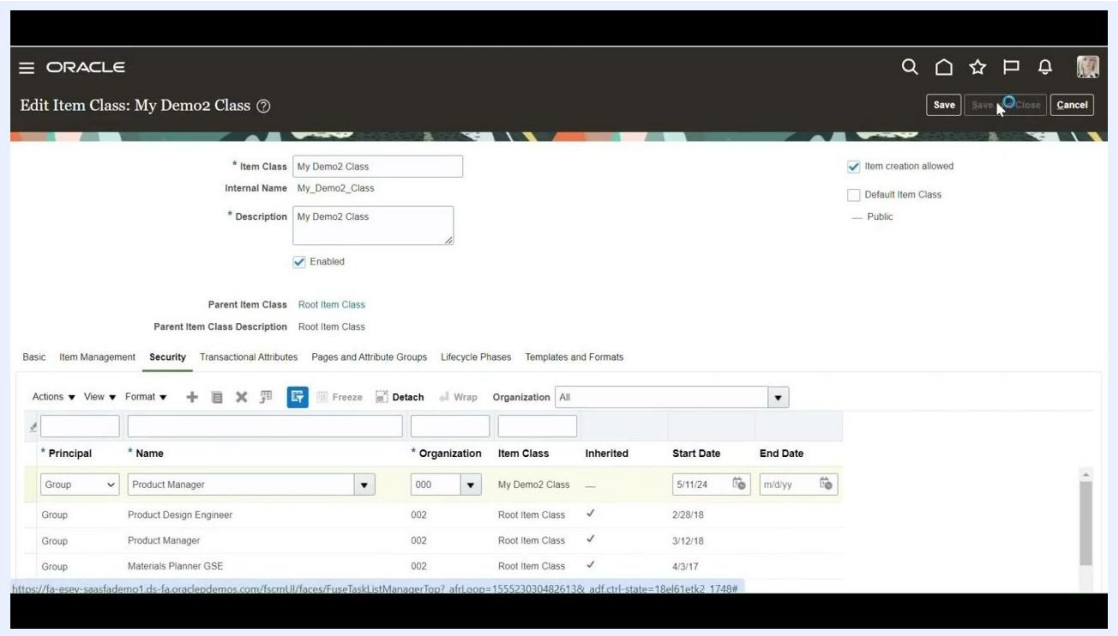
Click **Save** at the top right of the screen. Confirm that the **Product Manager** group has the correct permissions for **My Demo2 Class**.



Edit Item Class screen on the Security tab with the Product Manager group permissions and the Save button being clicked

Step 16: Verify the item class and permissions

After saving, you stay on the **Edit Item Class: My Demo2 Class** screen. Confirm that the **Product Manager** group is listed with the correct organization (000), item class (My Demo2 Class), and start date (5/11/24). The **Security** tab shows all assigned groups and their permissions.

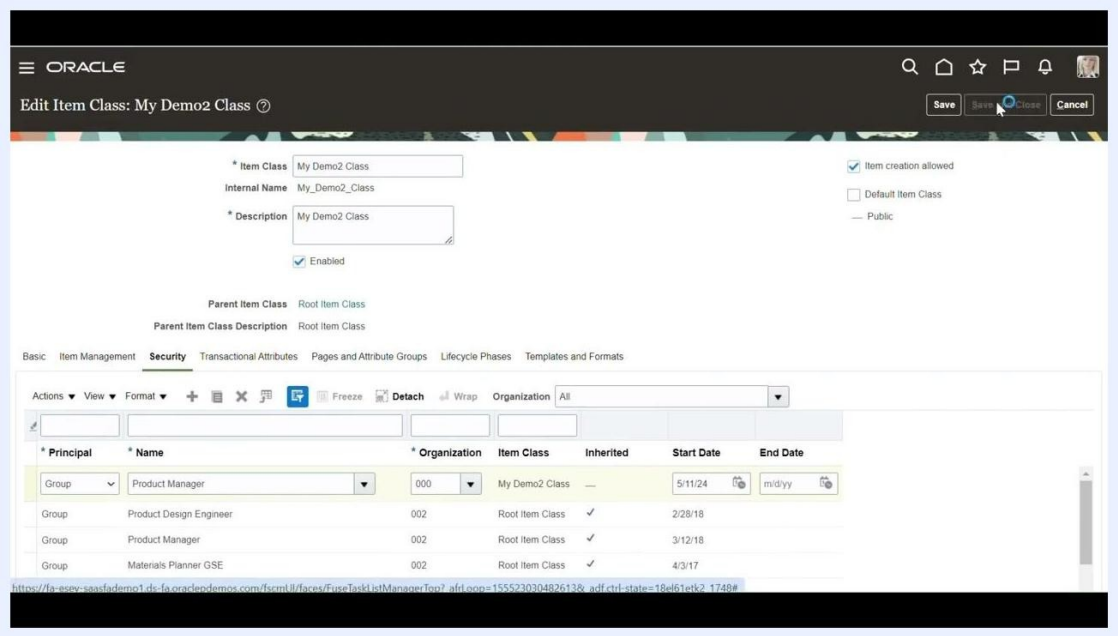


Edit Item Class screen on the Security tab listing the Product Manager group and its permissions

Create an item in the new item class

Step 17: Open Product Information Management

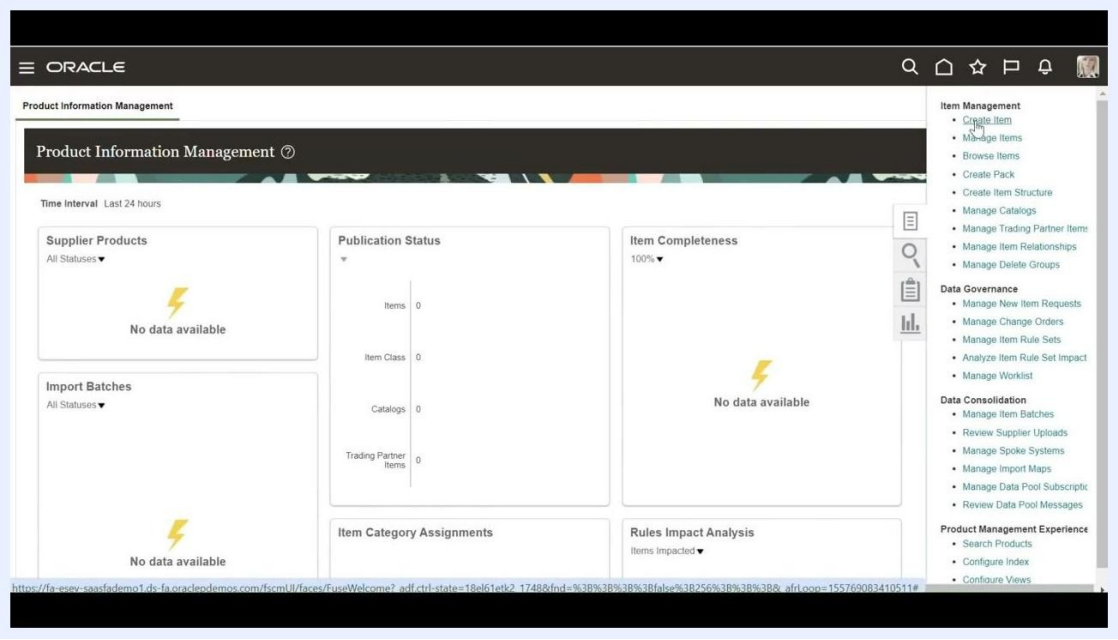
Return to the main menu or dashboard. Select the **Product Management** tab, then click **Product Information Management**.



Oracle dashboard with the Product Management tab selected and the Product Information Management app highlighted

Step 18: Start the Create Item task

In the **Product Information Management** workspace, find the **Item Management** panel on the right. Click **Create Item**.



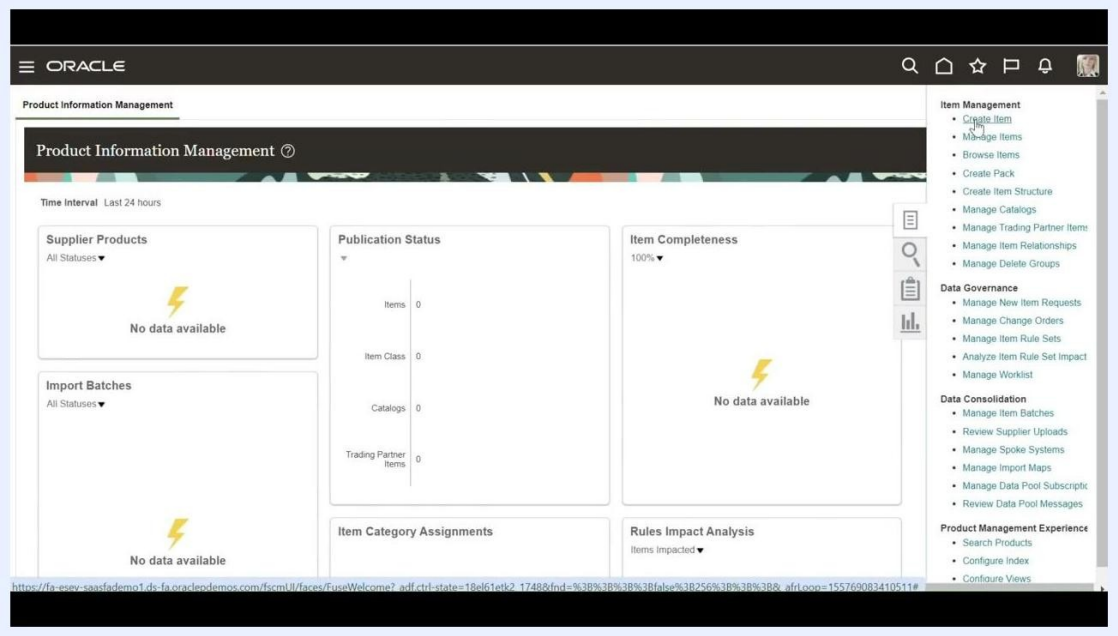
Product Information Management workspace with Create Item highlighted in the Item Management panel

Step 19: Select your item class

In the **Create Item** dialog, set these fields:

- **Organization:** Enter 000.
- **Create New:** Make sure this option is selected.
- **Number of Items:** Enter 1.
- **Item Class:** Open the dropdown, start typing My Demo2 Class, and select **My Demo2 Class My Demo2 Class**.

Review the **Templates** section if needed, but leave it at the default unless you need a specific template.



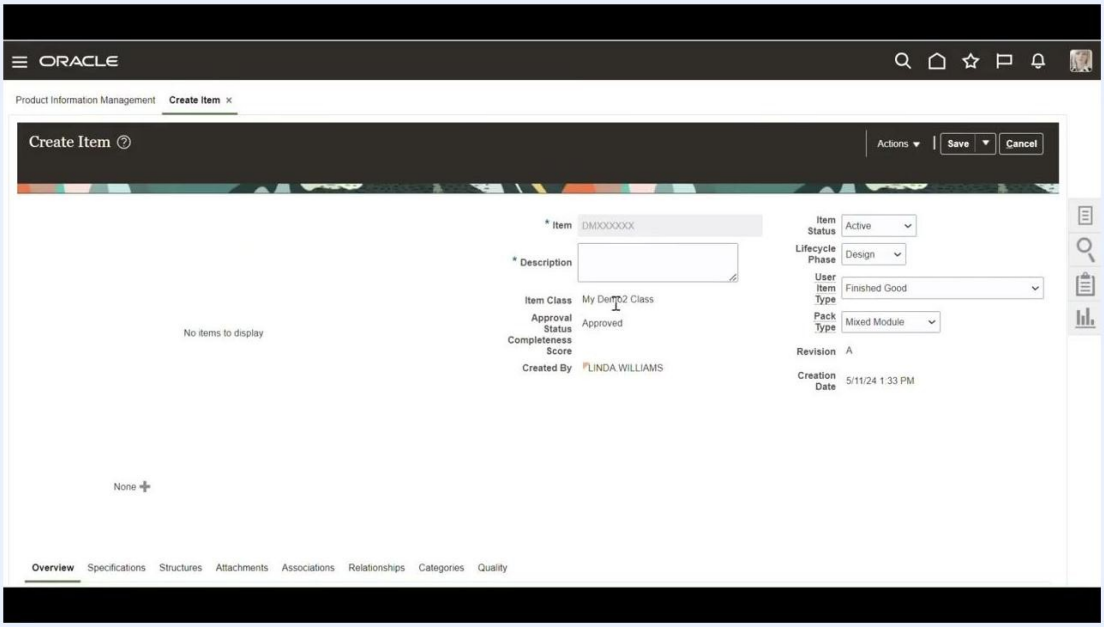
Create Item dialog with Organization 000, Create New selected, Number of Items 1, and the Item Class dropdown showing My Demo2 Class

Step 20: Confirm the system-generated item number

Click **OK**. The system generates a new item number from the sequence you configured (for example, DMXXXXXXX). The **Create Item** screen shows:

- **Item:** The system-generated number
- **Description:** Enter as needed
- **Item Class:** My Demo2 Class
- **Approval Status:** Approved
- **Created By:** For example, LINDA.WILLIAMS
- **Item Status:** Active
- **Lifecycle Phase:** Design
- **User Item Type:** Finished Good
- **Pack Type:** Mixed Module
- **Revision:** A

- **Creation Date:** For example, 5/11/24 1:33 PM

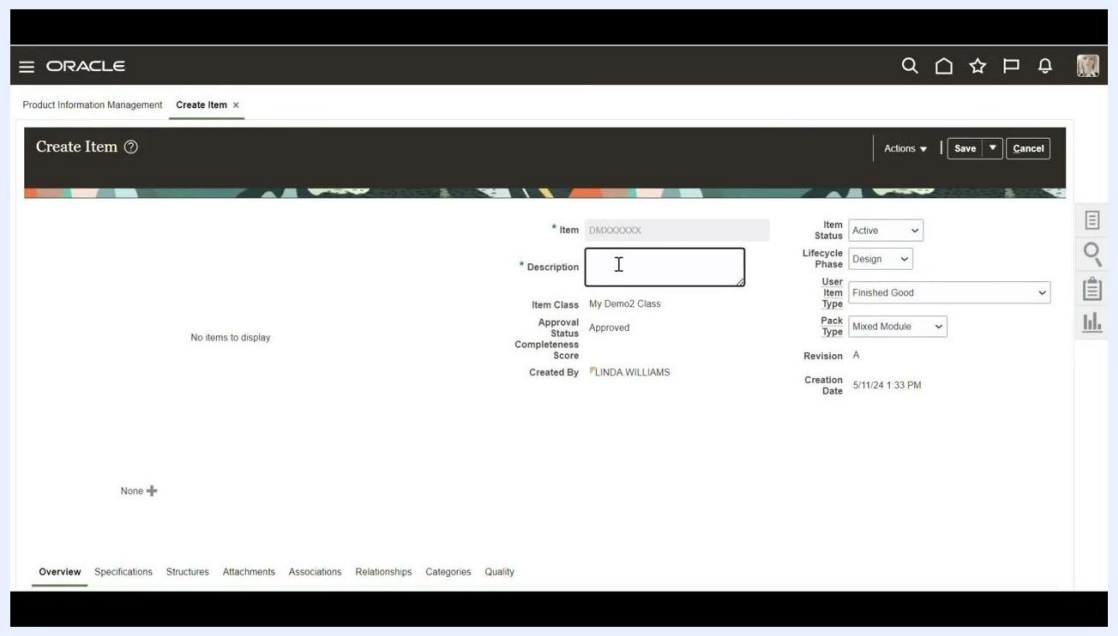


Create Item screen showing the system-generated item number DMXXXXXXX, Item Class My Demo2 Class, and other item details

Step 21: Enter the item description

In the **Description** field, enter the description for the item (for example, TEST). Confirm that the **Item** field shows the system-generated number and that the other fields are populated as described in the previous step.

The item is automatically set to **Approved** status, so no additional approval is required at this stage. You can configure approval workflows if needed.



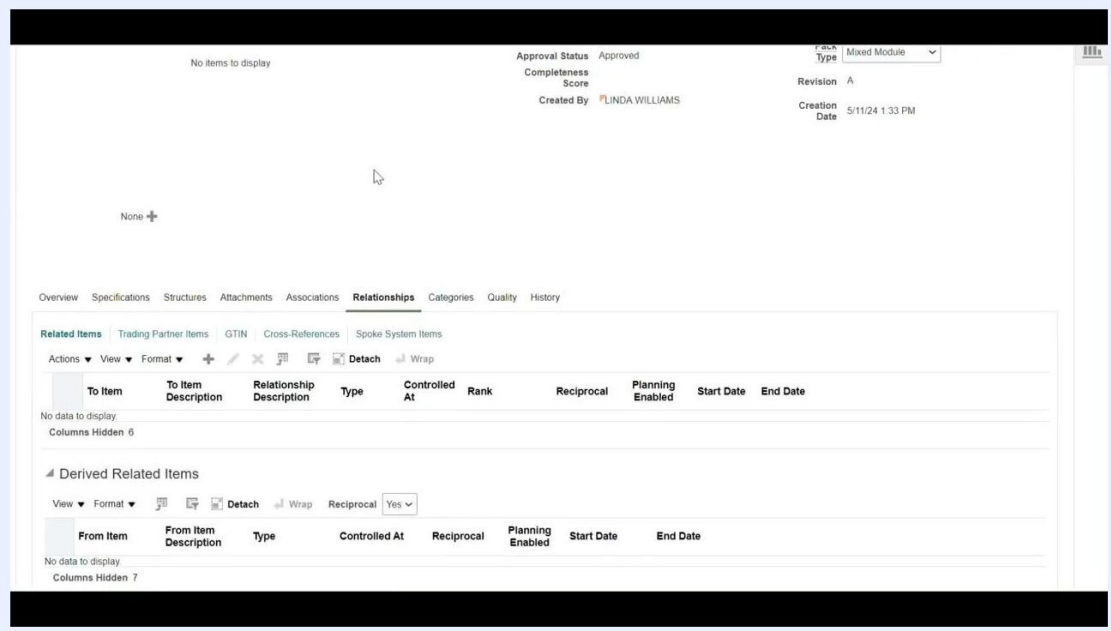
Create Item screen with the Description field being edited and the system-generated item number and item details visible

Assign the item to organizations

Step 22: Open the organization selection dialog

1. Click the **Associations** tab.
2. Review the current organization assignment (for example, 000 - Operations).
3. Click **Select and Add** to open the **Select and Add: Organizations** dialog.

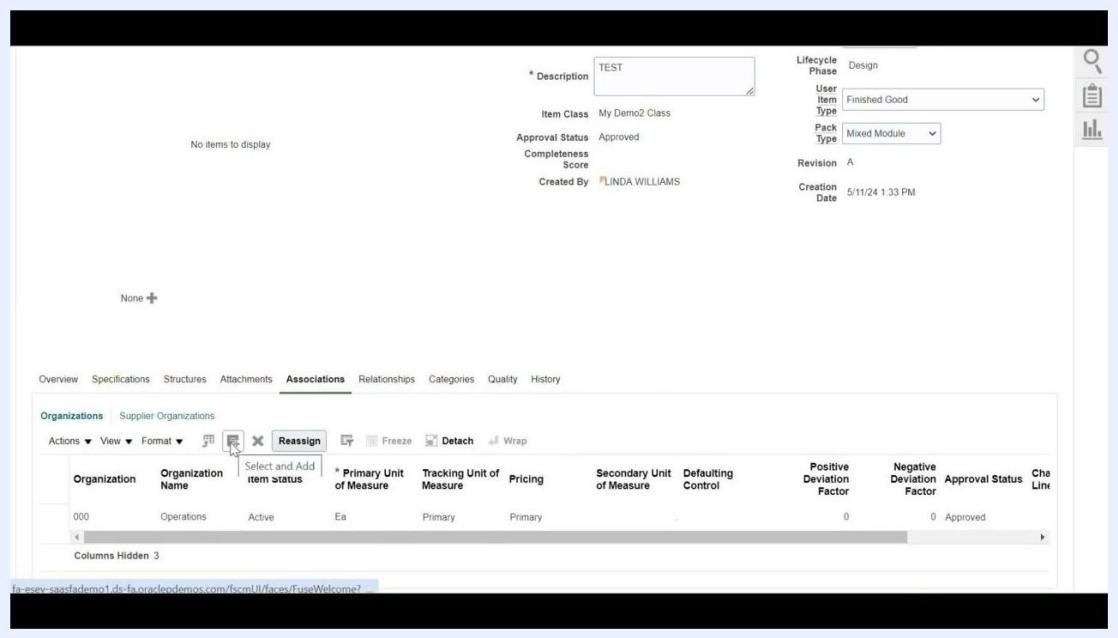
The dialog lists the available organizations, such as Seattle, Atlanta, Chicago, Boise, and Dallas.



Associations tab with the Select and Add: Organizations dialog open and a list of organizations

Step 23: Select the organizations

In the dialog, select one or more organizations. To select several, hold **Ctrl** and click each one (for example, 001 - Seattle, 002 - Atlanta, 003 - Chicago, and 004 - Boise). Click **OK** to confirm.



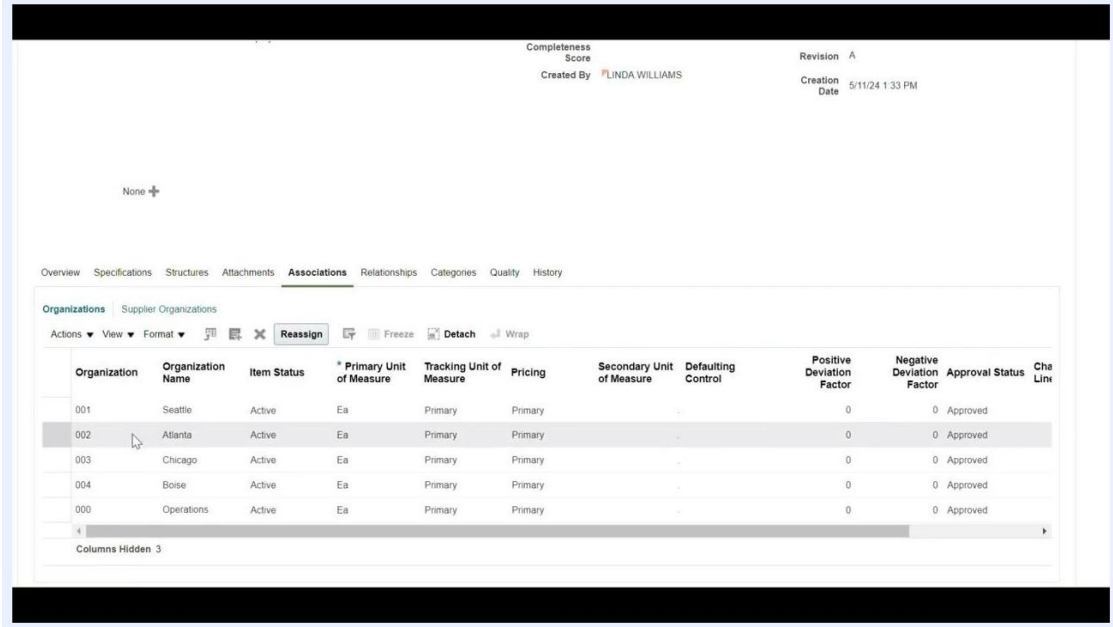
Select and Add: Organizations dialog with multiple organizations selected

Step 24: Review the organization assignments

The **Associations** tab now lists every selected organization, including 000 - Operations. For each, confirm these details:

- **Item Status:** Active
- **Primary Unit of Measure:** Ea
- **Tracking Unit of Measure:** Primary
- **Pricing:** Primary

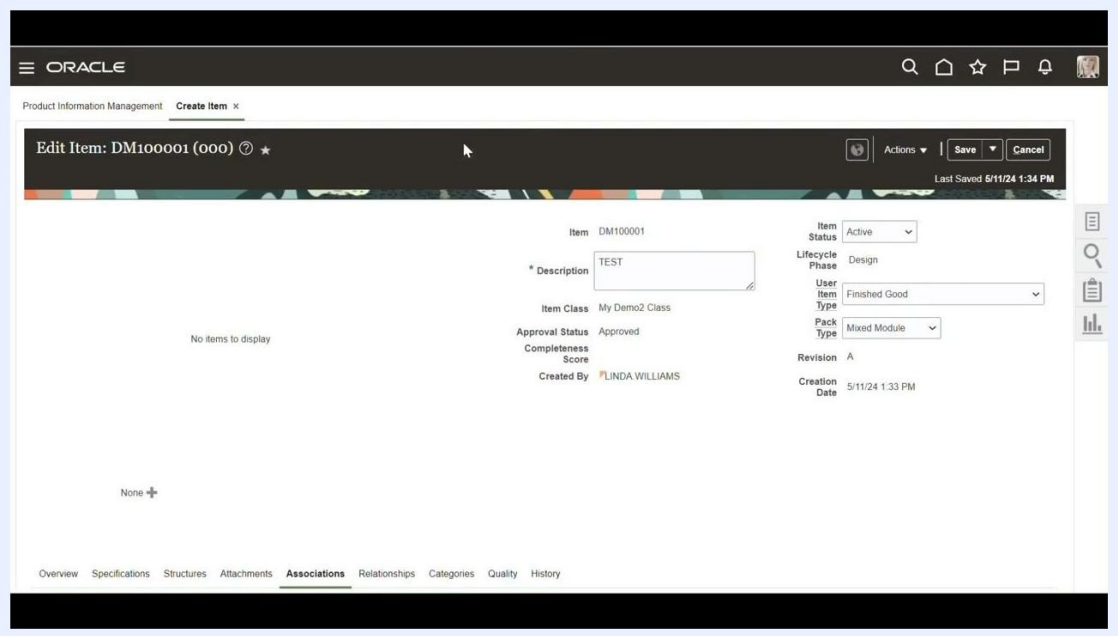
- **Approval Status:** Approved



Associations tab showing multiple organizations assigned to the item with status and unit of measure details

Step 25: Save the item

Click **Save** at the top right of the screen. The **Edit Item** screen shows the updated information, including the item number, description, item class, approval status, and all assigned organizations.



Edit Item screen showing the saved item details and organization assignments

Summary

You now know how to create an item class in Oracle Fusion and use it to create an item. You completed these tasks:

- Created the My Demo2 Class item class under Root Item Class.
- Configured sequence-based item number generation and user-defined descriptions.
- Granted the Product Manager group permissions on the class, then saved and verified the security configuration.
- Created an item in the class, with the system generating the item number from your sequence settings.
- Entered the item description, reviewed its approval status, and assigned it to multiple organizations.