



Leverage R12 features of Order Management

Vikas Khurana **Infosys Technologies Limited**

home of the OAUG KNOWledge Factory







Learning Objectives

- As a result of this session you will be able to:
 - Understand R12 features of OM
 - ➢ How to use R12 OM features
 - Understand new features in Pricing and iStore modules







Speaker's Qualifications

- Vikas is a Consultant in Enterprise Solutions unit of Infosys
 Technologies Limited
- Vikas has presented papers in OAUG conferences
- Infosys Technologies Limited (NASDAQ: INFY) is a global leader in Consulting and IT services (<u>www.infosys.com</u>)
- Enterprise Solutions (ES) group at Infosys provides Consulting and End-to-End implementation solutions for almost all the ERP packages (http://www.infosys.com/services/packagedapplications/default.asp)
- Oracle Applications practice in ES provides Oracle consulting services to world's leading corporations across industry verticals
- Infosys is a "Certified Advantage Partner (CAP Worldwide)" of Oracle in i-Platform and E-business Suite track
- Infosys has the highest number of EBS certified professionals globally







• R12 OM Enhancements

- MOAC An Insight
 - Scheduling Enhancements
 - Cascading Enhancement
 - Exception management
 - Other Enhancements
 - Advanced Pricing Enhancements
 - iStore Enhancements
 - Conclusion
 - FAQ





R12 Features

- Multi Org Access Control (MOAC)
- Scheduling Enhancements
- Cascading Attributes from Header to Line
- Exception Management
- Credit card payment related enhancements





- R12 OM Enhancements • MOAC – An Insight
 - Scheduling Enhancements
 - Cascading Enhancement
 - Exception management
 - Other Enhancements
 - Advanced Pricing Enhancements
 - iStore Enhancements
 - Conclusion
 - FAQ





MOAC

- New feature in R12 EBS
- Provides data access across OU's Single responsibility

Spain OU	Italy OU
Holland OU	France OU
EMEA Re	esponsibility

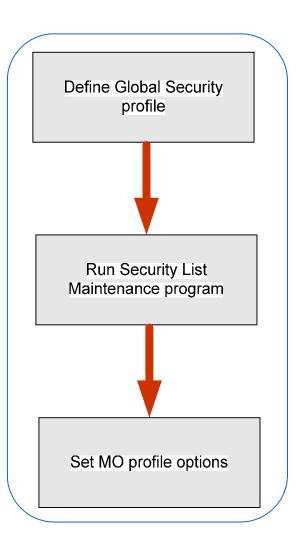






MOAC – Setups

- Define Security profile
- Set MO Profile options
- Set User level preferences







MOAC – Setups

D Superior	Descent	erica	× =×							
	his Reques	est								
		Casu								
<	🖸 Dystem P	Profile Values								
		ORACLE								
	Desta		Diagnostics Preferences Close Window							
	Profile MO: De	Multi-Org Preferences								
			Cancel Apply							
At th	MO: Op	User Name OPERATIONS								
~ "	MO: Se	Responsibility Name Order Management Super User, Vision Operations (USA) Security Profile Global Vision								
	MO: Se									
Lines	Modifier	Default Operating Unit								
Upor	Income	If you do not select a default operating unit, then the default operating unit set at the Responsibility level will be used.								
			e used.							
		Responsibility Level Default Operating Unit	e Used.							
			e 0386.							
		Responsibility Level Default Operating Unit	e Used.							
	E	Responsibility Level Default Operating Unit User Level Default Operating Unit Vision Operations	e 030G.							
	E	Responsibility Level Default Operating Unit User Level Default Operating Unit Vision Operations Q Preferred Operating Units	e Used.							
	Ē	Responsibility Level Default Operating Unit User Level Default Operating Unit User Level Default Operating Unit Vision Operations Preferred Operating Units If you have no preferences or do not make a selection, then all your operating units will be accessible. Search If you have no preferences or do not make a selection, then all your operating units will be accessible.	e Used.							
		Responsibility Level Default Operating Unit User Level Default Operating Unit Vision Operations Preferred Operating Units If you have no preferences or do not make a selection, then all your operating units will be accessible. Search Search Go								
		Responsibility Level Default Operating Unit User Level Default Operating Unit Vision Operations Preferred Operating Units If you have no preferences or do not make a selection, then all your operating units will be accessible. Search Search Go Select Operating Unit: Set as Preferred Clear Preferred	⊙ Previous 1-10 ♥ btent 10 0							
		Responsibility Level Default Operating Unit User Level Default Operating Unit Vision Operations Preferred Operating Units If you have no preferences or do not make a selection, then all your operating units will be accessible. Search Search Go	Previous 1-10 Vent 10 0							
		Responsibility Level Default Operating Unit User Level Default Operating Unit Vision Operations Preferred Operating Units If you have no preferences or do not make a selection, then all your operating units will be accessible. Search Search Select Operating Unit: Set as Preferred Clear Preferred Select All Select None	© Previous 1-10 Vent 10 0 Ledger							
		Responsibility Level Default Operating Unit User Level Default Operating Unit Vision Operations Preferred Operating Units If you have no preferences or do not make a selection, then all your operating units will be accessible. Search Search Search Select Operating Unit: Set as Preferred Clear Preferred Select Operating Unit: Set as Preferred Select Operating Unit: Set as Preferred Clear Preferred Business Group	⊙ Previous 1-10 ¥ bent 10 0 Ledger LE FED Set of Books							
		Responsibility Level Default Operating Unit User Level Default Operating Unit User Level Default Operating Unit Vision Operations Preferred Operating Units If you have no preferences or do not make a selection, then all your operating units will be accessible. Search Search Search Go Select Operating Unit: Set as Preferred Clear Preferred Select Operating Unit: Select Operating Unit: Set as Preferred Select Operating Unit: Set as Preferred Select Operating Unit: Set as Preferred Select Operating Unit: Set as Operating Unit: Set as Operating Unit: Set as Operating Unit:	⊙ Previous 1-10 ¥ bent 10 0 Ledger LE FED Set of Books							
		Responsibility Level Default Operating Unit User Level Default Operating Unit User Level Default Operating Unit Vision Operations Preferred Operating Units If you have no preferences or do not make a selection, then all your operating units will be accessible. Search Search Search Go Select Operating Unit: Set as Preferred Clear Preferred Select All Select Dperating Unit : Set as Preferred Select Operating Unit : Set as Preferred Select None Select None Select Operating Unit : Set as Preferred Select Operating Unit : Set as Preferred Select Operating Unit : Set as Preferred Select Operating Unit : Set as Group ITSA OU/INV ITSA Bus Group PRU-Vision Process Industries (US) Vision Corporation	③ Previous 1-10 ♥ Ment 10 0 Ledger LE FED Set of Books n OPM US							





MOAC – Order Management

- OU added as a hidden field to OM Transaction forms
- OM Profile Options migrated to System parameters
- OU added as a hidden field to OM Setup forms
- Perform Actions to Orders across OU's
- Operating Unit added as a parameter to Concurrent programs and Reports
- Operating Unit added as a parameter to OM PUB API's







MOAC – Order Management

OFind O	rders/Quotes				=	□ × □
3						
	Eile Edit Yiew			40 40 × 100 × 0		
	10 0 F	New Den	0000000000000	Ø\$\$1017		
	🗢 Order Organiz	Order Organizer				
	Find Orders/	Find Orders/Quotes	0			
	2					
	Quote/Order					
	c	Quote/Order Informatio	Order Organizer			_ O ×
		Order Num				
		Order T ¹	Find Orders/Quotes	2		
R	(Created	ਛ			
		Customer	Quote/Order Information	Line Information	Advanced Holds Information Schedu	ling
		Custor	Operating Unit	Vision Operations	Deerating Unit	×
	Related		Order Type			
	0	Salesper:	Created By		Find %	
		Related PO Num	Customer PO		Operating Unit	
		Order Sou	Customer		Vision Hungary	
		Order D	Salesperson		Vision India Hyderabad Vision India Mumbai	
			Related PO Number		Vision Industries	
			Order Source		Vision Italy Vision Korea	
	Orders	<u>C</u> lear	Order Date		Vision Leasing	
					Vision Netherlands Vision Norway	
			Clear	New Quo	Vision Operations	Id
		Orders	Siear	Hew Suc	Vision Poland Vision Portugal	
					Vision Project Manufacturing USD	
			Orders	Summa		
				Diariket Sales Agreem Pricing and Availability		





Concurrent Requests / Reports

Order Import Request						×
Run this Request						
					Cog	y
Name	Order Impo	ort				
Operating Unit						
Parameters						
Language	American	Parameters				×
		Operating Unit				
At these Times		Order Source				
Run the Job	As Soon a	Order Reference				
		Validate Only?	No			
Upon Completion		Instances	4			
	☑ Save all	Change Sequence				
Layout		Trim Trailing Blanks	No			
Notify		Validate Descriptive Flexfield	Yes			
Print to	noprint					
Help (<u>C</u>)			(<u>Ok</u>	Cancel	Clear	Help

🖸 Order Management Re			×
Run this Request			Copy
Name	Sales Order Acknowledgement		
Operating Unit	Vision Operations		
Parameters			
Language	American English		
		Language Settings	Debug Options
At these Times			
Run the Job	As Soon as Possible		Schegule
- Upon Completion	Save all Output Files		
Layout			
Notify			Options
Print to	noprint		
Help (<u>C</u>)		Submit	Cancel





OM Schema changes

SN	Object Name	Name 11i			
1	OE_ORDER_HEADERS	OU based View	Synonym		
2	OE_ORDER_LINES	OU based View	Synonym		





Customization Methodology

 mo_global.set_policy_context can be used to set policy context for a given OU

mo_global.init(<application short name>)
mo_global.set_policy_context('S',<ORG_ID>)

• Execute the step before calling the OM standard API





- R12 OM Enhancements
- MOAC An Insight
 - Scheduling Enhancements
 - Cascading Enhancement
 - Exception management
 - Other Enhancements
 - Advanced Pricing Enhancements
 - iStore Enhancements
 - Conclusion
 - FAQ





Scheduling Enhancements

- Enhancements to Schedule Orders program
- Ability to Schedule lines that were never picked up for Scheduling
- Unscheduling
- Reshceduling

un this Request				
			Cogy	
Name	Schedule Orde	rs		
Operating Unit				
Parameters				
Language	American Engl	Parameters		×
		Planning Priority		
these Times		Shipment Priority		
Run the Job	As Soon as F	Line Type		
		Request Date Low		
pon Completion	70.00	Request Date High		
	Save all Ou	Ship-to Location		
Layout		Schedule Ship Date Low		
Notify		Schedule Ship Date High		
Print to	noprint	Schedule Arrival Date Low		
		Schedule Arrival Date High		
Help (C)		Booked		
		Scheduling Mode		-
+ items + Bills		Apply - wa chause		
+ Pricing		Apply - Schedule Date		
Scheduling		First Order By	Finder	
ATP Inquiry		Second Order By		
Order Backlog ATP Data Coll		Second Order By	Scheduling Mode Progress Lines at Schedule-Eligible Activity	Description Progress Lines waiting at Schedule-Eligible activit
	action .		Reschedule	Reschedule using Warehouse, Schedule Date
			Reschedule using Request Date	Reschedule using Request Date
			Schedule	Schedule All Unscheduled Lines
			Unschedule	Unschedule





- R12 OM Enhancements
- MOAC An Insight
 - Scheduling Enhancements
 - Cascading Enhancement
 - Exception management
 - Other Enhancements
 - Advanced Pricing Enhancements
 - iStore Enhancements
 - Conclusion
 - FAQ





Cascading Enhancements

- Changes to Header Attributes can be conditionally cascaded to Lines
- Profile Option / Lookup based

		Application	Responsibility	User	
Profile Option Name	Site				
OM: Sales Order Form: Cascade Header					
	OM: Sales Order Form: Ca		e 🗙		
(Cascade Options Ask Me Automatic Manual	$\mathbf{\mathcal{D}}$			
		(Eind) OK C	ancel		

-	Туре	OM_HEADER_1	O_LINE_CASCADE			 Access User 			
Mea	ining	OM: Header To	Line Cascade Attributes			-			
Applica	ation	Order Managem	ent		○ E <u>x</u> te				
Descri	ption	To decide wheth	r the cascading feature for a attribute is tur						
Effective Dates								En	abled
Code	Mean	ing	Description	Tag	From		То		[]
ACCOUNTING	Αссοι	unting Rule	Accounting Rule		19-MAY-2	19-MAY-2005			
AGREEMENT	Agree	ment	Agreement		19-MAY-2	19-MAY-2005		•	
BILL_TO	Bill To)	Bill To		20-MAY-2	20-MAY-2005			
BILL_TO_CON	Bill To	o Contact	Bill To Contact		19-MAY-2	19-MAY-2005			
BLANKET_NU	Sales	Agreement Nurr	Sales Agreement Numb		19-MAY-2	005			N
CUSTOMER_I	Custo	mer PO	Customer PO		19-MAY-2005				J
DELIVER_TO	Delive	er To	Deliver To		19-MAY-2	19-MAY-2005			
DELIVER_TO	Delive	r To Contact	Deliver To Contact		19-MAY-2	19-MAY-2005			
DEMAND_CL/	Dema	nd Class	Demand Class		19-MAY-2	005			
FOB POINT	FOB I	Point	FOB Point		19-MAY-2	105			Π.





- R12 OM Enhancements
- MOAC An Insight
 - Scheduling Enhancements
 - Cascading Enhancement
 - Exception management
 - Other Enhancements
 - Advanced Pricing Enhancements
 - iStore Enhancements
 - Conclusion
 - FAQ





Exception Management

• Improved Error reprocessing

OSubmit Request				×		ubmit Request				×	_ × _	
─ Run this Request ─				Сору	[Run this Request			Copy			
Name	Retry Activities in	n Error				Name	Retry Activities	in Error				
Operating Unit						Operating Unit						
Parameters						Parameters						
	American English	h				Language	American Englis	sh				
			Language Settings	Debug Options		At these Times		L	anguage Settings Debug Option	IS		
At these Times							As Soon as Pos	sible	Schedule			
Run the Job	As Soon as Pos	sible		Schegule					Genegate			
					-	Upon Completion		Parameters				×
Upon Completion		Parameters					☑ Save all Outpu	n Order Number				
	☑ Save all Output					Layout			OM Order Import			
Layout		Order Numb				Notify		Activity in Error				
Notify		ltem Ty				Print to	noprint	Activity Error Date From	Activity in Error			×
Print to	poprint	Activity in En		Item Type				Activity Error Date To				
Fillit to	noprint	Activity Error Date Fro		Find OM %	_ (Help (\underline{C})		Mode	Find %			
Help (C)		Activity Error Date	Го					- · · ·	Activity in Error			Internal Name
rieip (⊵)		Mo	de Preview	Item Type					Check Order Import execution Mode			CHECK_MODE
L				OM Change Order OM EDI Workflow					End Generate XML Integration Event			END GENERATE_CLN_EVENT
				OM Error				L	Is Delivery Required			IS_DELIVERY_REQD
				OM Negotiation Head					Is Order Import Complete? Is Outbound Confirm BOD Required			IS_OL_COMPLETE
		L		OM Open Interface Tr OM Order Header	rack				Raise CBOD Out Event			IS_CBOD_OUT_REQD RAISE_SEND_CBOD_OUT_EVENT
				OM Order Import		· · · · · · · · · · · · · · · · · · ·			Raise Send Acknowledgment Event			RAISE_SEND_ACK_EVENT
				OM Order Line					Receive Event Run Order Import			RECEIVE_EVENT RUN ORDER IMPORT
				OM Sales Agreement					Set CBOD Event Key			SET_CBOD_EVENT_KEY
				OM Send Acknowledg OM Show Sales Orde					Set User Key Start			SET_USER_KEY START
									Jan			51001
				Eind)					Eind	<u>O</u> K	Cancel





- R12 OM Enhancements
- MOAC An Insight
 - Scheduling Enhancements
 - Cascading Enhancement
 - Exception management
 - Other Enhancements
 - Advanced Pricing Enhancements
 - iStore Enhancements
 - Conclusion
 - FAQ





Other Enhancements

- Create / Edit Orders in Contact Center (TeleService)
- Credit card Security Code Enhancements







- R12 OM Enhancements
- MOAC An Insight
 - Scheduling Enhancements
 - Cascading Enhancement
 - Exception management
 - Other Enhancements
 - Advanced Pricing Enhancements
 - iStore Enhancements
 - Conclusion
 - FAQ





Advanced Pricing Enhancements

- Price Book
- Continuous Price Breaks
- MOAC Pricing Security
- Pricing Parameters





- R12 OM Enhancements
- MOAC An Insight
 - Scheduling Enhancements
 - Cascading Enhancement
 - Exception management
 - Other Enhancements
 - Advanced Pricing Enhancements
 - iStore Enhancements
 - Conclusion
 - FAQ





iStore Enhancements

- Telecommunication specific features
- Self service online Account creation
- Duplicate Carts
- Ability to capture End Customer
- Multi Org Access Control





- R12 OM Enhancements
- MOAC An Insight
 - Scheduling Enhancements
 - Cascading Enhancement
 - Exception management
 - Other Enhancements
 - Advanced Pricing Enhancements
 - iStore Enhancements
 - Conclusion
 - FAQ





Conclusion

- Enables Shared service operations
- Provides a way to View and Manage data across
 OU's from a single responsibility
- Provides a global consolidated view of sales data across OU's
- Reduces processing time





- R12 OM Enhancements
- MOAC An Insight
 - Scheduling Enhancements
 - Cascading Enhancement
 - Exception management
 - Other Enhancements
 - Advanced Pricing Enhancements
 - iStore Enhancements
 - Conclusion
 - FAQ





FAO

1. Can MOAC be used to restrict to certain list of OU's?

Yes. By using Custom Security Profiles.

- 2. Can Actions be performed on Orders across OU's from a single responsibility? Yes.
- 3. Can Cascading for Header to Line Attributes be done conditionally?

Yes. By using the lookup.







References

- R12 TOI: OM Functional
- R12 TOI: OM Technical
- R12 OM RCD







Q & A

Email: vikas_khurana@infosys.com

Office: 91 40 39822222

home of the OAUG KNOWledge Factory









Thank You!



