

Leverage R12 features of Order Management

Vikas Khurana

Infosys Technologies Limited

1. Introduction

Multi-Org Access Control (MOAC), Mass scheduling, Scheduling ATO Items without BOM are some of the key features introduced in R12. This paper details out the OM enhancements done in R12. The paper explains the enhancements with detailed examples.

The paper also gives a brief overview on Shipping, iStore and Pricing enhancements.

2. Key R12 Enhancements

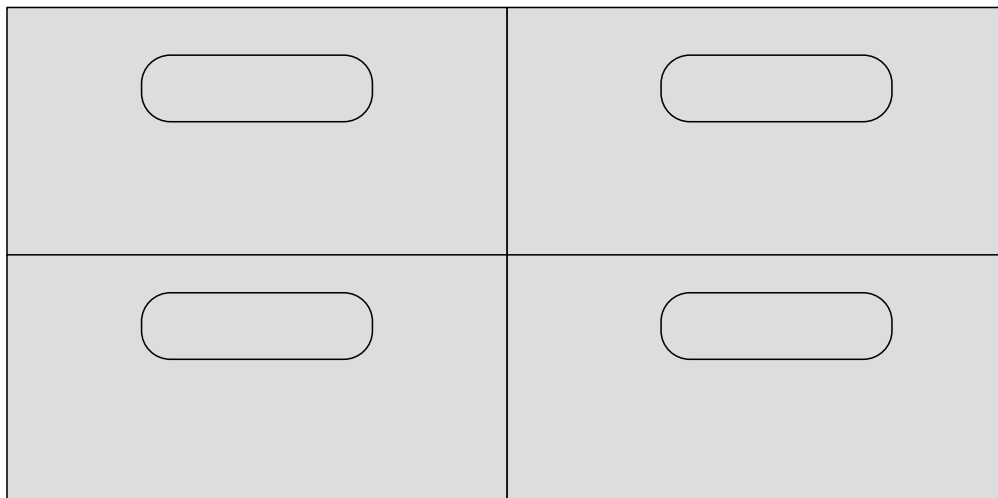
The following are some of the key features in OM in R12.

- MOAC
- Scheduling enhancements
- Cascading Attributes from header to line
- Improved Exception Management
- Other enhancements related to Credit card payment etc

3. MOAC – An Insight

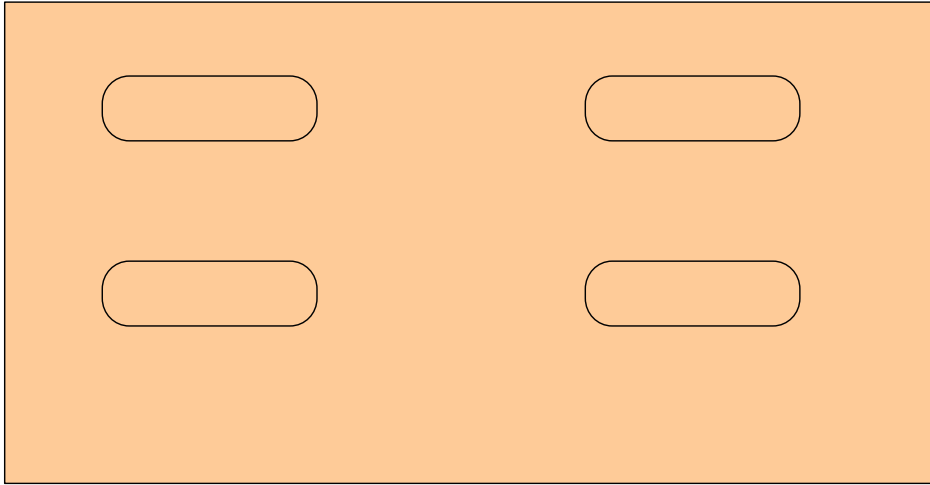
The key objective to MOAC is to provide a global consolidate view of sales data across operating units.

The below figure provides a business scenario where four different operating units under EMEA region are accessed through four different responsibilities. Each of the operating unit is for a given country, and the data for the same operating unit is accessed by four different responsibilities.



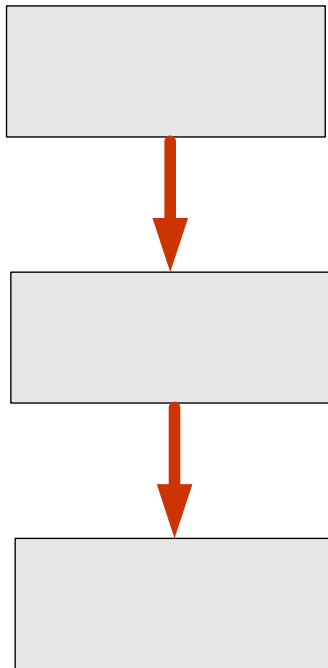
This was the approach used till 11.5.10.2 release.

In R12, MOAC eliminates the need of four different responsibilities for this shared services model. With the evolution to MOAC, a single EMEA responsibility can cater to four different operating units. The below figure erases the responsibility specific boundaries, that were drawn in the earlier figure.



MOAC Setups

The following figure provides the setup flow for required for MOAC.

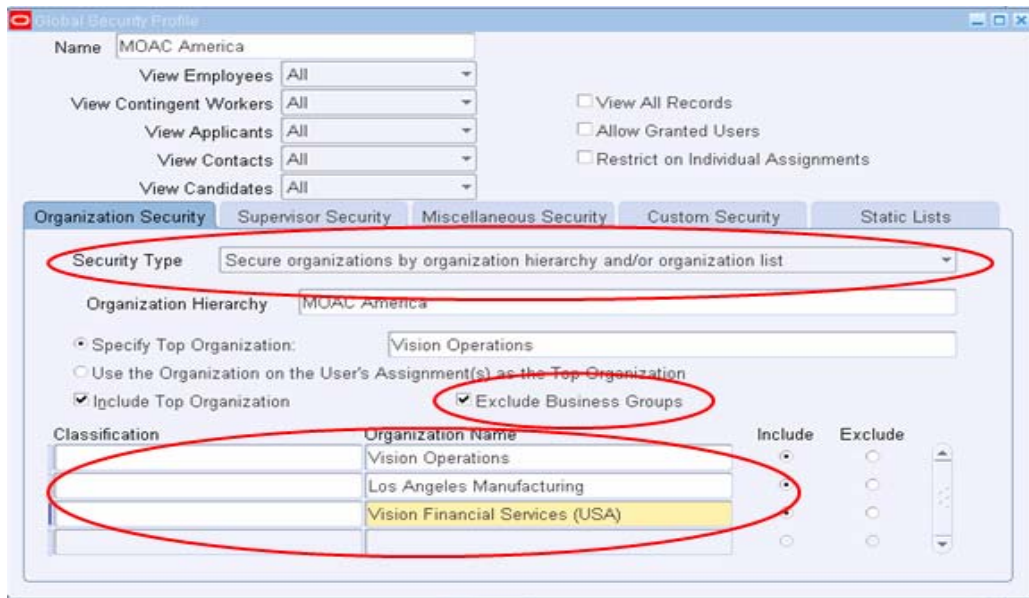


Step 1 – Define Global Security profile

1. Navigate to *Human Resources, Vision Enterprises* responsibility → Security → Global Profile
2. Define a Global Security Profile
3. Choose *Secure Organizations by organization hierarchy and/or organization list. Operating Unit and Inventory Org.* for the security type
4. Choose Exclude Business Groups
5. Assign the required Operating Units

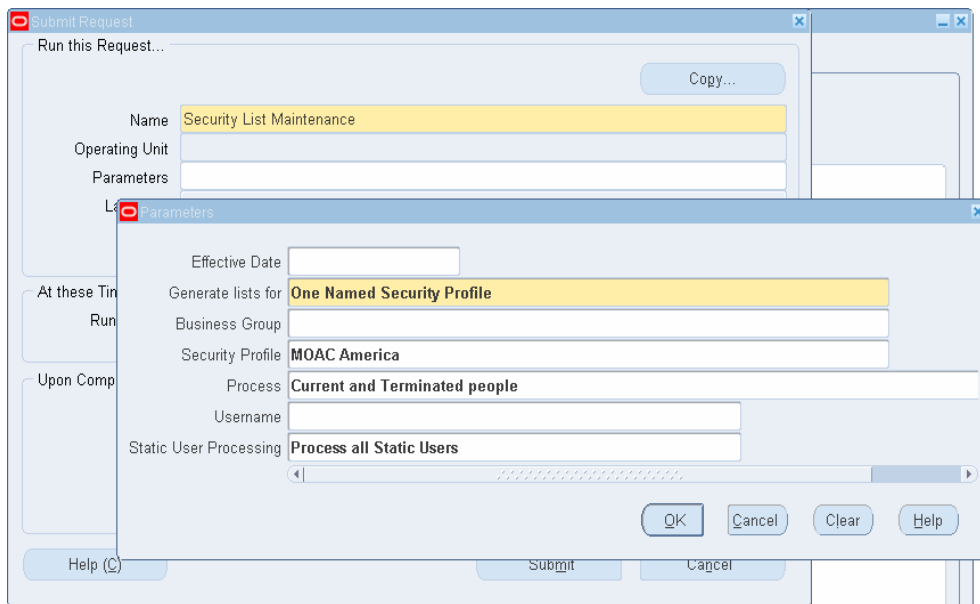
Spain C

Holland



Step 2 – Run Security List Maintenance program

1. Navigate to *Human Resources, Vision Enterprises* responsibility → Submit *Security List Maintenance* program



Step 3 – Set MO Profile options

1. Set values to following profile options
 - MO: Security Profile
 - MO: Operating Unit
 - MO: Default Operating Unit

Profile Option Name	Site	Application	Responsibility	User
MO: Default Operating Unit			Order Management Super Us	
MO: Operating Unit	Vision Corporation		Vision Operations	
MO: Security Profile	Global Vision		Vision Operations	
MO: Set Client_Info for Debugging			MOAC America	
Modified Historic Cost Accounting : Debt				

Step 4 – Set User Preferences

1. Set OU preferences for the User

ORACLE
Diagnostics Preferences Close Window

Multi-Org Preferences

User Name: OPERATIONS
Responsibility Name: Order Management Super User, Vision Operations (USA)
Security Profile: Global Vision

Default Operating Unit

If you do not select a default operating unit, then the default operating unit set at the Responsibility level will be used.

Responsibility Level Default Operating Unit: Vision Operations

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: Operating Unit Name [] Go

Select Operating Unit: Set as Preferred Clear Preferred

Select Operating Unit	Preferred	Business Group	Ledger
<input type="checkbox"/> ITSA OU/INV		ITSA Bus Group/IE	FED Set of Books
<input type="checkbox"/> PRU-Vision Process Industries (US)		Vision Corporation	OPM US
<input type="checkbox"/> Progress Administration		Progress Master	Progress State & Local
<input type="checkbox"/> Progress BE		Progress BE	Progress BE
<input type="checkbox"/> Progress Canada		Vision Canada	Progress Canada

MOAC in Order Management

The following are some of the key changes done for MOAC in Order management module.

- Some of profile options have been moved to OM system parameters
- Operating unit has been added as a hidden field to some of the OM data entry and setup forms

OM system parameters

The following profile options are migrated to OM system parameters.

- OM: Credit Salesperson for Freight on Sales
- OM: Credit Memo Transaction Type
- OM: Employee for Self-Service Orders
- OM: GSA Discount Violation Action
- OM: Invoice Transaction Type
- OM: Invoice Source

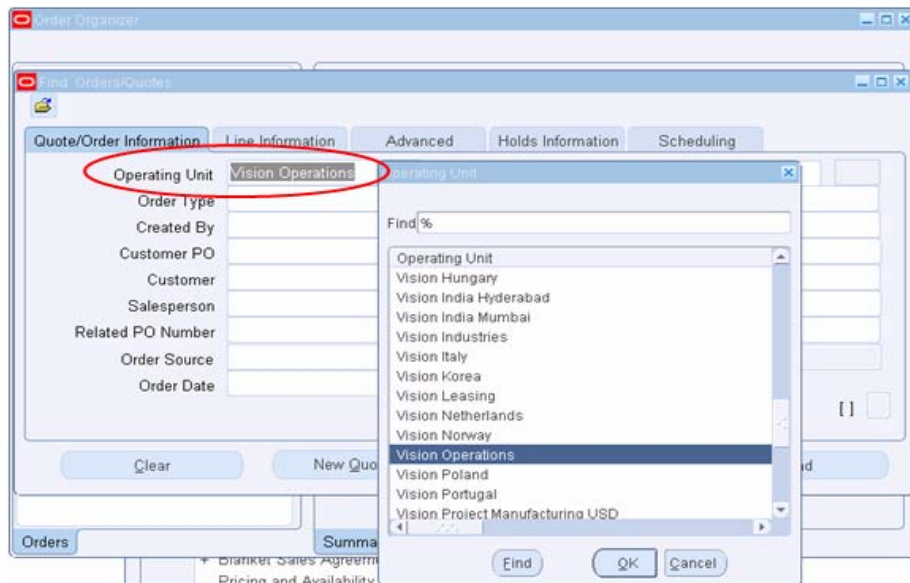
- OM: Non-Delivery Invoice Source
- OM: Overshipment Invoice Basis
- OM: Reservation Time Fence
- OM: Schedule Line On Hold
- OM: Show Discount Details on Invoice
- Tax: Invoice Freight as Revenue
- Tax: Inventory Item for Freight

OU in OM transaction forms

OU has been added as a hidden field to OM forms. Some of the forms are listed below.

- Order Organizer
- Sales Order
- Quick Order Organizer
- Quick Sales Orders
- Sales Agreement form
- Order Information Portal

OU has been added as a hidden field and can be enabled using folder options.



Operating Unit: Vision Operations

Customer: []

Customer Number: []

Customer PO: []

Customer Contact: []

Ship To Location: []

Bill To Location: []

Order Number: []

Order Type: []

Date Ordered: 01-OCT-2007 18:02:55

Price List: []

Salesperson: No Sales Credit

Status: []

Currency: USD

Subtotal: 0.00

Tax: 0.00

Charges: 0.00

Total: 0.00

OU in OM setup forms

OU has been added as a hidden field to OM setup forms. Some of the forms are listed below.

- Transaction types
- System parameters
- Payment types

Operating Unit: Vision Operations

Category: [] Show All [v]

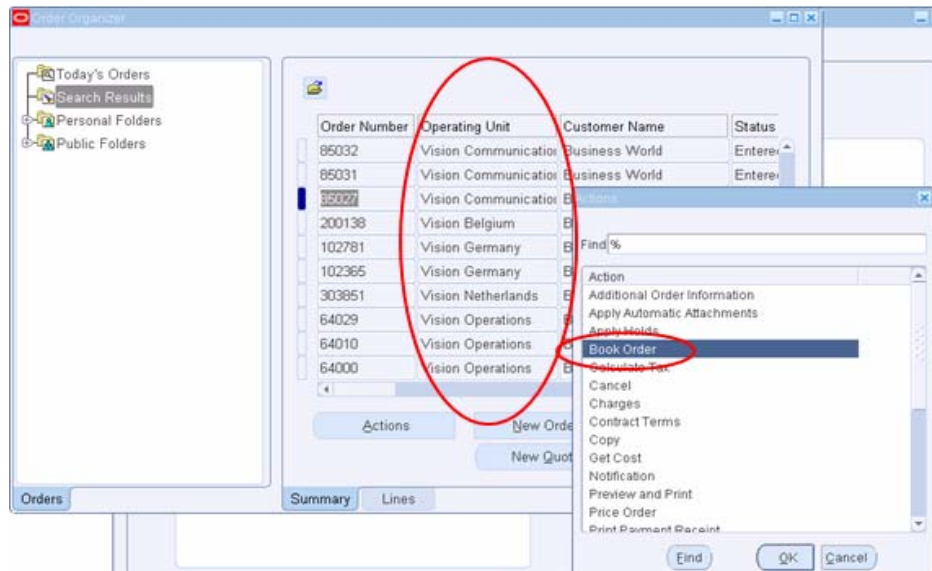
Parameter	Value
Allow Partial Reservation	[]
Audit Trail	Enable when Order is Booked
Call line DFF extension API in COPY	[]
Configuration Effective Dates	[]
Credit Memo Transaction Type	Credit Memo
Credit Salesperson for Freight on Sales	No
Customer Relationships	Related Customer
Default Hint for Pricing and Availability	[]

Description: Default Hint for Pricing and Availability form

OK Cancel

Perform actions on Orders across OU's

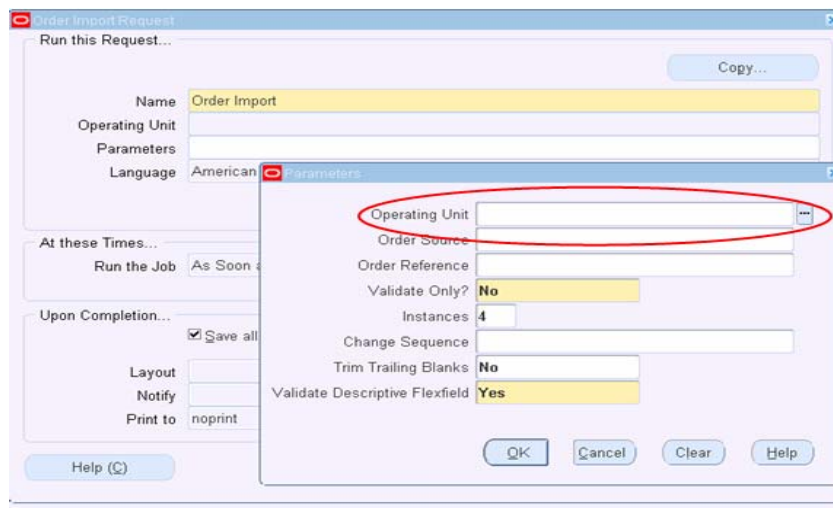
MOAC allows actions to be performed from Order workbench for Orders across OU's.



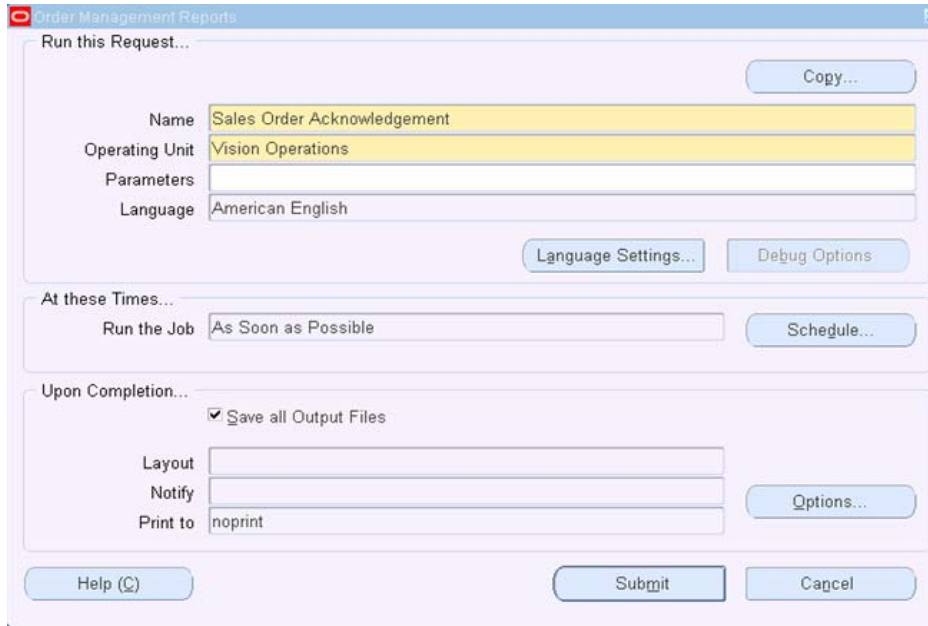
Concurrent Requests

A new parameter for OU has been added to SRS (standard request submission screen). It has also been added to some of the concurrent programs. This parameter is mostly made optional. If no value is passed to this parameter, then the program processes data for all the OU's under the profile.

The below screenshot is for Order Import program. Orders from multiple OU's can be brought in together by submitting the Order Import program only once from a given responsibility.

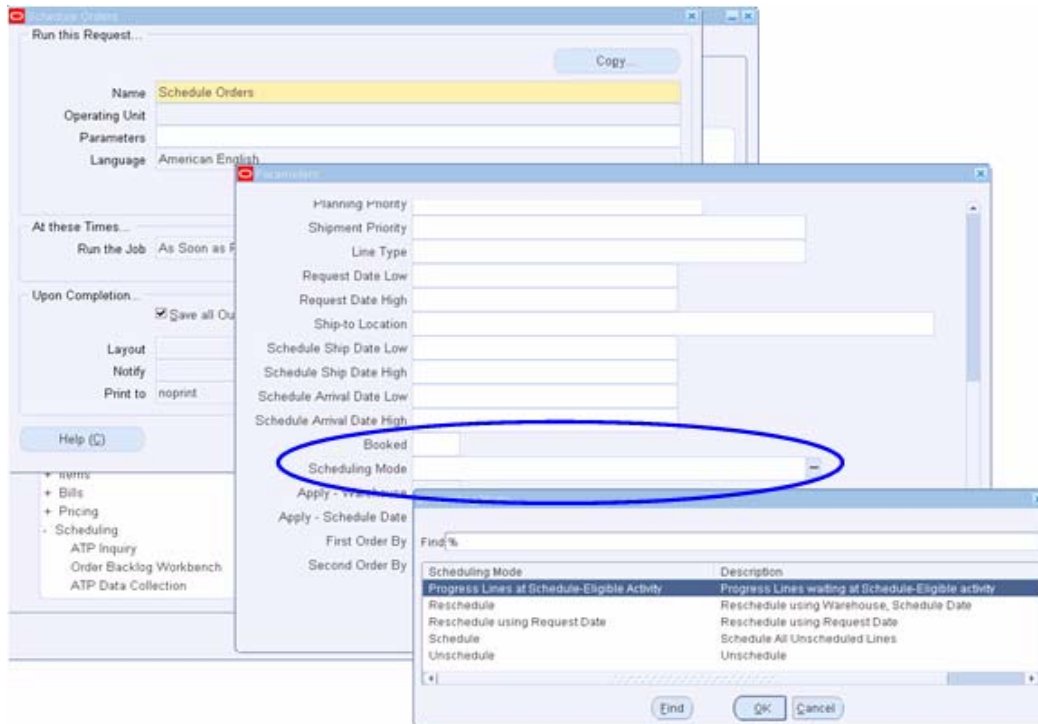


OU has been added as a parameter to some of the OM reports.

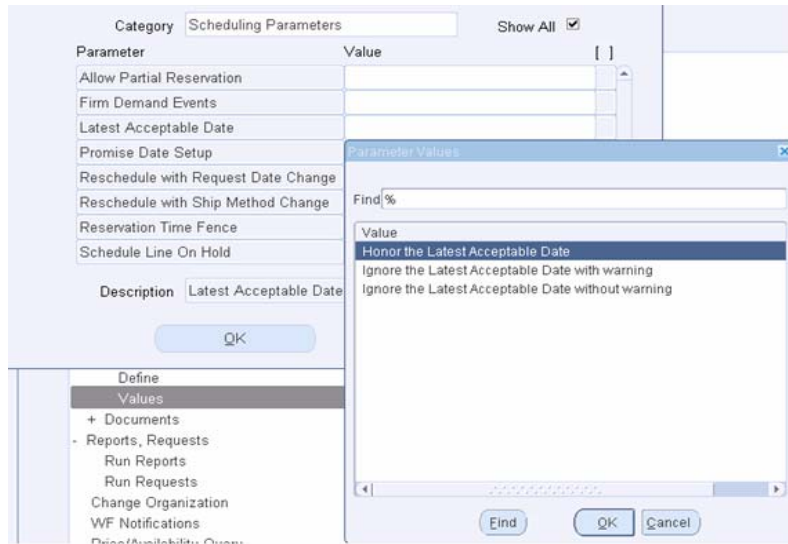


4. Scheduling Enhancements

In R12, the Schedule Orders program has been changed to pick those lines that were never picked for scheduling. The program is also modified to select different modes for scheduling. For example, Reschedule, Unschedule etc.

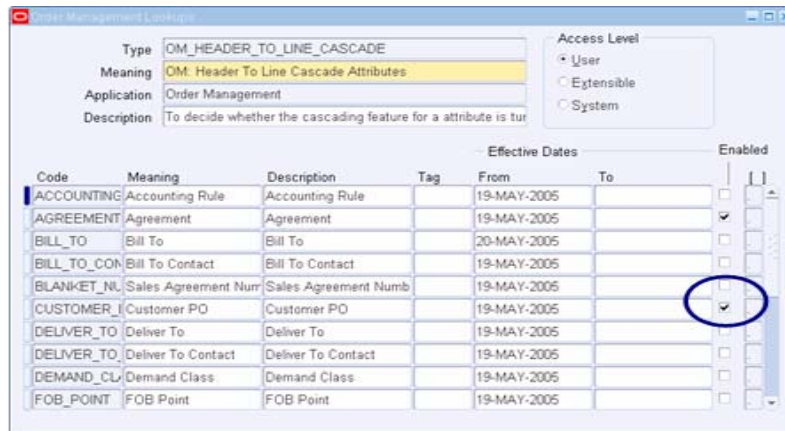
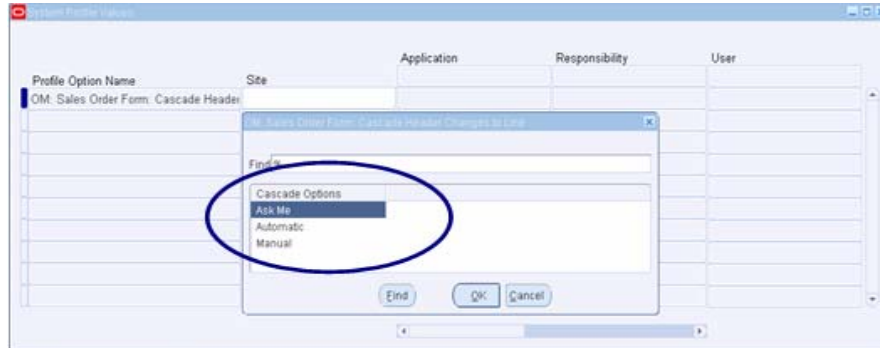


The OM System parameters can be used to set different options for Scheduling.



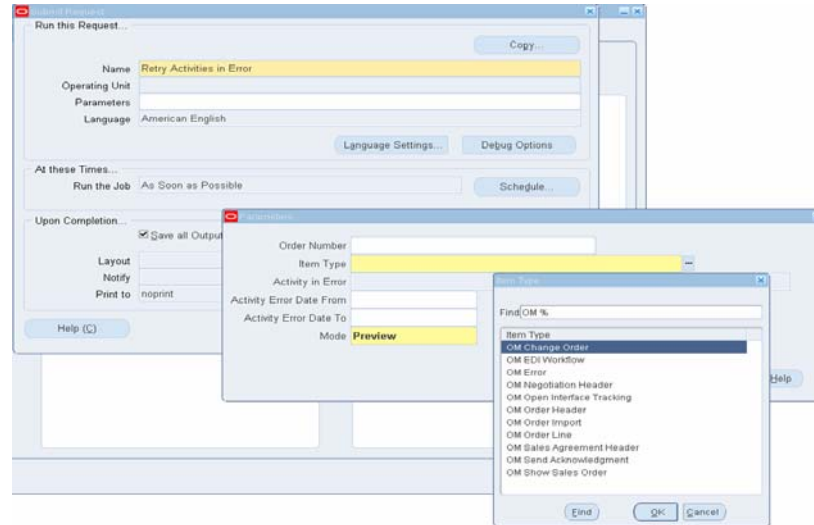
5. Cascading Enhancements

The cascading of attributes from Header level to line level has been enhanced in R12. The attributes updated at header level can be cascaded with the help of a Profile Option and OM Quickcode.



6. Exception Management

The 'Retry Activities in Error' program has been enhanced to reprocess the pending / error activities for various Item types in OM.



7. Schema changes

Till 11.5.10.2, the OU based Views used to control the data access for a given responsibility. These Views used to restrict the data access based on the OU set for *MO: Operating Unit* profile option for a give responsibility.

With the evolution of MOAC, these Views no more exist in the application. These Views have been migrated as Synonyms. For example: *OE_ORDER_HEADERS*, *OE_ORDER_LINES*.

8. Customization methodology

Till 11.5.10.2, Org Specific Views (*OE_ORDER_HEADERS*) were used to filter rows with a specific *ORG_ID*. In R12, the views are no longer used. Instead, Synonym together with Security Policy is used to return rows for a single OU.

mo_global.init needs to be used to populate MO global temp table.

Syntax: *mo_global.init*(<application short name>)

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

Syntax: *mo_global.set_policy_context*('S',<ORG_ID>)

S stands for Single and *ORG_ID* is the desired operating unit. This step needs to be executed before calling the standard API's.

mo_global.set_policy_context in R12 could be considered as a substitute to *dbms_application_info.set_client_info* in 11i.

9. Advanced Pricing Enhancements

The following are some of the key enhancements of Pricing in R12.

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

10. iStore Enhancements

The following are some of the key enhancements of iStore in R12.

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

11. Conclusion

R12 OM provides MOAC which gives data access to multiple OU's from a single responsibility. This helps to improve shared services operations. It not only reduces costs, but also provides the global consolidated view of data which can help in some decision making.

The other new features of OM also improve the Order processing.

12. References

1. R12 TOI: OM Functional
2. R12 TOI: OM Technical
3. R12 OM RCD