

Tips and Techniques

Volume 8 -6, May-2007

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From the Editor

Welcome to this month's Atlanta OAUG newsletter.

We have a variety of interesting articles in this issue and I thank the authors for their contributions.

I request the members to contribute regularly and share their experiences with the user community.

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Coordinator's Corner

2007 Meeting Dates

May 18,

Volunteer Opportunities

- Speakers to give 35-40 minute main presentations.
- Facilitators to lead the informal breakout sessions.

Deadline for contributions to March newsletter - March 6 2006

Credit is given to all contributors.

- Submit in a Word document attached to an email.
- Length – 2 – 4 paragraphs. Maximum – 300 words.

*Brenda Carlton,
Atl-OAUG Coordinator
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General

OAUG Updates

Upcoming events:

Oracle OpenWorld 2007

November 11-15, 2007
Moscone Center
San Francisco, California

Oracle With 20:20 Foresight

Presented by Australian Oracle User Group (AUSOUG) and OAUG
November 20-21, 2007 (Sheraton Perth, Perth, Australia)
November 27-28, 2007 (Melbourne Exhibition and Convention Centre, Melbourne, Australia)

OAUG Membership Benefits

We appreciate your assistance in communicating the benefits of OAUG membership to your Geo and SIG members! OAUG members receive:

- **Advocacy** opportunities to influence Oracle on product enhancements, usability, new features, Oracle support, pricing and quality.
- **Knowledge** that showcases the latest trends and techniques used by industry leaders through our national and regional events and our publications, such as *OAUG Insight* magazine.
- **Education** through the hundreds of career-enhancing presentations in our conference paper database archive, as well as discounts to conferences and Oracle education.

- **Communication** with other OAUG members worldwide through participation in OAUG committees, leadership positions, interaction with Oracle Corporation's user initiatives, frequent member surveys, and Oracle management briefings.
- **Networking** with Oracle customers, industry experts, third-party software firms, and other Oracle Applications specialists through our Member Database and Online Vendor Directory.

- **Full Web site access**
- **Collaborative opportunities with Oracle**
- **Exclusive content**
- **Special conference discounts**
- **Access to the Oracle Applications community network**

From Geo/SIG eLink newsletter
18th May 2007

Functional Articles

Migrating Call Notes from AR to Advanced Collections using JTF NOTES PUB API in 11.5.10

Objective:

To explain migration of Call Notes from AR to Advanced Collections

Business Requirement:

Recently the Client has implemented Advanced Collections modules. Previously the client was using AR Collections Workbench to manage its Collections Activities. As such the Call notes are currently maintained in AR in the Customer Calls form as a Response Note or a Call Topic Note. These notes are either at the account level or a transaction level. When the Collectors switch to the Collections form in Advanced Collections, the AR Call notes cannot be viewed in the Notes Tab. Hence there is a need to migrate the AR Call notes from AR to Advanced Collections

Benefits

The AR Call Notes can be viewed from the Collections form without the need to navigate to the AR Customer Calls Form. With this call notes migration, the collectors do not lose the Call Notes history information that they previously maintained using the AR Collections workbench.

Solution:

The Notes entered in Advanced Collections are stored using the Oracle Common Application Notes Component. Hence to migrate the AR Call Notes to Advanced Collections, we used the `jtf_notes_pub.create_note` API. We created a custom concurrent program with a 'From Date' and a 'To Date' parameter. This program selects all the AR Call Notes data within the date parameter and passes it as a parameter to the API. The API then creates a jtf note based on the parameters passed. The jtf note could be at the Account level or the Invoice level depending on how the note was created in AR.

Business Rules Implemented

If a particular Call Note is migrated, it should not be migrated again even if the user runs the concurrent program with the same or overlapping date parameters

High-Level Algorithm used for the Concurrent Program

- Select the source data that needs to be migrated
- Check if the Source data has already been migrated.
- If 'YES', return to End . Else go to '4'
- Provide the source data as input parameters to the JTF_NOTES_PUB API and execute it.
- Capture the return status flag from the API
- Provide the output of the Notes migrated (Success / failure) in the Output file.

Queries to select source data

1. Query to select the response note from customer calls. These notes are at the account level and hence have no reference to the transaction

```
SELECT acc_customer_id "CUST_ACCOUNT_ID"  
  , ano_text note_text  
  , rcu_customer_number account_number  
  , 'RESPONSE' note_type  
  , last_updated_by  
  , last_update_date  
  , last_update_login  
  , created_by  
  , creation_date  
FROM ar_customer_calls_v  
WHERE trunc (creation_date) >= trunc(&p_date_from)  
AND trunc(creation_date) <= trunc(&p_date_to) ;
```

2. Query to select the customer call topic notes. If the customer_trx_id is NULL, it means that the note is at an account level. Else the note is at a transaction level.

```
SELECT cct_customer_trx_id customer_trx_id  
  , cct_customer_id cust_account_id  
  , ano_text note_text  
  , 'CALL_NOTE' note_type  
  , last_updated_by  
  , last_update_date  
  , last_update_login  
  , created_by  
  , creation_date  
FROM ar_customer_call_topics_v  
WHERE trunc(creation_date) >= trunc(&p_date_from)  
AND trunc(creation_date) <= trunc(&p_date_to) ;
```

Queries to check if Source data is already migrated

1. Query for checking if the account level note is already migrated

```
SELECT DISTINCT COUNT (*)  
INTO x_count  
FROM jtf_notes_b jtfn  
  , jtf_notes_tl jtfn_tl  
WHERE  
jtfn.source_object_code = 'IEX_ACCOUNT'  
AND jtfn.source_object_id = note_rec.cust_acct_id  
AND jtfn_tl.jtf_note_id = jtfn.jtf_note_id  
AND jtfn_tl.source_lang = 'US'  
AND UPPER(jtfn_tl.notes) = UPPER(note_rec.note_text)  
AND jtfn.creation_date = note_rec.creation_date  
AND jtfn.created_by = note_rec.created_by  
AND jtfn.last_update_date = note_rec.last_update_date  
AND jtfn.last_updated_by = note_rec.last_updated_by;
```

In the above query, note_rec is a record_type consisting the source data. If the x_count variable is not zero, it means that the note is already migrated.

2. Query for checking if the invoice level note is already migrated

```
SELECT DISTINCT COUNT (*)
INTO x_count
FROM jtf_notes_b jtfn
, jtf_notes_tl jtfn_tl
WHERE
jtfn.source_object_code = 'IEX_INVOICES'
AND jtfn.source_object_id = note_rec.payment_schedule_id
AND jtfn_tl.jtf_note_id = jtfn.jtf_note_id
AND jtfn_tl.source_lang = 'US'
AND UPPER(jtfn_tl.notes) = UPPER(note_rec.note_text)
AND jtfn.creation_date = note_rec.creation_date
AND jtfn.created_by = note_rec.created_by
AND jtfn.last_update_date = note_rec.last_update_date
AND jtfn.last_updated_by = note_rec.last_updated_by;
```

In the above query, note_rec is a record_type consisting the source data. If the x_count variable is not zero, it means that the note is already migrated.

JTF_NOTES_PUB API

Account Level Notes

The Account level notes were migrated using the following code

```
Declare
l_notes_detail CLOB;
l_note_type VARCHAR(30) := 'IEX_HIST';
l_note_status VARCHAR2 (1) := 'I';
l_return_status VARCHAR2 (1);
l_msg_count NUMBER;
l_msg_data VARCHAR2 (2000);
l_note_id NUMBER ;
l_msg_index_out NUMBER;
BEGIN

jtf_notes_pub.create_note
(p_api_version => 1.0,
p_init_msg_list => 'T',
p_commit => 'T',
p_jtf_note_id => NULL,
p_validation_level => 100,
p_source_object_id => note_rec.cust_account_id,
p_source_object_code => 'IEX_ACCOUNT',
p_notes => note_rec.note_text ,
p_notes_detail => l_notes_detail,
p_entered_by => note_rec.created_by,
p_entered_date => note_rec.creation_date,
p_last_update_date => note_rec.last_update_date,
p_last_updated_by => note_rec.last_updated_by,
```

```
p_creation_date => note_rec.creation_date,
p_created_by => note_rec.created_by,
p_last_update_login => fnd_global.login_id,
p_note_type => l_note_type,
p_note_status => l_note_status,
x_jtf_note_id => l_note_id,
x_return_status => l_return_status,
x_msg_count => l_msg_count,
x_msg_data => l_msg_data
);
IF (l_return_status <> 'S')
THEN
fnd_file.put_line(fnd_file.LOG,'l_return_status <> S ');
IF (fnd_msg_pub.count_msg > 0)
THEN
FOR i IN 1 .. fnd_msg_pub.count_msg
LOOP
fnd_msg_pub.get
(p_msg_index => i,
p_encoded => 'F',
p_data => l_msg_data,
p_msg_index_out => l_msg_index_out
);
DBMS_OUTPUT.put_line ('Error:' || l_msg_data);
fnd_file.put_line(fnd_file.LOG,'ERROR :' || l_msg_data);
END LOOP;
END IF;
END IF;
COMMIT;
END ;
```

In the above query, note_rec is a record_type consisting the source date.

The value of l_note_type should be a valid lookup code for lookup type JTF_NOTE_TYPE

```
SELECT LOOKUP_CODE, MEANING, DESCRIPTION,
TAG, START_DATE_ACTIVE, END_DATE_ACTIVE, ENABLED_FLAG,
LOOKUP_TYPE
FROM FND_LOOKUP_VALUES_VL WHERE (nvl ("", territory_code) = territory_code or
territory_code is null)
AND lookup_type = 'JTF_NOTE_TYPE'
order by LOOKUP_CODE;
```

Invoice Level Notes

For migrating the Invoice level notes, the code remained the same except the value passed to the parameters p_source_object_id and p_source_object_code. The values that needed to be passed to these parameters are

```
p_source_object_id => note_rec.payment_schedule_id ,
p_source_object_code => 'IEX_INVOICES'
```

Summary

This document details the approach we took for migrating Call Notes from AR to Advanced Collections. These notes can then be viewed in the Notes Tab of the Collections Form.

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Multiple Organization Access Control (MOAC) *Strategic Breakthrough for Share Services Business Model*

In today's fast paced and broadening markets of global economy, businesses are redesigning their support functions with the intent of pulling out non-strategic tasks from their individual business units, enabling them to concentrate on their core business. These functions that were previously non-strategic now become strategic and the core functions of a shared service center. Multiple Organization Access Control feature, introduced in Oracle Applications Release 12, lays the foundation for meeting the shared service requirements by allowing the access to data across Operating Units.

Let's understand it from this example. You have offices all over the world, say in North America, South America, UK, France, and in Germany. You do the data entry, data processing, and reporting in each office separately: North America office, South American office, and also in the UK, France, and German offices. Now you open one more office in Japan and do the data entry, data processing and reporting in that office as well. Strategically, that may not be the efficient method for getting the work done. Instead, you can open a Shared Service Centre and start doing the data entry, data processing and reporting for all of the offices worldwide and leave those offices to cater to your core business.

Features of MOAC

Let's see what is offered by this Multiple Organization Access Control enhancement.

In order to explain, I have categorised these changes into data entry, inquiry (or review), adjustments, data processing and report generation. You can enter the data for multiple operating units from a single responsibility because the Operating Unit field is now available on all the forms (accessing the Organization striped data) where you enter the data. So, you will find the Operating Unit field added on Sales Order form, Pre-Approved Expenditure Entry form, Review Transactions form, WebADI templates, and the setup forms. As a result of these changes, the data entry operators at the Shared Service Centers can enter the data without changing the responsibility.

You do not need to change the responsibility to inquire or adjust the data for different operating units in Release 12. What you need to do is just give the access to multiple operating units from the responsibility, and then you can inquire and adjust the data from a single responsibility. So, you will find that Order Organizer form has OPERATING UNIT field in Find order window, you have access to Sales Orders across operating units. You can query and adjust the data for different Sales Orders and operating units from this form. Similarly, you can review the invoices of multiple sales orders across operating units from the same responsibility. Also, you can check the order status for the customer of different operating units all using the same responsibility.

Please note that, when I say accessing the data for multiple operating units, it is possible from a single responsibility, it does not mean you can access the data for multiple operating units at one go. You need to run the query each time you want the data for different operating unit. To put it differently, you need not change the responsibility but you need to run the query separately for each operating unit from the same responsibility.

Coming to Data Processing and Report Generation, in Release 12, you can run the concurrent programs and reports for multiple operating units from a single responsibility. This does not mean you can run a single concurrent process across multiple operating units. You must still submit a request for each operating unit, but you can do this from a single responsibility. While running the concurrent program, you should specify the operating unit for which you intend to run the concurrent process. For shared service center users, what it means is easy data entry followed by hassle free data processing and report generation.

Defaulting an Operating Unit

Let's take an example of a company where work may be allocated as follows:

US at 60%

UK at 25%

And the remaining 15% scattered among other operating units around the globe.

In such cases, you would expect the US operating unit to automatically be selected each time you open the form. This release introduces a profile option called MO: Default Operating Unit that determines the default value to use for all entry forms or pages. If you set this to the US operating unit for this example, you would get the desired behavior.

In addition, if you do not have access to multiple operating units, where you have not set the value for MO: Security Profile, your operating unit field will be populated from the profile option, MO: Operating Unit.

Benefits of Multiple Organization Access Control functionality

First benefit is you will be able to achieve the same result in the reduced number of steps. This guy could have taken each step individually equating to three or four steps, but instead he took a shortcut, and achieved it in just one step. Similarly, if you want to enter, inquire, or process data for different operating units, you do not have to close the form, change responsibility, open the form and taken action. Instead, you can enter the data in the same form without closing it.

The second benefit is an automatic result flowing from the first one. It will definitely result in increased efficiency.

Purpose and Steps Involved

The purpose of this enhancement is specifically to control the access for the operating units.

Step 1

So, the first thing you need to define is the operating units, if not already done. Next step is determine whether the Operating Unit hierarchical structure exists. If so, then you must complete step 1 and define the organization hierarchy. If the hierarchy does not exist, then you can go directly to step 2

Step 2

Define the Security profile and run the security list maintenance program.

Step 3

To set the MO: Security profile where in the security profile defined in step 2 is identified

Step 4

Requires you to set the user default-operating unit by setting the profile option MO: Default Operating Unit.

Note: MO: Security Profile and MO: Default Operating Unit are the new security profiles introduced for Multiple Organization Access Control. Oracle HR form Define Security Profile is used to define the Security profile to be used for giving the access to Multiple Operating Units.

Summary

This functionality is dependent on Oracle Human Resources to the extent that the Security Profile is defined in the HR form.

Multiple Organization Access Control feature allows you to enter and process data and generate reports from a single responsibility.

This is achieved by providing the Operating Unit field on the forms and while running the concurrent programs.

To set up this feature, you need to define the security profile containing operating units and set it at MO: Security Profile.

You can set the default operating unit on forms by setting the MO: Default Operating Unit profile.

It improves your efficiency because you can perform the same functional in the reduced number of steps.

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New Functionality in Oracle Sourcing Module (in Release 12)

Support Very Large Number of Line Items on a Negotiation:

Oracle Sourcing R12 expands support for very large RFXs/Auctions allowing thousands of line items on a single negotiation. Buyers can create such large negotiations using the spreadsheet upload feature, or by renegotiating an existing catalog with thousands of lines. Suppliers can download the line items to spreadsheet in order to enter their bid offline and upload the completed bid. As part of the oracle sourcing setup, the administrator can setup the threshold for the number of lines for using asynchronous processing. If the user submits a request to process more than this number of lines, the system will automatically initiate an asynchronous request to complete the processing. The user will be notified when the processing completes. This allows the user to go on to other tasks online, while the system completes the request to process a very large number of lines.

Negotiation Styles:

Negotiation styles allow buying organizations to tailor the oracle sourcing user interface to match the needs of different sourcing events. Through reusable negotiation styles, deploying organizations expose or hide unneeded oracle features, therefore simplifying the user interface and reducing clutter. When a sourcing document is created using a style, disabled features are hidden to simplify the user interface. For example, the buyer can setup a 'Simple Auction' style that turns off all advance features such as multi attribute scoring, cost factors,

location-based pricing, and price differentials. Negotiations created using this style inherit the streamlined interface of the style

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OAUG Business

Atl-OAUG Structure

Position	Person	Email address
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Highlights:

AGENDA – May 18, 2007

Time 8:30 – 12:00

Lunch afterwards provided by Oracle Corporation

Main Presentations

1. GRC – Governance, Risk and Compliance Manager - Sean Cronin, Director, Governance, Risk & Compliance
2. Member Spotlight: Equifax - Mark Robertson, Equifax

Breakout Sessions 11:00 – 12:00

1. R12 Supply Chain Enhancements - Mark Mandeville, Oracle
2. Automating Purchasing documents (End to End) - Shree Iyer, R & R Technology, Inc
3. Current Trends in Business Intelligence and How Oracle Applications Fit In - Paul Frangoulis, NCR

Vendor Spotlight: Oracle Corporation

Host: Oracle Corporation, www.oracle.com

Location: Matrix Resources, South Terrace Building , Dunwoody

Reservations: Karlotta Howard, [karlotta.howard@ oracle.com](mailto:karlotta.howard@oracle.com), 770-351-3776