

# Tips and Techniques

Volume 8 -6, October-2007

## In this issue

From the Editor

Coordinator's Corner

General

*Oracle Open world*

*Technology and  
Applications Forum*

*OAUG Membership  
Benefits*

Functional Articles

*Advance collection  
strategies*

OAUG Business

*Atl-OAUG Structure*

*Highlights: Oct 19<sup>th</sup>  
Agenda*

## 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.

*Lokesh Govindaiah*

*Principle Consultant*

**Enrich IT**

[lokesh.govindaiah@enrichit.com](mailto:lokesh.govindaiah@enrichit.com)

Phone: 330-224-0719

---

## Coordinator's Corner

**2007 Meeting Dates**

**Oct 19**

**Volunteer Opportunities**

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

**Deadline for contributions to January newsletter - Dec 2007**

Credit is given to all contributors.

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

**Andrew Snyder,**

*Atl-OAUG Coordinator*

[asnyder@noodleit.com](mailto:asnyder@noodleit.com)

## 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 26-27, 2007 (Melbourne Exhibition and Convention Centre, Melbourne, Australia)
- [COLLABORATE 08: Technology and Applications Forum for the Oracle Community](#)  
Presented by IOUG, OAUG and Quest  
April 13-17, 2008  
Colorado Convention Center  
Denver, Colorado, USA

### 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  
19<sup>th</sup> October 2007

## Functional Articles

---

# **Advanced Collections - Implementing Different Strategies for Different Operating Units using Strategy Filters**

## Objective

The Objective of this document is to explain how we implemented Different Strategies for Different Operating Units in Advanced Collections using Strategy Filters

## Business Requirement

Our client is implementing Advanced Collections on a Multi-Org environment. The Client has operations in many countries and each country is defined as an operating unit. The work culture is different in most of the countries and hence the Collections Strategies are also different. A common global strategy cannot be applied to the Accounts of different countries and hence the need to have different strategies assigned to the Accounts pertaining to different operating units.

## Setups

The existing setups are as follows

1. Strategy is defined to run at the 'Account' Level
2. One Account exists only in One Org (All transactions created for one account are created only from One Org)
3. The 'Delinquency Status Determination' scoring engine determines the delinquency status as either 'CURRENT' or 'DELINQUENT'

## Solution

To implement the solution for this requirement, we use Filters. The complete solution for the configuration of filters is summarized in the following activities

- 1) For the purpose of explanation, let us assume the following

- a. The Client has 5 orgs

Org_Id	Name
1001	Vision Operations USA
1002	Vision Operations Australia
1003	Vision Operations UK

1004	Vision Operations India
1005	Vision Operations Mexico

b. Out of these 5 orgs, we need to assign different strategies for India and Mexico org. The other 3 orgs have the same strategy. Each country has two strategies 'Account Hard Strategy' and 'Account Soft Strategy'.

2) We therefore define six different strategies as follows

Strategy Name	Score	Strategy to be used for
IN Account Soft Strategy	50	India
IN Account Hard Strategy	1	India
MX Account Soft Strategy	50	Mexico
MX Account Hard Strategy	1	Mexico
Global Account Soft Strategy	50	USA, Australia and UK
Global Account Hard Strategy	1	USA, Australia and UK

3) We create a Collections Lookup to store the Org information for those orgs that needs org specific strategies. The Code value is the Org\_id (N) Collections Forms Administrator > Lookups

(N) Collections Forms Administrator > Lookups

Type		IEX_STRATEGY_ORG_FILTER				
Meaning		IEX_STRATEGY_ORG_FILTER				
Application		Collections				
Description		Lookup Values for Orgs having Org specific Strategies				
Access Level		User				
Code	Meaning	Description	Tag	Effective From	Effective To	Enabled
1004		India Org		01-Jan-1952		Y
1005		Mexico Org		01-Jan-1952		Y

The values of this lookup can be checked as follows  
 select lookup\_code from fnd\_lookup\_values\_vl  
 where lookup\_type = 'IEX\_STRATEGY\_ORG\_FILTER'  
 AND VIEW\_APPLICATION\_ID=695  
 AND enabled\_flag = 'Y' ;

4) Create Views for the filters – We create three views here. The view name must start with 'IEX\_F' and must be created in the APPS schema)

a. For India Org:

```
create or replace view IEX_F_IN
as select distinct cust_account_id, org_id from IEX_DELINQUENCIES_ALL
where STATUS <> 'CURRENT' and org_id = 1004 ;
```

b. For Mexico Org:

```
create or replace view IEX_F_MX
as select distinct cust_account_id, org_id from IEX_DELINQUENCIES_ALL

where STATUS <> 'CURRENT' and org_id = 1005 ;
```

c. For Other Orgs:

```
create or replace view IEX_F_OTHER
as select distinct cust_account_id, org_id from IEX_DELINQUENCIES_ALL
where STATUS <> 'CURRENT'
and org_id NOT IN (select lookup_code
from fnd_lookup_values_vl
where lookup_type = 'IEX_STRATEGY_ORG_FILTER'
AND VIEW_APPLICATION_ID=695
AND enabled_flag = 'Y' );
```

5) Create Filters – We create three filters here. The filter name must start with 'IEX\_F'. To create the filter

- a. Using the Collections HTML Administrator responsibility or Collections HTML Manager responsibility, navigate to Administration > Strategy. The Strategy Summary Page appears
- b. On the Strategy Summary page, the six strategies as mentioned in step 2 above will appear.
- c. Click the Link on the Filter column for 'IN Account Soft Strategy' strategy.
- d. Specify the following values and create the filter

Filter Type	Strategy Filter
Filter Name	IEX_F_IN
Filter Active	Y
View Name	IEX_F_IN
Select Column	cust_account_id

e. Follow the same process to create filters for all 6 strategies. The summarized table shows the mapping of the Strategies, filters and the views

Strategy Name	Filter Name	View Name
IN Account Soft Strategy	IEX_F_IN	IEX_F_IN
IN Account Hard Strategy	IEX_F_IN_1	IEX_F_IN
MX Account Soft Strategy	IEX_F_MX	IEX_F_MX

MX Account Hard Strategy	IEX_F_MX_1	IEX_F_MX
Global Account Soft Strategy	IEX_F_OTHER	IEX_F_OTHER
Global Account Hard Strategy	IEX_F_OTHER_1	IEX_F_OTHER

- 6) We are now done with the setups. If we now run the 'IEX: Strategy Management' concurrent program, all delinquent accounts of India org will be assigned the India Strategy, all delinquent accounts of Mexico org will be assigned the Mexico Strategy and all delinquent accounts of USA, UK and AU will be assigned the Global Strategy.
- 7) With this approach, at a later point of time, if there is a need for any other org that currently has Global Strategy to have an Org specific strategy (lets say Australia), we do the following
- a. Add a Lookup code for Australia in the 'IEX\_STRATEGY\_ORG\_FILTER' lookup
  - b. Create Strategies for Australia Org
  - c. Create a view IEX\_F\_AU for Australia Org (Refer Step 4 for view creation)
  - d. Create filters for Australia Strategies and assign the view IEX\_F\_AU to the filter.

**Anil Patil**  
*Senior Principle Consultant*  
**Enrich IT**  
[anil.patil@enrichit.com](mailto:anil.patil@enrichit.com)

## OAUG Business

---

### Atl-OAUG Structure

Position	Person	Email address
Coordinator	Andrew Snyder, Consultant	<a href="mailto:asnyder@noodleit.com">asnyder@noodleit.com</a>
Web Server & Internet Services	David Rincon, The DBA Group, LLC	<a href="mailto:drincon@dbagroup.net">drincon@dbagroup.net</a>
Web Mistress	Mary Lou Weiss, Solution Beacon	<a href="mailto:mweiss@solutionbeacon.com">mweiss@solutionbeacon.com</a>
Newsletter Editor	Lokesh Govindaiah, Enrich IT	<a href="mailto:lokesh.govindaiah@enrichit.com">lokesh.govindaiah@enrichit.com</a>
Technical Session Coordinator	Erik Shin, SageWise Group, Inc	<a href="mailto:eshin@sagewisegroup.com">eshin@sagewisegroup.com</a>

---

### Highlights:

#### October 19<sup>th</sup> Agenda: 8:30 – 12:00

Networking / Breakfast Snacks / Member Introductions 8:30 – 9:10am

#### Main Presentations

1. Solution Beacon: Hands On Quick Start Guide to Oracle BI Publisher, Tim Sharpe, Solution Beacon
2. Oracle Corporation: Approvals Management (AME) with TCA Hierarchy, Ajoy A. Devadawson, Oracle

#### Breakout Sessions 11:00 – 12:00

1. Building a Financial Statement with BI Publisher: A Hands-on Demo, Tim Sharpe, Solution Beacon
2. A Practical Approach to Change Management: How to make change Stick - Chris Hagler, Resources Global Professionals
3. To Be Determined

**Host:** Bottomline Technologies

**Location:** Sheraton Buckhead

**Reservations:** **Host:** LogicalApps

**Location:** Matrix Resources, South Terrace Building, Dunwoody

**Reservations:** To register, visit <http://forms.logicalapps.com/forms/ATLOAUGForm>. If you have questions or problems, please contact Kevin Fukuda, 949-419-1234

**Directions:** [www.atloaug.org](http://www.atloaug.org)