

Release 12  
Multi-Org Access Control (MOAC)  
An Inside Look

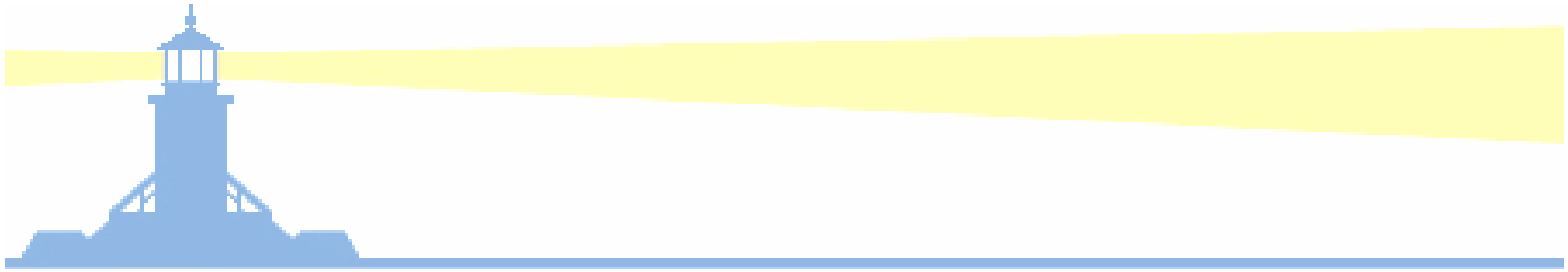
Daryl Geryol  
Alyssa Johnson  
February, 2008





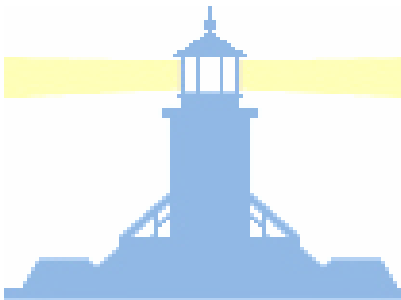
# Agenda

- What is Multi-Org Access Control
- Setup
  - Operating Units
  - Security Profile
  - Run Security List Maintenance
  - Profile Options
  - User Preferences
- Technical
- Multi-Org Access Control Demonstration
- Summary
- More Information



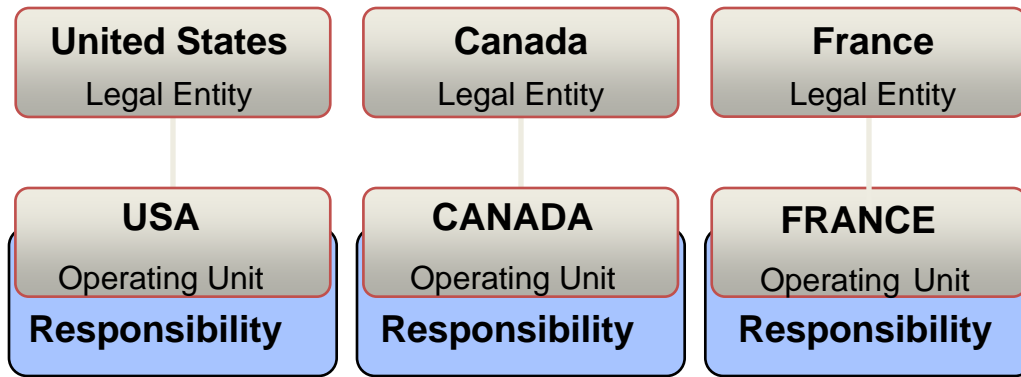
# What is Multi-Org Access Control?



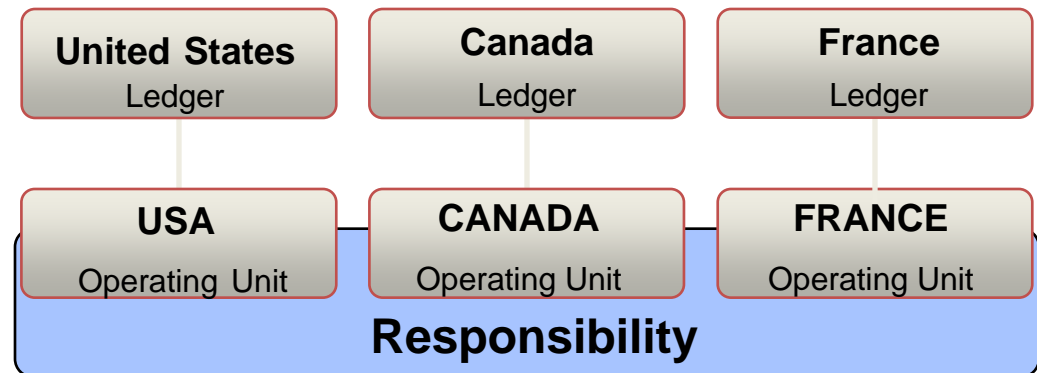


# What is Multi-Org Access Control?

Release 11i



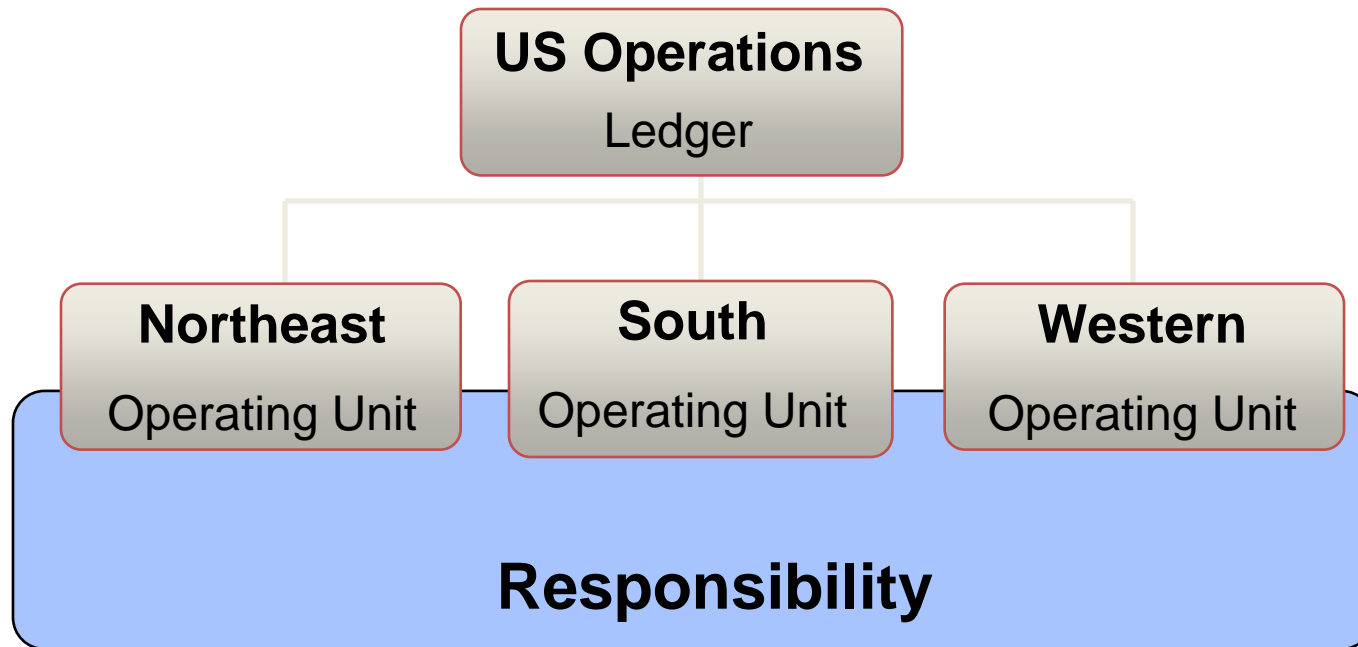
Release 12

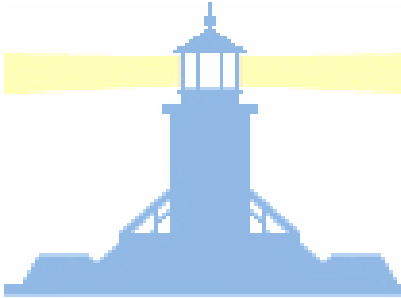




# What is Multi-Org Access Control?

- Structure for Business Operating in US only





# What is Multi-Org Access Control?

- Multi-Org Access Control = MOAC
- Access multiple operating units within a single application responsibility
- Increase effectiveness of Shared Service Centers
- Perform tasks for and across multiple operating units
  - View information
  - Enter transactions
  - Process data
  - Run reports



# What is Multi-Org Access Control?

Query

ORACLE<sup>®</sup> Purchasing Close Window Preferences Help Diagnostics

Requisitions **Orders** Agreements Deliverables Negotiations Suppliers

Orders

Indicates a pending change request Create Standard Purchase Order

Headers Lines Schedules Pay Items Distributions

Views

View My Incomplete Orders

Select Order: Update  |

Select	OU	Order	Rev	Description	Supplier	Site	Order Date	Total	Curr	Status	Acknowledgment
<input checked="" type="radio"/>	Vision Operations	<a href="#">3058</a>	0	Paper	<a href="#">Corporate Express Office Supply</a>	CEOS	25-Oct-2001	40.00	USD	Incomplete	
<input type="radio"/>	Vision Operations	<a href="#">1733</a>	0		<a href="#">Office Supplies, Inc.</a>	OFFICESUPPLIES	02-Jul-2001	250.00	USD	Incomplete	
<input type="radio"/>	Vision Operations	<a href="#">1538</a>	0		<a href="#">Grainger</a>	GRAINGER LA	20-Sep-2000	35.25	USD	Incomplete	
<input type="radio"/>	Vision Operations	<a href="#">1536</a>	0		<a href="#">Corporate Express Office Supply</a>	CEOS	19-Sep-2000	350.00	USD	Incomplete	
<input type="radio"/>	Vision Operations	<a href="#">1526</a>	0		<a href="#">Corporate Express Office Supply</a>	CEOS	07-Sep-2000	0.98	USD	Incomplete	
<input type="radio"/>	Vision Operations	<a href="#">1513</a>	0		<a href="#">Corporate Express Office Supply</a>	CEOS	24-Aug-2000	27.50	USD	Incomplete	
<input type="radio"/>	Vision Services	<a href="#">752</a>	0		<a href="#">Office Supplies, Inc.</a>	OFFICE PROJ	22-Apr-1997	15,000.00	USD	Incomplete	
<input type="radio"/>	Vision Services	<a href="#">758</a>	0		<a href="#">Office Supplies, Inc.</a>	OFFICE PROJ	22-Apr-1997	260.00	USD	Incomplete	

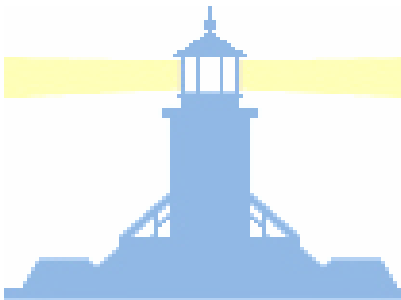
Create Standard Purchase Order

Requisitions **Orders** Agreements Deliverables Negotiations Suppliers Close Window Preferences Help Diagnostics

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View data across Operating Units





# What is Multi-Org Access Control?

Data Entry

Oracle Applications - Solution Beacon Internal R12 Vision

Invoice Workbench (Payables, Vision Operations (USA))

Operating Unit	Customer Taxpayer ID	Type	PO Number	Trading Pa	Supplier Num	Supplier Site	Invoice Date	Invoice Num	Invoice I
Vision Operations		Standard							USD

Operating Units

Find/Vision %

Operating Unit	Ledger
Vision Operations	Vision Operations (US
Vision Services	Vision Services (USA)
Vision Communications (...)	Vision Communication

Amount Paid: USD 0.00

Status

Description

Actions... 1    Calculate Tax    Tax Details    Corrections    Quick Match    Match    All Distributions





# What is Multi-Org Access Control?

## Concurrent Requests

Oracle Applications - Solution Beacon Vision R12

File Edit View Folder Tools Window Help

Submit Request

Run this Request...

Name Invoice Validation

Operating Unit

Parameters

Language American English

419 concurrent processes can be run for Multiple OUs

At these Times... Run the Job

Upon Completion...

Layout

Notify

Print to

Help (H)

Parameters

Operating Unit

Option

Invoice Batch Name

From Invoice Date

To Invoice Date

Supplier Name

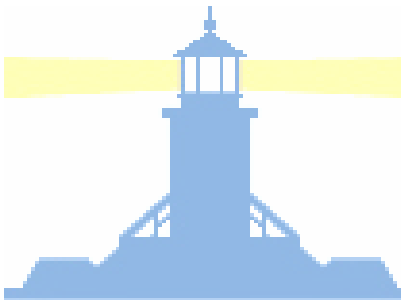
Pay Group

Invoice Number

Entered By

If OU left blank, runs for all OUs assigned to responsibility/user

OK Cancel Clear Help



# What is Multi-Org Access Control?

## Concurrent Requests

If process can be run for only Single OU, Operating Unit is required and populates this new field

Submit Request

Run this Request... Copy...

Name **Supplier Balance Revaluation Report**

Operating Unit

Parameters

Language **American English**

At these Times... Run the ... as Possible

Print to **noprint**

Help (C) Submit Cancel

Reports

Find **Vision%** Options

Operating Unit

**Vision ADB**

Vision Accrual - Offset (AC)

Vision Accrual - Offset (BS)


Vision Approvals

Vision Argentina

Vision Australia

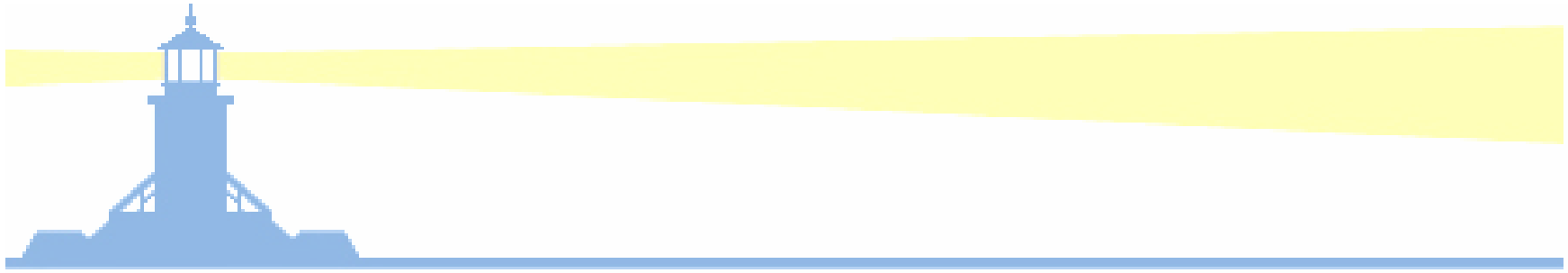
Vision ...

Find OK Cancel ns...

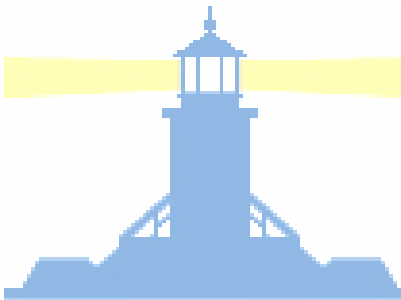


# What is Multi-Org Access Control?

- Subledgers that leverage MOAC
  - Inventory
  - Purchasing
  - Payables
  - Receivables
  - Assets
  - Work in Process
  - Projects



# Setup

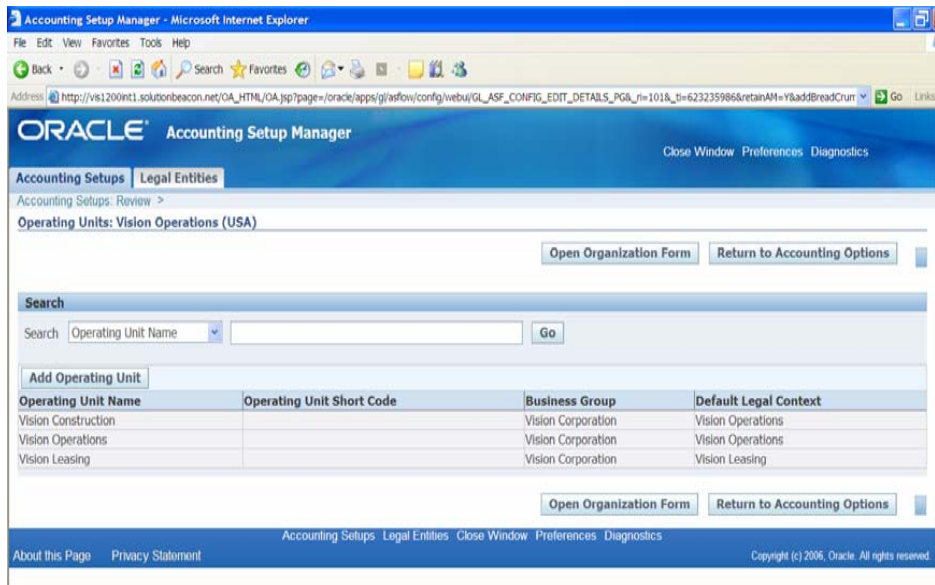


# Setup – Operating Units

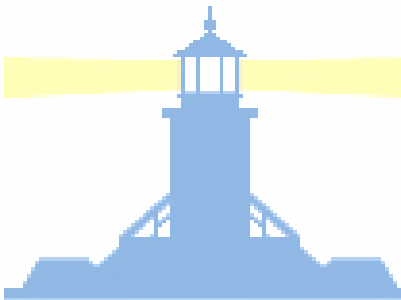
- HRMS Organization Form
  - Work Structures – Organization – Description
  - Operating Unit is Classification for an Organization

Name	Enabled
Inventory Organization	<input checked="" type="checkbox"/>
Operating Unit	<input checked="" type="checkbox"/>
Project Expenditure/Event Organization	<input checked="" type="checkbox"/>

# Setup – Operating Units



- GL Accounting Setup Manager
  - Setup – Financials – Accounting Setup Manager
  - Setup at same time as other Accounting Setups
  - All relevant operating units are assigned to appropriate ledger

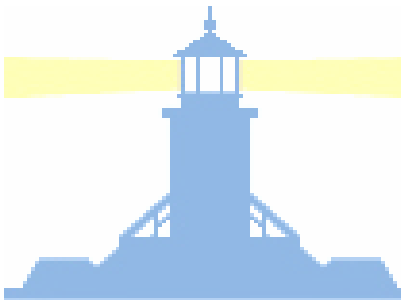


# Setup – Security Profile

- Operating Units Not In Exclusive Organizational Node

The screenshot shows the Oracle Applications Security Profile window for 'AJ Payables Clerk' in the 'Vision Corporation' business group. The 'Organization Security' tab is active, showing a security type of 'Secure organizations by organization hierarchy and/or organization list'. The 'Exclude Business Groups' checkbox is checked. A table lists three operating units: Vision Operations, Vision Communications (USA), and Vision Services. Red arrows point to the 'Name' field, 'Business Group' dropdown, 'Security Type' dropdown, and the 'Exclude Business Groups' checkbox. A red bracket highlights the 'Operating Units' table.

Classification	Organization Name	Include	Exclude
Operating Unit	Vision Operations	<input checked="" type="radio"/>	<input type="radio"/>
Operating Unit	Vision Communications (USA)	<input checked="" type="radio"/>	<input type="radio"/>
Operating Unit	Vision Services	<input checked="" type="radio"/>	<input type="radio"/>




# Setup – Security Profile

- Based on Organizational Hierarchy

The screenshot shows the Oracle Security Profile configuration window. Red arrows point from text labels on the left to specific fields in the window:

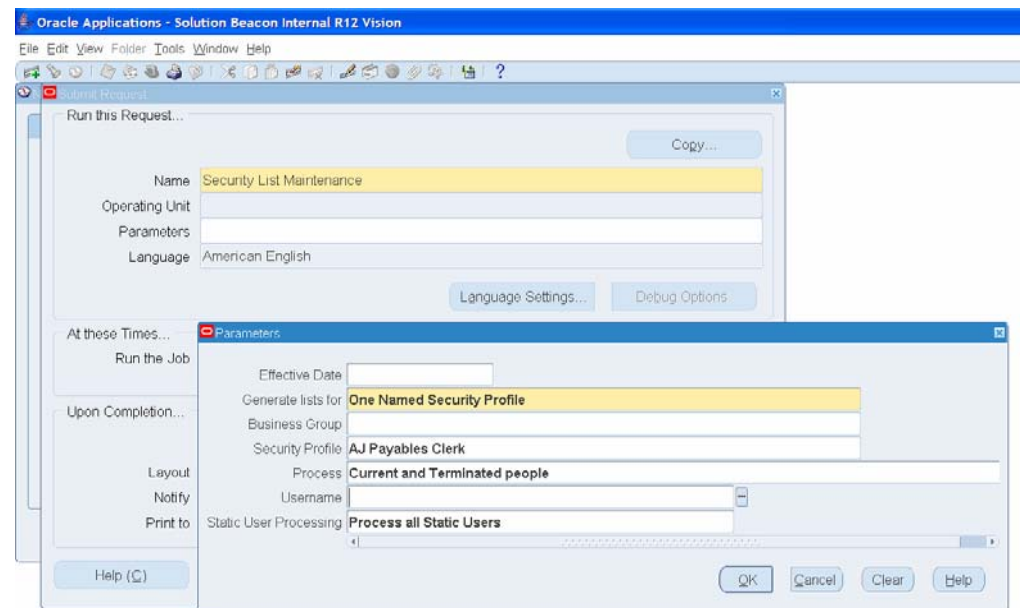
- Security Profile Name** points to the **Name** field, which contains "AJ Purchasing Clerk".
- Business Group** points to the **Business Group** dropdown, which is set to "Vision Corporation".
- Security Type** points to the **Security Type** dropdown, which is set to "Secure organizations by organization hierarchy and/or organization list".
- Organization Hierarchy** points to the **Organization Hierarchy** text field, which contains "Vision Corp EBI Hierarchy".
- Include Top Organization** points to the **Include Top Organization** radio button, which is selected.
- Operating Units** points to the **Organization Name** column in the table below.

Classification	Organization Name	Include	Exclude
	Vision Services	<input checked="" type="radio"/>	<input type="radio"/>
		<input type="radio"/>	<input type="radio"/>
		<input type="radio"/>	<input type="radio"/>
		<input type="radio"/>	<input type="radio"/>



# Setup – Run Security List Maintenance

- Run after any change to a security profile
- Generate Lists for
  - All Security Profiles
  - All Security Profiles in One Named Business Group
  - One Named Security Profile



The screenshot shows the Oracle Applications interface for running a security list maintenance job. The main window is titled "Run this Request..." and contains the following fields:

- Name: Security List Maintenance
- Operating Unit: (empty)
- Parameters: (empty)
- Language: American English

Buttons: Copy..., Language Settings..., Debug Options.

Below the main window is a "Parameters" dialog box with the following fields:

- Effective Date: (empty)
- Generate lists for: One Named Security Profile
- Business Group: (empty)
- Security Profile: AJ Payables Clerk
- Process: Current and Terminated people
- Username: (empty)
- Print to: Static User Processing

Buttons: Help (F1), OK, Cancel, Clear, Help.

# Setup – Profile Options

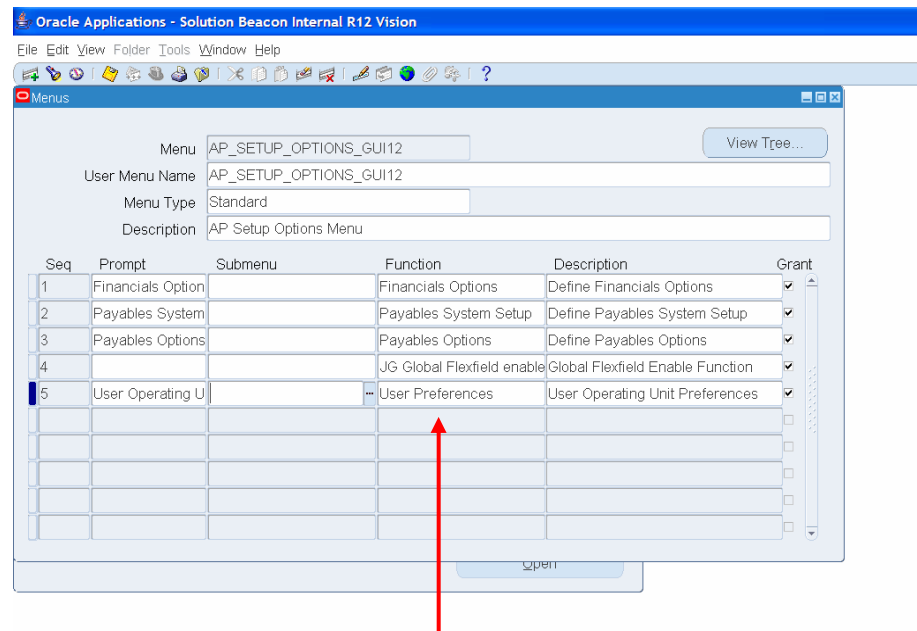
- Can be assigned to Responsibility or User

Profile Option Name	Site	Application	Responsibility	User
MO: Default Operating Unit				AJOHNSON2
MO: Operating Unit	Vision Operations			Vision Operations
MO: Security Profile				AJ Payables Clerk
MO: Set Client_Info for Debugging				

Open

# Setup – User Preferences

- Users can manage the profiles assigned to them through a easy to use interface
- System Administrator add function FNDMOPREFS to user menu

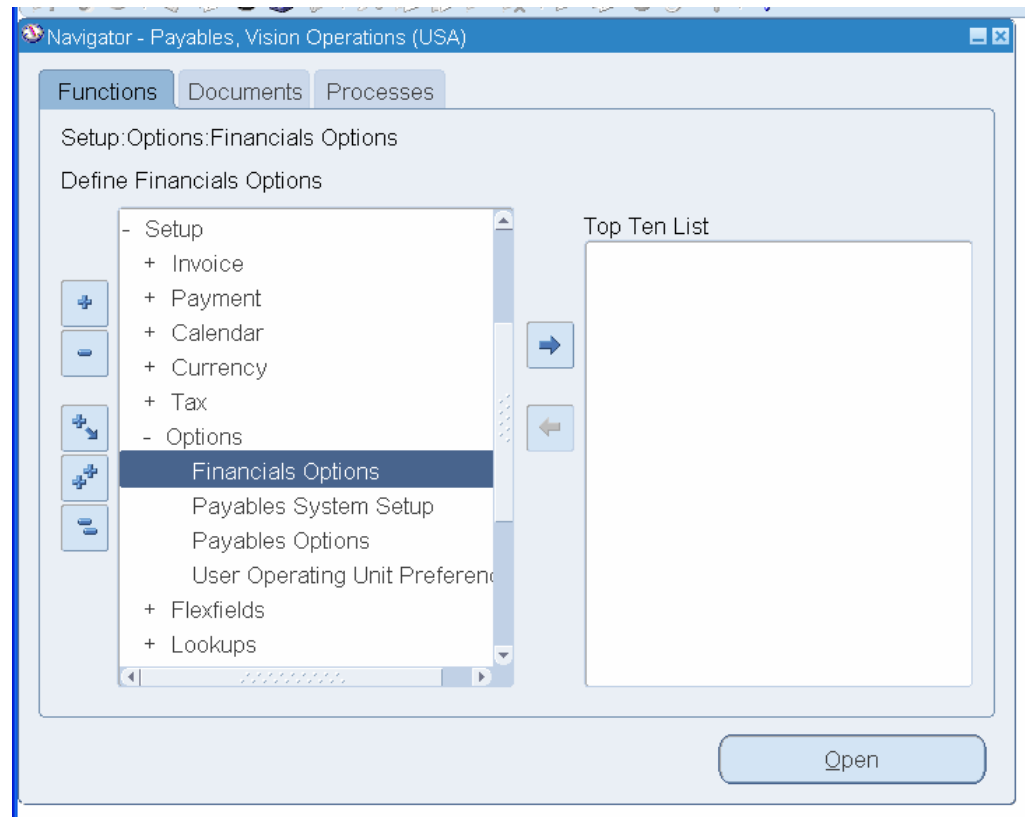


Menu addition



# Setup – User Preferences

- Resulting Menu



# Setup – User Preferences

- User can change default Operating Unit without navigating to Profile Options
- Default will populate first in Operating Unit Field

ORACLE  
Diagnostics Preferences Close Window

Multi-Org Preferences  
Cancel Apply

User Name: AJOHNSON2  
Responsibility Name: Payables, Vision Operations (USA)  
Security Profile: AJ Payables Clerk

**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  
User Level Default Operating Unit: Vision Services

**Preferred Operating Units**  
If you have no preferences or do not make a selection, then all your operating units will be accessible.

Search  
Search: Operating Unit Name [ ] Go

Select Operating Unit: Set as Preferred Clear Preferred

Select All | Select None

Select Operating Unit	Preferred	Business Group	Ledger
<input type="checkbox"/> Vision Communications (USA)		Vision Corporation	Vision Communications (USA)
<input type="checkbox"/> Vision Operations		Vision Corporation	Vision Operations (USA)
<input type="checkbox"/> Vision Services		Vision Corporation	Vision Services (USA)

Cancel Apply

Diagnostics Preferences Close Window



# Setup – User Preferences

Invoice Workbench (Payables, Vision Operations (USA))

Batch Control Total  Batch Actual Total

Operating Unit	Customer Taxpayer ID	Type	PO Number	Trading Pa	Supplier Num	Supplier Site	Invoice Date	Invoice Num	Invoice I
Vision Services		Standard							USD

Operating Units

Find Vision %

Operating Unit	Ledger
Vision Operations	Vision Operations (USA)
Vision Services	Vision Services (USA)
Vision Communications (USA)	Vision Communications (USA)

4 View Payments 5 Scheduled Payments 6 View Prepayment Applications

Status

Status

Accounted

Approval

Holds

Scheduled Payment Holds

Description

Tax

Freight

Miscellaneous

Total

End OK Cancel

Actions... 1 Calculate Tax Tax Details Corrections Quick Match Match All Distributions

# Setup – User Preferences

- Only those OUs set as preferred will show up in the List of Values
- Utilize if single OU processing most efficient

The screenshot displays the Oracle Multi-Org Preferences page. At the top, the user's name is AJOHNSON2, with a responsibility of Payables, Vision Operations (USA) and a security profile of AJ Payables Clerk. The 'Default Operating Unit' section shows 'Vision Operations' selected. Below, the 'Preferred Operating Units' section contains a table with columns for 'Preferred', 'Business Group', and 'Ledger'. The 'Vision Operations' row has a checked checkbox in the 'Preferred' column, highlighted by a red arrow. Other rows include 'Vision Communications (USA)', 'Vision Services', and 'Vision Corporation'.

Select Operating Unit	Preferred	Business Group	Ledger
<input checked="" type="checkbox"/> Vision Communications (USA)	<input checked="" type="checkbox"/>	Vision Corporation	Vision Communications (USA)
<input type="checkbox"/> Vision Operations	<input type="checkbox"/>	Vision Corporation	Vision Operations (USA)
<input type="checkbox"/> Vision Services	<input type="checkbox"/>	Vision Corporation	Vision Services (USA)

# Setup – User Preferences

Oracle Applications - Solution Beacon Internal R12 Vision

File Edit View Folder Tools Reports Window Help

Invoice Workbench (Payables, Vision Operations (USA))

Batch Control Total  Batch Actual Total

Operating Unit	Customer Taxpayer ID	Type	PO Number	Trading Pa	Supplier Num	Supplier Site	Invoice Date	Invoice Num	Invoice
Vision Communicatic		Standard							USD

1 General 2 Lines 3 Holds 4 View Payments 5 Scheduled Payments 6 View Prepayment Applications

Summary

Items

Retainage

Prepayments Applied

Withholding

Subtotal

Tax

Freight

Miscellaneous

Total

Amount Paid

USD

Status

Status

Accounted

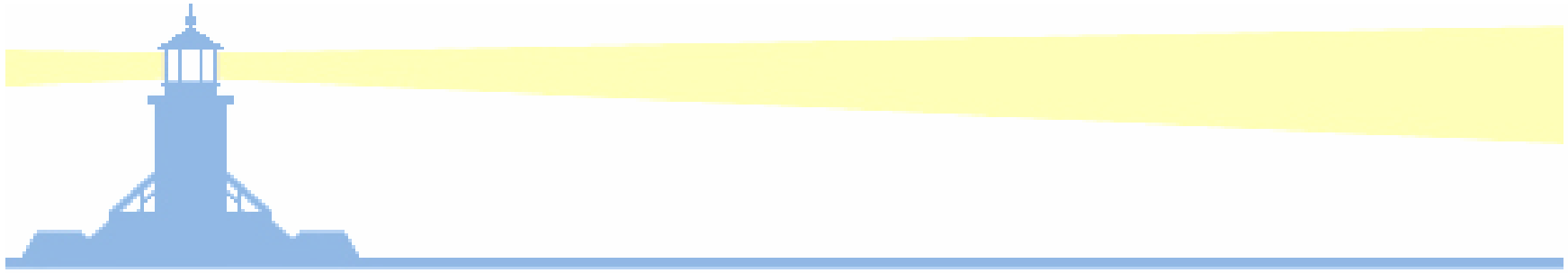
Approval

Holds

Scheduled Payment Holds

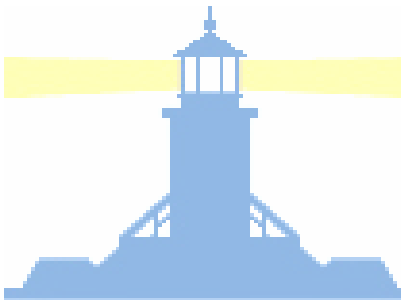
Description

Actions... 1 Calculate Tax Tax Details Corrections Quick Match Match All Distributions




# Technical





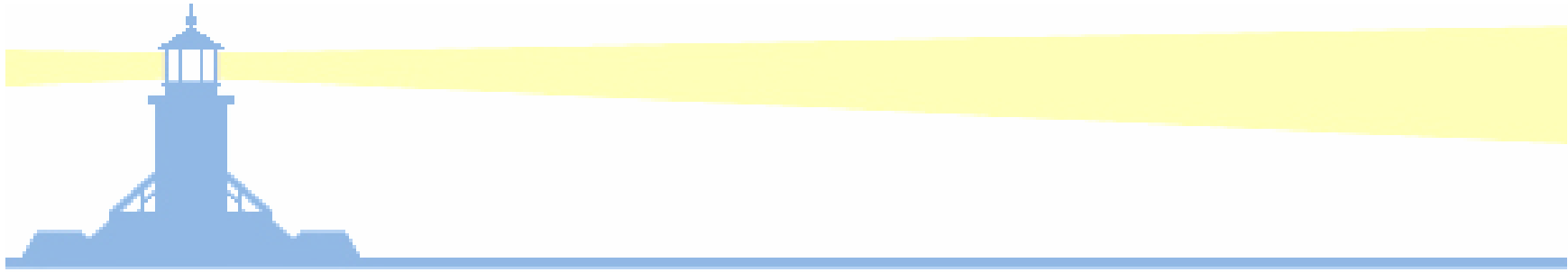
# Technical - Customizations

- Virtual Private Database (VPD) feature will replace usage of CLIENT\_INFO(Org Context) function in Multi-Org Architecture
- Release 11/script to access data
  - begin
  - dbms\_application\_info.set\_client\_info('&org\_id');
  - end;
  - /
  - select \* from po\_headers
  - /
- Release 12 must request access through Security Policy in the database
  - begin
  - mo\_global.set\_policy\_context('S', &org\_id);
  - end;
  - /
  - select \* from po\_headers
  - /
- Custom forms and reports need to be initialized to secure access through security profile

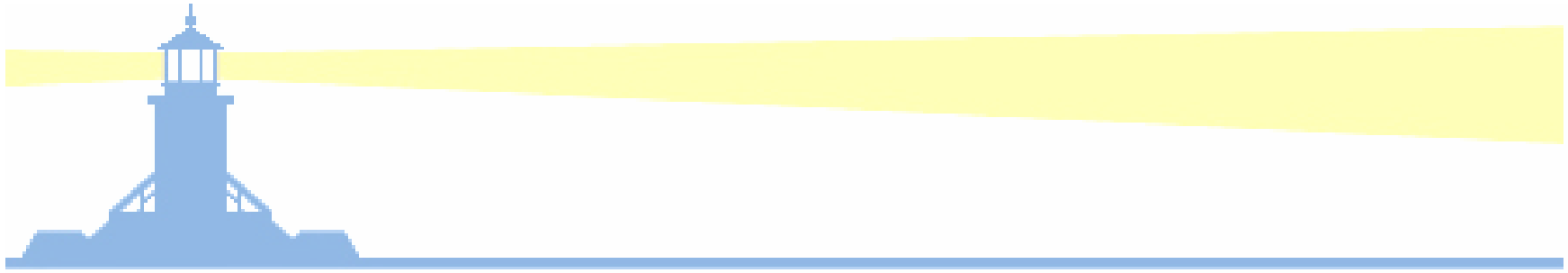


# Technical – Concurrent Programs

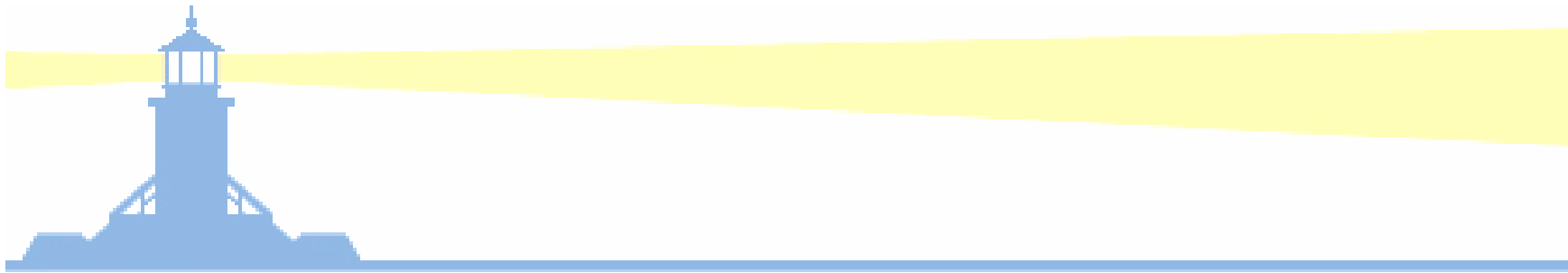
- New column MULTI\_ORG\_CATEGORY in FND\_CONCURRENT\_PROGRAMS
- Values
  - ‘S’ = Single Org
  - ‘M’ = Multi Org
- In upgrade, for programs where definition has been customized, value is null and concurrent program will NOT run.
- Script to set value
  - UPDATE FND\_CONCURRENT\_PROGRAMS  
SET MULTI\_ORG\_CATEGORY = {'S' or 'M'}  
WHERE CONCURRENT\_PROGRAM\_NAME = '{Program Name}'



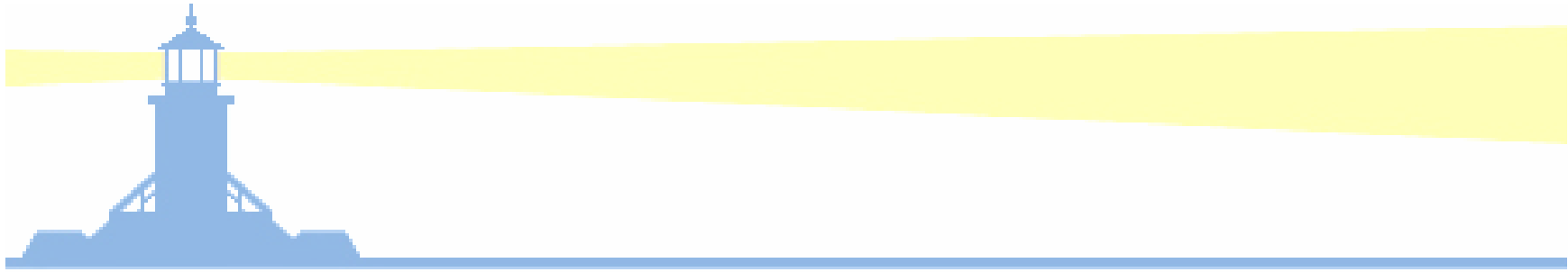
# Multi-Org Access Control Demonstration



# Summary



- R12 does support a hybrid environment where some users operate in MOAC and others may not.
- Features unconstrained by multi-org today are still unaffected in R12 MOAC
- Upon upgrade you are not required to implement MOAC however you should test boltons, personalizations, customizations and 3<sup>rd</sup> party apps with some users MOAC enabled
- MOAC may require additional internal controls or security



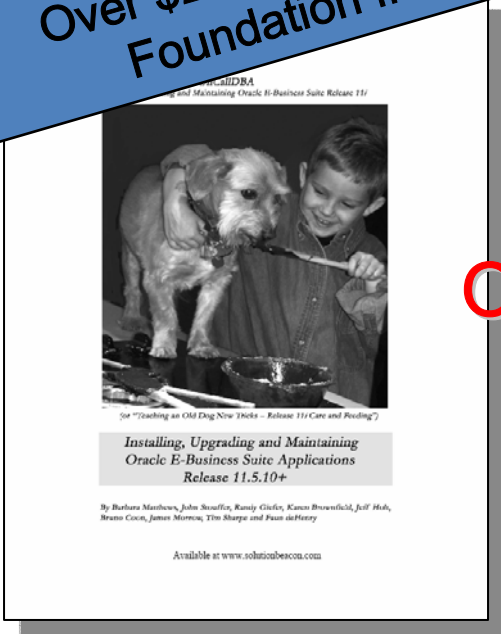
# More Information





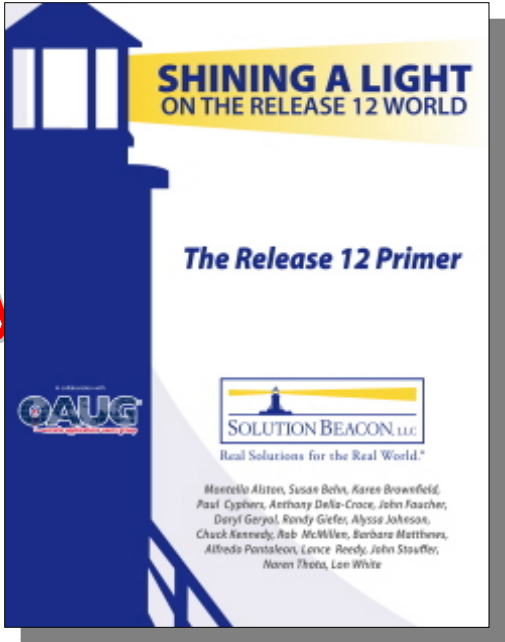
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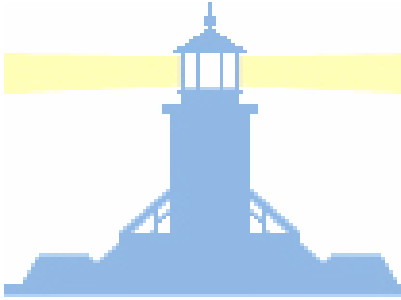
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# Questions and Answers

Thank You!

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