Evosys • Live

Advisory Webinar

22B – Supply Chain Management (INV/OM)

Empowering you for the next update

Value Based Delivery | ORACLE Partner | Evosys Glide On-Prem to Cloud Transformation

Host: Hardik Patel
Operations Manager – Managed Services

Speakers: Charmi Agarwal
Centre of Excellence
Cloud Supply Chain

Evosys
A Mastek Company

Oracle's Global Partner of Year (2017, 2019)

Featured in Gartner MQ for Oracle Cloud (2019, 2020)

These advisory webinars are organized to equip you with the latest updates. The content of this session is based on the interpretation of the material and documentation that Oracle has released and is a general guideline/recommendation only.

Disclaimer

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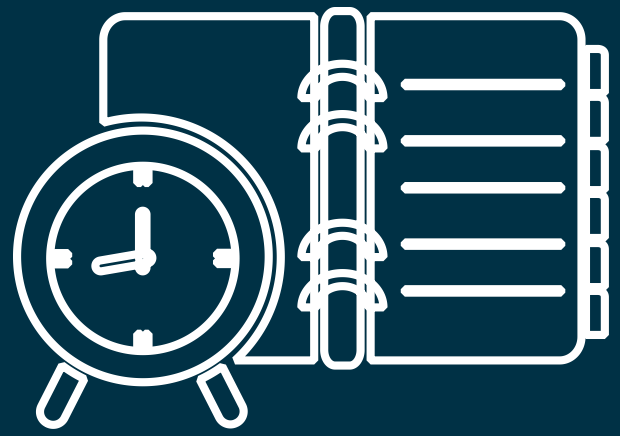
Oracle's Global Partner of Year (2017, 2019)

Featured in Gartner MQ for Oracle Cloud (2019, 2020)

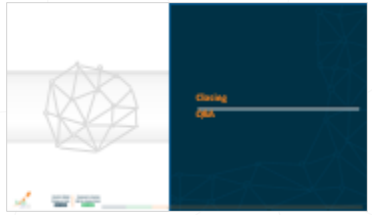
AGENDA



- Our Approach to Oracle Update

- Our Analysis of Latest Release
  - New Features

- Closing
  - Q&A



Oracle's Global Partner of the Year

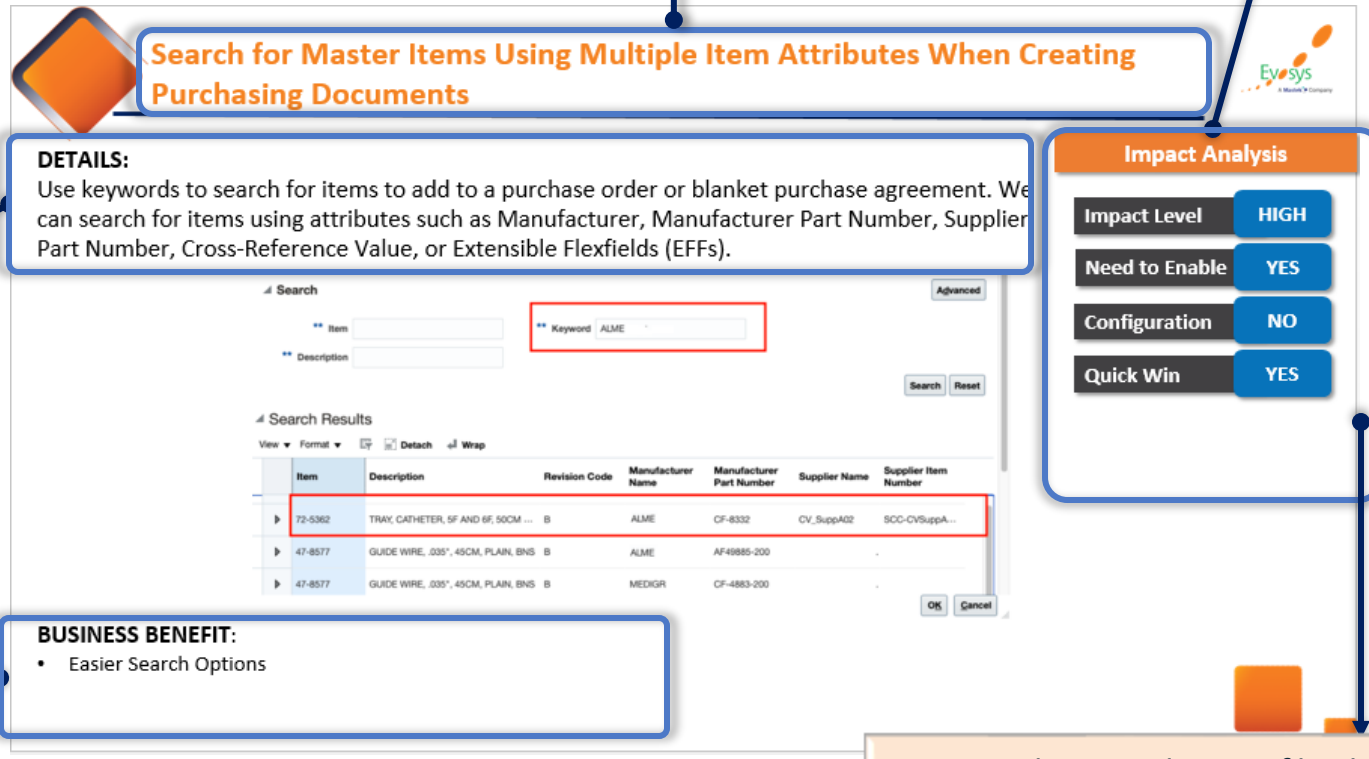
How to read each feature summary?

New Feature Introduced in latest release by Oracle

Short Description of the New Feature

Business Benefits realized from the New Feature

Evosys Feature Analysis for Your Business



Evosys Impact Study on Potential Impact to users for using new feature
LOW: *No large scale impact. Regression testing can be ignored.*
HIGH: *Needs to be part of the regression testing.*

NO : *Already enabled and ready to use with some or no configuration*
YES: *Need to opt-in to use the feature.*

YES: *Need minimal time of both parties to make use of the feature.*
NO : *Need significant amount of time and effort to make use of the feature.*

YES*: Configuration set up needed to use new feature.*
NO*: User can use the feature by default with no change needed.*

Our Analysis of Latest Release New Features

Evosys Analysis- Statistics

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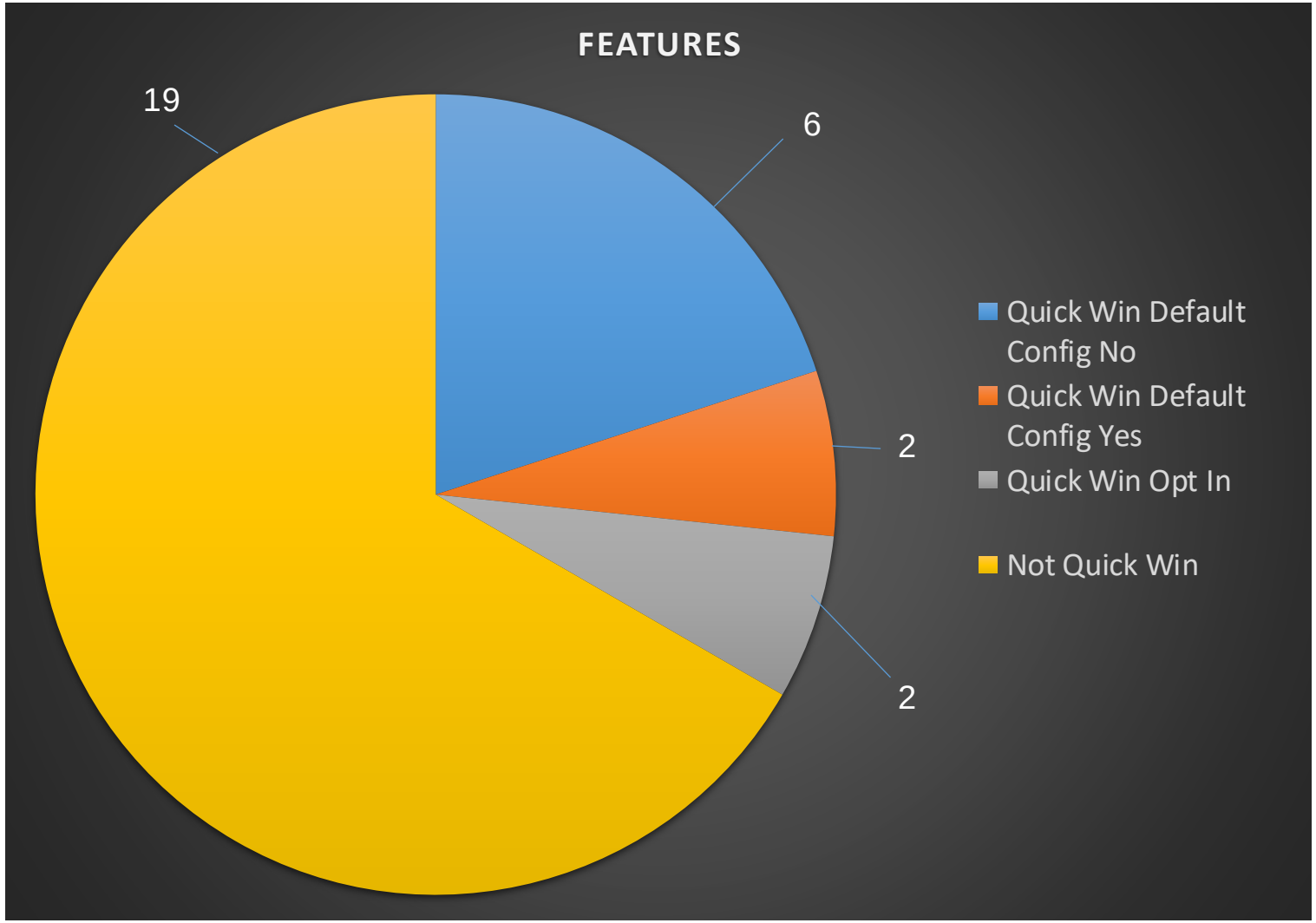
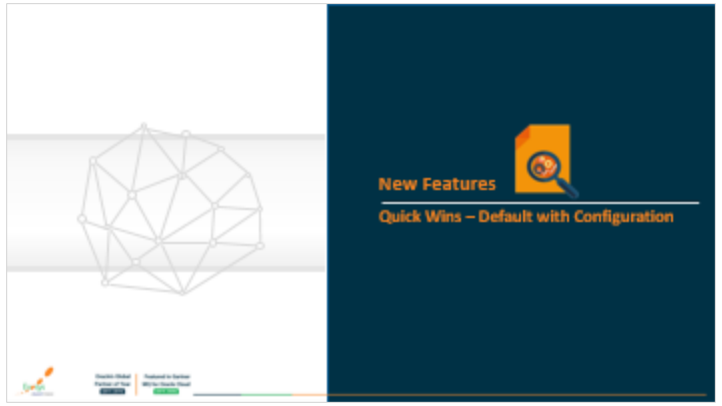
Cloud SCM New Features



Evosys Analysis



New Features

Quick Wins – Default with No Configuration

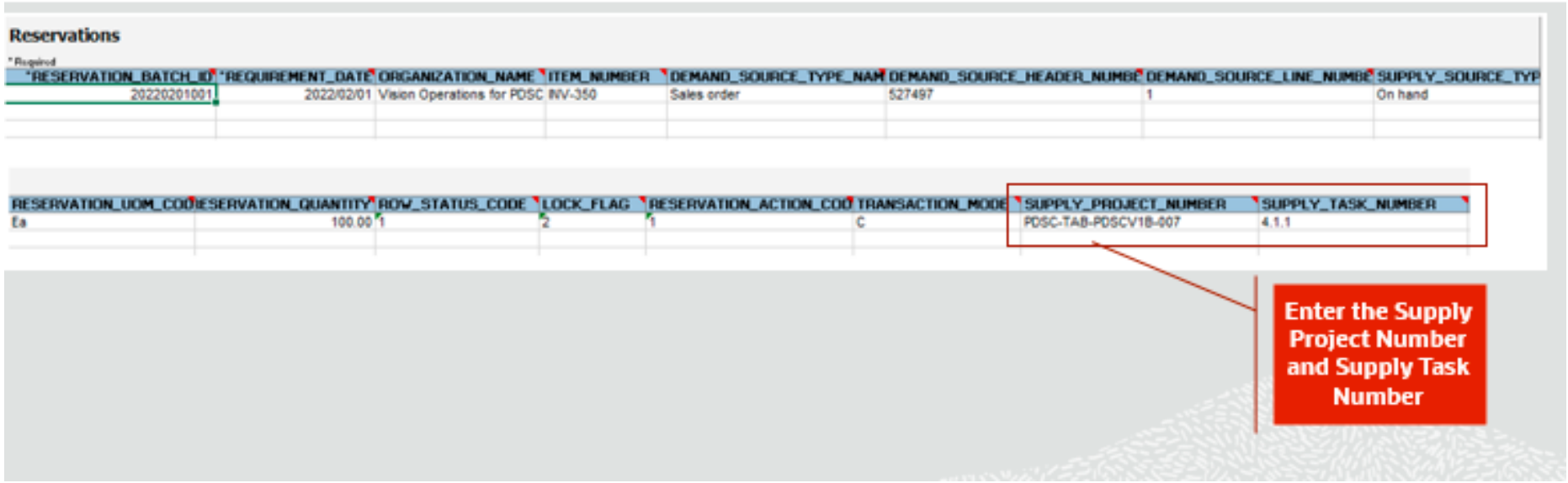
Reserve Common Inventory for Project Orders using Inventory Reservation FBDI

Details:

When using the Inventory Reservation file-based data import (FBDI) template to create project-based order reservations in bulk, you need the ability for these reservations to consider your common on-hand balance. Previously, when importing reservations using the FBDI template, the reservations process only considered on-hand material for the exact designation provided. This meant that a reservation for a project-based demand never considered your common on-hand balance for that material even if you enabled the use of common material.

Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	NO
Quick Win	YES



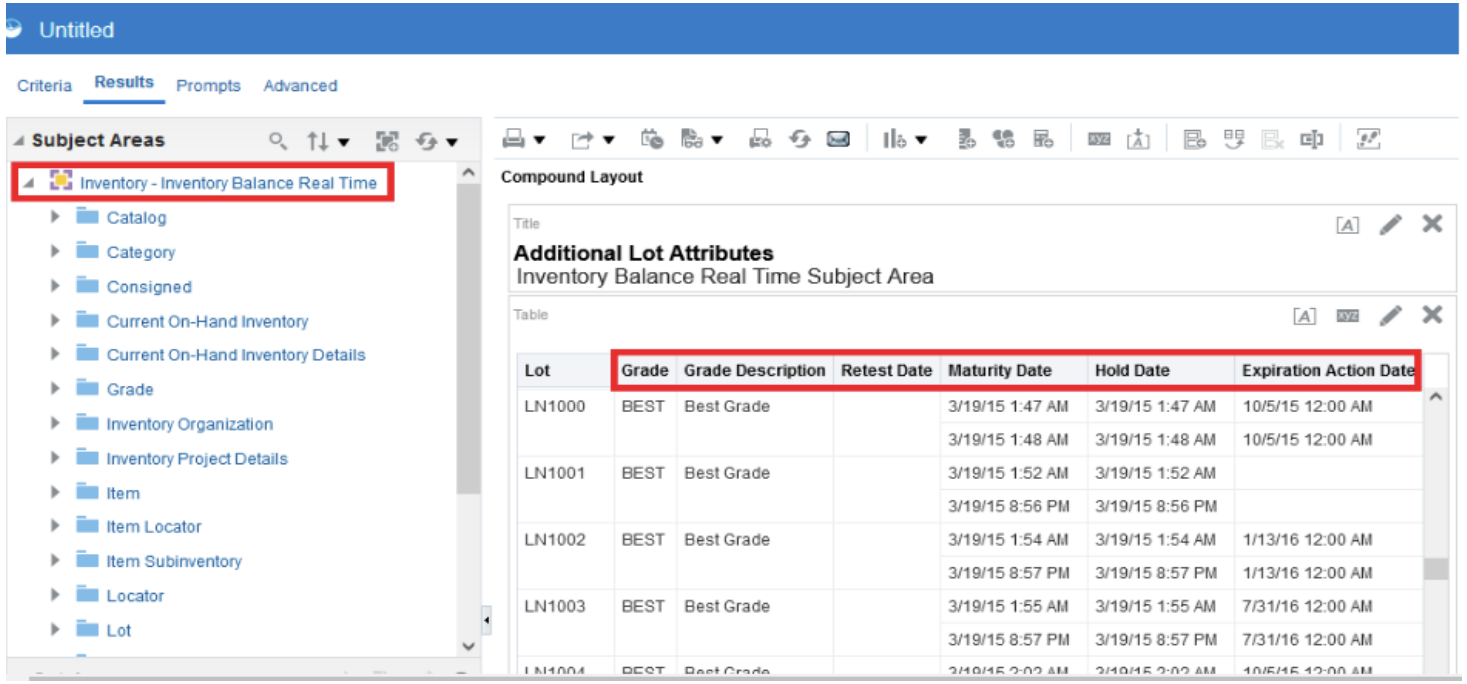
Business Benefit:

- Better Planning of Stock

View Additional Lot Columns in the Inventory Subject Areas in OTBI

Details:

Oracle Transactional Business Intelligence (OTBI) lets you create ad-hoc reports using real-time transactional data from Oracle Fusion Cloud Inventory Management to monitor your materials management processes. In this update, the **Grade**, **Grade Description**, **Retest Date**, **Maturity Date**, **Hold Date**, and **Expiration Action Date** columns are now available in the **Lot** dimension of the Inventory Balance Real-Time and Inventory Transactions Real-Time subject areas.



Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	NO
Quick Win	YES

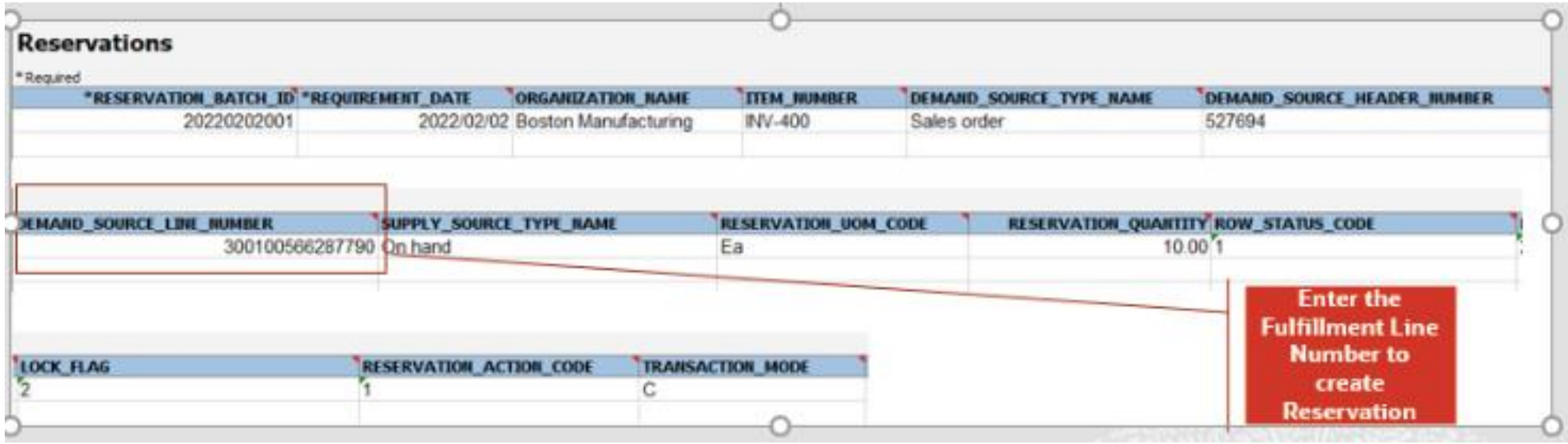
Business Benefit:

- Better Reporting options

Reserve Unreleased Orders using FBDI

Details:

Unforeseen emergencies or natural disasters can generate demand spikes that quickly drive your on-hand quantities well below what's required to meet demand, or possibly even down to zero. When this happens, you need a way to reserve supply for priority orders before releasing the order to your warehouse. Previously, you had to create these reservations manually using the Manage Reservations and Picks page, but now you can create these reservations using the file-based data import process.



Impact Analysis

Impact Level	MED
Need to Enable	NO
Configuration	NO
Quick Win	YES

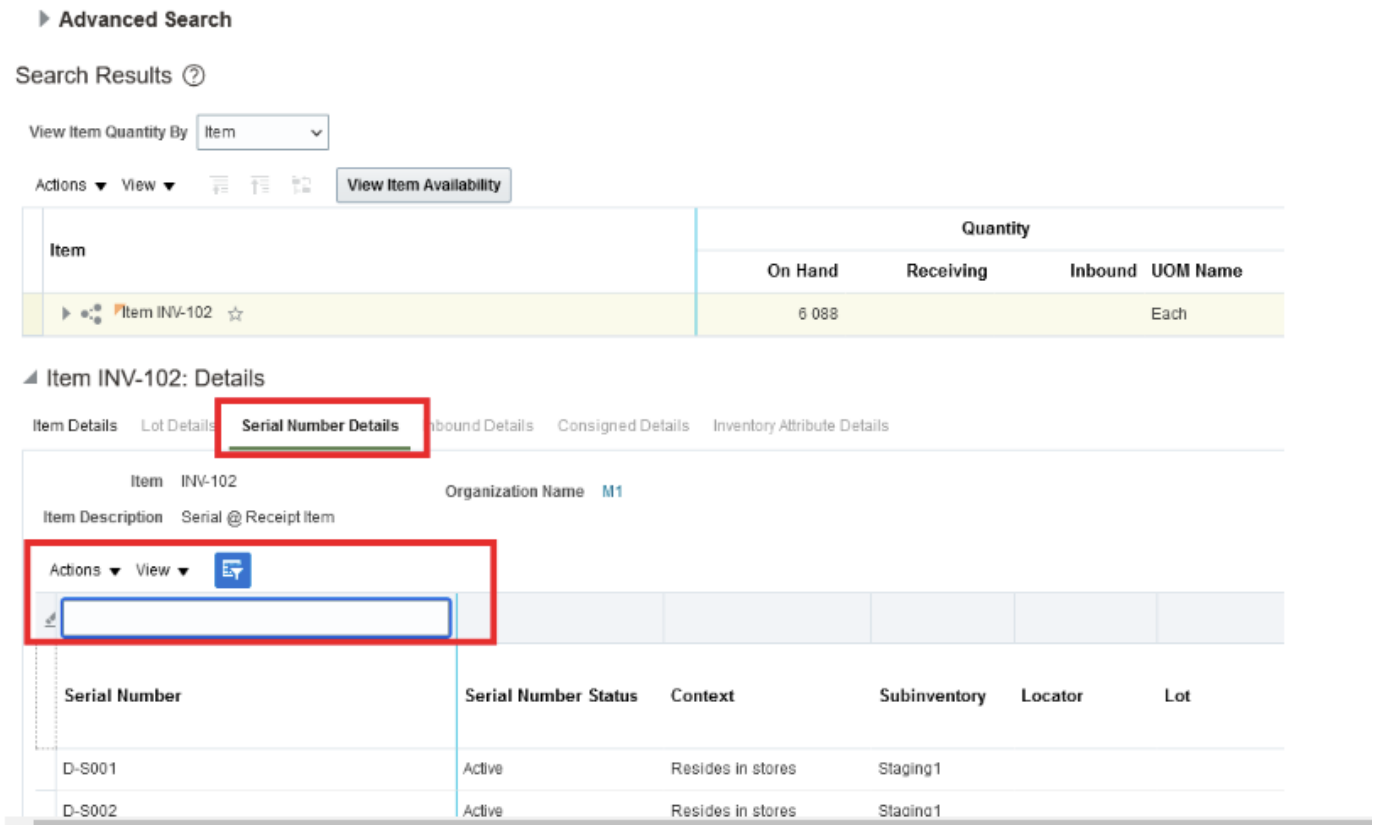
Business Benefit:

- Better Stock Planning

Use Query by Example to Search Serial Number in Manage Item Quantities

Details:

When reviewing your on-hand quantities using the Manage Item Quantities page, you need an efficient way to find and verify a specific serial number's details. Now, after performing your search in the Manage Item Quantities page, you can use query by example within the Serial Number Details tab to quickly and easily find a specific serial number.



Business Benefit:

- Better User Experience

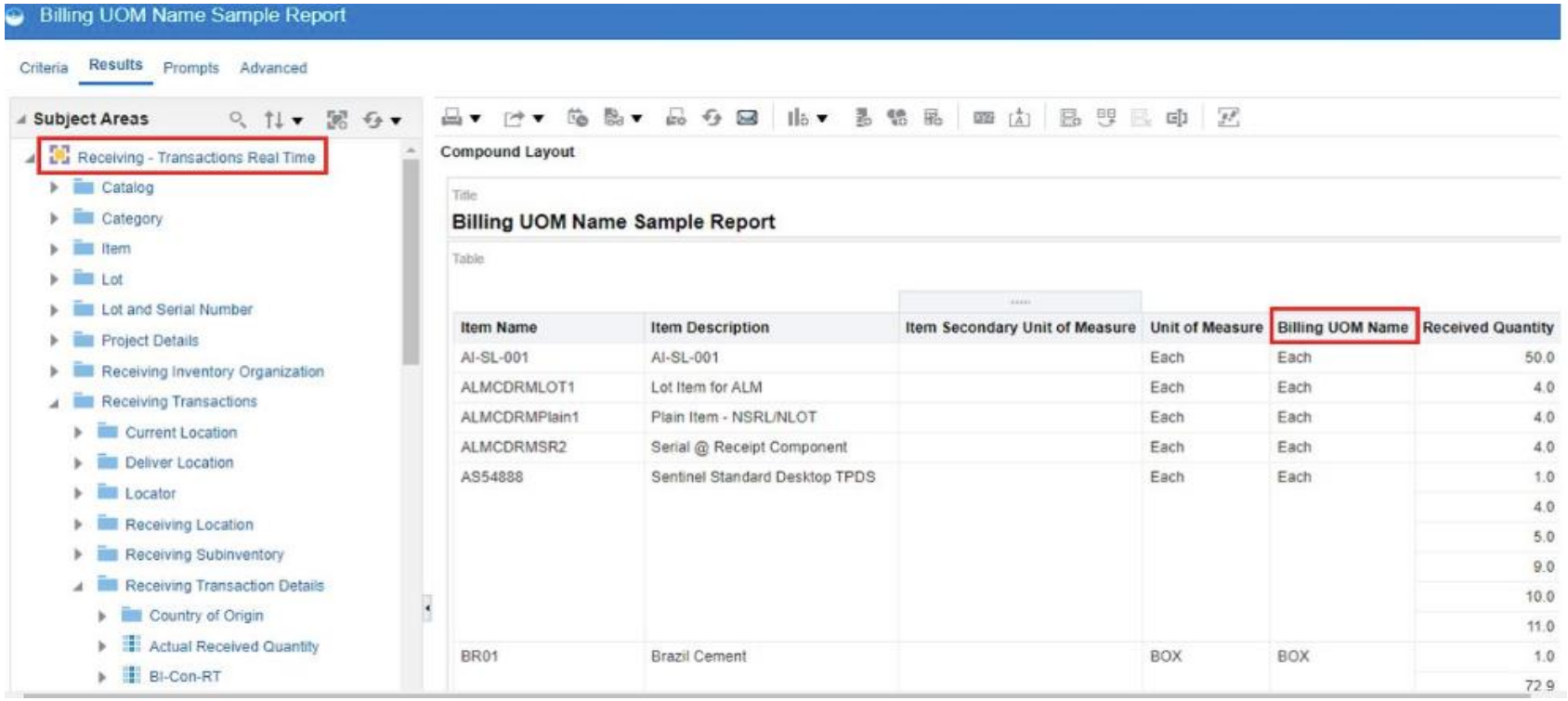
Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	NO
Quick Win	YES

View Billing UOM Name Column in Receiving Transactions Subject Area in OTBI

Details:

Oracle Transactional Business Intelligence (OTBI) lets you create ad-hoc reports using real-time transactional data from Oracle Fusion Cloud Inventory Management to monitor your materials management processes. In this update, the **Billing UOM Name** column is now available in the **Receiving Transactions Details** dimension of the Receiving Transactions Real-Time subject area.



Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	NO
Quick Win	YES

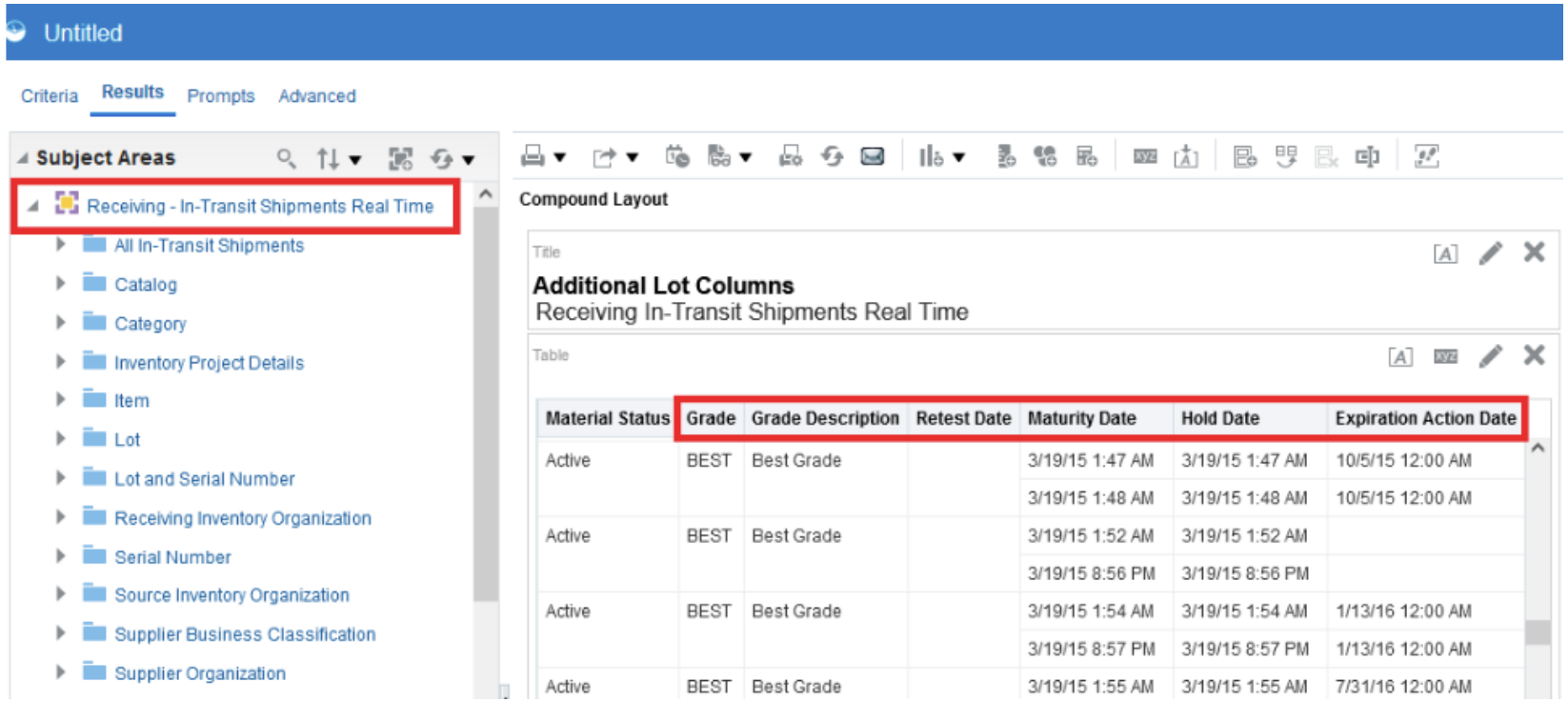
Business Benefit:

- Better Reporting options

View Additional Lot Columns in the Receiving Subject Areas in OTBI

Details:

Oracle Transactional Business Intelligence (OTBI) lets you create ad-hoc reports using real-time transactional data from Oracle Fusion Cloud Inventory Management to monitor your materials management processes. In this update, the **Grade**, **Grade Description**, **Retest Date**, **Maturity Date**, **Hold Date**, and **Expiration Action Date** columns are now available in the **Lot** dimension of the following receiving subject areas



Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	NO
Quick Win	YES

Business Benefit:

- Better Reporting options

New Features

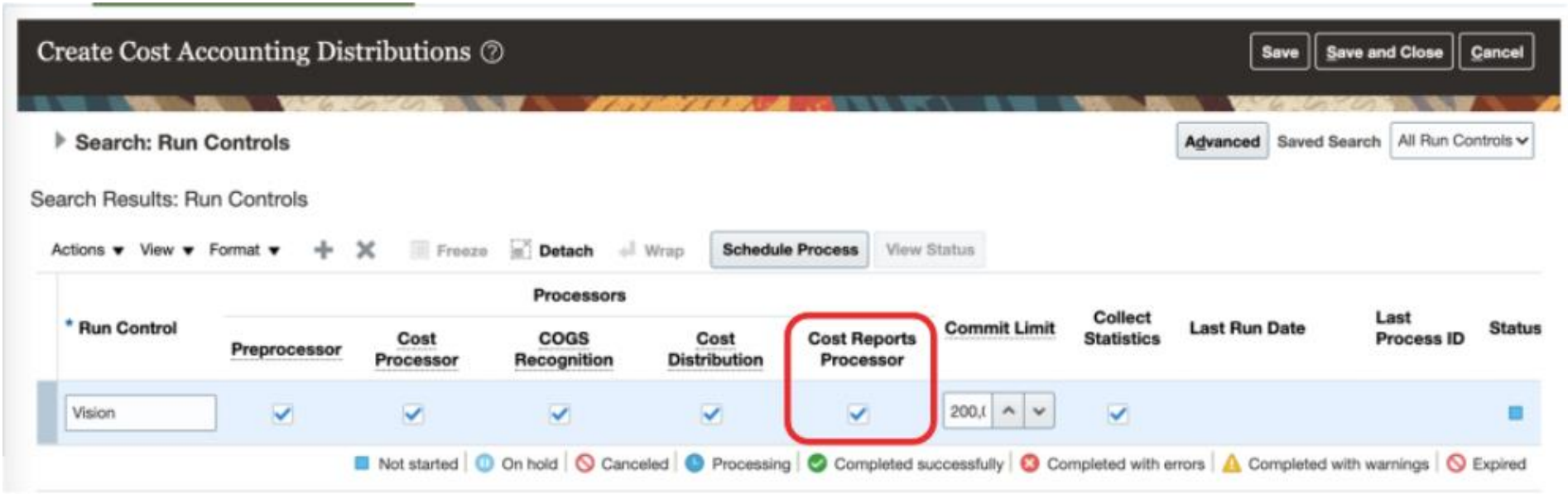
Quick Wins – Default with Configuration

Use the New High-Volume Inventory Valuation Subject Area in OTBI

Details:

Use the high-volume inventory valuation subject area in OTBI for your analytics if your business has huge volume of inventory transactions. With this subject area, you can get insights into the inventory value of your business by the period to identify key metrics.

To use the high-volume inventory valuation subject area, make sure you are running Cost Reports Processor when you run the Create Cost Accounting Distributions process. To run the Cost Reports Processor, select the Cost Reports Processor check box in your run control.



Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	YES
Quick Win	YES

Business Benefit:

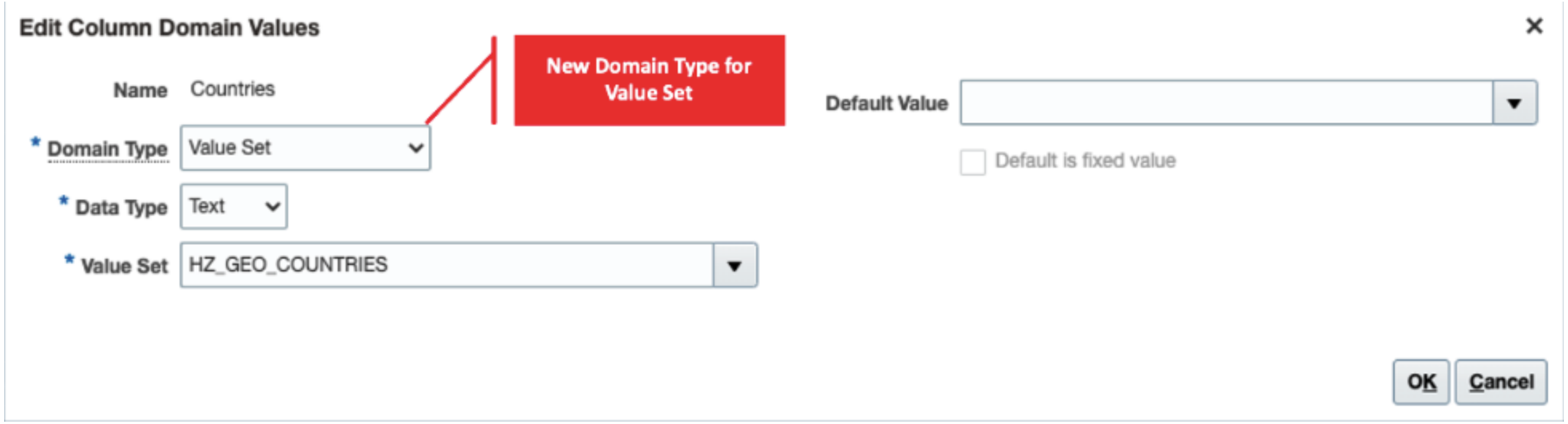
- Better Reporting Options

Specify a Value Set for the Domain Type in Your Matrix Class

Details:

Get values for an attribute on a pricing matrix according to a value set. Use the Domain Type attribute in a pricing matrix or matrix class to specify the value set. You can set the Validation Type attribute on the value set to Independent, Dependent, Subset, or Table.

Before this release, if you create a matrix rule that prices according to an attribute, you had to use values from a lookup, view object query, your own list, or an item extensible attribute



Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	YES
Quick Win	YES

Business Benefit:

- Choose from wider range of attributes

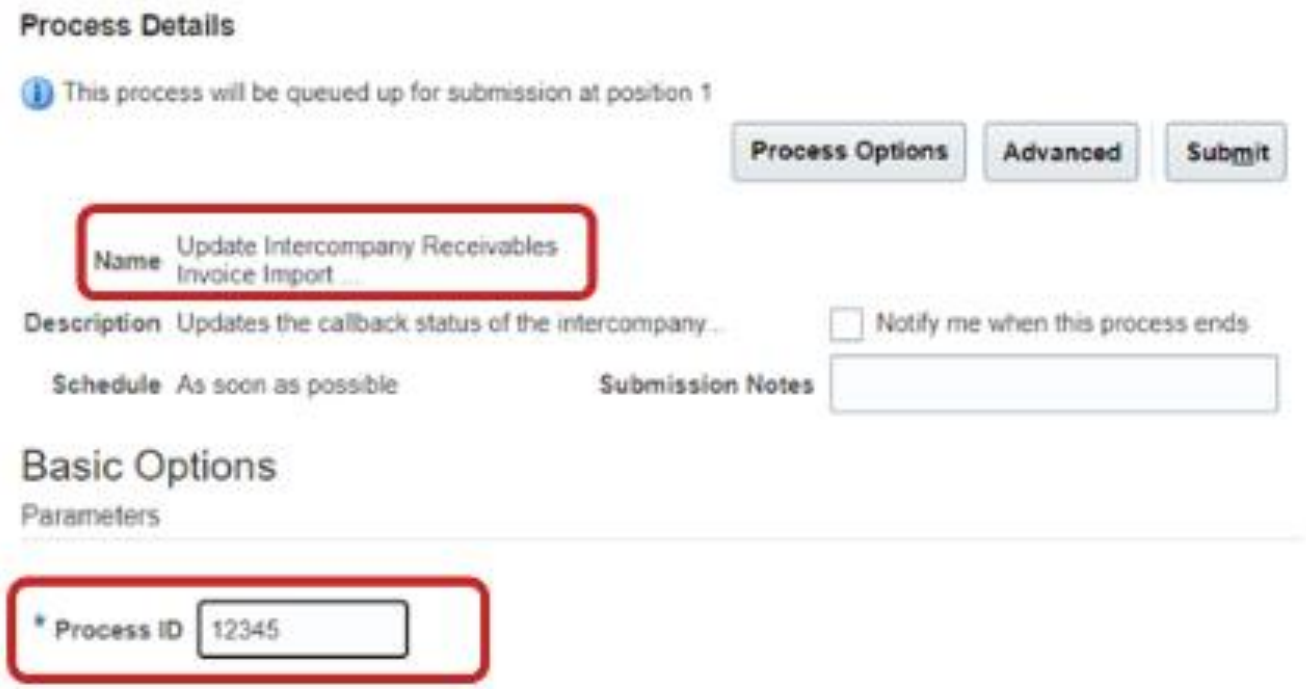
New Features

Quick Wins – opt ins

Update the Import Status of Intercompany Receivables Invoices Using an Enhanced Scheduled Process

Details:

The existing Import Autoinvoice scheduled process is enhanced to perform better while processing the intercompany invoices. The Import Autoinvoice scheduled process automatically triggers the new Update Intercompany Receivables Invoice Import Details request to import the latest invoice data from Receivables and update the financial orchestration tasks.



Impact Analysis

Impact Level	LOW
Need to Enable	YES
Configuration	YES
Quick Win	YES

Business Benefit:

- Better Processor

High-Volume Order Promising

Details:

Order promising is a critical business process that must scale with demand and continue to operate even if hardware failures occur. Recent changes to Oracle Fusion Cloud Global Order Promising provide a scale-out architecture for availability checking and scheduling requests across a horizontal grid, enhancing capacity and resilience. The new architecture also reduces operational overhead, making supply and reference data updates immediately available, and eliminating the need to refresh/restart the order promising server.

Impact Analysis

Impact Level	LOW
Need to Enable	YES
Configuration	YES
Quick Win	YES

Business Benefit:

- Efficient Processor

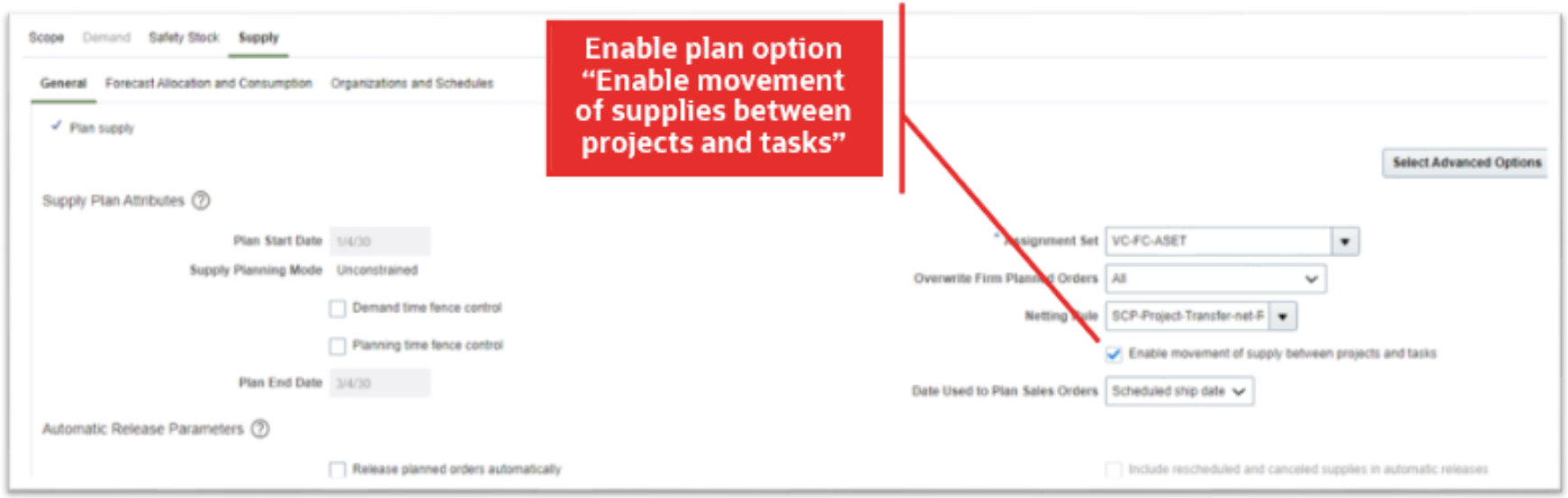
New Features

Not Quick Wins

Release Recommendations for Transfers of Project Supplies

Details:

In a variety of project-driven enterprises, only a subset of supplies of an item can be used to satisfy the demand for that item. The typical approach is to dedicate supplies to projects or tasks by striping the supplies and demands by project and task attributes.



Impact Analysis

Impact Level	MED
Need to Enable	YES
Configuration	NO
Quick Win	NO

Business Benefit:

- Better Planning

Use the Inventory Attribute Transaction Requests Rest Resource

Details:

Changes in project demands or schedules can leave you with unbalanced supply across your projects. If you're using an external project planning system that recommends reallocating your goods across projects to ensure you meet your project deadlines, you need the ability to quickly adjust the project designation of your on-hand balances. Now, you can use the Inventory Attribute Transaction REST resource to update the project and task assignments for your on-hand goods.

Impact Analysis

Impact Level	MED
Need to Enable	YES
Configuration	YES
Quick Win	NO

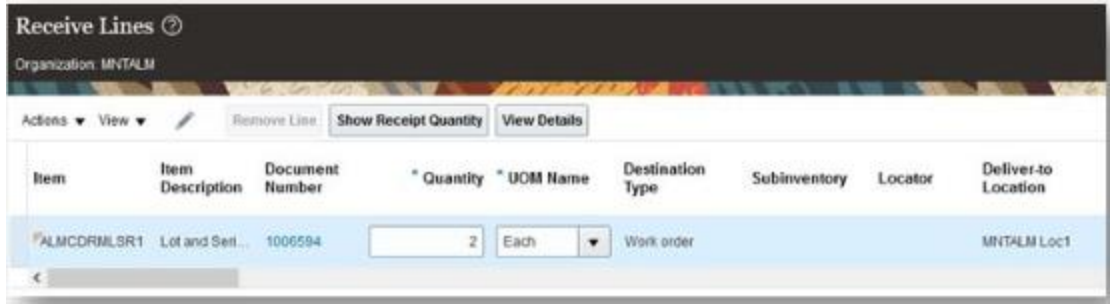
Business Benefit:

- Improved Integration

Capture Lot and Serial Numbers for Work Order Destination Receipts

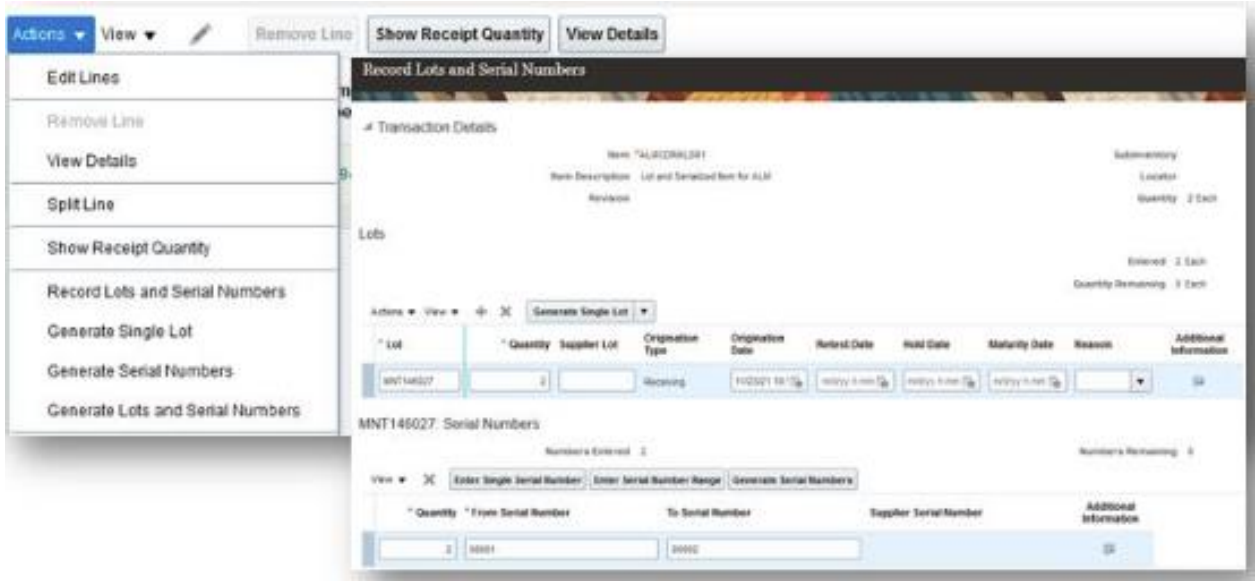
Details:

When receiving goods procured for a specific work order, there are instances when you need the ability to capture specific lot and serial information for those goods. For instance, while performing repairs on a piece of company equipment that is asset-tracked, you realize that a major component needs to be replaced. You submit a purchase requisition and indicate that the goods are specifically for the work order you are using to perform the repairs.



Impact Analysis

Impact Level	MED
Need to Enable	NO
Configuration	YES
Quick Win	NO



Business Benefit:

- Better Identification of Goods

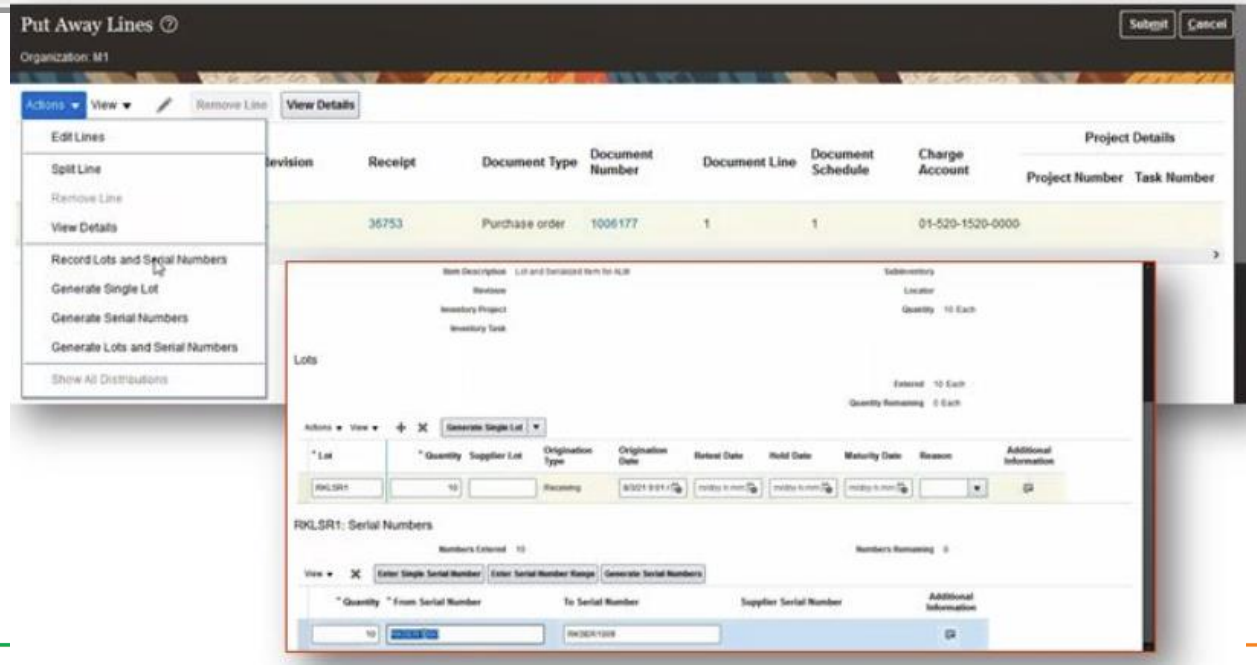
Capture Lot and Serial Numbers for Expense Destination Receipts

Details:

When receiving an expense-based purchase, there are times when you need to capture a good's lot or serial number information. For instance, when you procure a new forklift for your warehouse that you'll retain on your balance sheet as an enterprise asset for accounting purposes. Now, you have the ability to capture a good's lot or serial number information for expense destination receipts during put away for standard and inspection-based receipts.

Impact Analysis

Impact Level	MED
Need to Enable	NO
Configuration	YES
Quick Win	NO



Business Benefit:

- Better Identification of Goods

Allow Changes to Locator Settings on Inventory Organizations That Have a No Locator Control Setting

Details:

Enable changes to locator settings on inventory organizations that are set to have no locator controls. For existing inventory organizations that have no locator control settings, you can now update the settings to change the locator control to be determined at the subinventory level. Existing subinventories aren't altered and can't have their locator control changed. Only new subinventories created in the organization can use the new locator controls.

Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	YES
Quick Win	NO

Business Benefit:

- Better Identification of Goods

Use Sales Order Line Close Date as the COGS Recognition Transaction Date

Details:

If you use a third-party billing system and rely on a proof of delivery, or a similar event, to recognize revenue and cost of goods sold, you can use the new profile option to use the order line closed date as the date for cost of goods sold recognition for Ship Only sales orders. Ship-only orders are marked as such, have no billing information, and normally have a wait task for the proof of delivery confirmation. Once the proof of delivery is received, the sales order line is closed.

Impact Analysis

Impact Level	MED
Need to Enable	NO
Configuration	YES
Quick Win	NO

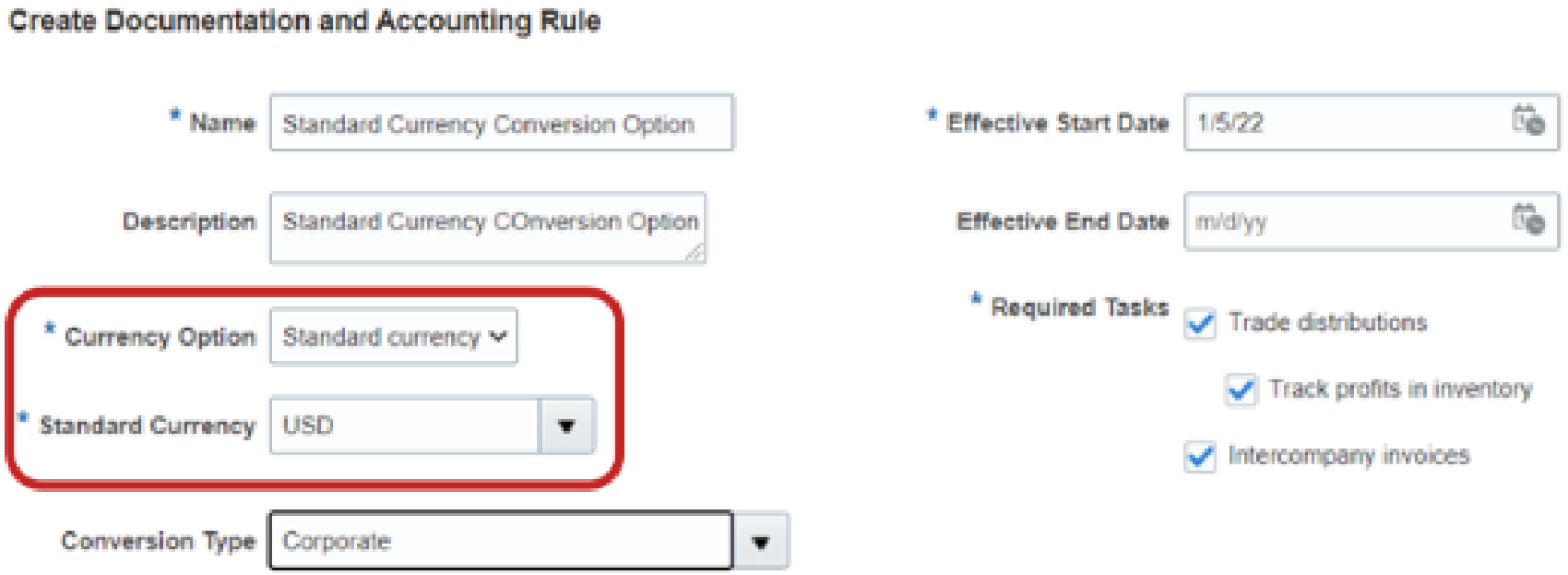
Business Benefit:

- Better Identification of Goods

Configure a Standard Currency as a Pricing Basis for Intercompany Flows

Details:

You can now configure the documentation and accounting rules to generate intercompany invoices in a standard currency, irrespective of the local currency, as you can do with this additional Standard Currency option



Impact Analysis

Impact Level	MED
Need to Enable	NO
Configuration	YES
Quick Win	NO

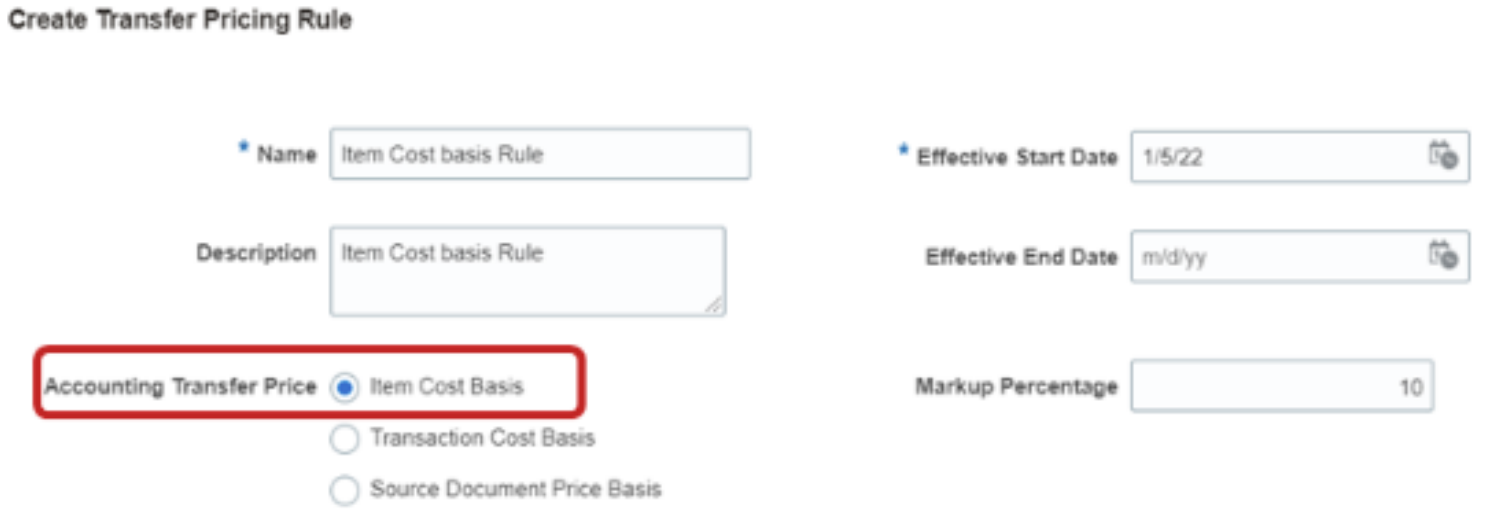
Bus

- Improves Standardization

Use the Current Item Cost as a Pricing Basis for Intercompany Transactions

Details:

Process the intercompany transactions based on the item's current cost by setting the transfer price to Item Cost Basis in the transfer pricing rule. At the time of shipment, the item cost will be considered for transfer price calculations in the intercompany transactions.
On the Manage Transfer Pricing Rules page, click Actions and select one of the options to create, insert, or correct a record. In the dialog that opens, set the Accounting Transfer Price to Item Cost Basis.



Impact Analysis

Impact Level	MED
Need to Enable	NO
Configuration	YES
Quick Win	NO

Business Benefit:

- Improves Standardization

Keep the Dates for your Sales Orders and Purchase Orders Synchronized

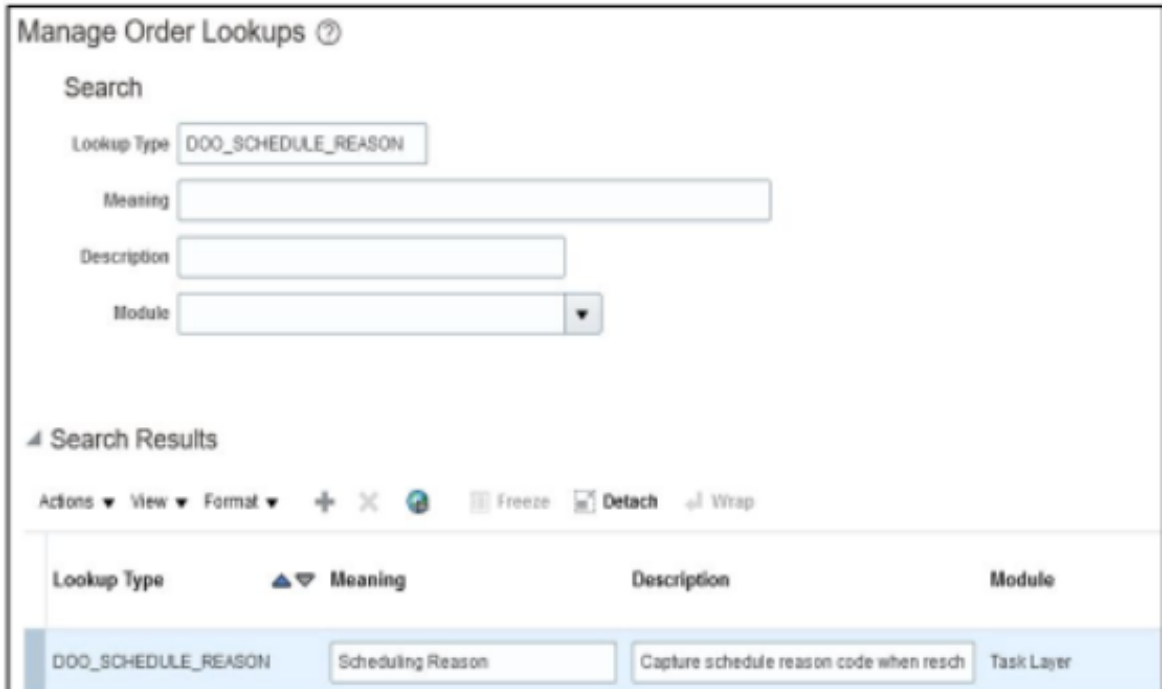
Details:

Use this feature to keep the dates on your sales order synchronized with the dates on the purchase order. If you update the shipment date, delivery date, or shipment method on a purchase order that you manually create or on an open purchase order that you revise, then this feature automatically updates these values on the sales order line and adds the reason for the change on the sales order line.
It applies to these types of items:

- Standard
- Pick-to-order
- Assemble-to-order
- Items that are part of a shipment set or kit

Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	YES
Quick Win	NO



Business Benefit:

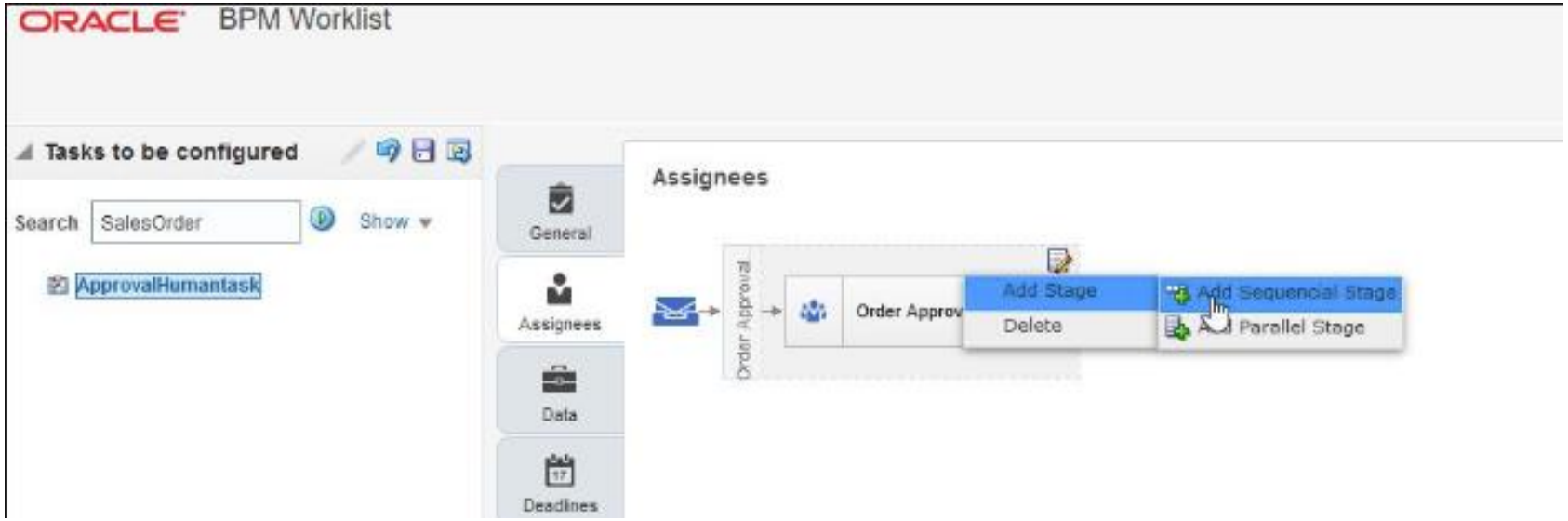
- Better Planning

Send Parallel Approval Requests for Sales Orders

Details:

Send an approval request in parallel to more than one approver at the same time. In order to handle complex approval routing requirements, you can also set up multi-stage approval routing, with a mix of sequential and parallel stages and participants.

You can also use voting percentages to determine approval outcome based on the response from the first person who replies to the approval request or to drive order approval based on a consensus of responses from approvers.



Impact Analysis

Impact Level	MED
Need to Enable	NO
Configuration	YES
Quick Win	NO

Business Benefit:

- Better Planning

Order Management Bug Fixes

Details:

Enable Your Items for Customer Orders

Starting in update 22B, when you import a sales order using any method except a REST API, Oracle Fusion Cloud Order Management validates that the Customer Ordered attribute and the Customer Orders Enabled attribute are set to Yes for the item. It does this for each item on each order line in your sales order. (Prior to update 22B, Order Management already does this validation when you import orders using a REST API.)

Impact Analysis

Impact Level	MED
Need to Enable	NO
Configuration	YES
Quick Win	NO

Business Benefit:

- Better Management

Use REST API to Update Project Attributes on Transfer Orders

Details:

Use this feature to update the project attributes on a transfer order that you import through the Supply Requests REST API resource. By doing so, you can:

- Maximize how you use excess supply for transfer orders that do or don't include project details.
- Minimize the cost of carrying excess inventory.

Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	YES
Quick Win	NO

Business Benefit:

- Easy Update of Information

Use File-Based Data Import to Update Project Attributes on Transfer Orders

Details:

Use this feature to update the project attributes on a transfer order that you import through file-based data import. When you do so, you can:

- Maximize how you use excess supply for transfer orders that do or don't include project details.
- Minimize the cost of carrying excess inventory.

Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	YES
Quick Win	NO

Business Benefit:

- Easy Update of Information

Release Recommendations for Purchase Orders that don’t Originate from Oracle Supply Planning

Details:

Your enterprise may allow your users or other systems to generate purchase orders in Oracle Fusion Cloud Procurement outside the planning process that Oracle Fusion Cloud Supply Planning enables. Previously, these purchase orders were collected and accounted for in the planning process, but the reschedule or cancel recommendations released from the planning work area weren't processed in Oracle Fusion Cloud Purchasing.

Impact Analysis

Impact Level	MED
Need to Enable	NO
Configuration	YES
Quick Win	NO

Supply Chain Planning > Supply Planning > Manage Plans > Open > Supplies and Demands

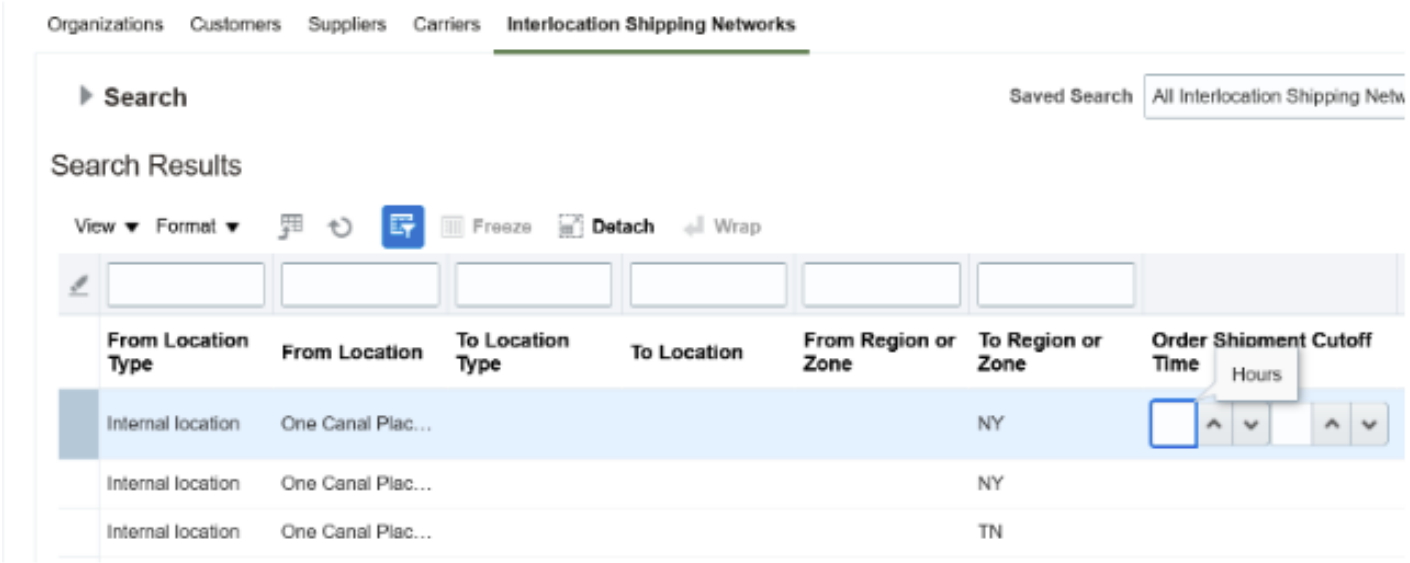
Business Benefit:

- Better Planning

Control Shipment Cut-Off Times by Carrier and Destination

Details:

The last carrier pickup time for a transit mode and route may take place before an order is received making it infeasible to ship on the current date. Oracle Fusion Cloud Global Order Promising compares the current time with the cutoff time specified for the carrier and destination within the shipping organization. If the current time is later than the cutoff time, then Oracle Global Order Promising sets the shipment date to the next open day in the organization's shipment calendar for the selected carrier to the customer's location.



Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	YES
Quick Win	NO

Business Benefit:

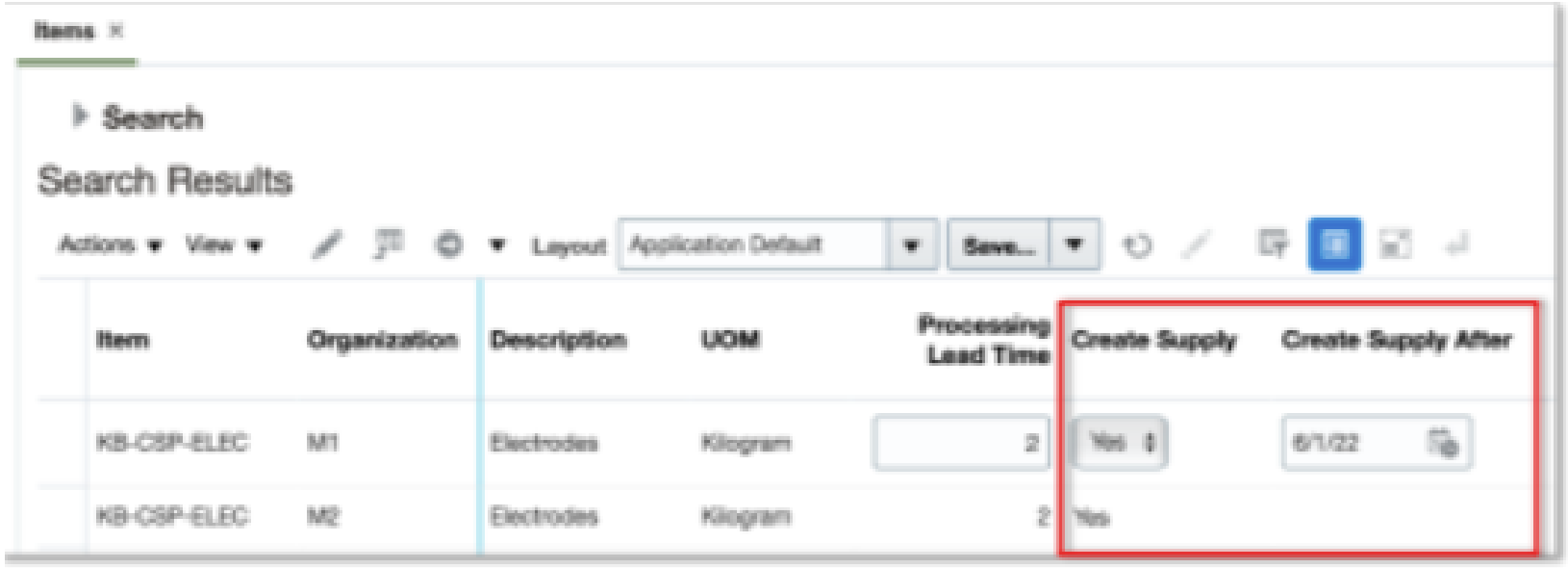
- Better Planning and Management

Create New Supplies Based on Earliest Date Constraint

Details:

In some industries, such as healthcare, there may be situations, such as a temporary product recall, where no new orders can be placed on a supply location until a specified date. With this update, Oracle Fusion Cloud Supply Planning honors the business requirement of creating new supply order recommendation only after the date.

You can configure each product's earliest supply creation date using the new **Create Supply After** attribute.



Impact Analysis

Impact Level	MED
Need to Enable	NO
Configuration	YES
Quick Win	NO

Business Benefit:

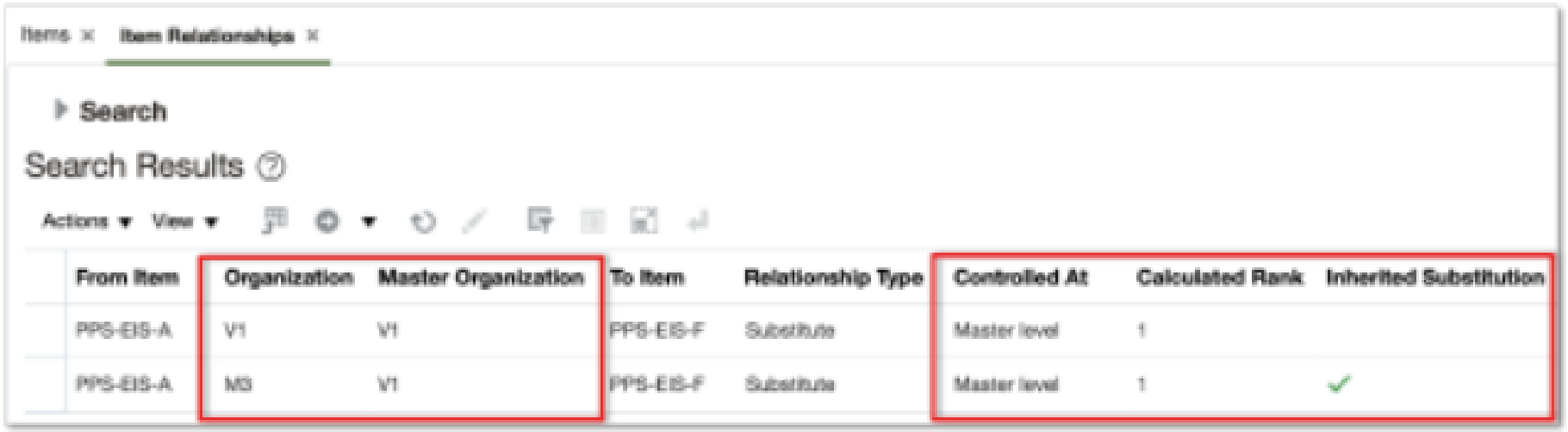
- Better Planning and Management

Respect Organization-Specific Item Substitution Rules

Details:

In a variety of industries, it's desirable to substitute an ordered item with an equivalent item when there's a shortage. Previously, you could set up end-item substitution rules globally only in the master inventory organization. With this update, you can set up more granular substitution rules for individual inventory organizations.

In this update, the Item Relationships table is enhanced to display the attributes of Organization, Master Organization,and Rank.



Impact Analysis

Impact Level	MED
Need to Enable	NO
Configuration	YES
Quick Win	NO

Business Benefit:

- Better Execution of tasks

Plan Counter Sales Orders

Details:

In industries such as wholesale distribution, some orders are fulfilled immediately from stock on hand, also known as counter sales. To improve the overall user experience associated with capturing transactions related to this fulfillment mode, Oracle Fusion Order Management Cloud now provides the ability to fulfill these orders without requiring picking and shipping transactions.

Order Management > Manage Orders > Fulfillment Line View

Business Benefit:

- Better Plannning

Impact Analysis

Impact Level	MED
Need to Enable	NO
Configuration	YES
Quick Win	NO

Support Alternate Resources and Substitute Components in Primary Work Definitions

Details:

Some plants may have multiple resources that can perform the same job. If the primary resource isn't available, the manufacturing work definition may identify one or more alternates. Capable-to-promise requests based on bills of resources will check availability and schedule production using these alternates when needed.

A work definition may also specify an alternate component or material to be used to produce an end item. If the primary component doesn't meet demand on time, capable-to-promise requests based on bills of resources will now check the availability of alternates and schedule the alternative that reduces delay the most.

Impact Analysis

Impact Level	MED
Need to Enable	NO
Configuration	YES
Quick Win	NO

Business Benefit:

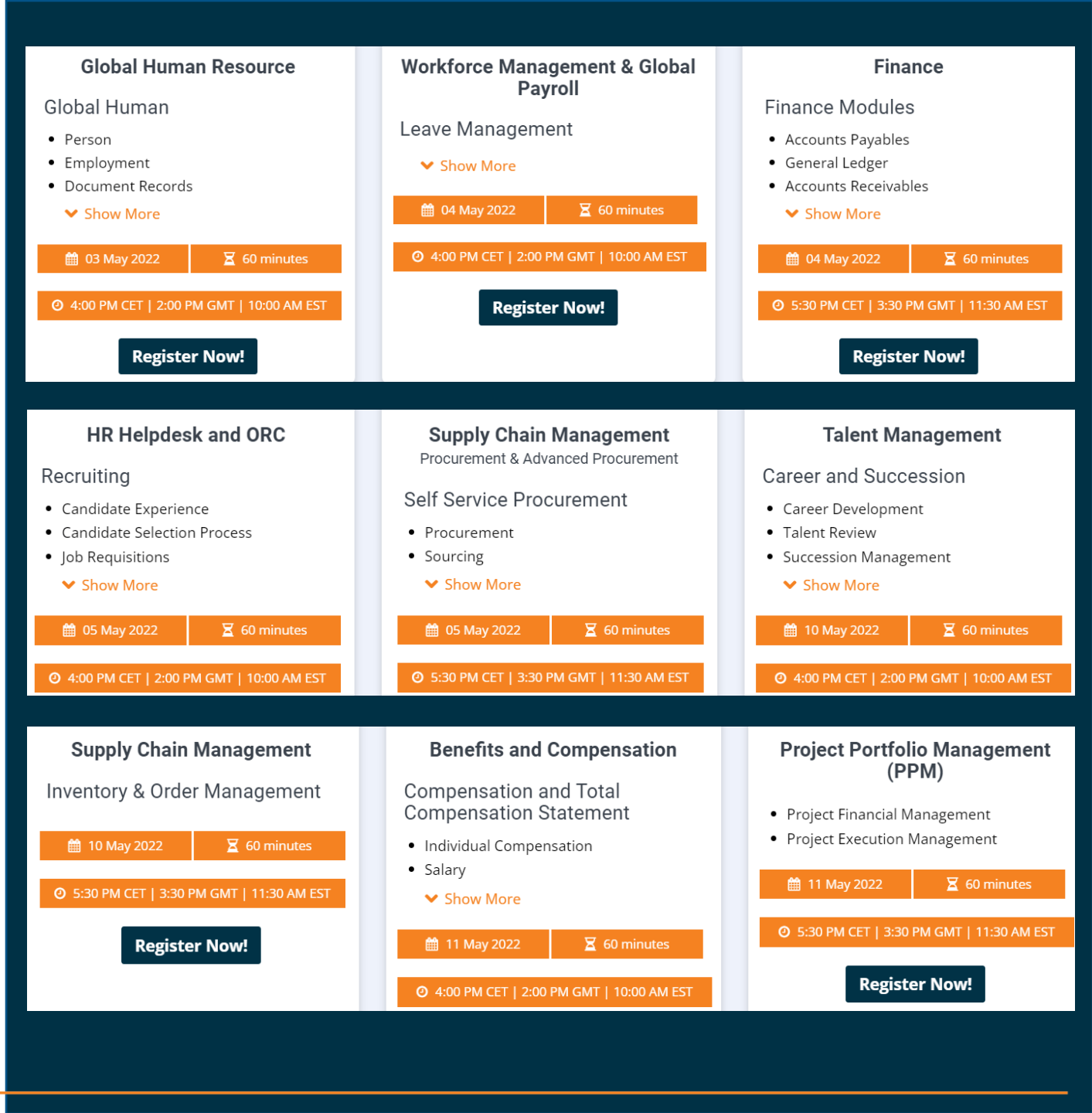
- Better Planning

Closing

Q&A

Closing Note

1. What happens next?
    1. Presentation
    2. Session Recording
2. Feedback Form
3. Speak with your Project Manager or business@evosysglobal.com
    1. for additional services around quarterly updates
    2. Learn more about Innovation
4. Next Sessions



EVOSYS is here to help you!

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It is always best to clear your doubts

Thank You!

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