

OTM USER CONFERENCE 2017

Loews Philadelphia Hotel
August 6-9, 2017
Philadelphia, PA



OTM SIG
Oracle OTM User Group

Know more on Order, Shipment & Invoice modification agents



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TECHNOLOGIES

OTM USER
CONFERENCE
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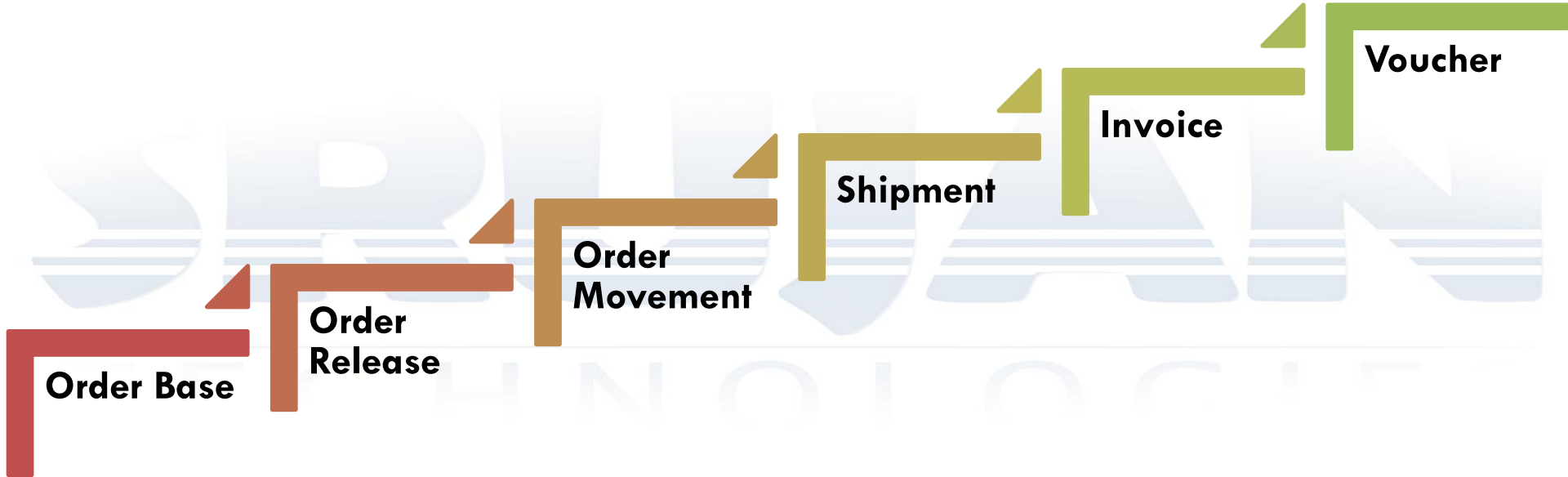
Agenda

- OTM Objects
- OTM Agent Actions
- Business Scenarios
- What's New?

Agenda

- OTM Objects
 - OTM Agent Actions
 - Business Scenarios
 - What's New?
- 
- OTM Objects
 - Update Dependencies

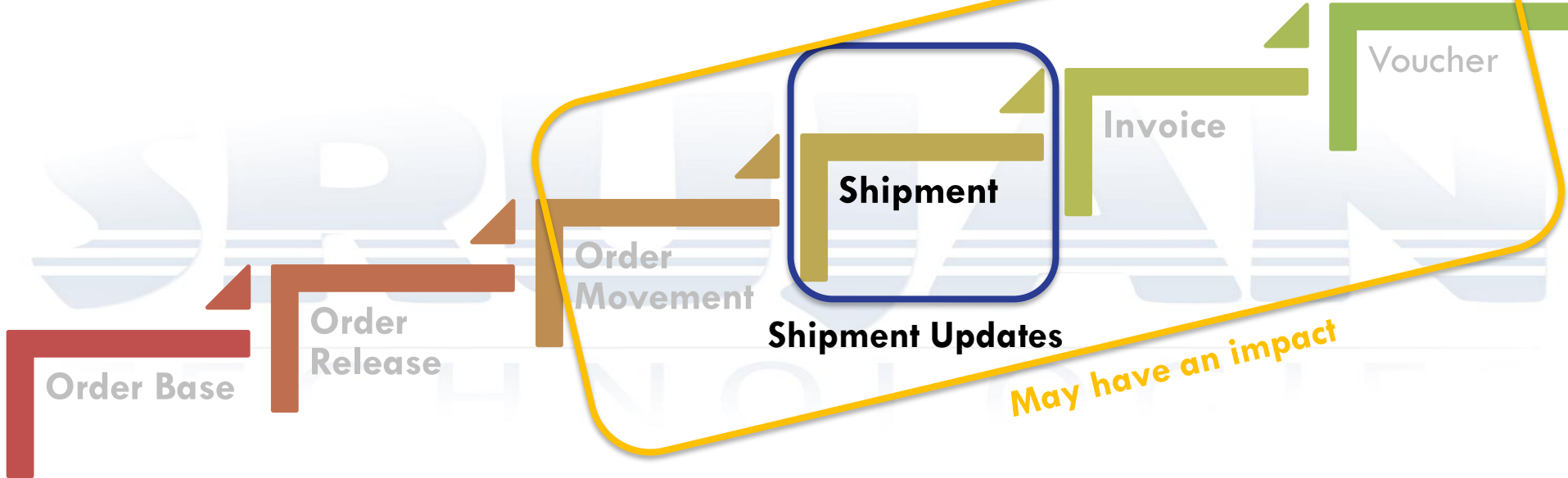
OTM Objects Hierarchy



OTM Objects Hierarchy



OTM Objects Hierarchy



OTM Objects Hierarchy



Agenda

- OTM Objects
- **OTM Agent Actions**
- Business Scenarios
- What's New?
- **Agent Actions & Usage**
- **Complex Actions**
- **What to Consider?**
- **Best Practices**

OTM Agent Actions

Order Base

- **No Updates**
 - Order Base - Mod - No Processing
- **Update Order Base Only**
 - Order Base - Mod - Future Processing
- **Update Order Base and Order Release**
 - Order Base - Mod - Re Release
 - Order Base - Mod - Incremental Release
- **Update Order Base, Order Release and Shipment**
 - Order Base - Mod - Edit Shipment
 - Order Base - Mod - Full Impact
 - Order Base - Mod – ReRoute (changes shipment routing while it is intransit)

OTM Agent Actions

Order Release

- **No Updates**
 - Order Release - Mod - No Processing
- **Order / SU Structure Changed & Shipment exists**
 - Order Release - Mod - Edit Shipment
- **Update Order Release Only**
 - Order Release - Mod - Future Processing
- **Update Order Release, Order Movement and Shipment (no structural changes)**
 - Order Release - Mod - Propagate Changes
- **Update Order Release, Order Movement, Shipment & Invoice / Bill**
 - Order Release - Mod - Full Impact

OTM Agent Actions

Shipment

- **Planned**
 - Assign Rate
- **Tendered**
 - Recalc Shipment
- **Tender Accepted**
 - Recalc Shipment
 - Modify Tender
- **In-Transit / Delivered**
 - Recalc Shipment
- **Invoice**
 - Invoice Adjusted Costs

When shipment updates received.

OTM Agent Actions

Order Release – Mod – Edit Shipment

- This action only applies to orders that have not been split, either across shipments or shipment equipment.
- ***Performs the following:***
 - Update order release according to order configuration.
 - Shipment ship units will be updated with modified order ship units.
 - Recalculates shipment cost and service time for all impacted shipments.
 - Sets order and shipments modification status.
 - Delete and regenerate invoices / bills if they auto-generated.
 - Modifies tenders for edited shipments if Retender Shipment agent action parameter option is selected.

OTM Agent Actions

Order Release – Mod – Propagate Changes

- Either this action or Order Release – Mod – Edit Shipment action is triggered at any given time but not both of them.
- ***Propagates the following from Order to Order Movement & Shipment:***
 - Propagate ship unit quantity.
 - Propagate pickup dates.
 - Propagate delivery dates.
 - Propagate equipment change.
 - Recalculate cost.
 - Propagate special service change.

OTM Agent Actions

IF ON EDITABLE SHIPMENT FOR ORDER RELEASE

- **Returns FALSE if one of the following is YES**
 - Has the order release been split?
 - There are no order movements or shipments found for the order release.
 - There are pools or cross-docks in the scenario.
 - The order release is split into multiple equipment.
 - The order release time window is not compatible with one or more stops
- **Order updates should be one of the following event:**
 - Order – Customer Service Modified
 - Order – Quantities Modified
 - Order – Dates Modified
 - Order – Special Service Modified
 - Order – ShipUnit PD Stop Modified
 - Order – OR Stop Added or Removed
 - Order – ShipUnit Added or Removed
 - Order – Line Added or Removed

It is always good to check this condition before using "ORDER RELEASE- MOD - EDIT SHIPMENT" agent action, since EDIT SHIPMENT action only run if the shipment is editable.

What to Consider?

Order Base

- Contains one or more order release / shipment and OB updates to be propagate to them?
- Does the update only for future releasing?

Order Release

- What type of order updates are expected, ship units structural changes, quantities changes, refnums, etc?
- Update contains planning impact, such as locations, special services, dates, etc changes?
- Is leg-wise planning enabled?
- Tendering restrictions like modify tender, do not retender, etc

Shipment

- Shipment already invoiced?
- Any structural changes to shipment ship units or new ship units are expected?
- Any downstream shipments exists (i.e. Multi leg / Rule-11)?
- Shipment already in-transit?



Order Base

- After order is planned, keep the updates for future release purpose.



Order Release

- After shipment is tender accepted, stop making changes to order release.



Shipment

- Do not make changes to Shipment after invoice is linked to shipment except cost recalculations.



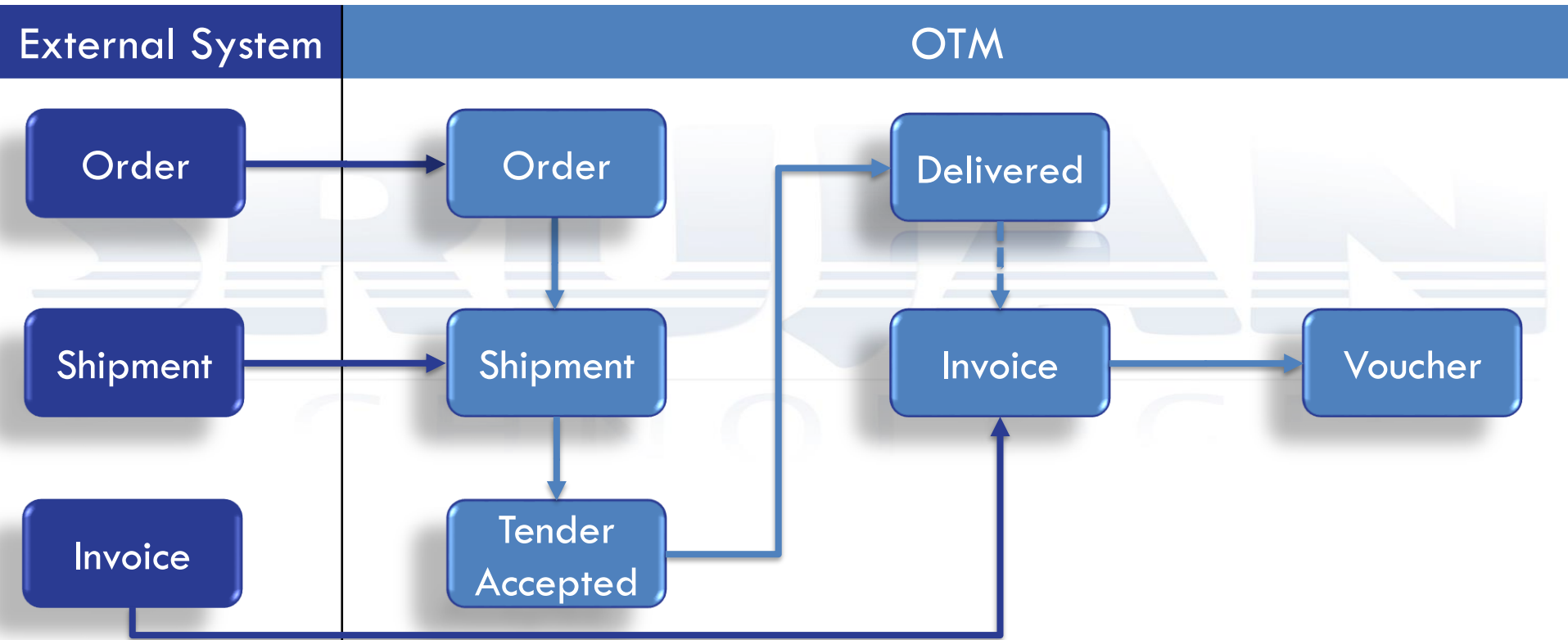
Invoice

- No updates after invoice is approved.

Agenda

- OTM Objects
- OTM Agent Actions
- **Business Scenarios**
- **Different Business Scenarios**
 - What
 - When
 - How
- What's New?

Order to Cash High Level Flow



Order Not Planned



External System

OTM



When:

- ✓ Order Release is not planned.

What:

- ✓ Replace the Order Release & Order Movement completely with new data.

How:

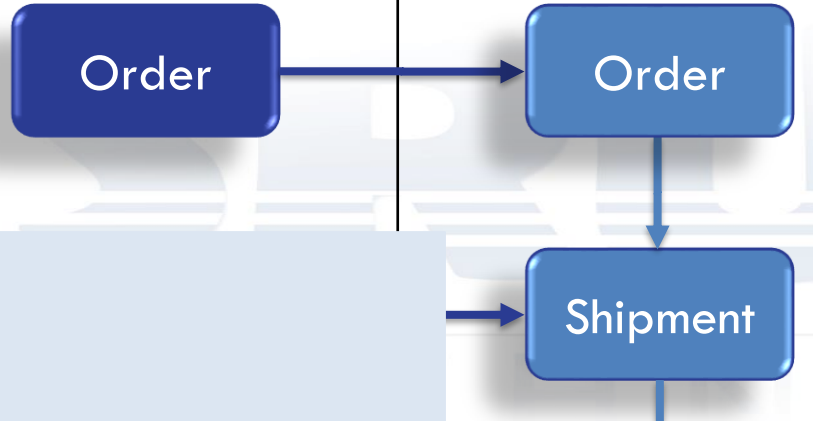
- ✓ Use “Order Release - Mod - Full Impact”.

Shipment Planned



External System

OTM



When:

- ✓ Order Release is planned but not tendered.

What:

- ✓ Update the Order Release, Order Movement & Shipment with new data.

How:

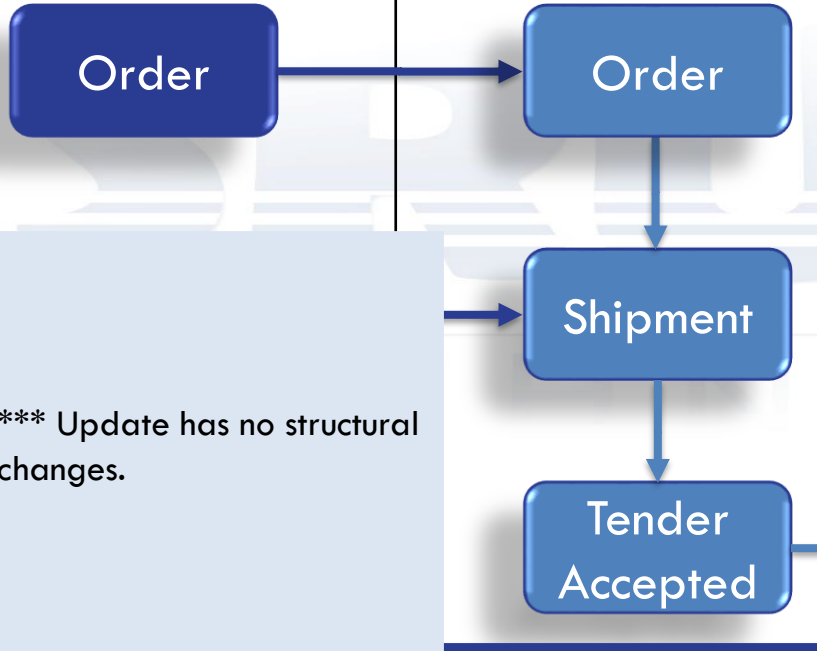
- ✓ Use “Order Release - Mod - Edit Shipment”.

Shipment Tender Accepted



External System

OTM



When:

- ✓ Order Release is planned and
- ✓ Shipment tender is accepted.

What:

- ✓ Update the Order Release, Order Movement & Shipment with new data.
- ✓ Send updated shipment information to carrier.

How:

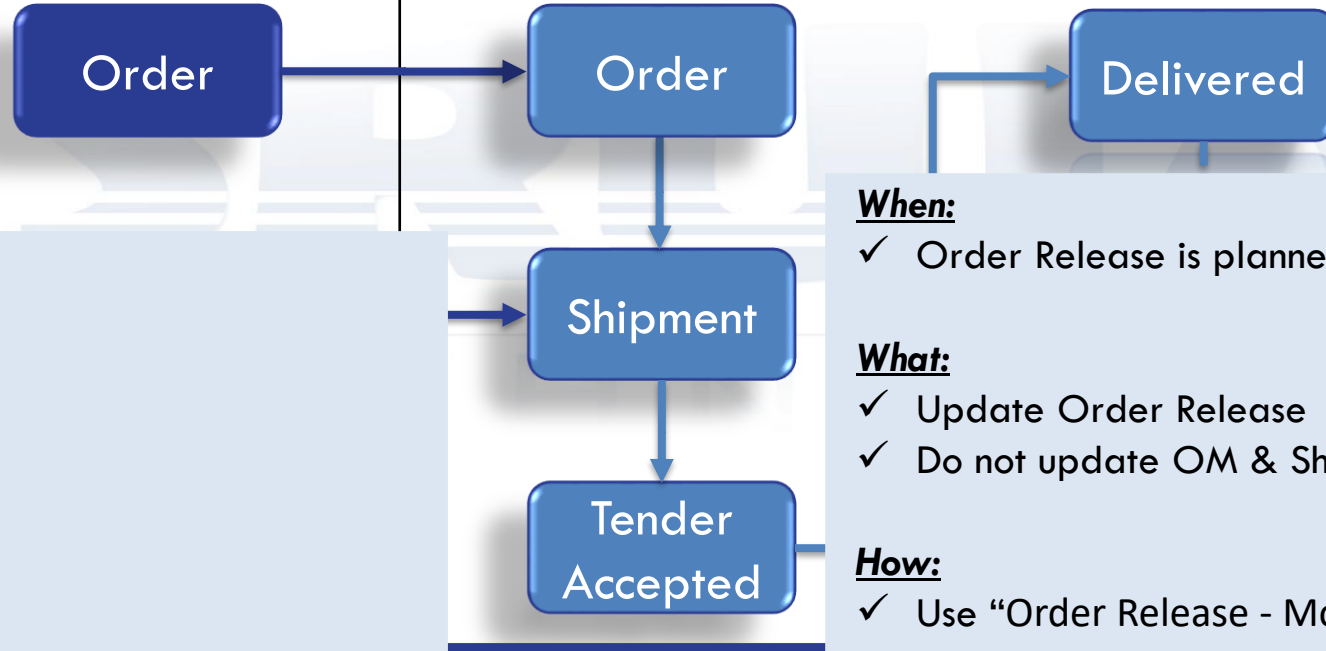
- ✓ Use “Order Release - Mod - Propagate Changes”.
- ✓ Send modify tender.

Shipment Delivered



External System

OTM



When:

- ✓ Order Release is planned and shipment delivered.

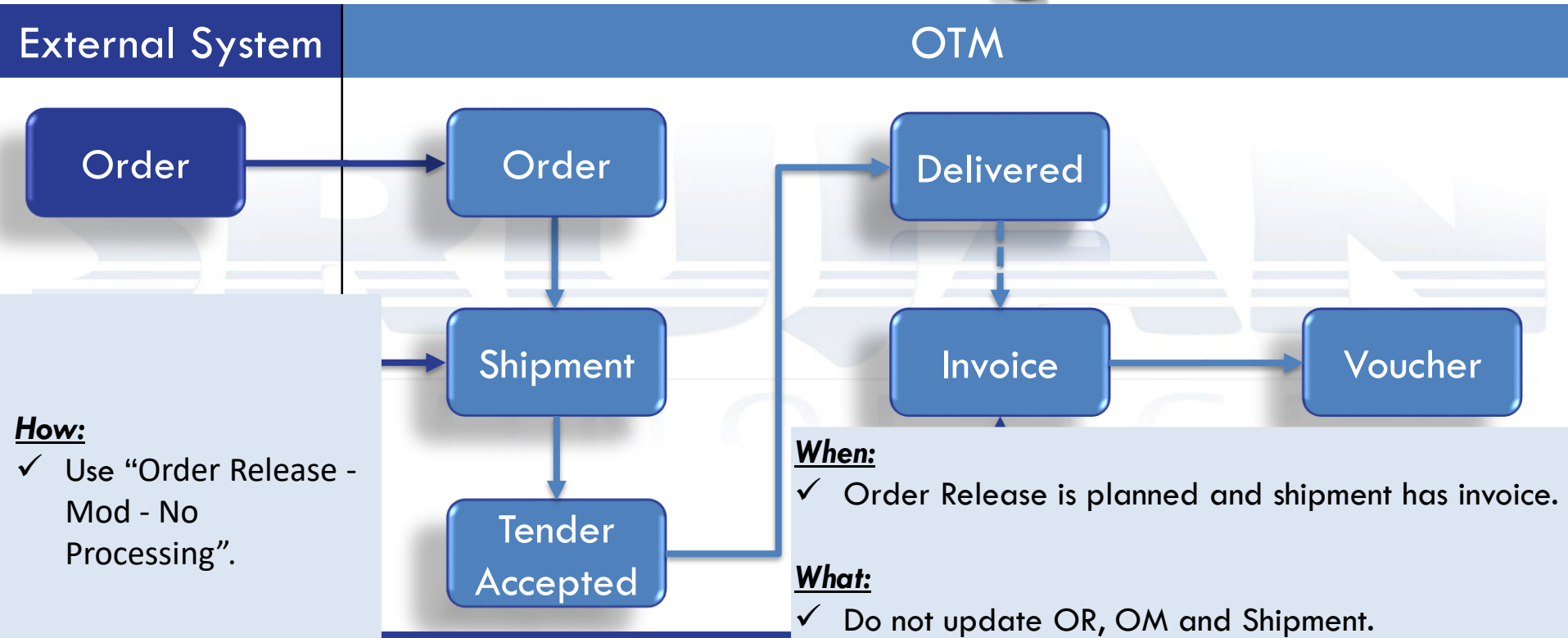
What:

- ✓ Update Order Release
- ✓ Do not update OM & Shipment with new data.

How:

- ✓ Use “Order Release - Mod - Future Processing”.

Shipment has Invoice



How:
✓ Use "Order Release - Mod - No Processing".

When:
✓ Order Release is planned and shipment has invoice.

What:
✓ Do not update OR, OM and Shipment.

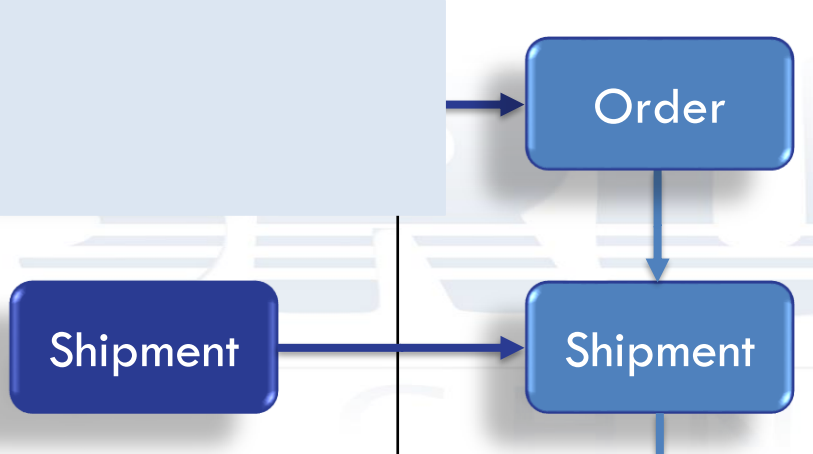
Shipment Planned



Shmt.
Updates

External System

OTM



When:

- ✓ Order Release is planned but not tendered.

What:

- ✓ Update the Shipment with new data.

How:

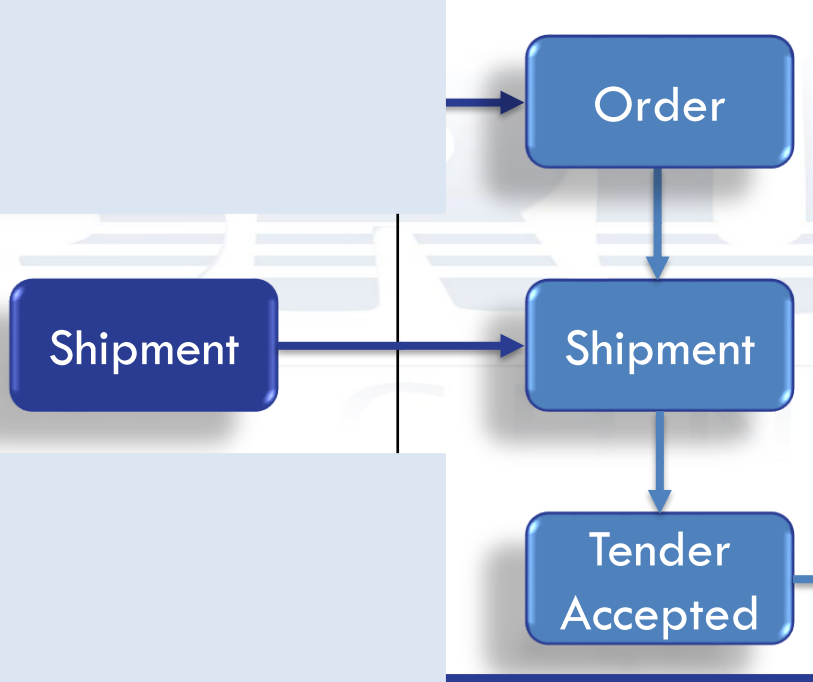
- ✓ Use “Recalc Shipment” to adjust the cost.

Shipment Tender Accepted



External System

OTM



When:

- ✓ Shipment tender is accepted.

What:

- ✓ Update the Shipment with new data.
- ✓ Send updated shipment information to carrier.

How:

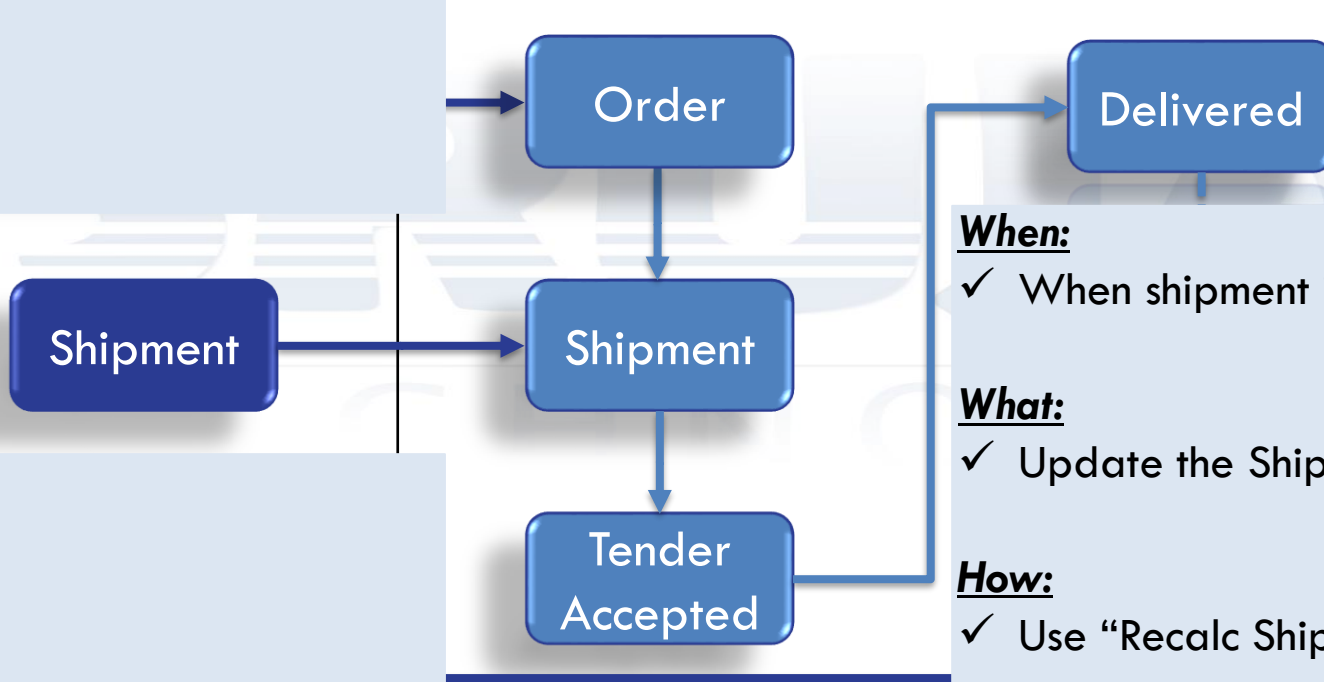
- ✓ Use “Recalc Shipment” to adjust the cost.
- ✓ Send modify tender.

Shipment Delivered



External System

OTM



When:

- ✓ When shipment is delivered.

What:

- ✓ Update the Shipment with new data.

How:

- ✓ Use “Recalc Shipment” to adjust the cost.

Shipment has Invoice



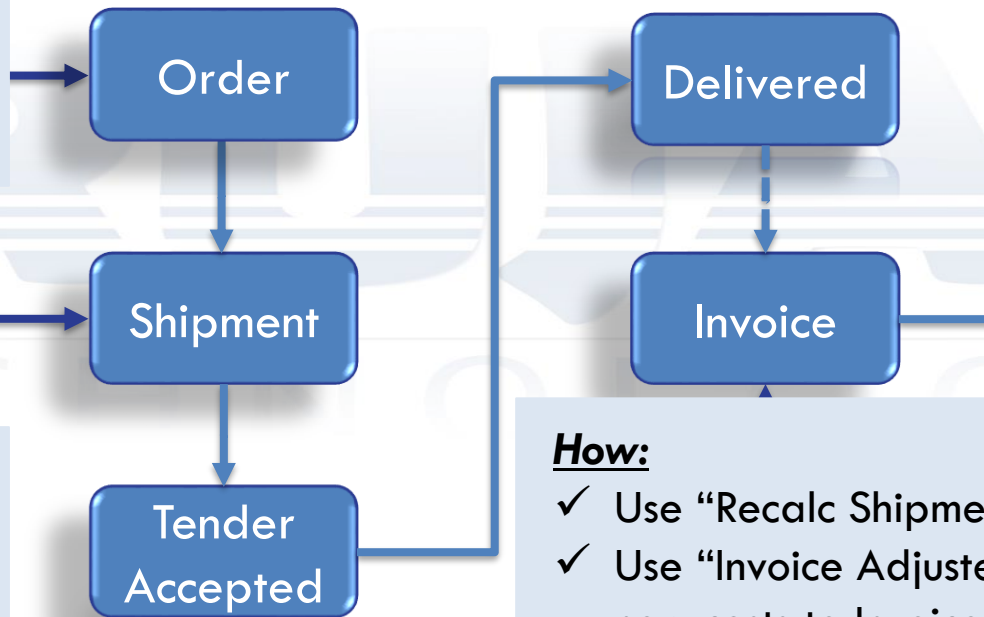
External System

OTM

When:

- ✓ When shipment has invoice.

Shipment



What:

- ✓ Update the Shipment with new data.

How:

- ✓ Use “Recalc Shipment” to adjust the cost.
- ✓ Use “Invoice Adjusted Costs” to propagate new costs to Invoice.

Shipment is Paid



External System

OTM

When:

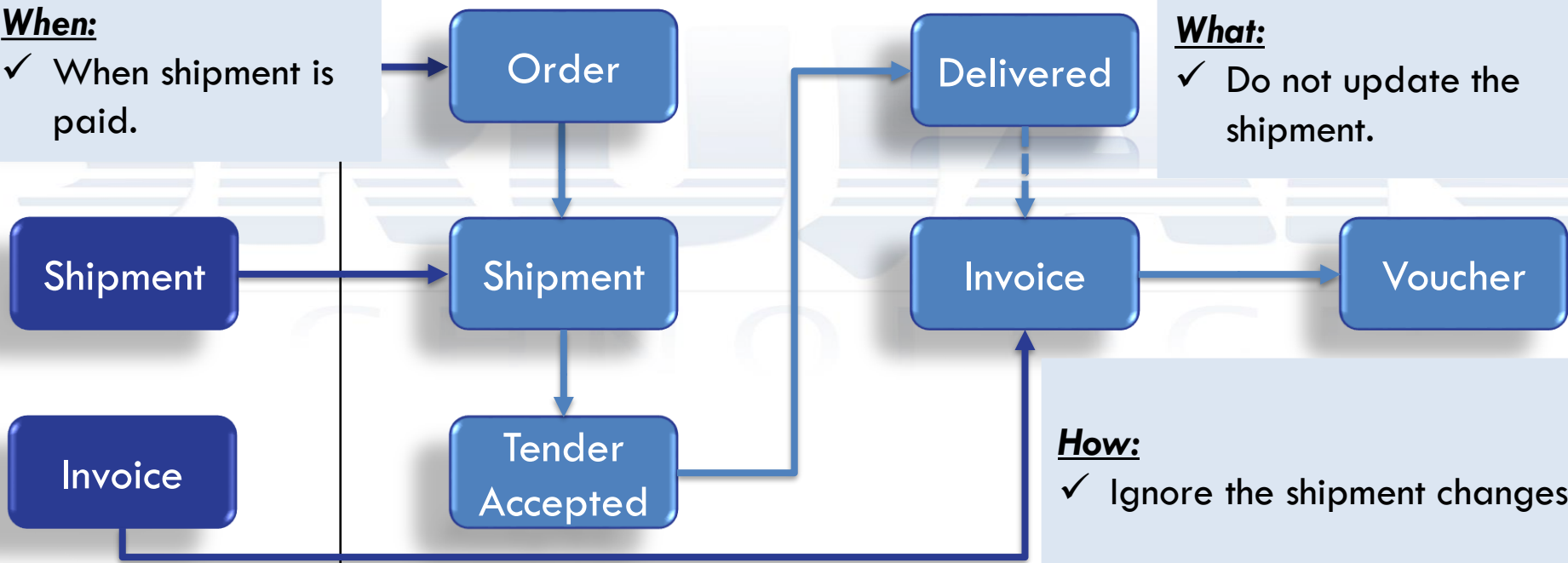
✓ When shipment is paid.

What:

✓ Do not update the shipment.

How:

✓ Ignore the shipment changes.



Agenda

- OTM Objects
- OTM Agent Actions
- Business Scenarios
- **What's New?**
- **SRUJAN Recommendations**
- **What's New in 6.4.2 for**
 - Modification Agent Actions
 - Other Agent Actions

SRUJAN Recommendations

Avoid raising multiple agents on the same event

Manage Updates: Respective workflow should complete before new updates receive in OTM for same object

Analyze the requirement and use appropriate MOD actions

Conflicts of Updates: Must consider the indirect object updates that may trigger the agents

Review of the existing agents during future phases rollouts before new agents are introduced

What's New? – MOD agents

OMD Propagator:

From 6.4.2, "ORDER RELEASE - MOD - PROPAGATE CHANGES" action can be configured as a pre-persist agent action. Prior to 6.4.2, this action only configured as post-persist action.

Enhanced Edit Shipment to Work on Ship Units that Contain Lines from Multiple Orders:

OMD Edit Shipment agent action now works for shipments with repacked shipment ship units from multiple orders.

What's New? – Agents

The agent description can now be 4000 characters.

The Direct SQL Update SQL length has been extended to 2000 characters. It has to share a single field with other fields describing the action (like Select SQL).

Provide Agent Action To Copy Flex Fields Between Objects.

What's New? – Agents

Agent Change Log:

When we modify an agent, a record is added to the AGENT_CHANGE_LOG table. This table holds the user, time and optional reason for the change. The user can see an agent's change log by clicking on the Change Log button on the agent edit screen, or opening the Change Log section of the agent view screen. The agent log is automatically removed if the agent is removed.

Add Notify Contact Agent Action: Added a new agent action "NOTIFY CONTACT" to notify a contact, in case any agent for Shipment Ship Unit and Shipment Ship Unit Line fails.

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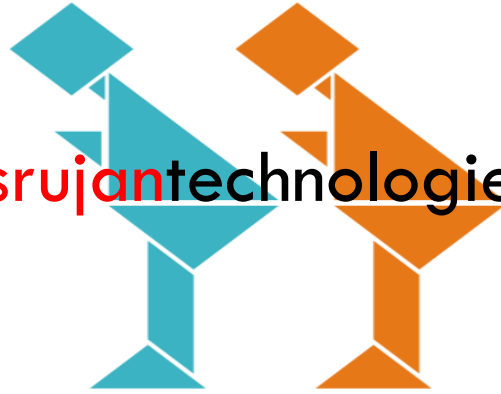
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