



Organizational Structures Multi-Org Setup

**OAUG Spring 2002
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- **Oracle Certified Solution Partner.**
- **Oracle Beta Tester for numerous programs including Reports 6i, OWB, Oracle 9i OLAP.**
- **Design and implement databases/data marts/data warehouses using RDBMS and Multidimensional tools for Business Intelligence.**
- **Creator of the first Oracle 9i Business Intelligence and Analytics tool.**



Agenda

- **Overview**
- **Business Needs**
- **Organization Definitions**
- **Organizational Models**
- **Organization Hierarchy**
- **Walk Through Setup Steps**



Multi-Org -- Overview

Oracle states:

- The Oracle Applications organization models define organizations and the relationships among them in arbitrarily complex enterprises.
- This organization model serves as the cornerstone for all of the Oracle Applications products.
- It dictates how transactions flow through different organizations and how those organizations interact with each other.



Multi-Org – Business Needs

- Use a single installation of any Oracle Applications product to support any number of organizations, even if those organizations use different sets of books.
- Define different organizational models.
- Support any number of legal entities within a single installation of Oracle Applications.



Multi-Org – Business Needs

- Secure access to data so that users can access only the information that is relevant to them.
- Sell products from a legal entity that uses one set of books and ship them from another legal entity using a different set of books.
- Purchase products through one legal entity and receive them in another legal entity.



Multi-Org – Org Definitions

- Sets of Books
- Business Groups
- Legal Entities
- Operating Units
- Inventory Organizations



Multi-Org – Org Definition

- **Set of books**
 - Financial reporting entity using a particular chart of accounts, functional currency, accounting calendar.
- **Business group**
 - Highest level in the organization structure, such as the consolidated enterprise, a major division, or an operation company.
- **Legal entity**
 - A legal company for which you prepare fiscal or tax reports.



Multi-Org – Org Definition

- **Operating unit**
 - Associated with a legal entity. It may be a sales office, a division, or a department.
- **Inventory organization**
 - An organization for which you track inventory transactions and balances, and/or an organization that manufactures or distributes products.
- **Can also be:**
 - Balancing Organization, HR Organization, Asset Organization.

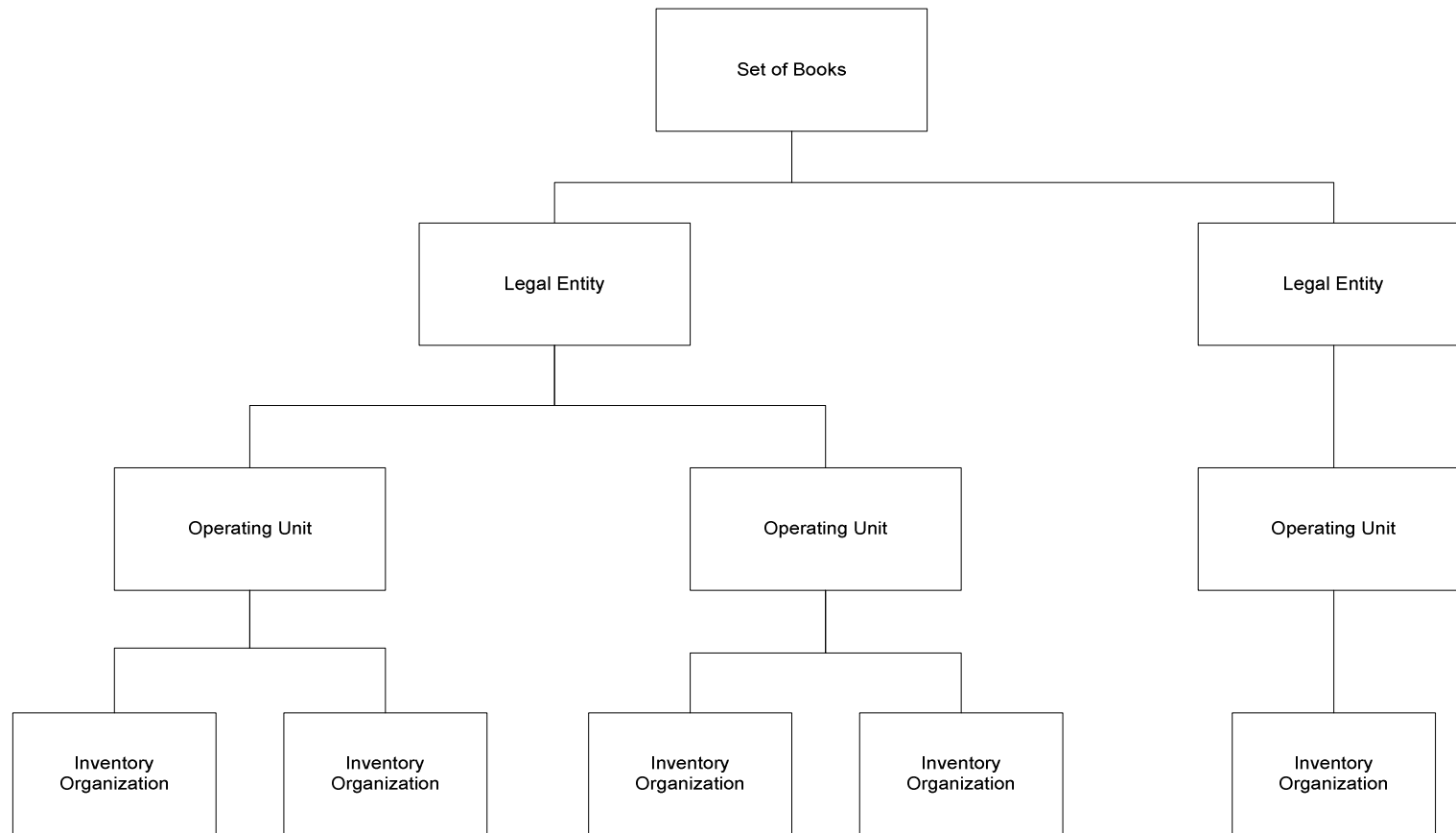


Multi-Org – Organizational Models

- **Accounting, Distribution, Materials Management.**
 - Define relationships via Sets of Books, Legal Entities, Operating Units, Inventory Organizations.
- **Asset Organizations and HR Organizations.**
 - Headed by a Business Group at the top of the hierarchy.



Multi-Org – Org Hierarchy





Multi-Org – Org Definition

- **Set of books**
 - Financial reporting entity using a particular chart of accounts, functional currency, accounting calendar.
- **Legal entity**
 - A legal company for which you prepare fiscal or tax reports.
- **Operating unit**
 - Associated with a legal entity. It may be a sales office, a division, or a department.
- **Inventory organization**
 - An organization for which you track inventory transactions and balances, and/or an organization that manufactures or distributes products.



Multi-Org – Environment Setup

Multi-Org Setup

Determining if multi-org is enabled



Multi-Org – Environment Setup

Is Multi-Org Enabled?

- In `$AD_TOP/sql` directory is script `adutconf.sql`.
- Run as apps: `sqlplus apps/apps @adutconf.sql` (assuming pwd is apps).
- File `adutconf.lst` is created by this script.
- One of the checks this scripts performs is to check if multi-org is enabled.



Multi-Org – Environment Setup

Script run in SQL Plus

```
Oracle SQL*Plus
File Edit Search Options Help

SQL*Plus: Release 8.0.6.0.0 - Production on Thu May 9 11:27:29 2002

(c) Copyright 1999 Oracle Corporation. All rights reserved.

Connected to:
Oracle8i Enterprise Edition Release 8.1.7.1.1 - Production
With the Partitioning option
JServer Release 8.1.7.1.1 - Production

SQL> @d:\oracle\visappl\ad\11.5.0\sql\adutconf.sql
```




Multi-Org – Environment Setup

adutconf.sql script

```
REM $Header: adutconf.sql 115.13 2001/04/23 10:08:38 pkm ship  $
REM +=====+
REM | Copyright (c) 1996 Oracle Corporation Redwood Shores, California, USA|
REM |                All rights reserved.                |
REM +=====+
REM NAME
REM  adutconf.sql
REM DESCRIPTION
REM  Utility script to display configuration of Applications
REM +=====+
```



Multi-Org – Environment Setup

Script Body

prompt --> Multi-Org enabled?

set head off

select decode(multi_org_flag,'N','No','Y','Yes','No')

from fnd_product_groups;

set head on



Multi-Org – Environment Setup

Script Output

--> Multi-Org enabled?

Yes

1 row selected.



Multi-Org – Environment Setup

Table queried: fnd_product_groups

```
Oracle SQL*Plus
File Edit Search Options Help

(c) Copyright 1999 Oracle Corporation. All rights reserved.

Connected to:
Oracle8i Enterprise Edition Release 8.1.7.1.1 - Production
With the Partitioning option
JServer Release 8.1.7.1.1 - Production

SQL> desc fnd_product_groups
Name                                Null?    Type
-----
PRODUCT_GROUP_ID                   NOT NULL NUMBER(15)
LAST_UPDATE_DATE                   NOT NULL DATE
LAST_UPDATED_BY                   NOT NULL NUMBER(15)
CREATION_DATE                      NOT NULL DATE
CREATED_BY                         NOT NULL NUMBER(15)
LAST_UPDATE_LOGIN                 NOT NULL NUMBER(15)
PRODUCT_GROUP_NAME                 NOT NULL VARCHAR2(60)
RELEASE_NAME                       NOT NULL VARCHAR2(50)
PRODUCT_GROUP_TYPE                 NOT NULL VARCHAR2(30)
ARGUMENT1                         VARCHAR2(30)
MULTI_ORG_FLAG                     VARCHAR2(1)
MULTI_LINGUAL_FLAG                 VARCHAR2(1)
MULTI_CURRENCY_FLAG                VARCHAR2(1)

SQL>
```



Multi-Org – Environment Setup

SQL statement:

```
SQL> select multi_org_flag  
2 from fnd_product_groups;
```

M

-

Y

```
SQL> exit
```

Note: APPLSYS is owner of fnd_product_groups object



Multi-Org – Setup Steps

- Step 1: Define Organizational Structure**
- Step 2: Define Set Of Books**
- Step 3: Define Locations**
- Step 4: Define Business Groups (or use default)**
- Step 5: Associate Responsibilities with Business Groups**
- Step 6: Define Organizations**
- Step 7: Define Organization Relationships**
- Step 8: Set Profile Options For Responsibilities**



Multi-Org – Setup Steps

Step 1: Define Organizational Structures

- **Usually done manually. The structure of an organization should be known prior to beginning application configuration.**
- **Changes in the organizational structure after configurations are completed can cause unnecessary effort to ensure informational integrity.**



Multi-Org – Setup Steps

Step 2: Define Set of Books

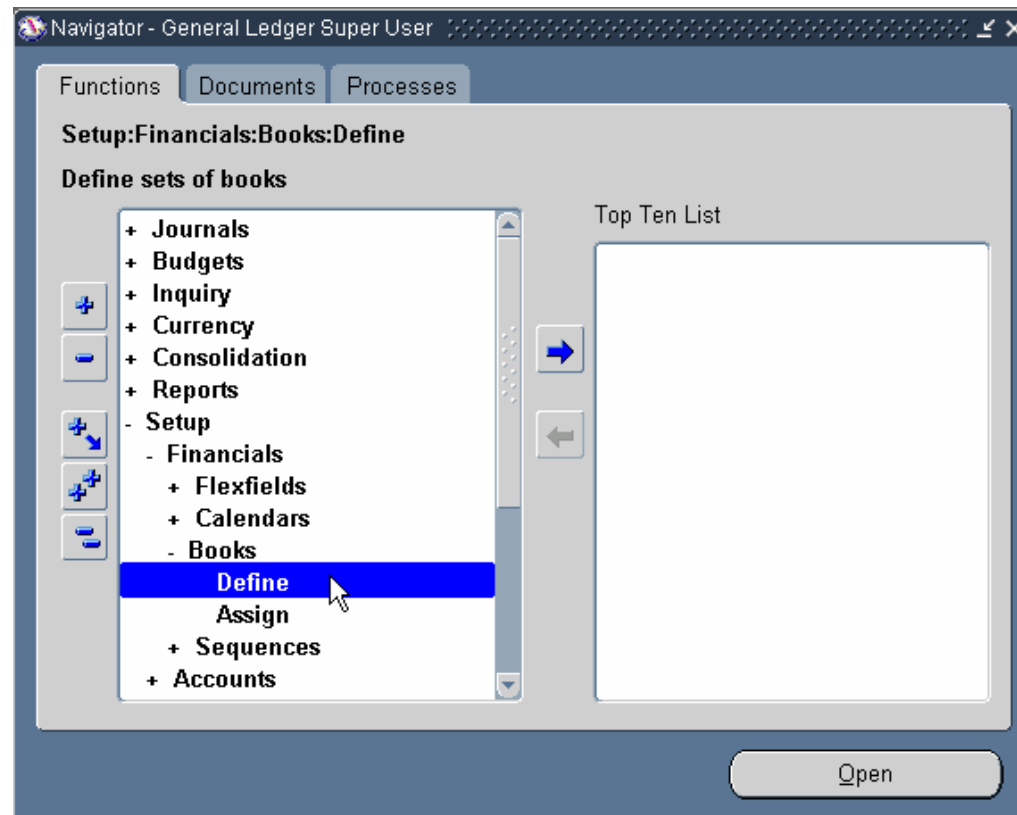
- If multiple Business Groups are used in Org Structure, Sets of Books should be defined prior to Business Groups.
- Determines functional currency, account structure, and accounting calendar for each company or group of companies.
- Before using a newly defined set of books, it must be associated with one or more responsibilities. This is done using the profile option **GL Set of Books Name**.



Multi-Org – Setup Steps

Define Set of Books (GL Super User)

Setup -> Financials -> Books -> Define





Multi-Org – Setup Steps

Define Set of Books (GL Super User)

Setup -> Financials -> Books -> Define

Set of Books: **OAug-SetOfBooks** Short Name: **OAug-SOB**

Description: **OAug-Spring2002-SetOfBooks**

Chart of Accounts: **Corporate Accounting Flex** Functional Currency: **CAD**

Calendar

Name: **Accounting** Future Periods: **1**

Period Type: **Month**

Closing | Journaling | Average Balances | Budgetary Control | Multiple Reporting Currencies

Retained Earnings: **Account**

Translation Adjustment:

— Account Description —



GL Set of Books Name – Profile Option

[illegible]



Multi-Org – Setup Steps

Step 3: Define Locations

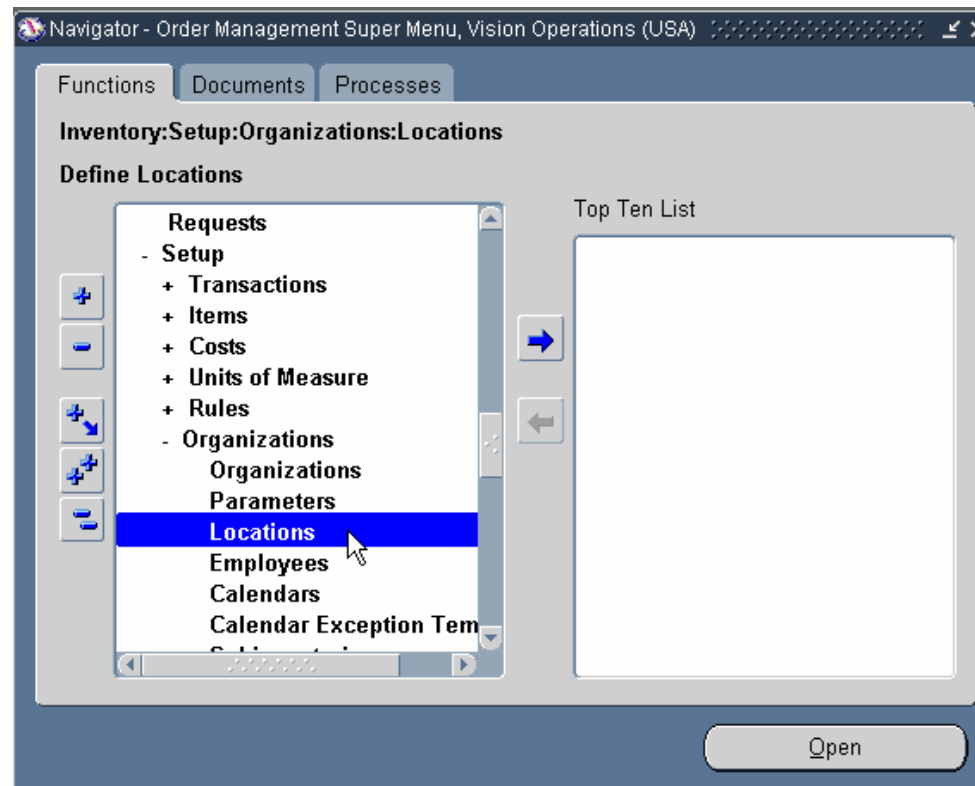
- **Define names and address of locations within the organization structure.**
- **Define each location only once. Multiple organizations can use the same location definitions.**
- **Definitions should be for legal entities and inventory organizations.**
- **Locations used for requisitions, receiving, shipping, billing, and employee assignments.**



Multi-Org – Setup Steps

Define Locations (OM Super User)

Inventory -> Setup -> Organizations -> Locations





Multi-Org – Setup Steps

Define Locations (OM Super User)

Inventory -> Setup -> Organizations -> Locations

Location

Name **Canadian Headquarter**

Description **Canadian Headquarters**

Inactive Date ☒ Global

Address Details Shipping Details Other Details

Address Style **Canada**

Address **110 Matheson Boulevard West...Mississauga.Toronto**

Extra Inform...



Multi-Org – Setup Steps

Address Details

- **Enter name, location and description. Select a national address style from the list.**
- **Uncheck the Global check box if the location is to only be available within the default Business Group of the current responsibility.**
- **Check the Global check box if the location is to be a global location and be available to all Business Groups.**
- **For a global location, the location name must be unique across all Business Groups.**



Multi-Org – Setup Steps

Define Locations (OM Super User)

Inventory -> Setup -> Organizations -> Locations

Location

Name **Canadian Headquarter**

Description **Canadian Headquarters**

Inactive Date ☒ Global

Address Details Shipping Details Other Details

Contact

Ship-To Location **Canadian Headquarter**

☒ Ship-To Site ☒ Bill-To Site

☒ Receiving Site ☒ Internal Site

☒ Office Site

Extra Inform...



Multi-Org – Setup Steps

Location Shipping Details

- **Ship-To Site:** a valid ship-to organization on a PO or requisition.
- **Receiving Site:** a valid receiving Location for creating receipt or receiving transaction.
- **Office Site:** an office site, such as field office.
- **Bill-To Site:** a valid bill-to site, is used by Payables, and is specified on PO header.
- **Internal Site:** a valid internal ship-to location when creating an internal requisition.



Multi-Org – Setup Steps

Define Locations (OM Super User)

Inventory -> Setup -> Organizations -> Locations

Location

Name **Canadian Headquarter**

Description **Canadian Headquarters**

Inactive Date ☒ Global

Address Details Shipping Details **Other Details**

Inventory Organization

Tax Code

EDI Location

Extra Inform...



Multi-Org – Setup Steps

Location Other Details

- **Inventory Org:** location will be available in LOV on Purchasing documents. Selecting no inventory org., location available on Purchasing documents in all organizations.
- **Tax Code:** tax code associated with ship-to location.
- **EDI Loc:** If using EDI for Advance Shipment Notices (ASNs) or ASNs with billing information (ASBNs), enter a defined location. This location should match the ship-to location specified on an ASN or ASBN.



Multi-Org – Setup Steps

Step 4: Define Additional Business Groups (if multiple BGs used)

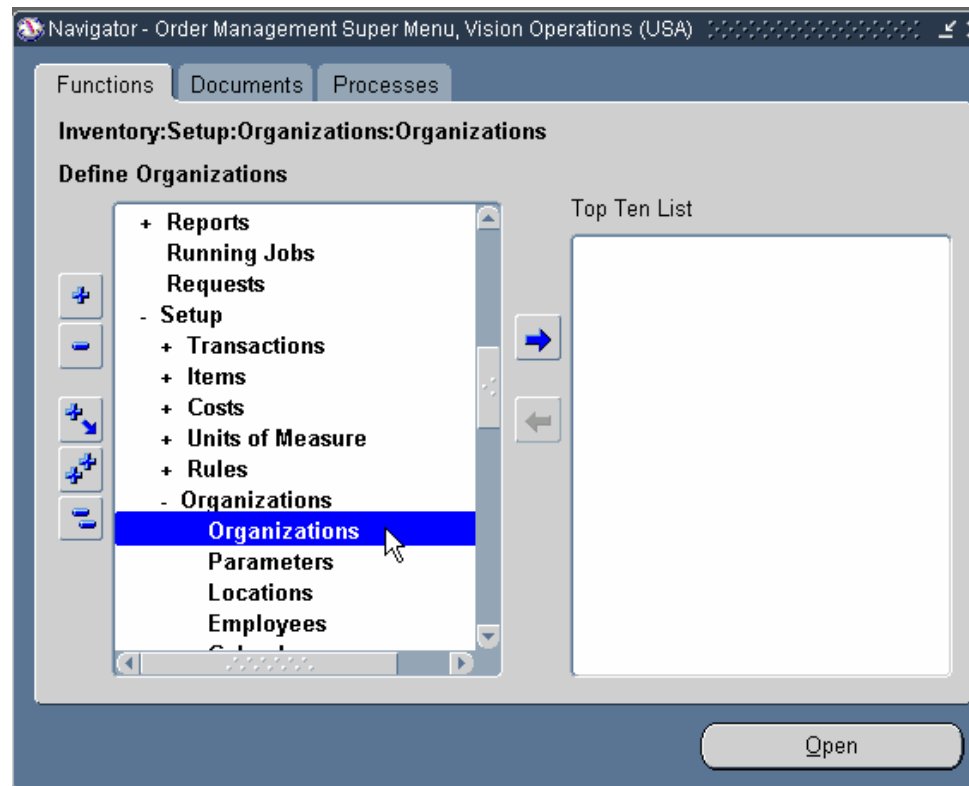
- **Must have at least one Business Group.**
- **Fresh install provides a default.**
- **The default can be modified.**
- **If new Business Groups defined, **HR:Business Group** profile option must be set at Responsibility level.**
- **A new Security Profile is automatically created when new Business Group is defined.**



Multi-Org – Setup Steps

Define Business Groups

Inventory -> Setup -> Organizations -> Organizations





Multi-Org – Setup Steps

Define Business Groups

Select New Button

The screenshot shows a window titled "Find Organization" with a standard Windows-style title bar. Inside the window, there are three input fields labeled "Name", "Type", and "Location". Below these is a section titled "Organization Classification" which contains a "Name" input field and three radio buttons labeled "Enabled", "Disabled", and "Either". At the bottom of the window are three buttons: "Clear", "New (A)", and "Find (B)". A mouse cursor is pointing at the "New (A)" button.



Multi-Org – Setup Steps

Define Business Groups

Enter Business Group Information

The screenshot shows a software window titled "Organization" with a standard Windows-style title bar. The window contains several input fields and sections for defining business group information:

- Name:** A text input field.
- Type:** A text input field.
- Dates:** A section containing:
 - From:** A date input field with the value "11-MAY-2002".
 - To:** A date input field.
- Location:** A text input field.
- Internal or External:** A dropdown menu currently set to "Internal".
- Location Address:** A long text input field.
- Internal Address:** A text input field.
- Organization Classifications:** A section containing:
 - Name:** A list of three text input fields, with the first one highlighted in blue.
 - Enabled:** A column of three checkboxes, all of which are currently unchecked.
 - Others:** A button at the bottom right of the section.



Multi-Org – Setup Steps

Define Business Groups

Organization Classification selection

Organization

Name **OAUG Business Group** Type

Dates

From **01-JAN-2002** To

Location Internal or External **Internal**

Location Address

Internal Address []

Organization Classifications

Name	Enabled
	<input type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

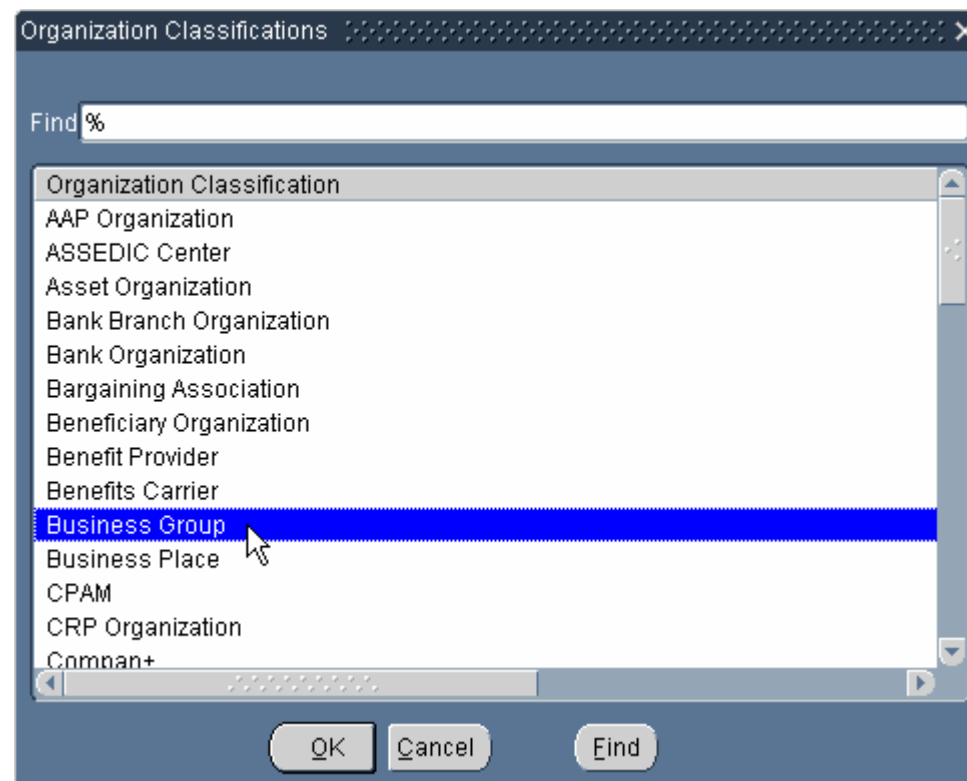
Others



Multi-Org – Setup Steps

Define Business Groups

Organization Classification: select Business Group





Multi-Org – Setup Steps

Define Business Groups

Enable classification

Organization

Name **OAUG Business Group** Type

Dates
From **01-JAN-2002** To

Location Internal or External **Internal**
Location Address
Internal Address []

Organization Classifications

Name	Enabled
Business Group	<input checked="" type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

Others



Multi-Org – Setup Steps

Define Business Groups

Select Others button for Additional Information

Organization

Name **OAUG Business Group** Type

Dates
From **01-JAN-2002** To

Location Internal or External **Internal**

Location Address

Internal Address []

Organization Classifications

Name	Enabled
Business Group	<input checked="" type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

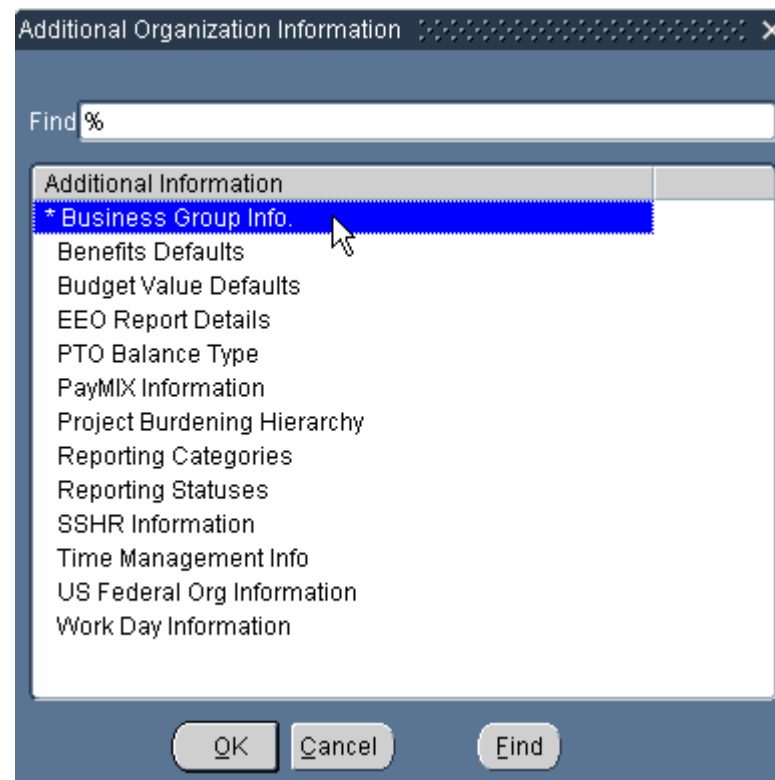
Others



Multi-Org – Setup Steps

Define Business Groups

Select Business Group Info





Multi-Org – Setup Steps

Define Business Groups

Additional Business Group Info

The screenshot shows a software window titled "Additional Organization Information" with a standard Windows-style title bar. Inside the window, there is a label "Business Group Info." followed by a text input field. The input field is currently empty, with a cursor visible. To the right of the input field is a small square button with a right-pointing arrow. At the bottom right of the window is a large "OK" button.



Multi-Org – Setup Steps

Define Business Groups

Additional Business Group Info

Business Group Info.

Short Name	<input type="text"/>
Employee Number Generation	<input type="text"/>
Applicant Number Generation	<input type="text"/>
Grade Flexfield Structure	<input type="text"/>
Group Flexfield Structure	<input type="text"/>
Job Flexfield Structure	<input type="text"/>
Costing Flexfield Structure	<input type="text"/>
Position Flexfield Structure	<input type="text"/>
Competence Flexfield Structure	<input type="text"/>
Legislation Code	<input type="text"/>
Currency	<input type="text"/>
Fiscal Year Start	<input type="text"/>
Minimum Working Age	<input type="text"/>
Maximum Working Age	<input type="text"/>

OK Cancel Clear Help



Multi-Org – Setup Steps

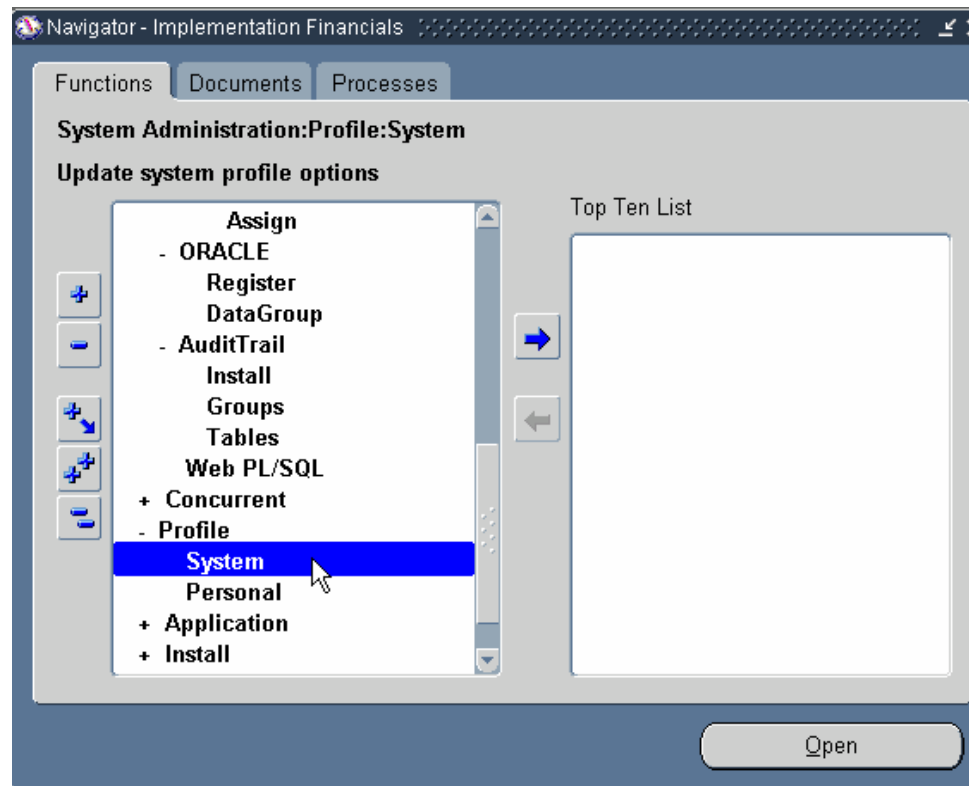
Step 5: Associate Responsibilities with Business Group

- **Responsibilities must be associated with one, and only one, Business Group.**
- **Associate Responsibility to a Business Group using HR:Business Group profile option.**



Multi-Org – Setup Steps

Associate Responsibilities to Business Group
System Administration -> Profile -> System





Multi-Org – Setup Steps

Associate Responsibilities to Business Group Select Responsibility

Find System Profile Values

Display

- ☒ Site
- ☐ Application
- ☒ Responsibility
- ☐ User

HR Offer Administrator

☒ Profiles with No Values

Profile

Find Clear



Multi-Org – Setup Steps

Associate Responsibilities to Business Group Select Profile Option

Find System Profile Values

Display

- ☒ Site
- ☐ Application
- ☒ Responsibility
- ☐ User

HR Offer Administrator

☒ Profiles with No Values

Profile: HR:Business Group

Find Clear



Multi-Org – Setup Steps

Associate Responsibilities to Business Group Select Business Group

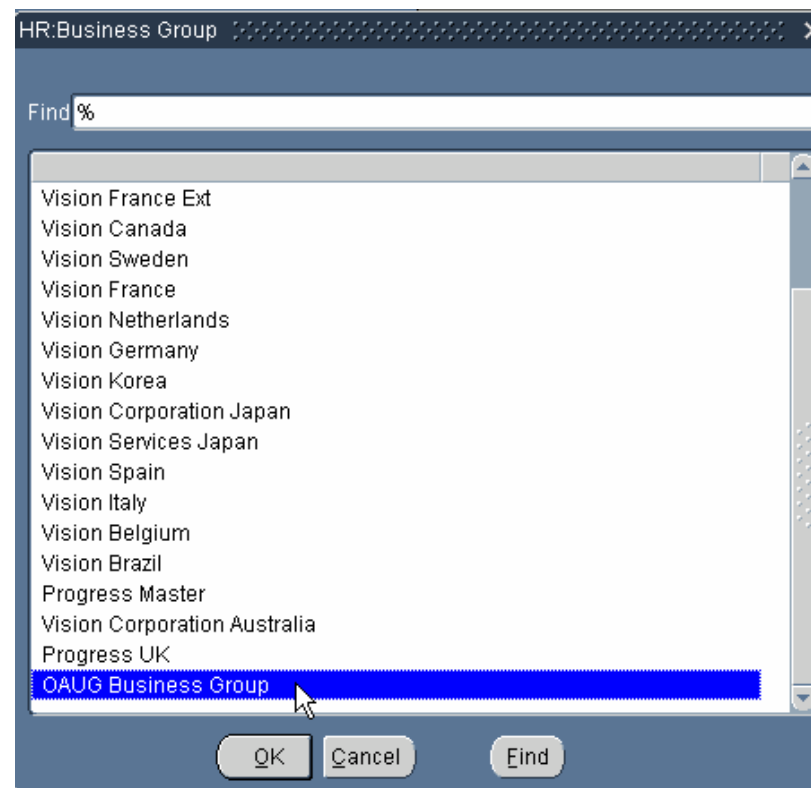
System Profile Values

Profile	Site	Application	Responsibility	User
HR:Business Group			HR Offer Administr	



Multi-Org – Setup Steps

Associate Responsibilities to Business Group Select Business Group

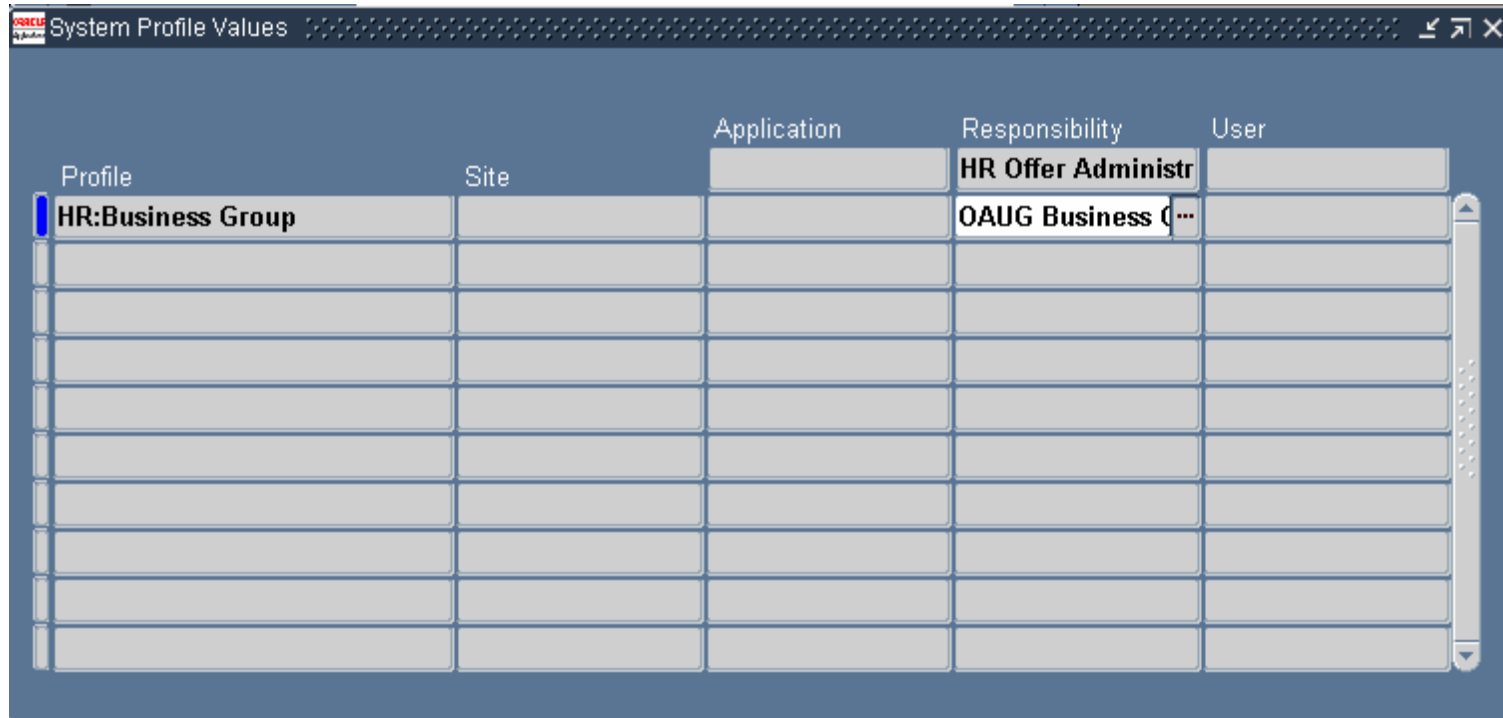




Multi-Org – Setup Steps

Associate Responsibilities to Business Group

Responsibility associated with Business Group



Profile	Site	Application	Responsibility	User
HR:Business Group			HR Offer Administr	
			O AUG Business C...	



Multi-Org – Setup Steps

Step 6: Define Organizations

Step 7: Define Organization Relationships

- **Define Organizations form used to define organizations**
 - Legal Entities
 - Operating Units
 - Inventory Organizations
- **Define Organizations form also used to define organization relationships (Step 6 & 7 can be performed at the same time).**



Multi-Org – Setup Steps

If multiple Business Groups are defined:

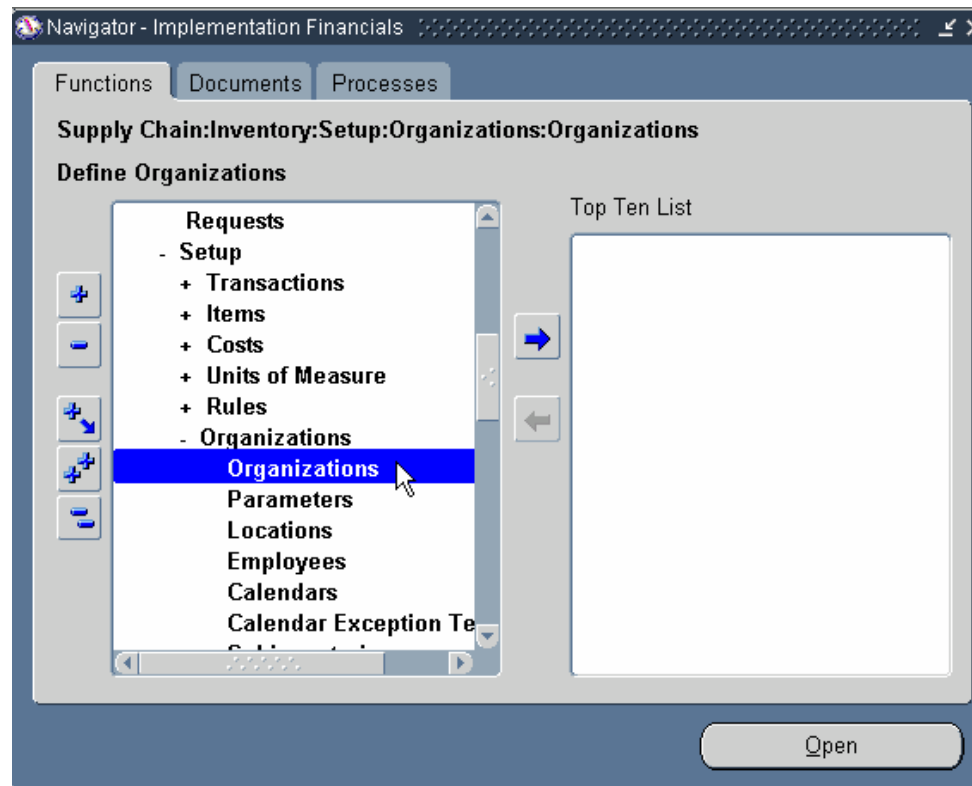
- **Log in with the Responsibility associated with the Business Group to which the Legal Entity will be assigned.**
- **Define the Legal Entity, it is attached to the Business Group attached to the Responsibility.**
- **Define Operating Units.**
- **Define Inventory Organizations.**
- **Log in with different Responsibility/Business Group association, repeat Org definitions.**



Multi-Org – Setup Steps

Define Organizations

Inventory -> Setup -> Organizations -> Organizations





Multi-Org – Setup Steps

Define Organizations

Inventory -> Setup -> Organizations -> Organizations

Organization

Name Type

Dates

From To

Location Internal or External

Location Address

Internal Address []

Organization Classifications

Name	Enabled
<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>

Others



Multi-Org – Setup Steps

Define Organizations

Select or Define Organization

Organization

Name: Type:

Dates

From: To:

Location: Internal or External:

Location Address:

Internal Address:

Organization Classifications

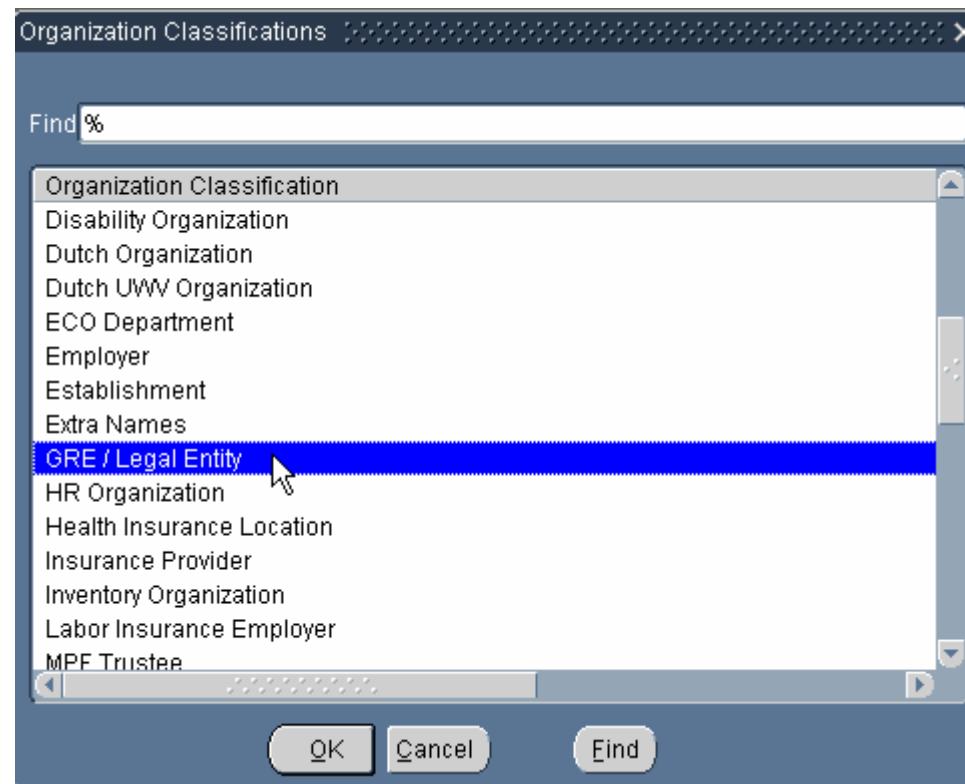
Name	Enabled
<input type="text" value="..."/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>



Multi-Org – Setup Steps

Define Organizations

Select GRE/Legal Entity classification





Multi-Org – Setup Steps

Define Organizations

Enable Legal Entity classification

Organization

Name Type

Dates

From To

Location Internal or External

Location Address

Internal Address

Organization Classifications

Name	Enabled
<input checked="" type="checkbox"/> GRE / Legal Entity	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

Others



Multi-Org – Setup Steps

Define Organizations

To define additional information, select Others button

The screenshot shows a software window titled "Organization". It contains several input fields and a table for organization classifications.

Name: OAUG LE Org

Type: [Empty field]

Dates:

- From:** 19-MAY-2002
- To:** [Empty field]

Location: Atlanta

Internal or External: Internal

Location Address: 1156 River Street...Atlanta.GA.30010.Fulton.United States....

Internal Address: [Empty field]

Organization Classifications:

Name	Enabled
GRE / Legal Entity	<input checked="" type="checkbox"/>
[Empty]	<input type="checkbox"/>
[Empty]	<input type="checkbox"/>

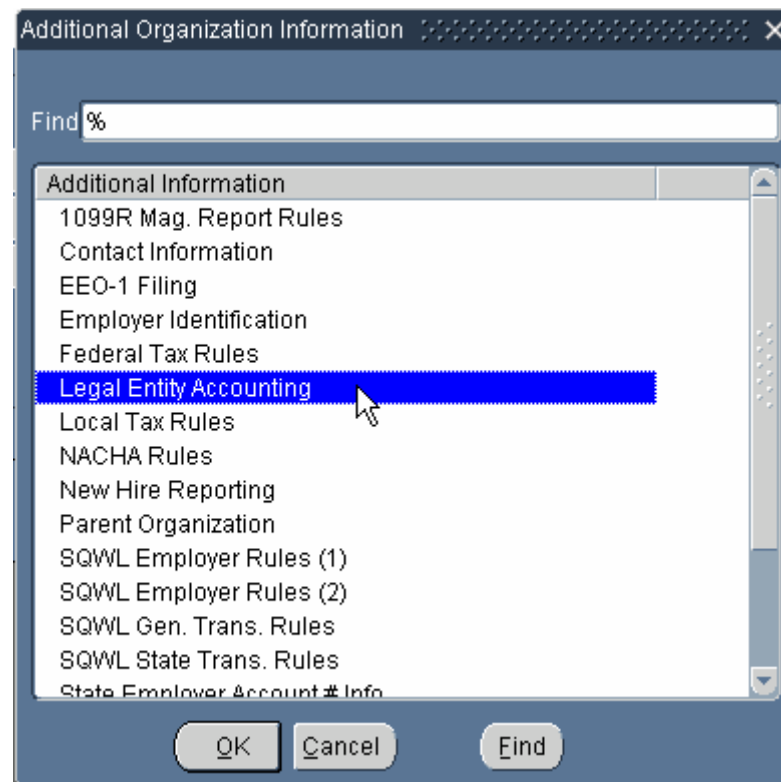
Others button



Multi-Org – Setup Steps

Define Organizations

Select Additional Organization Information category





Multi-Org – Setup Steps

Define Organizations

Legal Entity Accounting information

Additional Organization Information

Legal Entity Accounting

[]

OK



Multi-Org – Setup Steps

Define Organizations

Set of Books

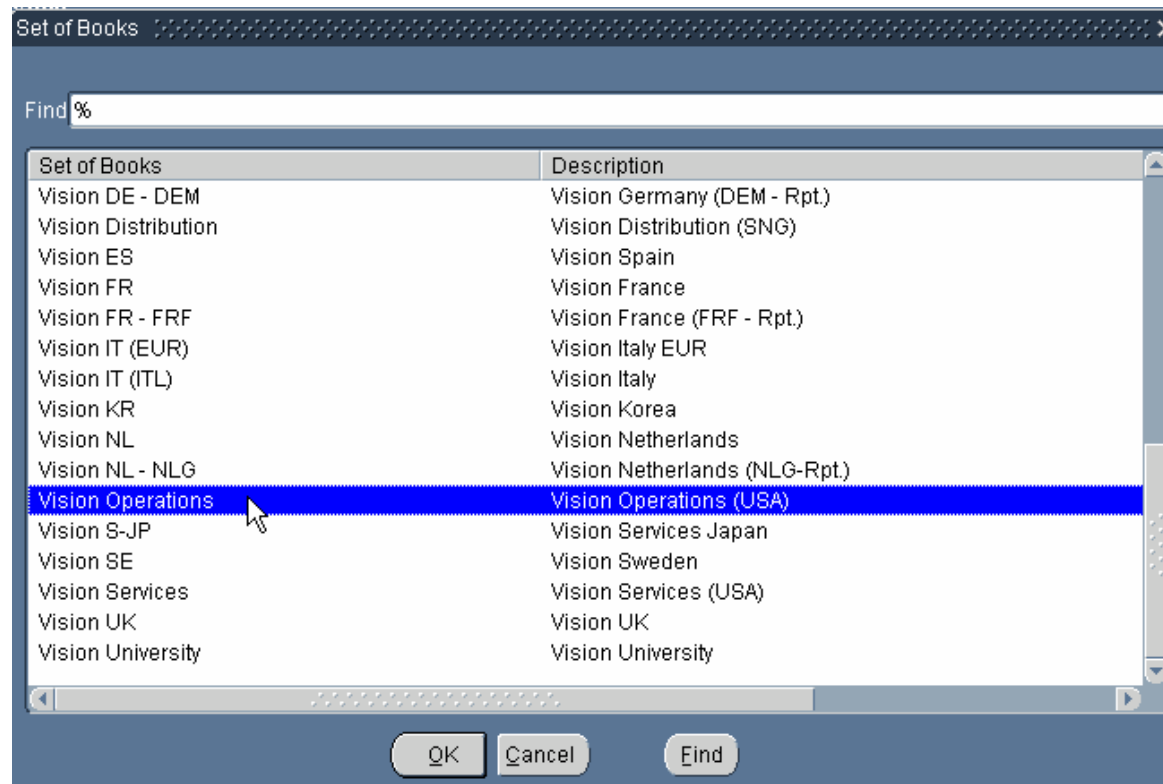
The screenshot shows a software window titled "Legal Entity Accounting" with a standard Windows-style title bar (minimize, maximize, close buttons). The window has a blue background. It contains two input fields: "Set of Books" and "VAT Registration Number". The "Set of Books" field is highlighted in yellow and has a small dropdown arrow on its right side. The "VAT Registration Number" field is a standard white text box. Below these fields is a horizontal scrollbar. At the bottom right of the window are four buttons: "OK", "Cancel", "Clear", and "Help".



Multi-Org – Setup Steps

Define Organizations

Select Set of Books





Multi-Org – Setup Steps

Define Organizations

Legal Entity will now use selected Set of Books

Legal Entity Accounting

Set of Books: **Vision Operations** Vision Operations (USA)

VAT Registration Number:

OK Cancel Clear Help



Multi-Org – Setup Steps

Define Organizations

Define Operating Unit

Organization

Name **OAUG LE Org** Type

Dates

From **19-MAY-2002** To

Location **Atlanta** Internal or External **Internal**

Location Address **1156 River Street...Atlanta.GA.30010.Fulton.United States....**

Internal Address

Organization Classifications

Name	Enabled
GRE / Legal Entity	<input checked="" type="checkbox"/>
	<input type="checkbox"/>
	<input type="checkbox"/>

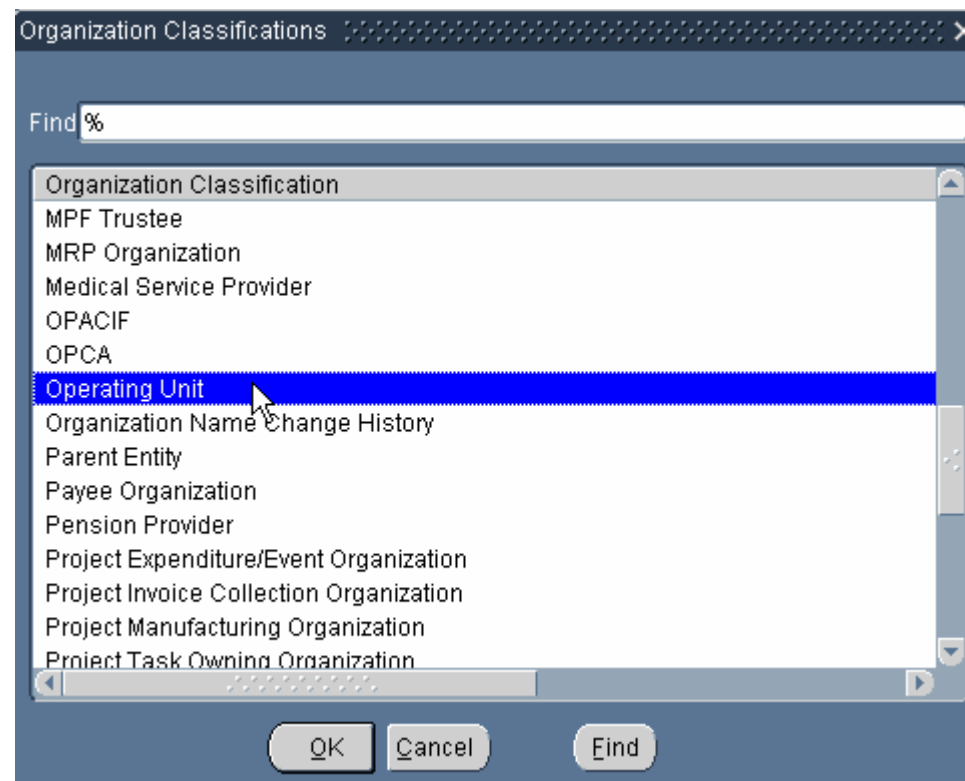
Others



Multi-Org – Setup Steps

Define Organizations

Select Operating Unit classification





Multi-Org – Setup Steps

Define Organizations

Enable Operating Unit classification

Organization

Name: Type:

Dates

From: To:

Location: Internal or External:

Location Address:

Internal Address:

Organization Classifications

Name	Enabled
GRE / Legal Entity	<input checked="" type="checkbox"/>
Operating Unit	<input checked="" type="checkbox"/>
	<input type="checkbox"/>



Multi-Org – Setup Steps

Define Organizations

To define additional information, select Others button

The screenshot shows the 'Organization' setup window. The fields are as follows:

- Name:** OAUG LE Org
- Type:** (empty field)
- Dates:**
 - From:** 19-MAY-2002
 - To:** (empty field)
- Location:** Atlanta
- Internal or External:** Internal
- Location Address:** 1156 River Street...Atlanta.GA.30010.Fulton.United States....
- Internal Address:** (empty field)

Organization Classifications:

Name	Enabled
GRE / Legal Entity	<input checked="" type="checkbox"/>
Operating Unit	<input checked="" type="checkbox"/>
(empty)	<input type="checkbox"/>

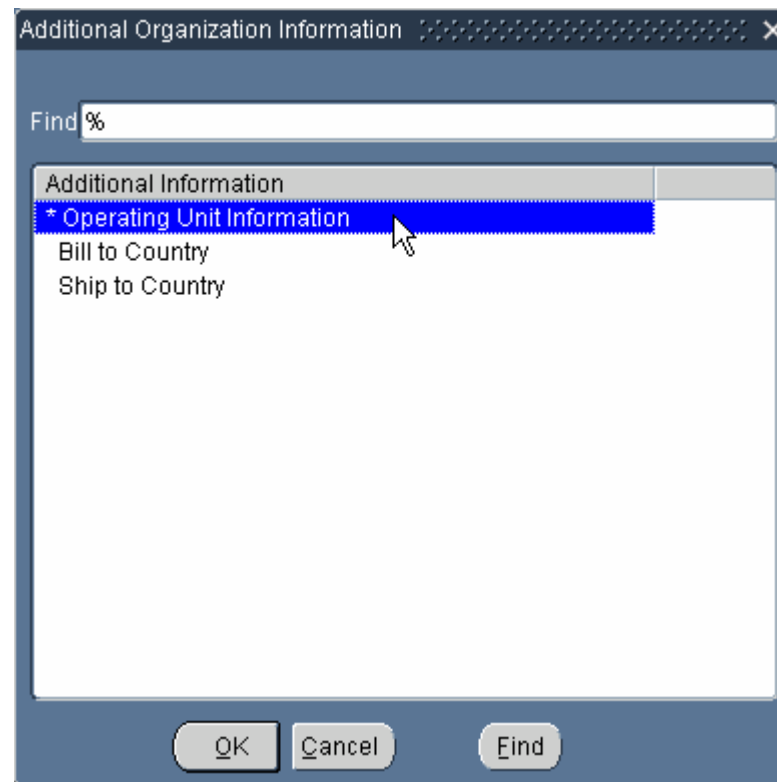
At the bottom right of the 'Organization Classifications' section is a button labeled 'Others' with a mouse cursor pointing at it.



Multi-Org – Setup Steps

Define Organizations

Select Additional Organization Information category





Multi-Org – Setup Steps

Define Organizations

Additional Operating Unit information

Additional Organization Information

Operating Unit Information

[]

OK



Multi-Org – Setup Steps

Define Organizations

Associate with a Legal Entity, select Legal Entity

Operating Unit Information

Legal Entity

Set of Books

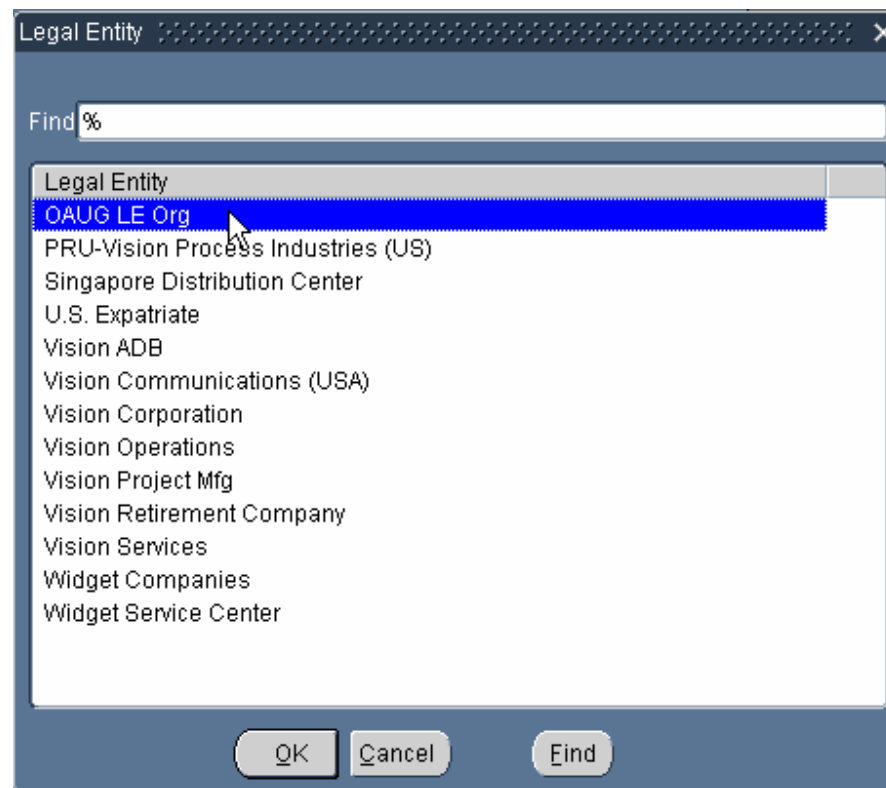
OK Cancel Clear Help



Multi-Org – Setup Steps

Define Organizations

Select a Legal Entity





Multi-Org – Setup Steps

Define Organizations

Set of Books associated with Legal Entity

Operating Unit Information

Legal Entity: OAUG LE Org

Set of Books: Vision Operations

Vision Operations (USA)

OK Cancel Clear Help



Multi-Org – Setup Steps

Define Organizations

Define Inventory Organization

Organization

Name: **OAUG LE Org** Type:

Dates

From: **19-MAY-2002** To:

Location: **Atlanta** Internal or External: **Internal**

Location Address: **1156 River Street...Atlanta.GA.30010.Fulton.United States....**

Internal Address:

Organization Classifications

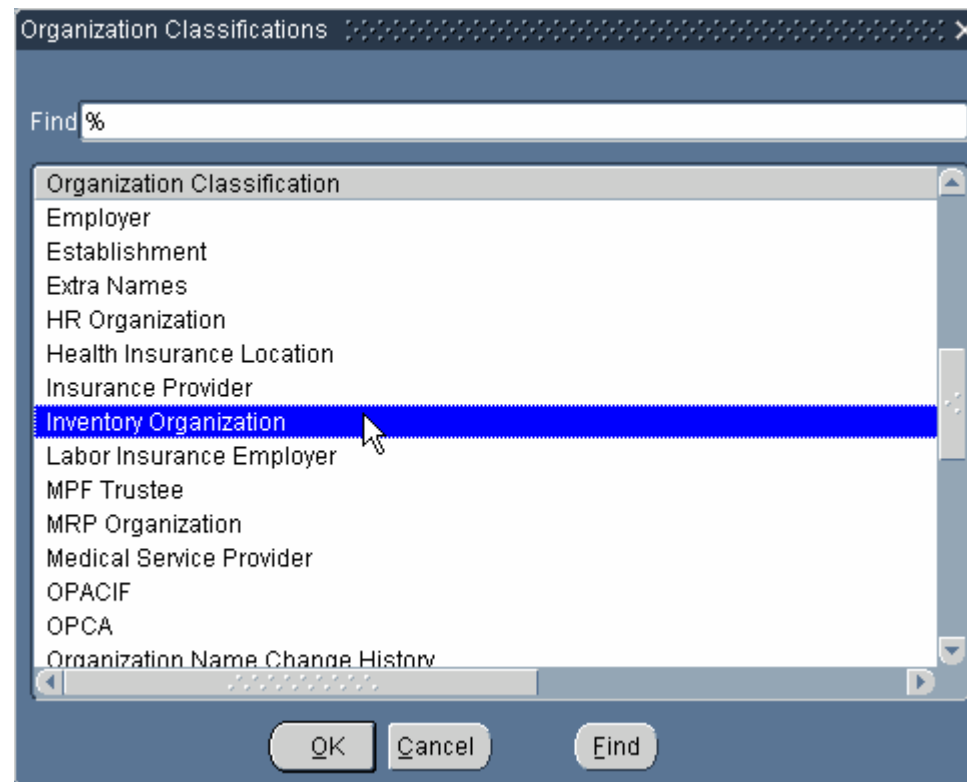
Name	Enabled
GRE / Legal Entity	<input checked="" type="checkbox"/>
Operating Unit	<input checked="" type="checkbox"/>
<input type="text"/>	<input type="checkbox"/>



Multi-Org – Setup Steps

Define Organizations

Select Inventory Organization classification





Multi-Org – Setup Steps

Define Organizations

Enable Inventory Organization classification

Organization

Name: Type:

Dates

From: To:

Location: Internal or External:

Location Address:

Internal Address:

Organization Classifications

Name	Enabled
GRE / Legal Entity	<input checked="" type="checkbox"/>
Operating Unit	<input checked="" type="checkbox"/>
Inventory Organization	<input checked="" type="checkbox"/>
<input type="button" value="Others"/>	



Multi-Org – Setup Steps

Define Organizations

To define additional information, select Others button

The screenshot shows the 'Organization' setup window with the following fields and values:

- Name: OAUG LE Org
- Type: (empty)
- Dates: From 19-MAY-2002 To (empty)
- Location: Atlanta
- Internal or External: Internal
- Location Address: 1156 River Street...Atlanta.GA.30010.Fulton.United States....
- Internal Address: (empty)
- Organization Classifications:
 - GRE / Legal Entity (disabled)
 - Operating Unit (disabled)
 - Inventory Organization (selected)

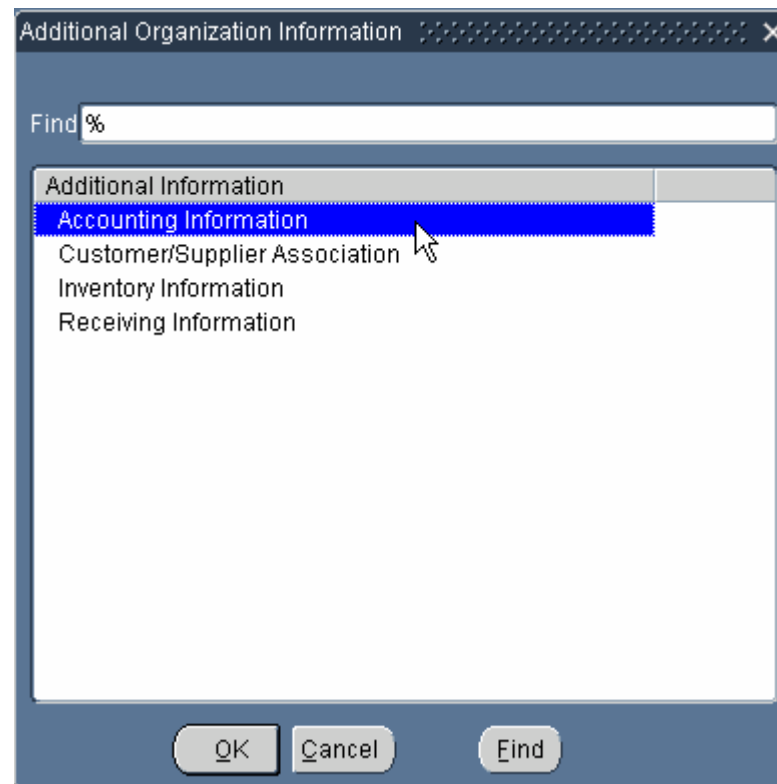
The 'Others' button is highlighted, indicating it should be selected to define additional information.



Multi-Org – Setup Steps

Define Organizations

Select Accounting Information category





Multi-Org – Setup Steps

Define Organizations

Additional Accounting Information category

Additional Organization Information

Accounting Information

[]

OK



Multi-Org – Setup Steps

Define Organizations

Select Set of Books

The screenshot shows a dialog box titled "Accounting Information" with a close button (X) in the top right corner. The dialog contains three input fields: "Set of Books" (highlighted in yellow), "Legal Entity", and "Operating Unit". A mouse cursor is pointing at the "Set of Books" field. Below these fields is a horizontal scrollbar. At the bottom right of the dialog are four buttons: "OK", "Cancel", "Clear", and "Help".



Multi-Org – Setup Steps

Define Organizations

Select Legal Entity

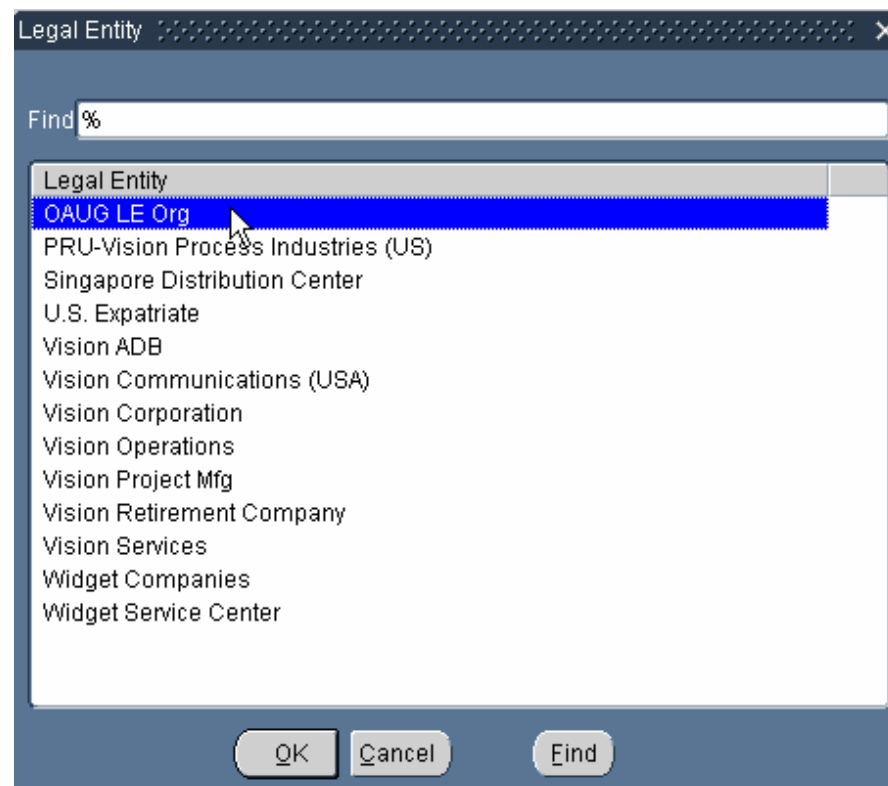
The screenshot shows a window titled "Accounting Information" with a close button (X) in the top right corner. The window contains three input fields: "Set of Books" with the value "Vision Operations" and a dropdown arrow, "Legal Entity" with an empty text box and a dropdown arrow, and "Operating Unit" with an empty text box and a dropdown arrow. To the right of the "Set of Books" field, the text "Vision Operations (USA)" is displayed. At the bottom of the window, there are four buttons: "OK", "Cancel", "Clear", and "Help".



Multi-Org – Setup Steps

Define Organizations

Select Legal Entity





Multi-Org – Setup Steps

Define Organizations

Select Operating Unit

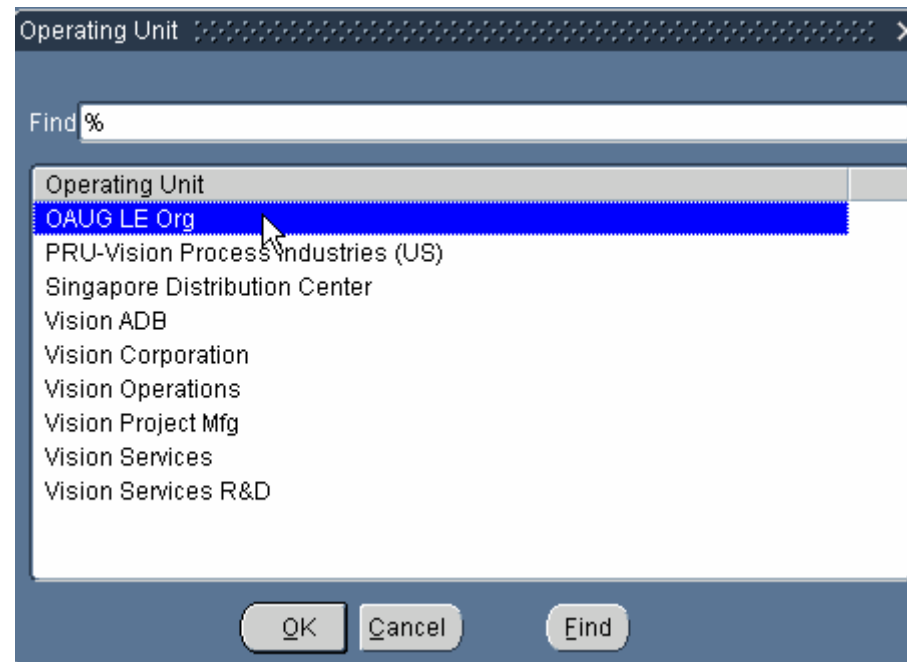
The screenshot shows a dialog box titled "Accounting Information" with a close button (X) in the top right corner. The dialog contains three input fields: "Set of Books" with the value "Vision Operations" and a dropdown arrow, "Legal Entity" with the value "OAUG LE Org", and "Operating Unit" which is currently empty. To the right of the "Set of Books" field, the text "Vision Operations (USA)" is displayed. Below the input fields is a horizontal scrollbar. At the bottom right of the dialog are four buttons: "OK", "Cancel", "Clear", and "Help".



Multi-Org – Setup Steps

Define Organizations

Select Operating Unit





Multi-Org – Setup Steps

Define Organizations

Additional Org Information for Operating Unit

Additional Organization Information

Accounting Information

Vision Operations|OAUG LE Org|OAUG LE Org []

OK



Multi-Org – Setup Steps

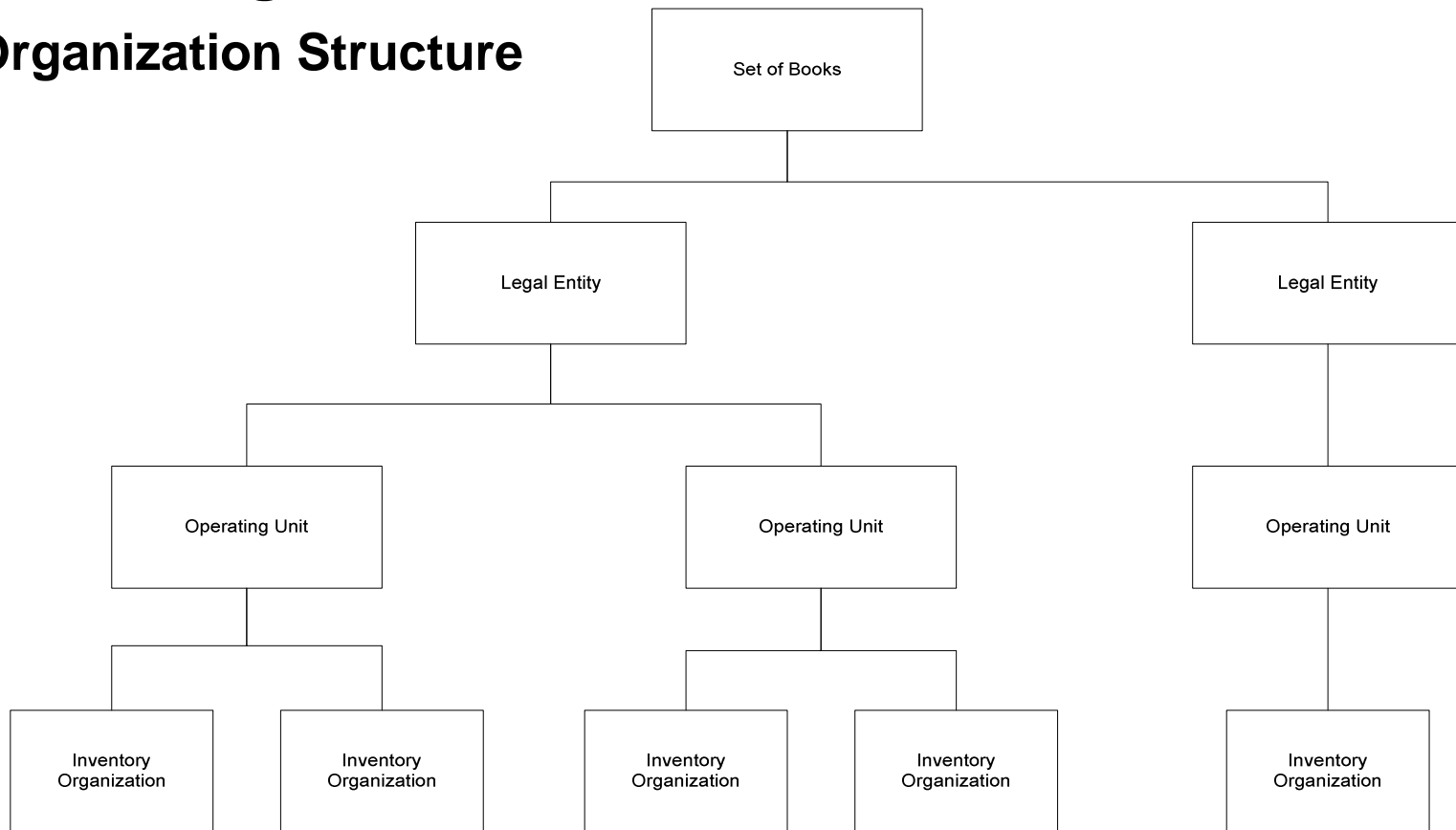
Define Organizations Organization Definition

The screenshot shows a window titled "Accounting Information" with a close button (X) in the top right corner. The window contains three input fields: "Set of Books" with the value "Vision Operations" (highlighted in yellow) and a tooltip "Vision Operations (USA)"; "Legal Entity" with the value "OAUG LE Org"; and "Operating Unit" with the value "OAUG LE Org". Below these fields is a horizontal scrollbar. At the bottom right, there are four buttons: "OK", "Cancel", "Clear", and "Help". A mouse cursor is pointing at the "OK" button.



Multi-Org – Setup Steps

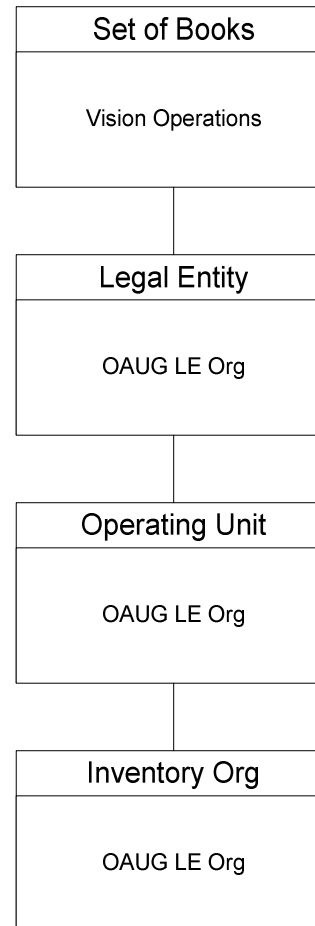
Define Organizations Organization Structure





Multi-Org – Setup Steps

Define Organizations Organization Structure

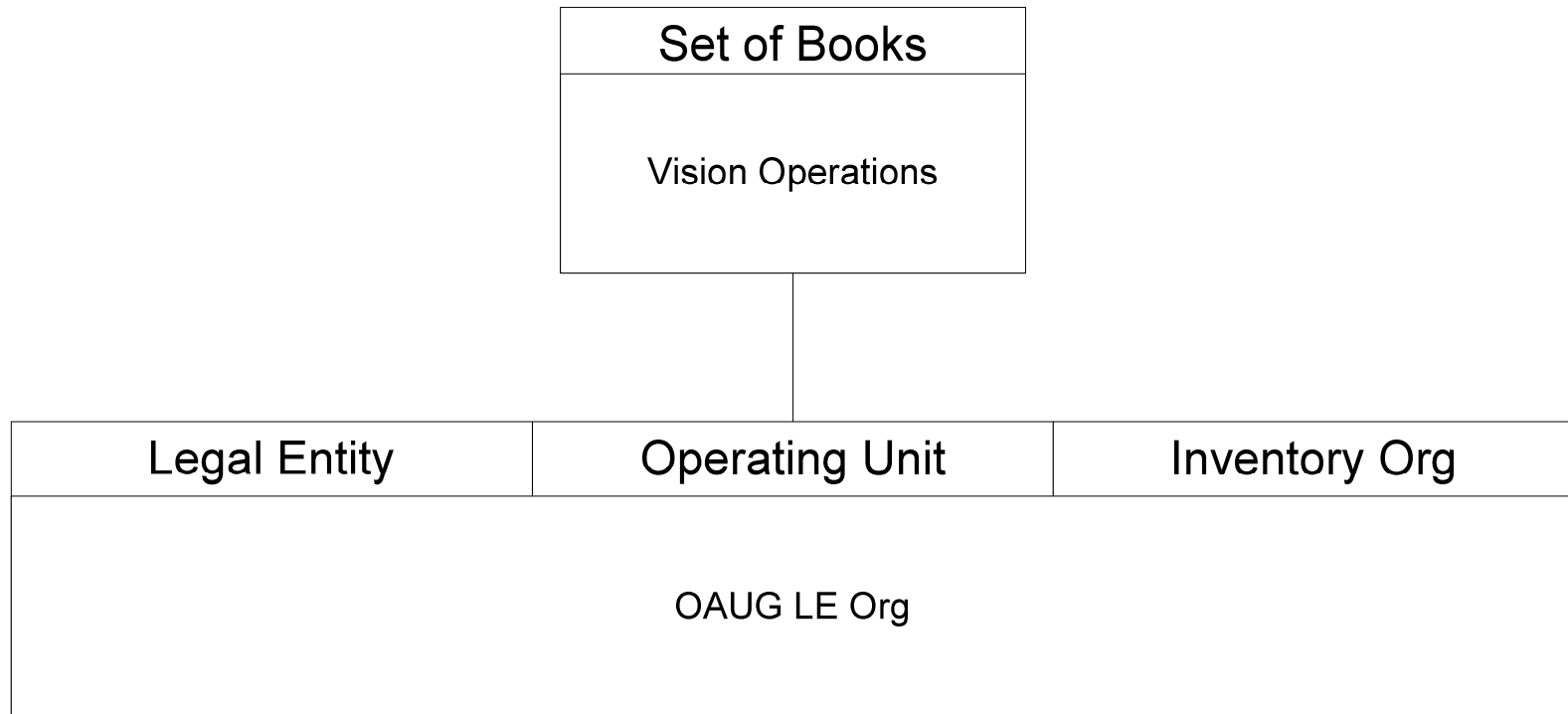




Multi-Org – Setup Steps

Define Organizations

Organization Structure





Multi-Org – Profile Options

Profile Options in Multi-Org Configuration:

- **Determine operating unit for users when logging into Oracle Applications.**
- **Control which reporting levels are available for particular responsibilities.**
- **Determine organization access for different responsibilities.**
- **Assign responsibilities to particular business groups.**



Multi-Org – Profile Options

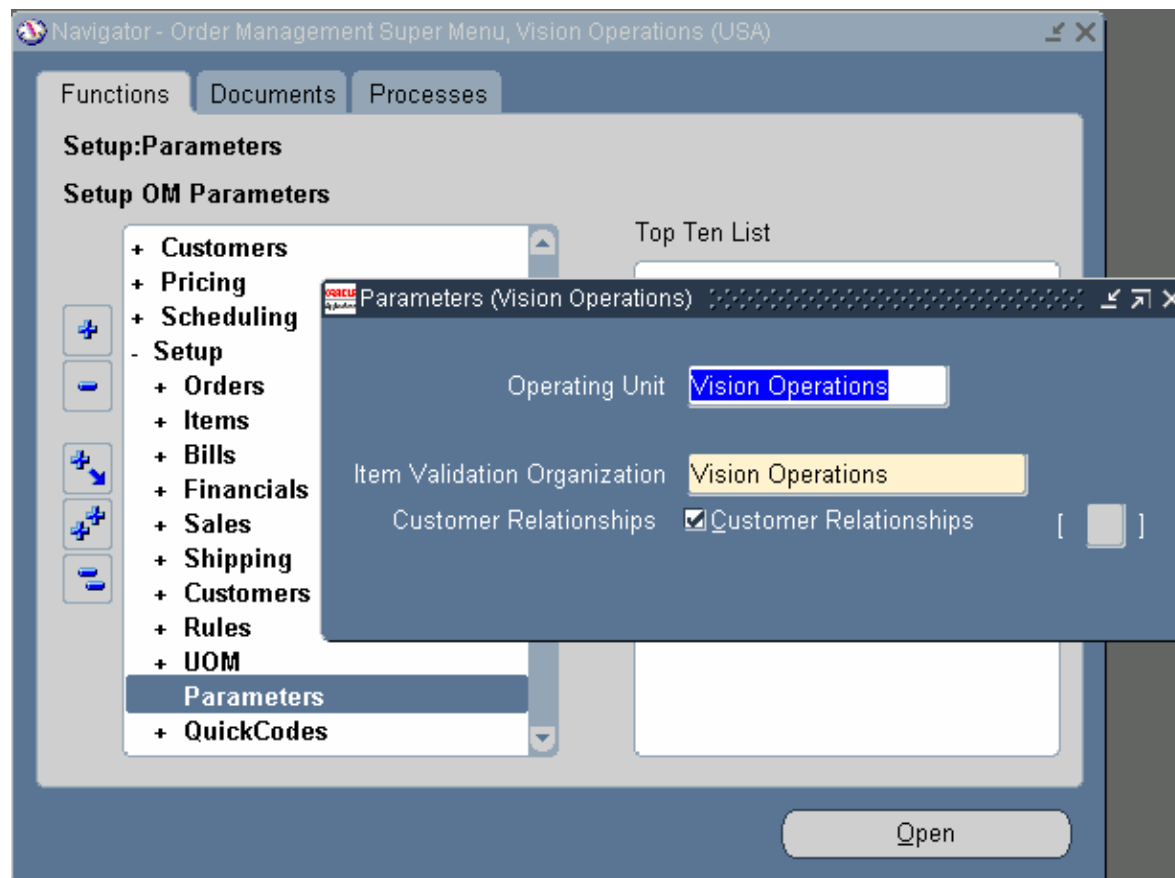
OM: Item Validation Organization

- **This profile option has been obsoleted.**
- **Referenced often in documentation.**
- **Is now a System Parameter.**
- **Can be set via Order Management responsibility, Setup -> Parameters.**



Multi-Org – Profile Options

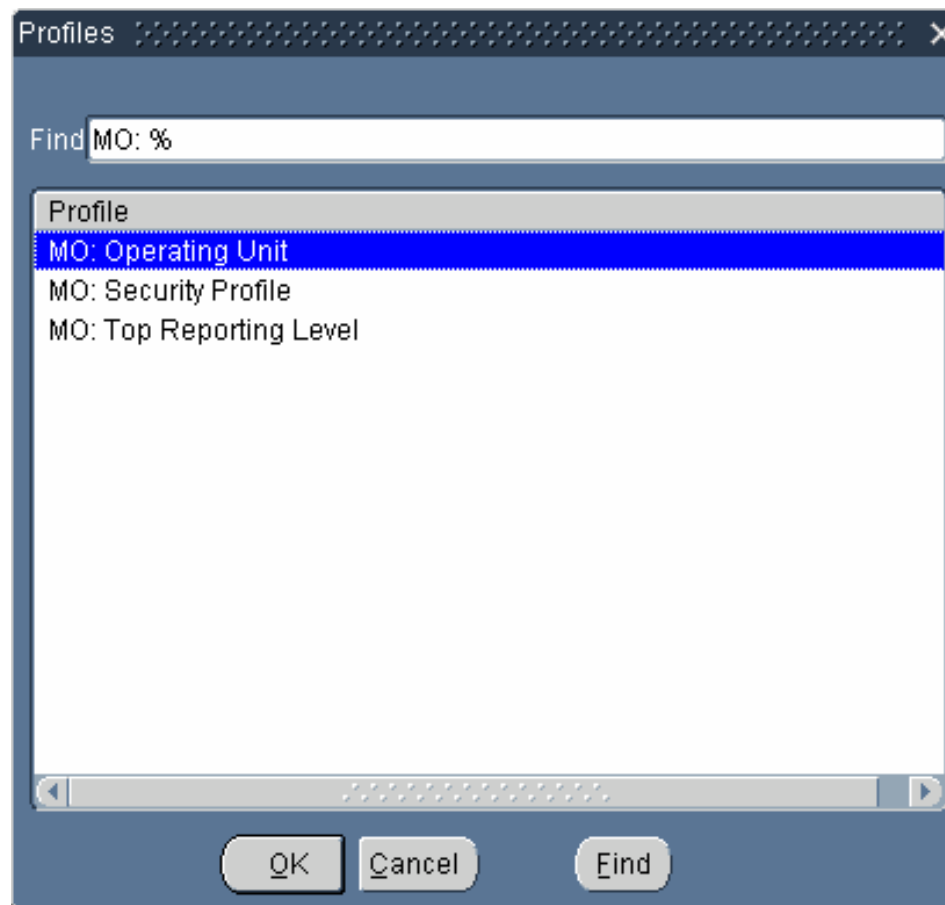
Item Validation Organization:





Multi-Org – Profile Options

Multi-Org Profile Options:





Multi-Org – Profile Options

MO: Operating Unit

- **Set at the Responsibility or User level.**
- **Determines which Operating Unit is used for users logging into the application.**



Multi-Org – Profile Options

MO: Security Profile

- **Allows users to view data globally across organizations.**
- **Control level of organization hierarchy users granted access to.**
- **Security Profiles can restrict user access to subsets of organization hierarchy.**



Multi-Org – Profile Options

MO: Top Reporting Level

- **Options include Set of Books, Legal Entity, Operating Unit.**
- **Controls reporting level availability.**
- **If set at Set of Books, reports can be run for Set of Books, Legal Entity, Operating Unit.**
- **If set at Legal Entity, reports run for Legal Entity and Operating Unit.**
- **If set at Operating Unit, reports run for Operating Unit only.**



Multi-Org – Profile Options

MO: Top Reporting Level selection options

The screenshot shows a software window titled "System Profile Values". It contains a table with the following columns: Profile, Site, Application, Responsibility, and User. The first row of the table has the following values: Profile: MO: Top Reporting Level, Site: Operating Unit, Application: (empty), Responsibility: (empty), User: (empty). A dialog box is open over the table, titled "MO: Top Reporting Level". It has a "Find %" search field and a list box containing three items: "Set of Books", "Legal Entity", and "Operating Unit". The "Set of Books" item is currently selected. At the bottom of the dialog are three buttons: "OK", "Cancel", and "Find".

Profile	Site	Application	Responsibility	User
MO: Top Reporting Level	Operating Unit			



Multi-Org – Profile Options

Other profile options used:

- **GL Set of Books Name**
- **HR:Business Group**
- **HR:User Type**



Multi-Org – Profile Options

GL Set of Books Name

- **Before using a newly defined set of books, it must be associated with one or more responsibilities. This is done using the profile option GL Set of Books Name.**



Multi-Org – Profile Options

HR:Business Group

- **HR:Business Group profile option must be set at the Responsibility level to determine the Responsibility's Business Group.**



Multi-Org – Profile Options

HR:User Type

- **Limits field access on windows shared between Oracle Human Resources and other applications. If you do not use Oracle Payroll, it must be to HR User for all responsibilities that use tables from Oracle Human Resources (for example, responsibilities used to define employees and organizations).**



Multi-Org – Q & A

Questions ?