Unit 1: Overview of Applications Manager

This unit covers the basic concepts of Applications Manager and one of its primary components, the Application Platform.

LESSON 1.1: Introduction to Applications Manager

Introduction

This lesson provides information about Applications Manager and one of its primary components - Sterling Application Platform.

Lesson Objectives

This lesson is designed to enable you to:

- Describe Applications Manager.
- Describe the layout of Applications Manager.
- Describe the components of Sterling Application Platform.
- Navigate Sterling Application Platform.

References

For more information on Sterling Application Platform, refer:

- http://www.ibm.com/support/knowledgecenter/SS6PEW_9.5.0/om_maps/om95_welcome.html

Introduction to Applications Manager

Overview

Applications Manager is a collection of rules and setup configurations necessary to implement the Sterling Selling and Fulfillment Foundation. The configurations are logically grouped based on the applications that can be accessed from the Applications Manager menu bar. In addition, the set-up rules, common codes, and settings necessary for Sterling Selling and Fulfillment Foundation to work in a real-world business setting are set through this Interface.

Applications Configured With Applications Manager

Within the Applications Manager, the following business applications can be configured:

Application	Description
Distributed Order Management	This application manages and co-ordinates the order fulfillment processes across enterprises for products and services from multiple order channels. This application allows checking for inventory availability and provides rule-based, dynamic allocation across all fulfillment locations. It coordinates third-party services such as credit, logistics, and installation, and collaborates execution among all participants.
Global Inventory Visibility	This application coordinates and tracks real-time availability of global inventory across multiple sites, enterprises, and participants by synchronizing multiple demand and supply types at internal and external ship nodes. It allows inventory planners to resolve problems and shortages.
Catalog Management	This application collects and manages detailed product and catalog data across multiple divisions, enterprises and, participants. It allows categorization, product cross-sell, up-sell, substitution, and act as a multi-tenant management tool that supports sharing and collaboration.

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Introduction to Applications Manager

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Applications Configured With Applications Manager ....(Continued)

Application	Description
Logistics Management	This application manages and executes complex multi-step, multi-leg, and multi-mode movement of goods of an inbound or outbound delivery process. It includes practices such as merge-in-transit, continuous movement, lane optimization, and cross-docking. It also coordinates the activities of all parties in the delivery chain, monitors events, and notifies participants when deviations occur.
Supply Collaboration	This application collects, routes, and tracks planned orders and purchase orders, with multiple divisions and complex supplier networks. It incorporates business rules by division, suppliers, and partners that impact how purchase orders are allocated, tracked, and managed. It can be tightly linked to the Global Inventory Visibility application to provide visibility into inbound, on purchase, or planned inventory.
Reverse Logistics	This application delivers condition-based returns processing, including execution and management of exchange orders, refurbishment and repair requests, and return dispositions. It closes the returns loop and tracks the reverse inventory to the Node based on business rules. It handles return receipts, dispositions, and the crediting process.
Application Platform	This application provides the technical foundation and framework that supports and allows the smooth flow of business transactions. It uses the latest technologies and standards to allow interoperability. It provides the framework that enables companies to do business in an extended enterprise environment.

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Introduction to Applications Manager

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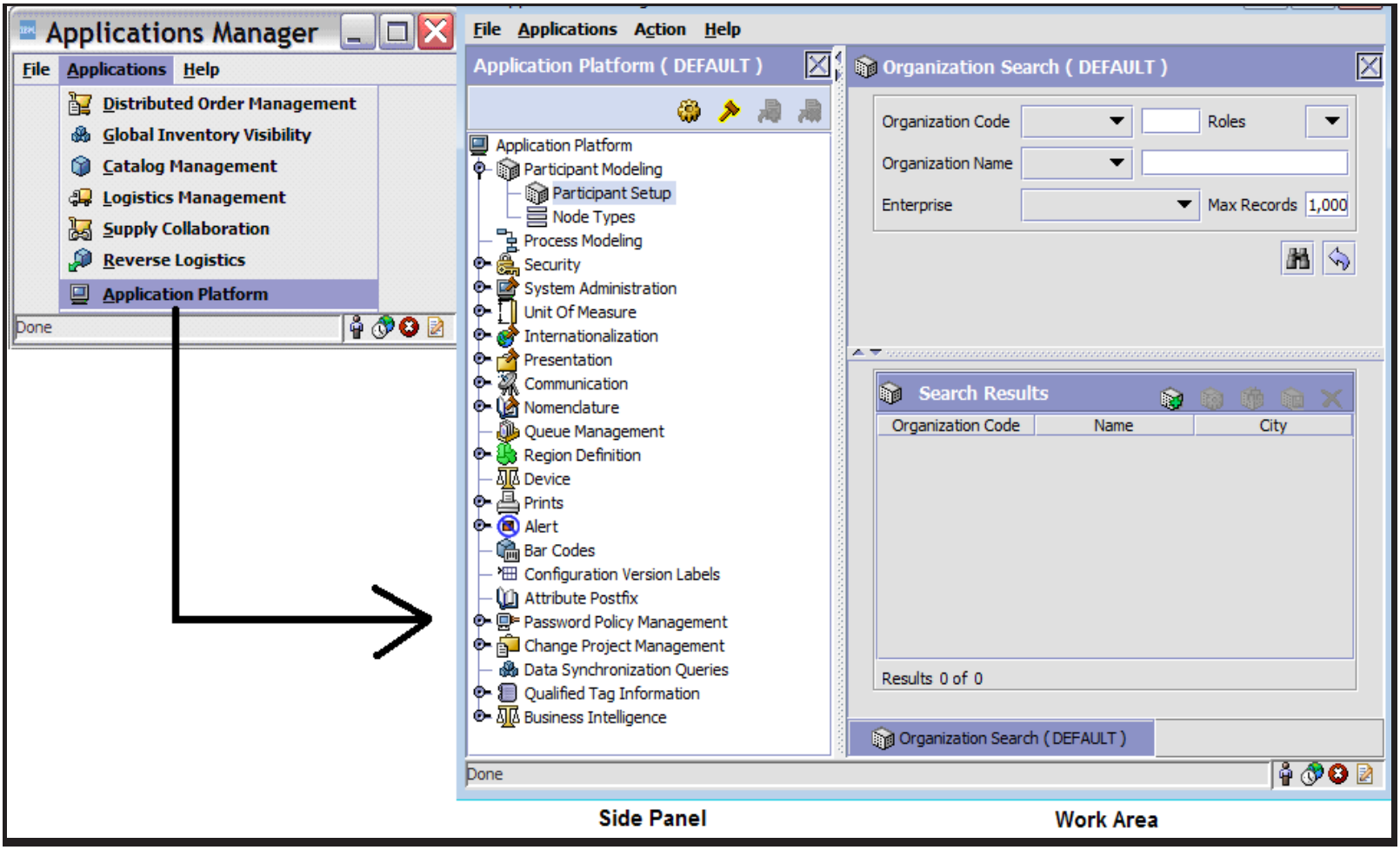
Applications Manager Layout

The Applications Manager menu shows the list of applications that the applications manager can manage. The Applications Manager provides an intuitive and logically organized graphical user interface for navigation and configuration. When you select an application to configure from the menu, Applications Manager shows the application rules Side Panel and Work Area.



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Introduction to Applications Manager

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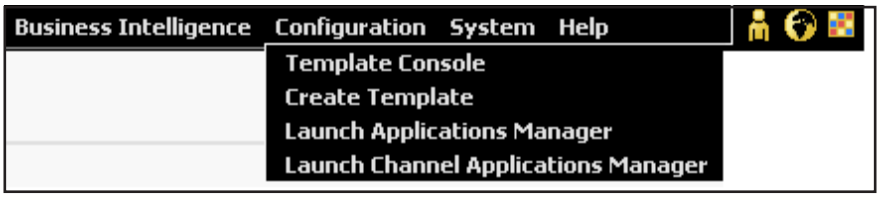
Application Manager Navigation

Procedure to Start and Navigate to the Applications Manager

1. Type the URL of the product environment in the browser. The URL is of the format:

   http://<hortname:portnumber>/smcfs/console/login.jsp

   where, host name is the computer name or IP address of the computer where Sterling Selling and Fulfillment Foundation is installed and the portnumber is the listening port of the computer where Sterling Selling and Fulfillment Foundation is installed.
2. The browser displays the login page. Enter the Login ID and Password and click Sign in. The Application Console is displayed.
3. From the menu bar, choose Configuration > Launch Applications Manager. Applications Manager opens in a new window.



4. Click the Applications menu to access the list of applications that can be configured.
5. You can change the color schemes of Application Console by clicking the colored tile. You can view and change the password and user contact address on the user profile screen. Standard navigation icons are at the upper left hand corner of each console screen.
6. Select the menu option corresponding to the application. A hierarchical tree of elements specific to processes used within the application are displayed in the Side Panel. Notice how the name of the application and the organization for which the rules are being configured are displayed.

In this case, the organization name is DEFAULT. You will learn more about DEFAULT and organizations in the next unit.

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Introduction to Applications Manager

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Application Rules Side Panel

The Application Rules Side Panel shows the elements specific to (processes that are used within) each application in a hierarchical tree structure. It identifies the organization for which you want to configure the business rules. It also identifies if any rules are inherited from another organization.

Application Rules Side Panel Usage

You can use the side panel to:

- Access configuration screens.
- Determine inheritance.
- Load rules of another organization.

Work Area

The work area is the main area where the configuration screens appear. The following are the main types of screens you can see in the work area.

Search Window

It allows you to perform a filtered search. The upper panel of a search window offers search criteria to narrow your search. The lower panel shows the search results.

List Window

When you configure a specific rule or code that does not require a search, Applications Manager shows a list window of the rules and codes that are already configured.

Details Window

A details window is the main interface through which most of the configurations are completed. This window contains editable fields, tables, and tabs to configure an entity, and perform additional actions on these entities.

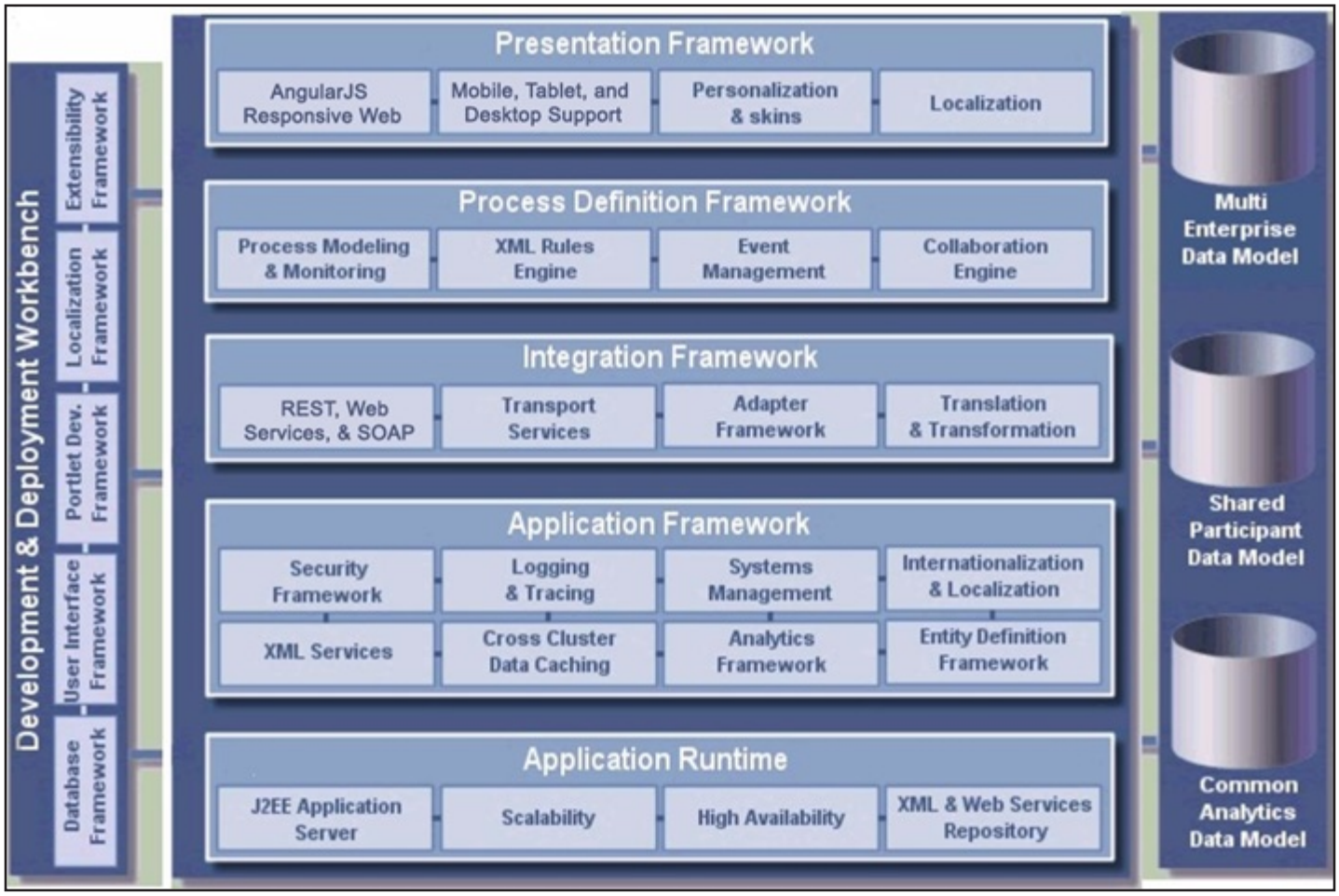
Drag-and-drop Window

A drag-and-drop window consists of a pallet and a graphical work area. You can use the graphical drag-and-drop window to ease the construction of pipelines, pipeline determination, event handlers, status monitoring rules, and services.

Introduction to Application Platform

Overview

Application Platform defines the technical foundation and base framework that supports and allows the smooth flow of business transactions.



Components Configured Using Application Platform

Sterling Selling and Fulfillment Foundation is a collection of common components that are used across the application. These components are the infrastructure upon which all other business application modules in Sterling Selling and Fulfillment Foundation are built.

In Applications Manager, you can use the Application Platform configuration grouping to establish the following aspects of Sterling Selling and Fulfillment Foundation.

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Introduction to Application Platform

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Components Configured Using Application Platform

Participant Modeling

Participant Modeling allows you to create and maintain organizations and their relationships. After you create an organization, you can define its role and the services it provides and uses. Additionally, you can define the business elements that are required to support the collaborative processes between all of the participating organizations in the Hub.

Process Modeling

Process Modeling is the setting up of the Sterling Selling and Fulfillment Foundation business process workflow. The Sterling Selling and Fulfillment Foundation workflow consists of the entire set of business logic that defines how Sterling Selling and Fulfillment Foundation handles business documents and transactions on those documents. A process type consists of one or more processes (with different statuses) that a specific document type (such as an Order) goes through during the lifecycle defined by that process type.

Security

Security is setup to allow users access to actions, views, and data within the user interface of Application Console and Applications Manager. A user's access is limited to only those applications to which the users have permission and data security rights. The security option is used to create Users, user groups, and teams.

System Administration

System Administration is used to configure system level information that is used throughout the Sterling Selling and Fulfillment Foundation infrastructure. System administration provides the system purge criteria, and a place where user exit implementations and installation-time rules can be defined.

Unit of Measure

Unit of Measure is used to define standard units of measure to associate with items and locales. Sterling Selling and Fulfillment Foundation provides unit of measure classifications for dimension, volume, weight, and time. Additionally, Sterling Selling and Fulfillment Foundation allows you to create conversion rates for different units of measure.

Internationalization

Internationalization provides a set of rules and common codes that can be used when implementing Sterling Selling and Fulfillment Foundation in different international locales. Internationalization can be used to define country codes, language codes, date and time formats, and currency conversion rates.

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Introduction to Application Platform

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Components Configured Using Application Platform

Presentation

Presentation is used to configure locales, menus, themes, and resources necessary for customizing the user interface.

Communication

Communication is used to configure business communication components that define the codes and documents that are used to communicate between Sterling Selling and Fulfillment Foundation and external systems and different business organizations within a business model.

Nomenclature

Nomenclature provides components to create a mapping of terms for use in any business model. It lets you to set the terms that trading partners can use.

Queue Management

Queue Management is used to create queues for different users and alert types. Queues can be designed to alert the specified users at specific levels and times. Queue management also defines how the configured users must be notified.

Region Definition

Region Definition provides components that the Sterling Selling and Fulfillment Foundation geography engine uses. The individual components that consist of regions and region levels are used to create region schemas. Later, these region schemas are used throughout the Sterling Selling and Fulfillment Foundation business application models, whenever geography is considered.

Device

Devices are hand-held and stationary devices that have unique definitions and, sometimes, are associated specifically to stations or equipment. Each group of devices are represented as a device type and subtype combination. A device and its unique communication requirements are represented when each device is configured.

Prints

Warehouse operations require numerous documents such as labels and reports to be printed daily. The printing of the documents, is either initiated by the occurrence of specific events, or is requested manually by a user. These documents are printed individually, in sets, or in groups. Sterling Selling and Fulfillment Foundation provides standard documents to assist the print function.

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Introduction to Application Platform

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Components Configured Using Application Platform ....(Continued)

Alert

Alerts allows a user to create new exception types, organization exception types, queues, and exception routing rules. Exception types are maintained at the Hub level and contain information such as the:

- Queue to which the exception is assigned.
- Default priority of the exception.
- High priority threshold.

A low priority number indicates that the alert is of a high importance. The high priority threshold value is used to determine the alerts that are of a high priority. Any alert with a priority number lower than that of the high priority threshold is considered a higher importance.

Configuration Version Labels

Configuration Version Labels track changes to the configuration of an implementation. Sterling Selling and Fulfillment Foundation provides the Configuration Data Versioning tool (part of the Configuration Deployment tool) to track configuration data versions or sets of changes to configuration data. It lets a user to capture changes from a source database, compare, and deploy them onto a target database.

Attribute Postfix

Defining common codes for attribute postfixes lets you to associate postfixes to attributes. Defining postfixes ensures that each customer sees attribute data in a familiar format.

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Introduction to Application Platform

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Components Configured Using Application Platform ....(Continued)

Password Policy Management

Sterling Selling and Fulfillment Foundation provides a built-in and flexible password management policy for controlling password use and behavior. A Password Policy is a set of rules to define, control, and manage user passwords. A set of default rules are provided; however, you can configure your own rules for the Password Policy.

Change Project Management

The Change Project Management feature allows users to implement new functions (projects) on a staging or a testing (source) environment before implementing them on a production (target) environment to minimize operational errors. This feature allows users to implement new features or database changes as separate projects.

Data Synchronization Queries

Data synchronization involves transfer of data from the source database (enterprise) to the target database (Stores). Sterling Selling and Fulfillment Foundation enables you to synchronize accurate and consistent data between the corporate enterprises and stores when it is deployed at multiple levels.

Qualified Tag Information

Qualified Tag Information allows a user to define qualified tag and qualified tag types. Qualified tags lets you to associate a rule or a common code to a particular Sterling Selling and Fulfillment Foundation version. Qualified tag types are used to configure the class to validate the Qualified Tags against a particular Sterling Selling and Fulfillment Foundation version. You can associate a particular qualified tag type with one or more qualified tags.

Business Intelligence

The Sterling Business Intelligence component provides powerful analytic and performance metrics that interface with the Sterling Selling and Fulfillment Foundation data set. The Sterling Business Intelligence application is installed on Sterling Selling and Fulfillment Foundation. It uses the report generation capability of Cognos® Business Intelligence to create and manage ad hoc reports and scheduled reports. You can then identify performance trends and make consistent, coordinated decisions to strengthen your extended enterprise and value chain relationships. The goal of the Sterling Business Intelligence component is to enhance the value of the Sterling Selling and Fulfillment Foundation by providing operational and analytical reporting capabilities to its users, suppliers, and partners.

Exercise 1.1.1: Launching the Applications Manager

Scenario

In this exercise, you will log in to Sterling Selling and Fulfillment Foundation and launch the Applications Manager. Additionally, you will navigate to the Application Platform and locate the enterprise Ariba Integration.

You are provided with a set of images to perform the lab exercises. The images are made available through a cloud platform called Skytap. Your instructor will provide a unique URL to each student to perform the exercises. For example, the URL of the image might resemble the following:

```
https://cloud.skytap.com/vms/8c5250e9f50b68b78e25b44b77bba6f1/desktops
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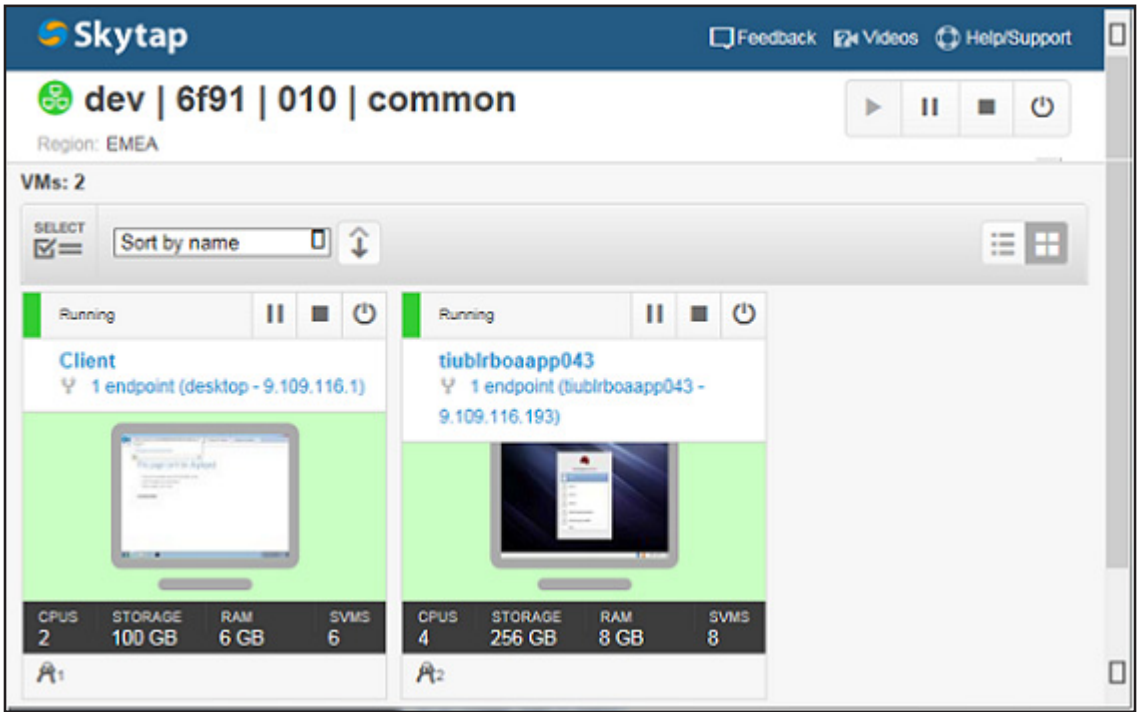
Instructions

Procedure to access the Training Environment

1. In a web browser, *open the URL you received from the instructor*. You will see a screen similar to the following screenshot when the link is accessed.



2. Click the **play** button on the image to start the machine. Alternatively, to start all the machines simultaneously, click the play button on the right hand corner of the page. It might take a few minutes to start the images.

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Exercise 1.1.1: Launching the Applications Manager

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Instructions

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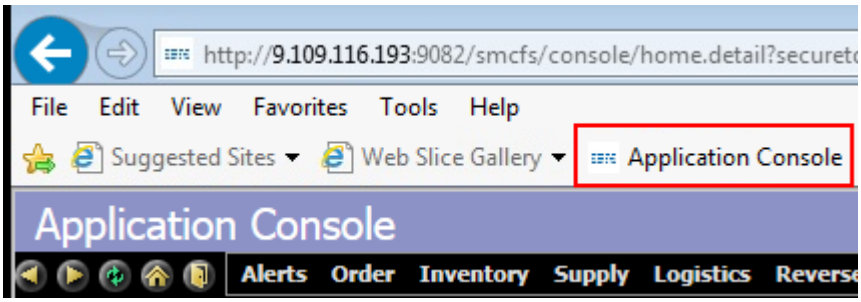
Note

Ensure you suspend the images at the end of the training day. The controls to suspend, shut down, and power-off the images are available on the right hand corner of the URL page.

3. In the Skytap environment, click the image that is named **Client** to access the Windows system. Specify **root123** as the password and then press **Enter**.
4. From the client Desktop, open an **MS Internet Explorer** browser window.
5. From the Favorites bar on the browser, click **Application Console**.



6. Type the Login ID as **admin** and password as **password** and click **Sign In**.
7. Choose **Configuration > Launch Applications Manager**. Applications Manager opens in a new window.
8. In the Applications Manager window, from the Applications menu, select **Application Platform**.
9. Navigate to **Participant Modeling > Participant Setup** from the Application Platform menu tree.
10. In the Organization Search screen, enter the organization name as **Ariba Integration** in the Organization Name field, as shown in the following figure.

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Exercise 1.1.1: Launching the Applications Manager

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Instructions

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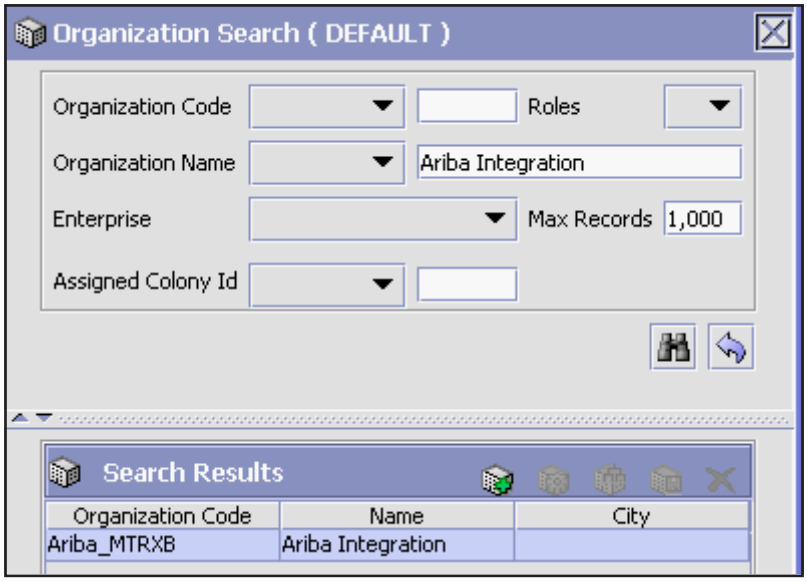

11. Click the icon to search for the organization. The organization is displayed in the **Search Results**.
12. Locate the enterprise **Ariba Integration**.
13. Exit Applications Manager by closing the Applications Manager window, or by clicking File > Exit.

Result

You logged in to the Applications Manager and searched and located the desired enterprise.

Lesson Review

Completed Objectives

This lesson was designed to enable you to:

- Describe Applications Manager.
- Describe the layout of Applications Manager.
- Describe the components of Application Platform.
- Navigate to Application Platform.

Unit 2: Configuring Organizations

This unit provides you with an overview of configuring participants in a supply chain network and the roles they can assume in a business. The unit also discusses how to configure organizations and the key attributes that affect and control the behavior. Additionally, the unit also covers the key attributes for the different roles.

LESSON 2.1: Defining Participants and Roles

Introduction

This lesson provides you with an overview of Sterling Selling and Fulfillment Foundation along with a brief introduction of its business models. This lesson also provides you with an overview of configuring and modeling participants.

Lesson Objectives

This lesson is designed to enable you to:

- Describe the business models that Sterling Selling and Fulfillment Foundation supports.
- Identify participants in a supply chain network.
- Describe the configurable organization roles in Application Platform.
- Map roles to participants.

References

For more information on configuring participants, refer:

- http://www.ibm.com/support/knowledgecenter/SS6PEW_9.5.0/com.ibm.help.org.partic.concepts.doc/productconcepts/c_Considerations_OrgAndParticModel.html

  Navigate to **Sterling Order Management 9.5.0 > Configuring shared components and users > Organization and participant modeling > Considerations**

Business Models

Introduction

Today, businesses are built on complex models. Such models require robust business solutions that can address their requirements effectively. These complex models can be based upon any of the following models and more:

- Multi-divisional corporations
- Third-party logistics (3PL)
- Marketplace business

Sterling Selling and Fulfillment Foundation offers a wide range of solutions that can be configured to address these different business models.

Example

Consider a 3PL provider, BizNet, that provides its services to more than 45 companies in five different countries. BizNet offers its customers advanced value-added services such as: tracking and tracing, cross-docking, specific packaging, or providing a unique security system. To manage its services effectively, BizNet employs Sterling Selling and Fulfillment Foundation applications.

Multi-Divisional Corporation Model

An organization that is modeled as a multi-divisional corporation primarily focuses on managing purchase and sales activities. Such an organization can assume the role of a buyer, seller, or both. Additionally, it may be a retailer, manufacturer, or both.

Whatever form the multi-divisional corporation takes, it normally has multiple channels with different types of customers such as, consumers, retailers, dealers, and original equipment manufacturers.

Business Model for a Multi-Divisional-Corporation

In the multi-divisional corporation model, each division might be setup as an enterprise which can configure its own business rules, workflow, and transaction processing.

Advantages of the setup

- Segregation of transactions at the division level, and
- Global visibility at the corporate level.

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Business Models

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Third-Party Logistics Model

An organization that is modeled as a traditional third-party logistics company primarily focuses on providing a range of outsourced services such as:

- Warehousing
- Transportation
- Contract Manufacturing

Business Model for a Third-Party Logistics Company

In the third-party logistics model, each client might be setup as an enterprise.

Advantages of the setup

- Global visibility of all transactions at the Hub environment.
- Localized visibility of transactions at the client-level (that are setup as enterprises).
- Provide unique transaction processing to its clients.

Sterling Selling and Fulfillment Foundation provides the engine that is needed to run the operations of a contract fulfillment provider. Additionally, it provides a centralized system for real-time order execution and event driven problem-solving for an entire fulfillment network.

Marketplace Model

A marketplace primarily focuses on providing an online intermediary that connects buyers and sellers. In other words, a marketplace is a central location, or Hub, where a trusted intermediary integrates both procedures and technology to lower the costs and enhance the effectiveness of buyer and seller transactions.

Business Model for a Marketplace

In the marketplace model, each market might be setup as an enterprise. This setup allows each market to be unique with their own product or service handling.

Advantages of the Setup

- Accumulating offerings from many sellers.
- Matching buyers and sellers in an exchange or auction.
- Marketplaces assist buyers by lowering their purchasing costs and helping them reach new sellers. They assist sellers by lowering their sales costs and giving them access to new customers.

Participants in an Organization

Overview

The participants of Sterling Selling and Fulfillment Foundation are the players such as purchasing organizations, selling organizations, legal entities, business groups, and plant and warehouses. Each of these participants can play multiple roles in the business. Sterling Selling and Fulfillment Foundation allows businesses to model their players based on predefined business roles. These roles determine the activities the players can perform, and then the rules they must follow.

Business Group

A business group is typically the highest level in the organization hierarchy. It has no accounting impact. It consists of one or more companies.

Company

A company typically represents a global brand name and is the organizational unit for which individual financial statements are created according to the relevant legal requirements. A company can have one or more legal entities.

Legal Entity

A legal entity represents a self-contained organization unit that is identified by local governments as operating units. They are typically instituted for every country a business operates in. A set of accounts can be drawn up for external reporting for a legal entity which involves recording all relevant transactions and generating all supporting documents for financial statements such as balance sheets and profit and loss statements.

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Participants in an Organization

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Sales Organization

A sales organization is responsible for sales and distribution of products and services and can be defined based on the following characteristics:

- Sales channel - for example, wholesale, retail, or direct sale.
- Product Line - for example, electronics, entertainment, and service.
- Geography - the geography of the ship-to location of orders. For example, east-coast or west-coast.
- A combination of one or more of the above characteristics.

Purchasing Organization

A purchasing organization (also known as a buyer organization) is responsible for placing purchase orders to vendors to replenish raw materials and products in a company's locations. Purchasing organizations can be created centrally or can be associated with each legal entity or sales organization. Purchasing organizations can also be modeled based on product lines, geography, or vendors.

Plant and Warehouse (Location)

Plants and Warehouses are physical locations where goods are manufactured or stored for distribution. Typically, a plant or a warehouse is owned by a legal entity. A business can have many plants or warehouses that are associated in almost all combinations to its sales and purchasing organizations.

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Participants in an Organization

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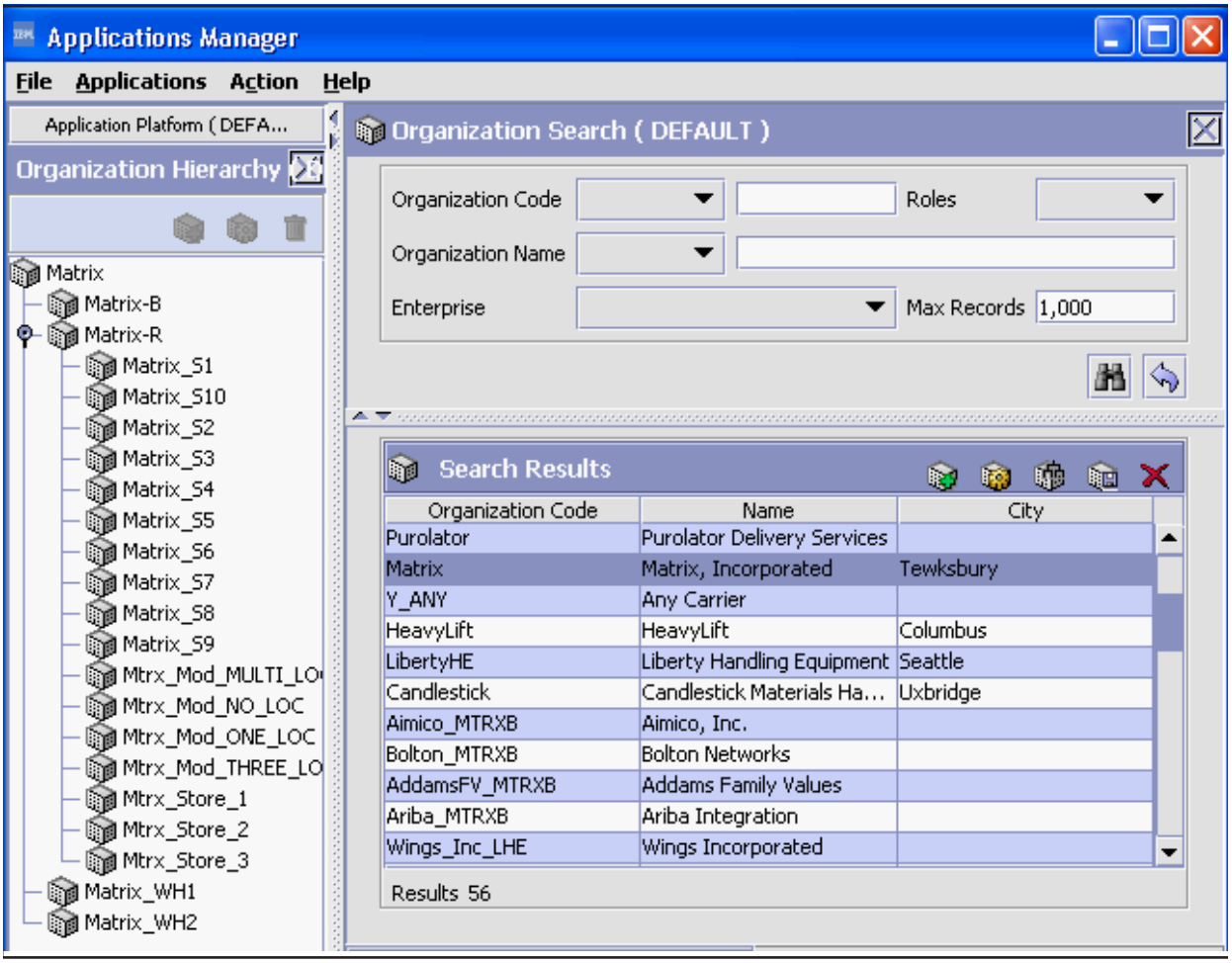
Organizational Model

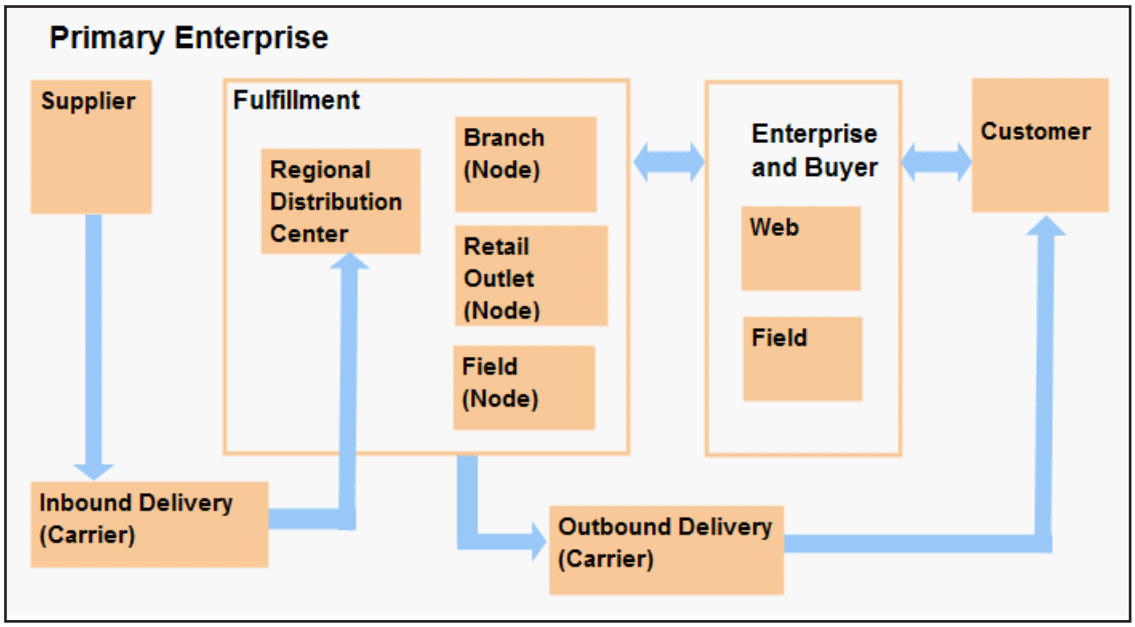
The following figure depicts a typical organizational model and shows the possible participants in a business setup.



Organization Roles

Introduction

A role is a well-defined set of activities that a participant can perform in an organization to achieve the organizational goals. Every participant can have a single or multiple roles. The roles that Sterling Selling and Fulfillment Foundation supports are Hub, enterprise, buyer, seller, carrier, node and template. The following figure depicts an example of the roles in a business organization.



Hub

A Hub is the center or focal point of any activity. In Sterling Selling and Fulfillment Foundation, the Hub role is the single central organization that owns the installation, around which all other organizations are built. A Hub is required irrespective of the business model. Only the Hub organization can modify configuration groups. All other organizations have read-only access.

Example of a Hub

Sigma Corporation is an organization that has two enterprises Alpha and Beta. Each of these enterprises have child organizations of their own. However, all these organizations are interacting with Sigma Corporation in different roles, and therefore, Sigma Corporation becomes the Hub that controls all the other organizations.

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Organization Roles

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Functions of a Hub

The Hub performs the following functions:

- Determines the business model and configures the roles for all other organizations such as:
  - Enterprises, which define rules.
  - Sellers, which sell items.
  - Buyers, which buy items.
  - Nodes, which carry inventory and service capacity.
  - Carriers, which move goods.
  - Template, which defines the point-of-sale rules, business processes, and configurations for a store or a group of stores.
- Maintains the list of all items that are sold, and inventory and service capacity available for all enterprises in the business, making the information available across enterprises.
- Assigns itself multiple roles such as an enterprise, a seller, and node. For example, a Hub can be an enterprise, seller, or buyer in itself and can perform all these roles.

Enterprise

An enterprise is an organization that connects services between buyers and sellers. The enterprise owns and controls the document flow and business rules that are associated with the document flow. Enterprises define rules for all other participants in that enterprise such as buyers, sellers, carriers, and nodes. If a business has multiple businesses that follow different business rules, each business unit can be defined as a separate enterprise.

Enterprise Rules

Because Sterling Selling and Fulfillment Foundation interprets business rules at the enterprise level, every organization in this business model is either:

- An enterprise, or
- Designates another enterprise as its *primary enterprise*

Example

The primary enterprise for Alpha North America - Purchasing is Alpha North America. This means that Alpha North America is the organization that controls and owns all transactions for Alpha North America - Purchasing, in Sterling Selling and Fulfillment Foundation.

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Organization Roles

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Buyer

A buyer is any organization that places demand on the network. It purchases product from the enterprise or organizations that are setup as sellers. In Sterling Selling and Fulfillment Foundation, buyers might be customers, but they also might be internal organizations that receive goods or services from other internal organizations.

Seller

A seller is any organization that fulfills demand for the network. It sells product to other enterprises, Organizations that are set up as buyers, or even consumers. A seller always sets the pricing and payment rules.

Example

A retail organization might have 1,000 stores that are set up as Nodes, with the Hub, enterprise, and seller roles all resting with a central organization. Even though individual sales might happen at stores, the pricing and payment rules are determined at the seller (in this case, the enterprise) level.

Carrier

A carrier is any organization that moves goods between participants in the network (between a buyer and seller). They can be independent (such as the USPS, DHL, UPS, or FedEx), or they be private, company-owned fleet. Carriers have three-shipping modes - Truckload (TL), Less-Than-Truckload (LTL) and Parcel.

 Note

Truckload (TL) is where the shipment fills a full truck or trailer, has one “ship to” location.
Less-Than-Truckload (LTL) is where the shipment is generally between 150 and 10,000 pounds, and can be mixed with other shipments from other businesses. Parcel is where the shipment is a smaller package, less than 150 pounds (weight limits are determined by different carriers). Distribution centers that fulfill consumer orders tend to generate numerous parcel packages.

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Organization Roles

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Node

A node is a physical location of inventory. When orders are created, Sterling Selling and Fulfillment Foundation identifies the node that can fulfill the order, and reserves the appropriate inventory or service capacity at that node.

Businesses can configure Sterling Selling and Fulfillment Foundation rules for selecting which node must fulfill an order. This selection is based on different factors that include proximity to the customer or on-hand inventory.

Template

A template represents an organization that defines the point-of-sale rules, business processes, and configurations for a store or a group of stores. A template is not a logical organization; rather, it inherits. Therefore, an organization that is configured as only a template cannot define configurations applicable for other roles, such as an enterprise. By default, template-only organizations do not display in the console or in Applications Manager when organizations in *All roles* are requested. To retrieve these organizations, the appropriate parameters must be set.

A template-only organization cannot define users, sourcing rules, or carrier-related configurations. Template organizations are defined in a hierarchy. Child template organizations can override, extend, or inherit the rules and configuration information defined by the parent template organizations.

 Note

An organization that is used in a store-specific configuration needs to have the template role only if it overrides an existing configuration. It does not require the template role in order to inherit a configuration from another organization, or to pass on a configuration.

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Organization Roles

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Commonly Used Organizational Terms and their Modeling

Some of the commonly used industry terms are:

Customer

In Sterling Selling and Fulfillment Foundation, a customer is an organization that is assigned a role of a buyer. This organization might be a typical business customer who purchases goods from a selling organization.

Vendor

A vendor is an organization that sells goods to a buying organization. A vendor is assigned a role of a seller in Sterling Selling and Fulfillment Foundation.

Internal and External Organizations

For ease of management and operations, some organizations creates separate divisions within themselves to perform sales or purchases.

For example, Sigma Corporation sets up Alpha North America - Sales as an organization to handle sales of a particular category of items and Alpha North America - Purchasing as an organization to buy raw materials. In this case, Alpha North America - Sales is modeled as a seller and Alpha North America - Purchasing as a buyer. These organizations are internal organizations, possibly child organizations of Sigma Corporation, that are assigned the roles of a seller and a buyer.

Alpha North America - Purchasing purchases raw materials from vendor VEN, and Alpha North America - Sales sells items to CUST. In this case, VEN and CUST are assigned seller and buyer roles. These organizations are external and participating organizations. These roles of these organizations must not be confused with the roles of internal organizations.

Map Participants and Roles

Introduction

Now that the different roles and participants are identified in Sterling Selling and Fulfillment Foundation, let us map them accordingly. Refer the Organization Model for reference.

Participants Roles Mapping

The following table indicates the mapping of the participants to the organizational role.

Participant	Role
Business Group	Hub
Company	Enterprise
Legal Entity	Enterprise
Purchasing Organization	Buyer
Selling Organization	Seller
Plant/Warehouse	Node
Store/ Group of Stores	Template

Important

A purchasing and selling organization can also be defined as an enterprise. They can also be separate legal entities.

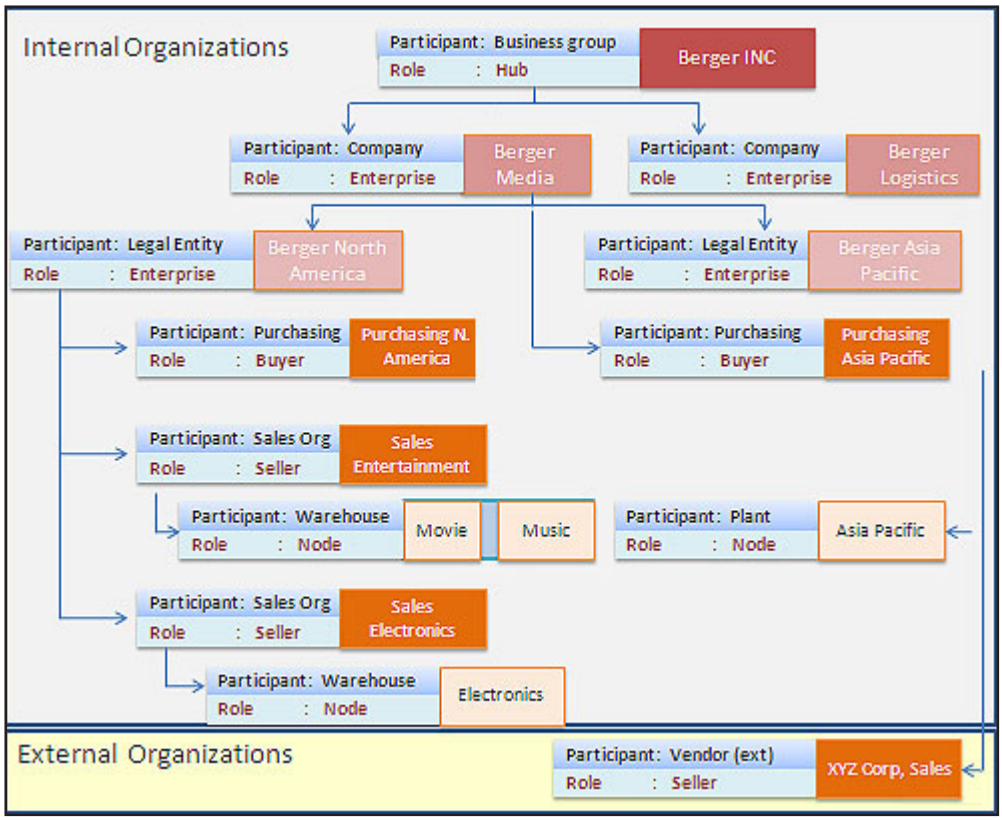
(Continued on next page)

Map Participants and Roles

(Continued)

Example: Mapping in an organization

The following figure shows the mapping of the participant and roles.



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Map Participants and Roles

(Continued)

Example: Multi-Divisional Corporation

DCI Corporation is a firm with two business lines. These business lines are:

- Network Components Division (NCD), which is engaged in the manufacturing, sales, and assembly of computers.

  NCD sells the products through two dealers who are also buyers for NCD. These two dealers are:

  - Wired Inc (WI) - WI has a warehouse in New York for storage and logistics management.
  - Great Buy (GB) - GB has a warehouse in Chicago for storage, cross-docking, and logistics management.
- Semicon, which is engaged in the manufacturing of semiconductors.

Purchases of DCI are centralized for better bargaining power with suppliers. Great Deal (GD) is one of the suppliers for DCI Corp. DCI also sells to a few large customers itself.

DCI has the following three warehouses from which they ship their inventory:

- Memphis warehouse
- San Francisco (SF) warehouse, and
- Dallas warehouse

DCI purchased Sterling Selling and Fulfillment Foundation for company-wide use. But first, they would like to start the implementation of Sterling Selling and Fulfillment Foundation with the NCD business line only. In the future, the solution will be extended to Semicon.

Sample Case Study

Overview

This module presents a case study of a multi-divisional corporation to help you understand the participants and roles they play in the supply chain network. This section provides you with a synoptic description of the case study and its high-level details. This case study helps you practice hands-on exercises throughout the module.

List of Organizations

Some of the key organizations that are explored in this case study are:

- General Holdings
- Matrix Incorporated
- Matrix Retail
- Matrix Business
- CamMax
- Papyrus
- Amico Incorporated
- Bolton Networks
- Addams Family Values

General Holdings Organization

General Holdings Company is a business conglomerate with a number of different companies that operate in diversified fields. Consider two of its businesses, Matrix Incorporated and Ben Pharma and model these organizations in Sterling Selling and Fulfillment Foundation during this training module.

(Continued on next page)

Sample Case Study

(Continued)

Matrix Incorporated

Matrix Incorporated (Matrix) is a multi-brand, multinational retailer of consumer electronics, consumer durables, and Fast Moving Consumer Goods (FMCG) and services. Matrix has its operations in the United States, Canada, and Europe and serves its customers through multiple call centers, and many retail stores from where customers pick up items. The following are the highlights of Matrix:

- Matrix has two business lines to handle the sales and distribution of its products – Matrix Retail and Matrix Business.
- Headquartered at Tewksbury, Matrix has one centralized purchasing department that handles purchases of the finished goods from its suppliers. It has many warehouses that are situated across geographical locations and two of its Distribution Centers (DCs) are in Brockton and San Francisco.
- Matrix maintains the inventory, defines the catalog of items, and sets pricing rules for the entire organization. Matrix Retail uses Matrix as its catalog organization and uses the catalogs that Matrix defines. Matrix Business maintains its own categories of items, within the catalogs that Matrix defines, to enable them to sell easily to its business customers.

Matrix Retail

Headquartered in Tewksbury, Matrix Retail manages the retail business for Matrix. It sells all brands of products that Matrix supports to consumer customers, through its many retail stores across geographical locations. Three of the stores are in Boston, Burlington, and San Francisco.

Some consumers prefer placing their through the call center and picking items through one of Matrix Retail stores. Matrix Retail supports such service requests from call center customers.

Matrix Business

Headquartered in New York, Matrix Business manages contract orders, typically from medium and large corporations. Amico Inc., Bolton Networks, Addams Family Values, Ariba Integration are the four of its major customers.

- Matrix Business' customers (B2B customers) place their orders online or send EDI/XML files directly to Matrix Business. It fulfills orders of these customers through their respective warehouses based on where the material is required. As it does not have any stores of its own, it uses the distribution centers of the organization to ship orders to its customers.

Matrix Business, as it is serving B2B customers, would want to maintain a separate catalog to serve its high-end business customers.

(Continued on next page)

Sample Case Study

(Continued)

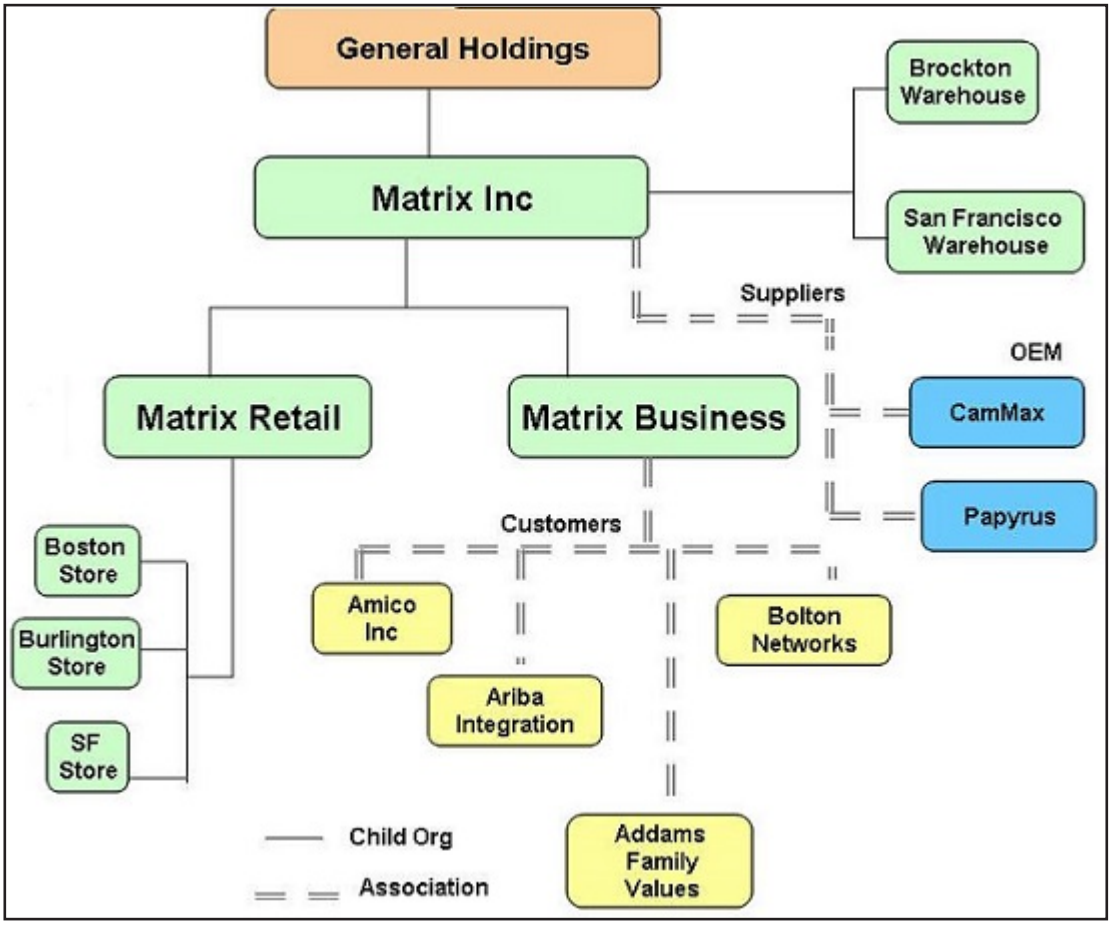
Suppliers

Matrix sources its inventory from Original Equipment Manufactures (OEMs) and other suppliers who deal with various brands.

- CamMax is one of leading OEMs of cameras and accessories who supply different camera models to Matrix.
- Papyrus is one of the biggest suppliers of FMCG to Matrix.

Organization Model

The following figure illustrates the organization Model of Matrix:



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Sample Case Study

(Continued)

Organization Model

....(Continued)

General Holdings purchased Sterling Selling and Fulfillment Foundation to manage its company-wide orders and warehouses. However, General Holdings wants to implement the solution in a phased manner. During the first phase, they would want to start the implementation of Sterling Selling and Fulfillment Foundation with the Matrix business line only. In the subsequent phases, the solution will extend to other business lines.

Lesson Review

Completed Objectives

This lesson was designed to enable you to:

- Describe the business models that Sterling Selling and Fulfillment Foundation supports.
- Identify participants in a supply chain network.
- Describe the configurable organization roles in Application Platform.
- Map roles to participants.

LESSON 2.2: Creating Organizations

Introduction

This lesson helps you to understand how to configure organizations. You will learn how to assign roles to an organization and configure the key attributes of an organization.

Lesson Objectives

This lesson is designed to help you to:

- Create organizations.
- Assign roles to the organization.
- Configure organizational attributes such as:
  - Primary information
  - Communication protocols
  - Payment information
  - Child organization details
  - Calendars
  - Departments
  - Advanced Attributes

References

For more information on configuring participants, refer:

- http://www.ibm.com/support/knowledgecenter/SS6PEW_9.5.0/com.ibm.help.org.partic.concepts.doc/productconcepts/c_Considerations_OrgAndParticModel.html

  Navigate to **Sterling Order Management 9.5.0 > Configuring shared components and users > Organization and participant modeling > Considerations**

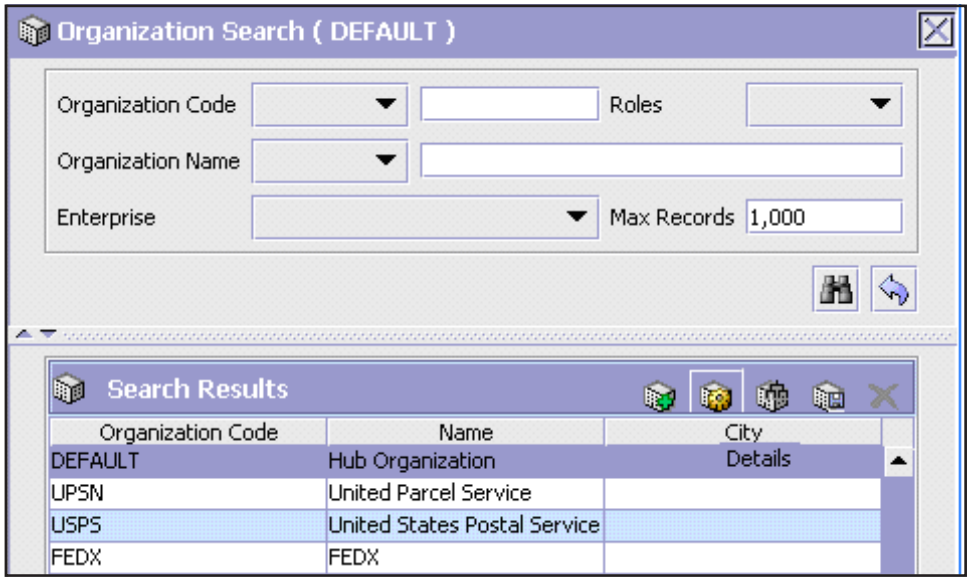
Setting up an Organization

Hub Organization Setup

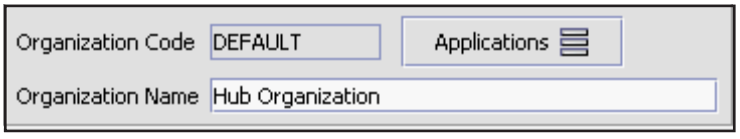
The Hub is pre-configured in the Applications Manager. There can be only one Hub organization per installation and you cannot create or delete a Hub. The organization code for a Hub is always DEFAULT. However, you can change the name of the Hub organization, change the attributes to setup the Hub as per your implementation requirements.

Organization Search Screen Layout

In the following figure, the hub organization with code DEFAULT is highlighted in the Organization Search screen.



The Hub organization name can be changed by clicking on the Details icon. The following figure indicates the screen to change the Hub name.



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Setting up an Organization

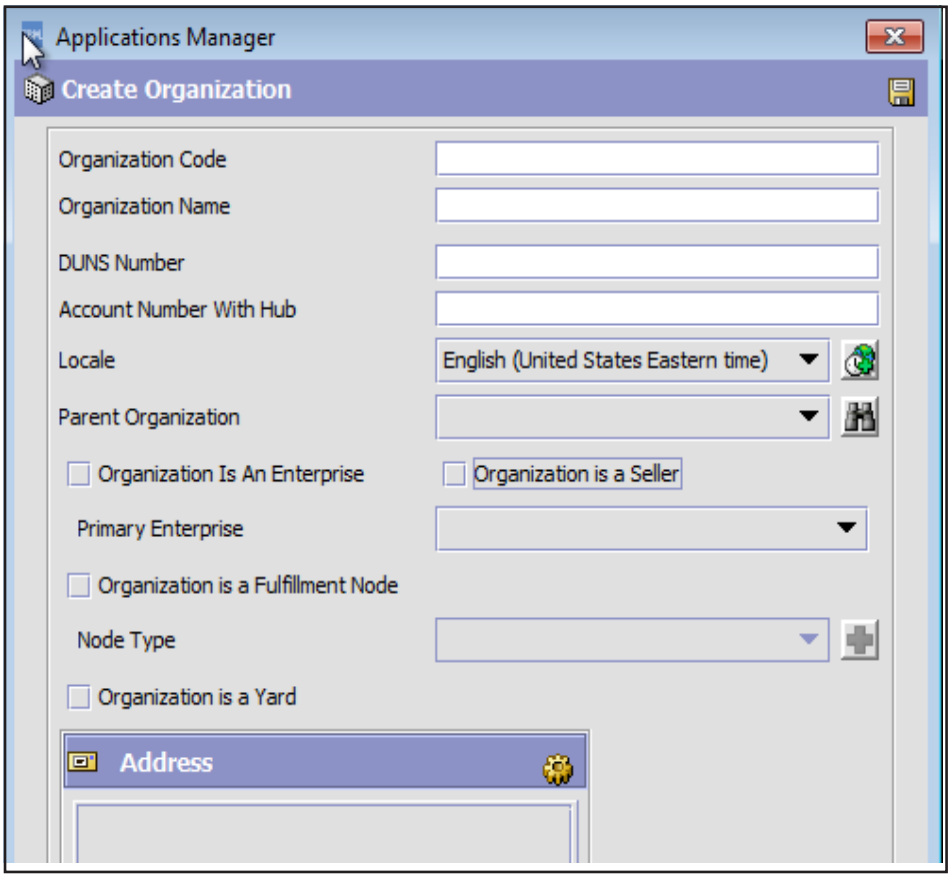
(Continued)

Organization Creation

An organization represents a company, department, cost center, division, sales unit, or any other Organizational unit within a business. Sterling Selling and Fulfillment Foundation allows businesses to model Organizations that are based on the role each Organization plays.

Create Organization Screen Layout

To add an organization, click Create New on the Search Results panel. The following figure depicts the Create Organization screen.



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Setting up an Organization

(Continued)

Organization Creation

....(Continued)

The details of the key attributes that must be specified in the Create Organization screen are as follows.

- **Organization Code** and **Organization name:** The organization code is a unique identifier that is used as a search parameter. The organization code cannot be edited after creation.
- **DUNS Number**: This number is a nine-digit identification number, which provides unique identifiers of single business entities. Sterling Selling and Fulfillment Foundation does not associate any logic with this field. However, in implementations, this number is used as a cross-reference number due to it's uniqueness. An additional four digits are used to identify units within a larger organization. For example, Sterling B2B Integrator can use this number for exchanging documents between the two organizations.
- **Account Number with Hub**: This number is the account number that the organization has with the hub. This number is specified only if the organization is not a hub.
- **Locale**: The locale determines the time zone, Unit of Measure for weight, Unit of Measure for volume, date and time formats, language, country and other parameters of the organization. You can add a locale from the Create Organization screen. You need to restart the application server to activate the new locale added.
- **Parent Organization**: The parent organization details are mentioned in this field to set up the appropriate hierarchy as it exists in the business.
- **Organization Is a Enterprise**: This attribute configures the organization as an enterprise. If the organization is not an enterprise, a different primary enterprise must be selected.

(Continued on next page)

Setting up an Organization

(Continued)

Organization Creation ....(Continued)

- **Organization is a Seller:** This attribute configures an organization as a seller. When this option is selected, the Assigned Colony Id drop-down is enabled.
- **Primary Enterprise:** Primary enterprise needs to be mentioned if the organization is a non-enterprise. If the organization is a non-enterprise, the rules for the organization are retrieved from the primary enterprise of that organization.
- **Organization is a Fulfillment Node**: Select this option to configure the organization as a Fulfillment Node which can be considered for sourcing. The parent organization and Node Type must be selected for a Fulfillment Node.
- **Node type**: The node type must be selected for a fulfillment node to specify whether it is a Distribution Center or Store, for example.
- **Organization is a Yard**: This must be selected if the organization is a yard.
- **Address**: The corporate address of the organization. This address can be different from the contact address.

Note

Specify the organization as a enterprise or specify a primary enterprise for the organization. Also, the Assigned Colony Id for an organization is specified only for multi-schema deployment.

Primary Enterprise and Parent Organization

The primary enterprise and the parent organization attributes which can be set for an organization have different implications.

(Continued on next page)

Setting up an Organization

(Continued)

Primary Enterprise and Parent Organization ....(Continued)

Primary Enterprise	Parent Organization
This attribute is specified only for an organization which is an enterprise.	The parent organization can be set for any organization other than the Hub.
The primary enterprises determine the rules and configurations.	The parent organization determines the business Hierarchy
Only an organization with the role of an enterprise can be selected.	Any organization other than Node can have child organizations.

Assignment of Roles

After an organization is created, you must map the roles of the organization in the Sterling Selling and Fulfillment Foundation. An organization is available for the transactions only if the roles are set and configured. For example, the organization can be selected as a buyer in the Purchase Order screen only if the buyer role is set for the organization. One organization can assume multiple roles. An enterprise can also be a seller organization

In the Roles and Participation tab of the Organization Details screen, you can assign the roles to the organization you created. On selection of a role, additional tabs are added corresponding to the role. The attributes specific to the role must be specified in these tabs.

(Continued on next page)

Setting up an Organization

(Continued)

Assignment of Roles

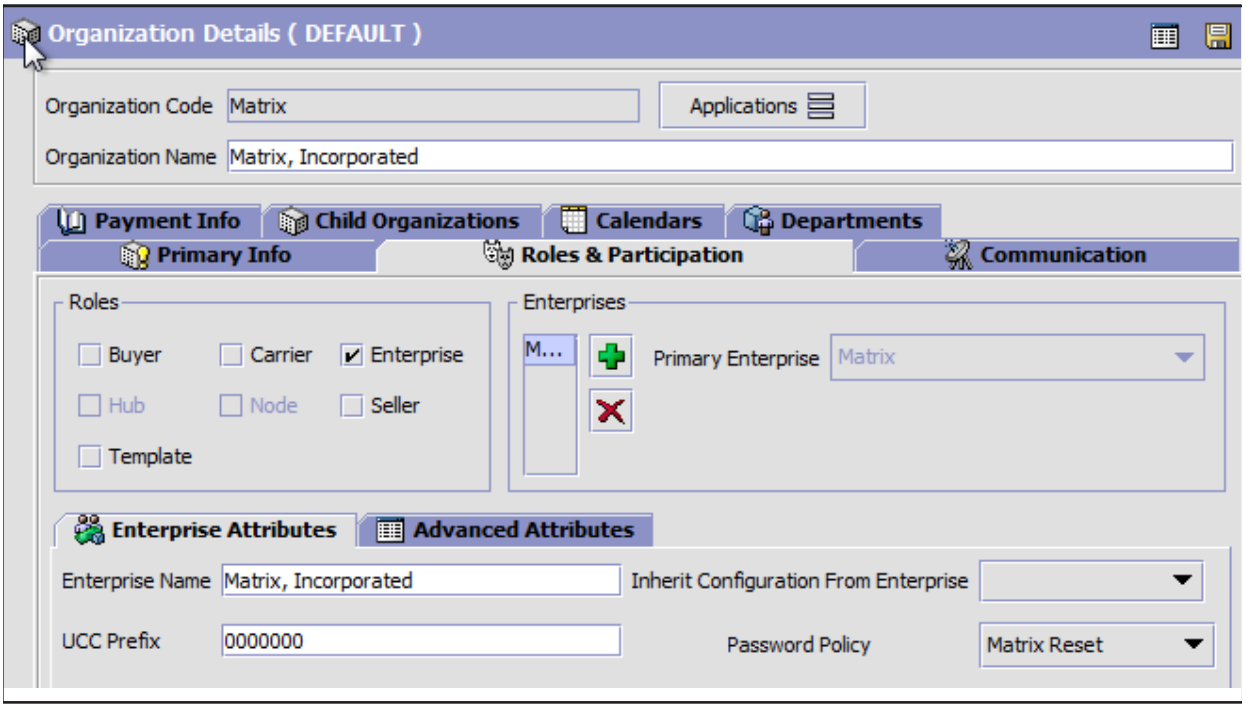
....(Continued)

Roles & Participation Screen Layout

The following figure shows the Roles & Participation tab for an organization with the role enterprise. You can see that the Enterprise Attributes tab is shown.

Note

Typically enterprises must be modeled as high as possible in the organization structure. This modeling ensures common business practices between different groups.



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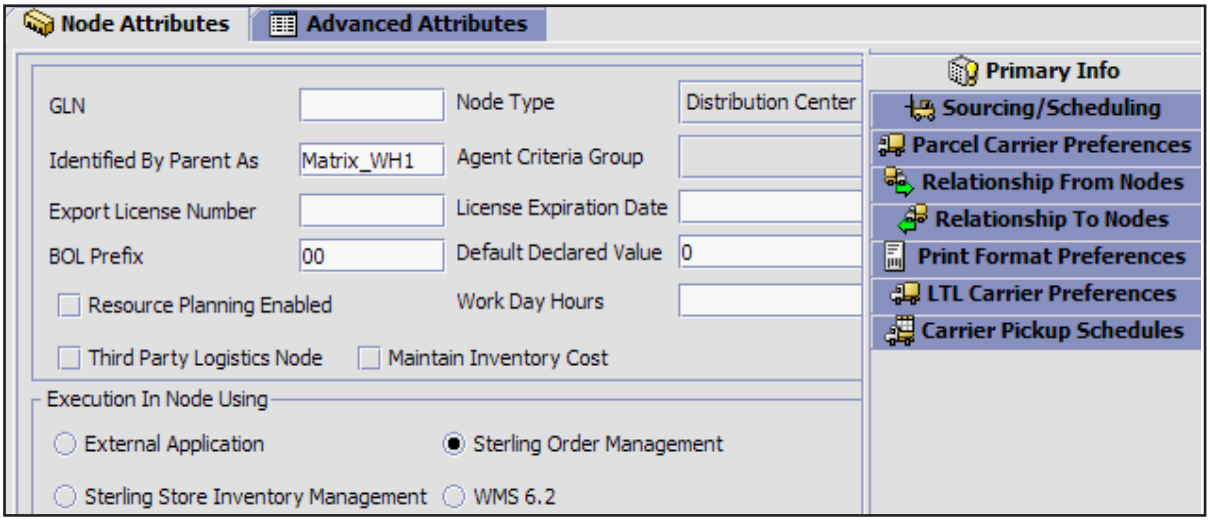
Setting up an Organization

(Continued)

Assignment of Roles

....(Continued)

The following figure shows the Roles & Participation tab for the node organization.



Note

Remember that node and enterprise are mutually exclusive roles, while node and carrier are mutually exclusive roles.

Organization Primary Information

Overview

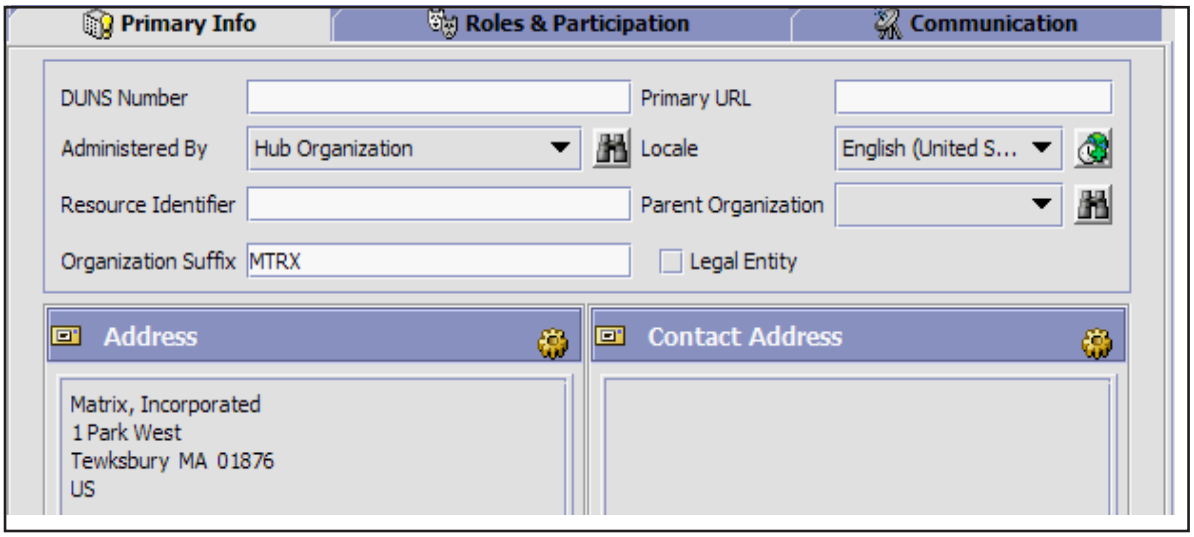
The primary information of an organization provides general information about the organization including the corporate and contact addresses of the organization. Some of these details can also be specified in the Create Organization screen on creation of the organization.

Primary Information Configuration

The Primary Information of the organization can be specified in the Primary Information tab of the Organization Details screen.

Organization Primary Information Screen Layout

The following figure shows the Primary Information tab.



The details that are previously specified on creation of the organization are populated on this tab. The address that is specified in the Create Organization screen is populated to the address field.

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Organization Primary Information

(Continued)

Primary Information Configuration ....(Continued)

The following are the key details.

- **Administered By**: Select an organization which administers the users, modify the organization attributes and the rules for this organization. The Hub is always the default administrator. An organization can be administered by itself.
- **Legal Entity**: If this option is checked, the organization is designated as a separate legal entity. A legal entity is an organization unit that is identified by local governments as an operating unit and usually represents a company's presence in a specific country. If this option is not checked, the organization is associated with the parent legal entity in the organizational hierarchy. Organizations that belong to the same legal entity can fulfill orders by direct sourcing and issue Transfer Orders.
- **Contact Address**: Specify the address of the single point of contact. This address can be different from the corporate address.
- **Resource Identifier:** Separate configurable resources such as templates, user exits, will be required for an enterprise as a part of the customization. A unique Resource Identifier, can be defined for an enterprise or group of enterprises, which can be used to identify the resources that belong to them. You can also add new enterprises with different resources without impacting the existing enterprise resources.

Communication

Overview

Communication protocols are the means by which an organization communicates with other organizations in the Hub environment and other external systems. For example, if the organization you are setting up uses both an FTP site and email services to send and receive documents, these protocols must be specified for the organization.

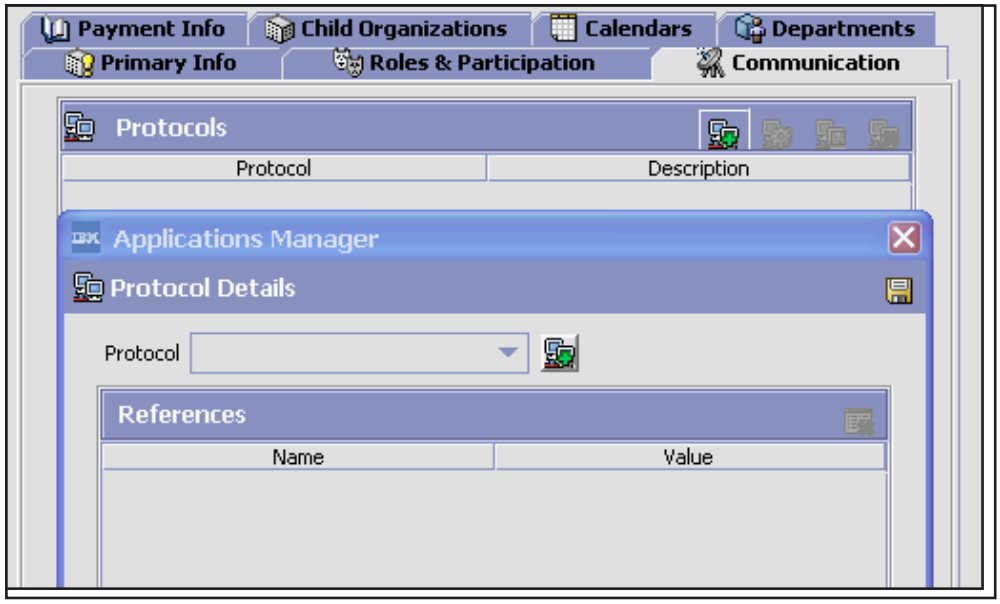
An organization uses different documents for communicating with the other organizations. The specific documents that are used depend on the role of the organization. For example, the buyer documents might be invoice and purchase order download. The seller documents might be Order confirmation and Shipment confirmation. The documents used, the default formats, the protocols to be used for communication for the document and the integration services are specified in the communication attributes.

Communications Protocol Configuration

You can select the list of communication protocols that the organization uses, in the Communication tab of the organizational Details screen.

Communication Tab Layout

The following figure shows the Communication Protocols tab.



Click on an existing protocol listed in the Protocol menu and click Save, to add the protocol to the organization.

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Communication

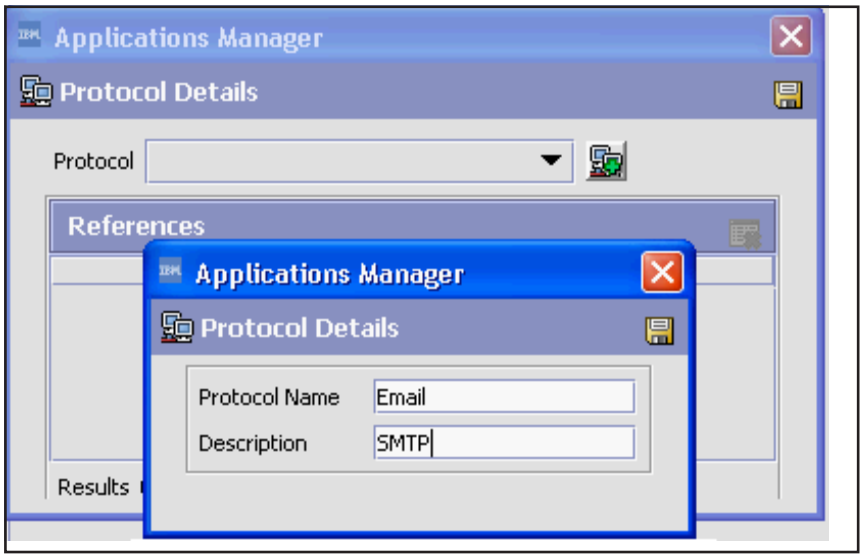
(Continued)

Add a New Protocol

You can create a protocol from the Protocol Details screen by specifying the protocol name and description.

Add Protocol Layout

Click  on the Protocols Details panel to create a protocol as shown in the following figure. The reference name for the protocol is Email and the Description is SMTP protocol. Click Save to save the protocol details.



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Communication

(Continued)

Documents

You can select and configure the list of the business documents that are communicated by the organization for each role. The document attributes specified such as document format, protocol, and integration services are applied for communication of the document with other organizations. Different documents can be specified for each role.

Important

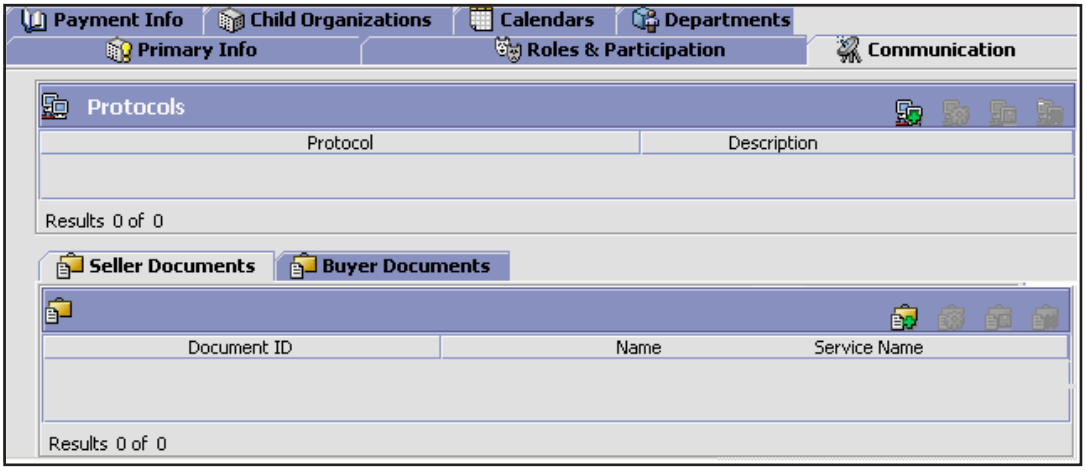
The documents can be configured only after the role is set for an organization.

The documents can be configured for the following roles.

- **Buyer**: An example of a buyer document is an outgoing Purchase Order.
- **Seller**: An example of a seller document is an incoming Purchase Order.
- **Carrier**: An example for a carrier document is a carrier Bill of Lading.

Documents Section of the Communication Tab

When an organization is assigned the role of buyer, seller or carrier, the Communication tab shows the documents related to that role. In the following figure, an organization is assigned the role of buyer and seller, so there are two separate tabs.



Clicking Create New opens the Document Details screen where new document details can be added as shown in the following figure.

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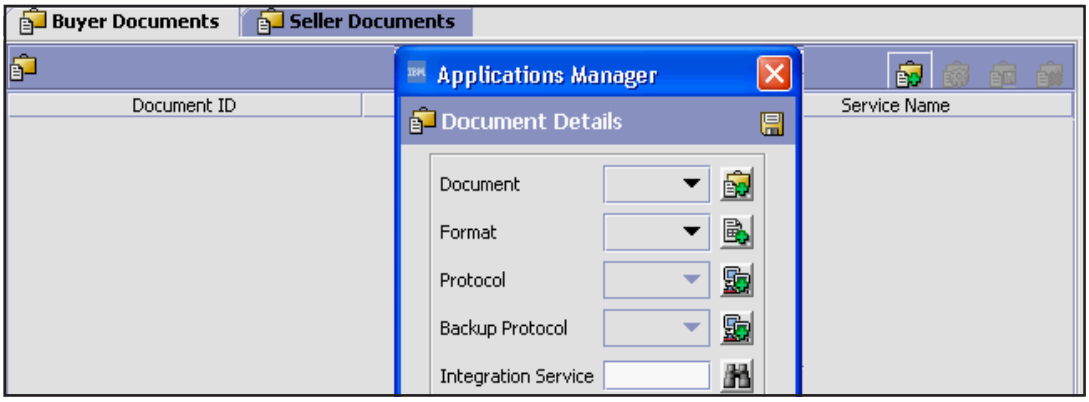
Communication

(Continued)

Documents

....(Continued)



The key details for the document communication are as follows:

- **Document:** This refers to the business documents, such as Purchase Orders (PO), Invoice, and Advanced Shipment Notice (ASN), that can be used in an organization.
- **Format:** This refers to the file format of the document. The examples of the different format codes are EDI, XML, and Flatfile.
- **Protocol**: This refers to the communication protocol used for sending and receiving the document.
- **Backup Protocol**: This is specified in the event when the primary protocol cannot be used.
- **Integration Service**: An organization needs to communicate the same document with multiple organizations, in different formats. The integration services creates the transfer of documents in different formats. The service used to transfer the necessary information into the formats that the organization requires must be specified.

Payment Information

Overview

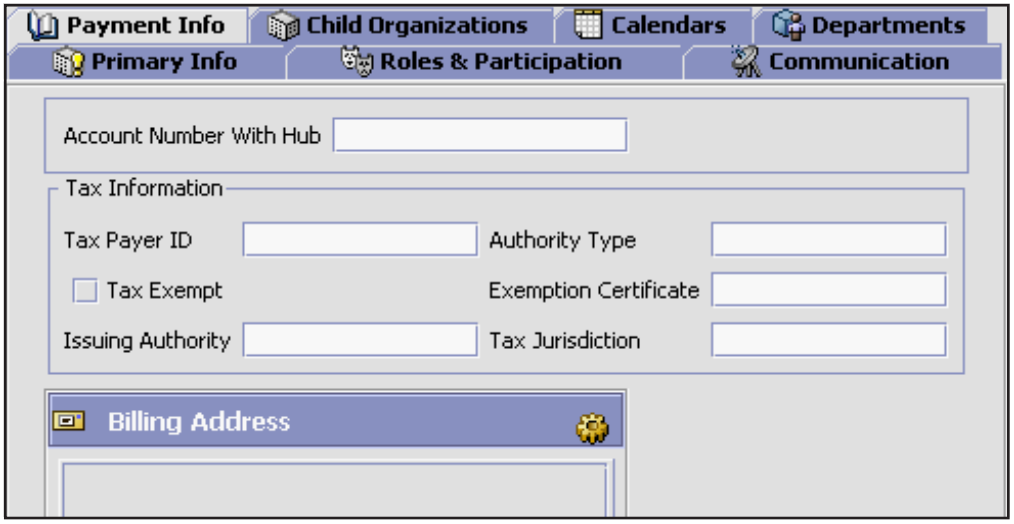
An organization that makes any type of monetary transactions with other organizations must have the Payment Information set up. This information provides all parties with an account number with the hub, billing address, and tax information.

Payment Info Configuration

You can configure the payment information for an organization from the Payment Info tab of the Organizational Details screen.

Payment Info Tab Screen Layout

The following figure shows the Payment Info screen.



The following are the key details of the payment information:

- **Account Number With Hub:** This field is populated from the account number that was specified during the organization creation. You can also change the account number by entering the appropriate value.
- **Tax Payer ID**: This field is a unique identification number that can be given to an organization if you want to consider the organization as a tax-paying entity.
- **Authority Type:** This refers to the authority type for a given exception type.
- **Tax Exempt**: Check this field to exempt the organization from paying taxes.
- **Exemption Certificate:** This refers to the identification number of the exemption certificate.
- **Issuing Authority** and **Tax Jurisdiction:** Specify the issuing authority that issued the exemption certificate and the jurisdiction of the issuing authority.

Child Organizations

Overview

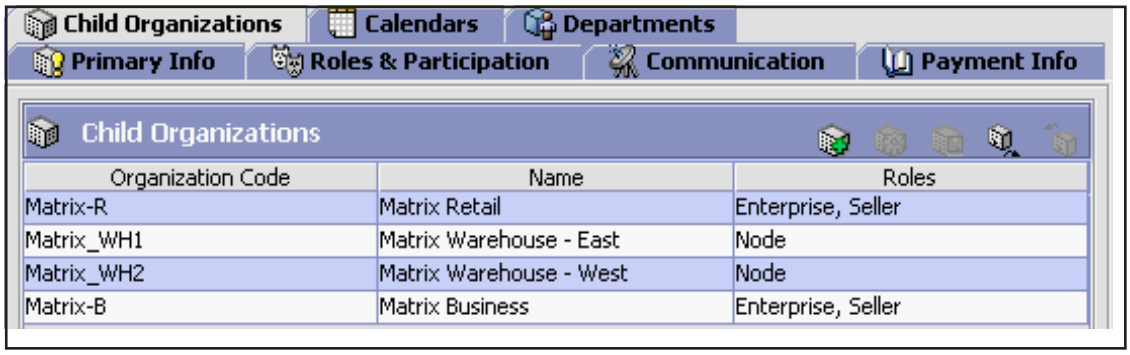
You can create hierarchy of child organizations for any organization which has the role of an enterprise, Hub, buyer, or seller. The child organizations belong to a parent organization. The creation of the child organizations enables to define an organizational hierarchy as it exists in the Business model.

Child Organization Configuration

You can create and modify the child organizations from the Child Organizations tab of the Organization Details screen. Click to create a child organization. Alternatively, you can add an existing organization as a Child to this Organization by clicking Find Child Organizations To Add.

Child Organization Tab Layout.

The following figure indicates the Child Organizations tab. The list of the child organizations and their roles are indicated.



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Child Organizations

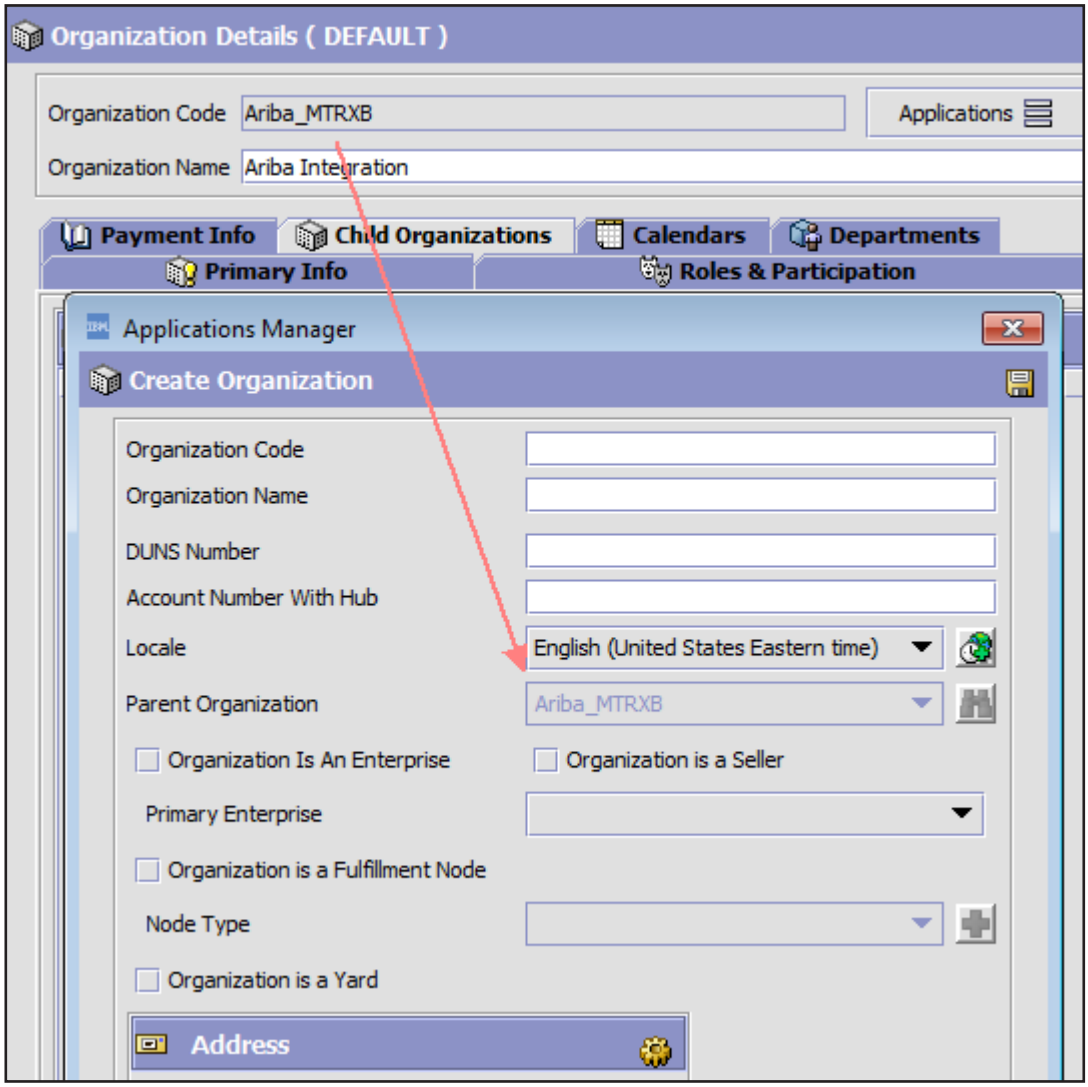
(Continued)

Add a Child Organization

You can add a organization as a child. When you add a child organization, the parent organization is prepopulated.

Add Child Organization Screen Layout

In the Organization Details screen, click Create New on the Child Organizations tab to create a child organization. The following figure indicates the Create Organization screen. The parent organization field is pre-populated to the organization to which the child organization is added.



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Child Organizations

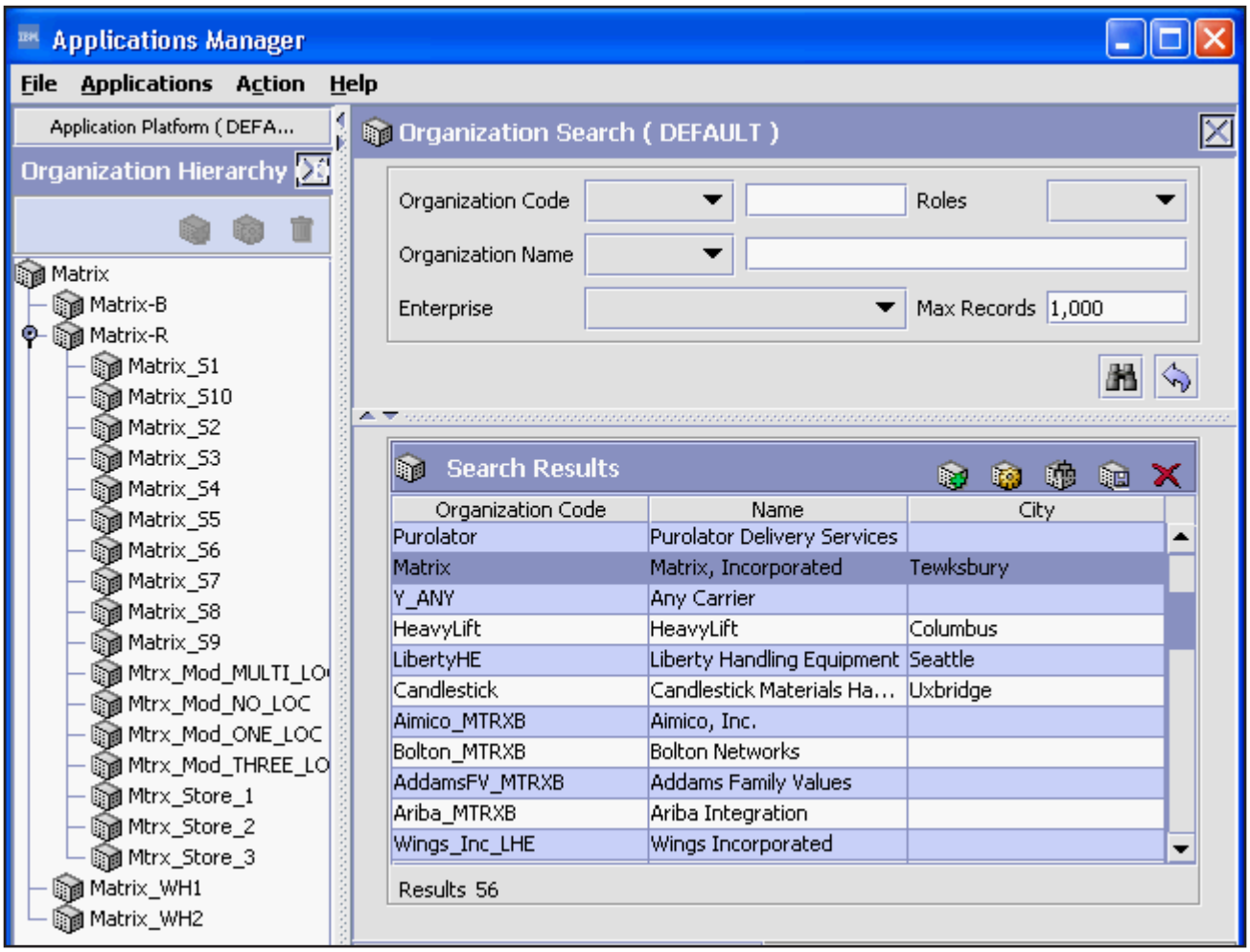
(Continued)

View Hierarchy

A hierarchy of child organizations can be created in line with the business requirements. You can view the hierarchy of the organizations that are set up in Sterling Selling and Fulfillment Foundation. Select the organization in the Organization Search screen and click the View Hierarchy icon to view the Organization Hierarchy.

Organization Hierarchy Screen Layout

The following figure indicates the Organization Hierarchy for Matrix, Incorporated.



Calendar

Overview

Sterling Selling and Fulfillment Foundation allows you to define the working calendars of an organization. A working calendar is a span of dates for a defined period. Any working shifts (Day Shift, Night Shift), exception shifts (extra shifts on the last day of the month for performing inventory stock), and exception days (Fourth of July, New Year's Day) may be defined, for a specific period. You can create multiple calendars for an organization.

A Node or an organization can choose its calendars and the calendars of its primary enterprise as one of the following calendars:

- Business calendar
- Shipping calendar
- Receiving calendar

Calendar Inheritance

A Node or an organization can optionally, inherit calendar definition from its primary enterprise when creating calendars. If a calendar is inherited, the parent calendar's components such as Effective Periods, Shifts, Calendar Day Exceptions, and Exception Shifts can be used by the Child Calendar. The inherited calendars cannot specify their own effective periods or shifts but they can specify their own set of Calendar Day Exceptions and Exception Shifts. These shifts are used along with the component of the parent's calendar while retrieving the day details of the child calendar during run time.

 Note

The Child Calendar's Calendar Day Exceptions and Exception Shifts override the exceptions of the parent calendar, if they fall on the same date.

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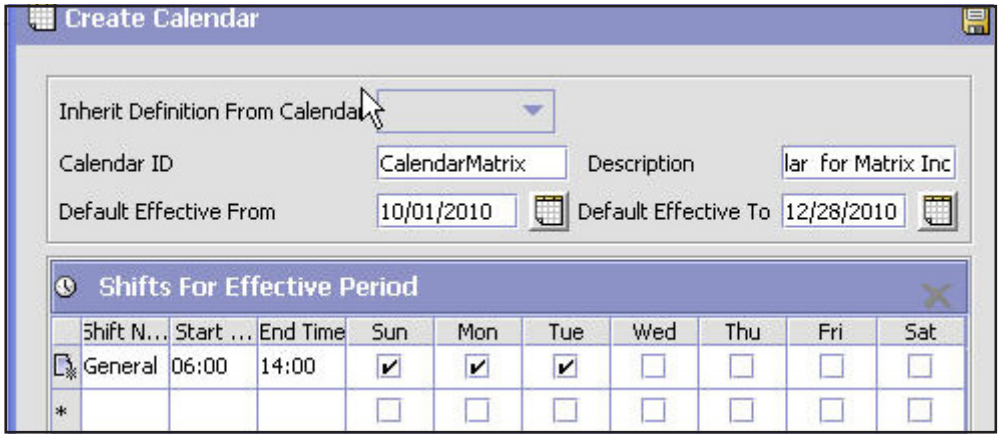
Calendar

(Continued)

Calendar Inheritance Example

A business calendar CalendarMatrix is created, as shown in the following figure. The shift details and the working day details are set for this calendar.



Note

The Exception Dates must fall under one of the effective periods of the parent calendar. Moreover, the start time and end time of the exception shifts must match the start time and end time of a shift within that effective period.

Limitations

The following limitations are assumed when inheriting calendars.

- The calendar of an organization or a Node can be inherited only from a calendar of the primary enterprise.
- The parent calendar cannot be an inherited calendar.
- An inherited calendar is not allowed to change to a non-inherited calendar and vice versa.
- An inherited calendar is not allowed to specify its own effective periods and standard shifts.
- The date must be entered in (MMDDYYYY format).

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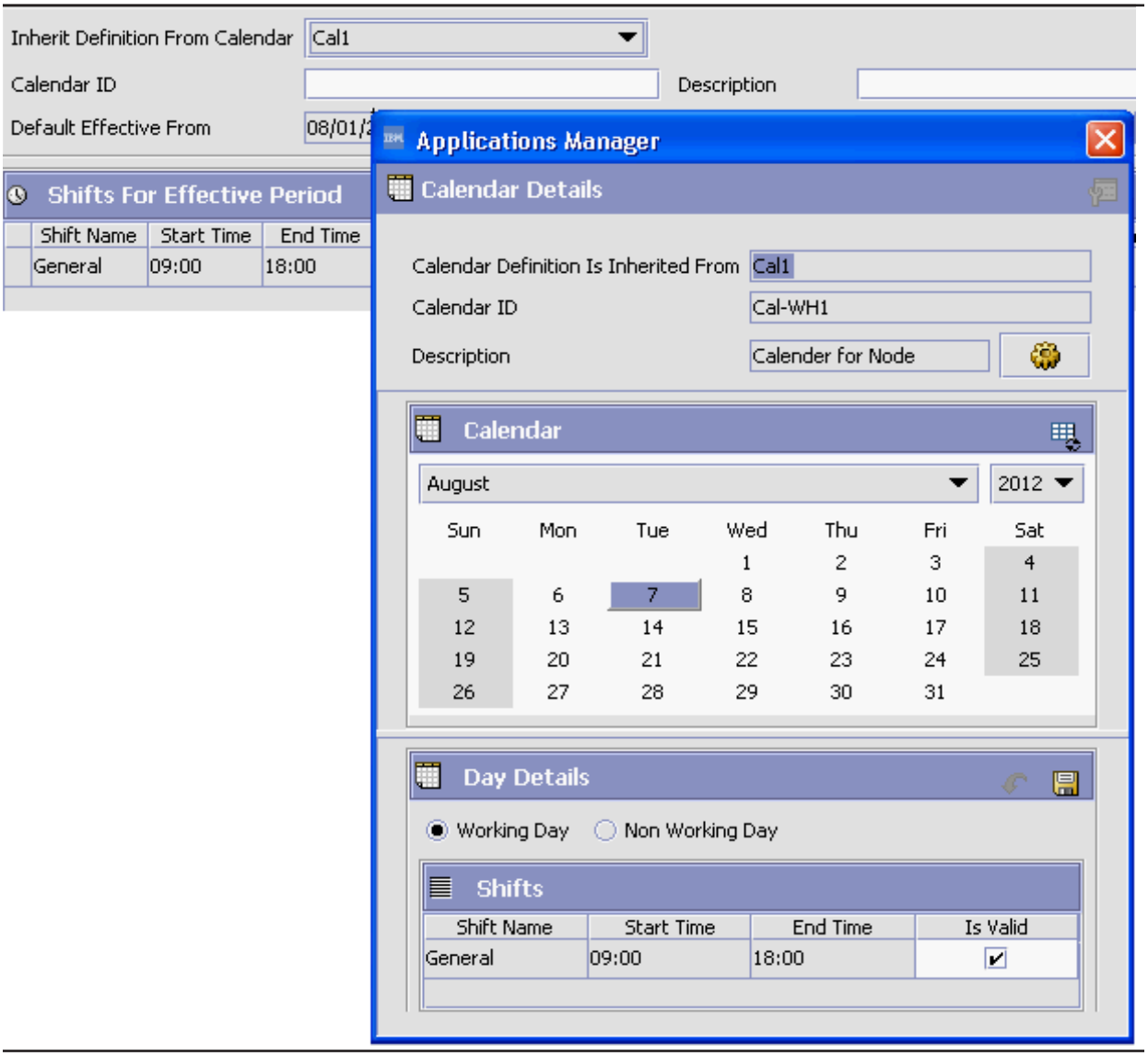
Calendar

(Continued)

Calendar Inheritance Example

A child calendar is created which inherits the definition from parent calendar as shown in the following figure. You can see that the calendar details cannot be edited for the inherited calendar. However, the working day exceptions can be set for this calendar.



(Continued on next page)

Calendar

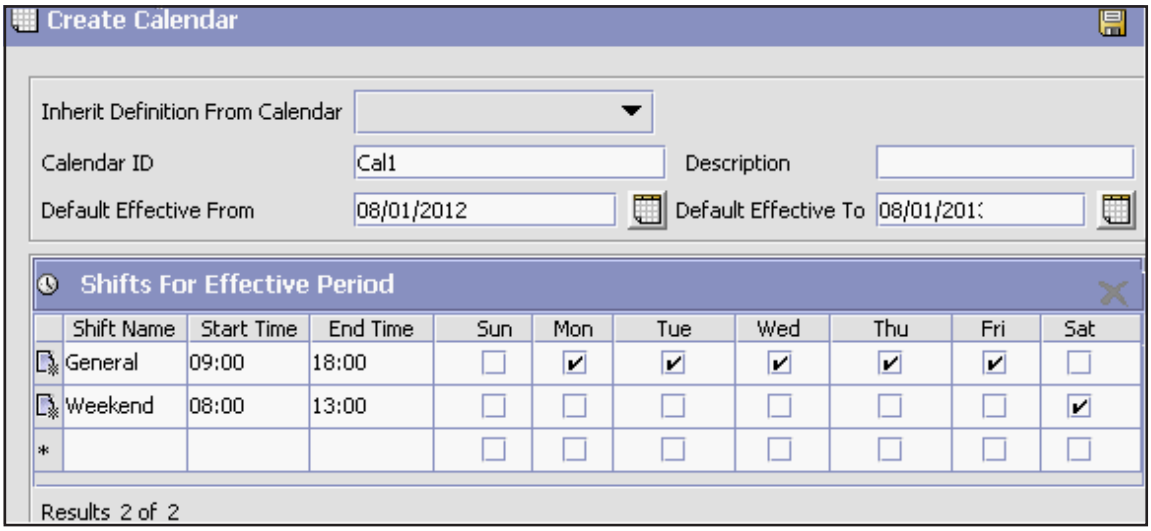
(Continued)

Calendar Creation

You can create a calendar by clicking Create New on the Calendars tab of the Organizational Details screen.

Create Calendar Screen Layout

The following figure indicates the screen to create a calendar.



The key information specified for a calendar are as follows:

- **Calendar ID**: This option specifies any unique ID or name that you would like to give to the calendar to distinguish it from other calendars that you create.
- **Description**: In this field, a short description of the specifics of the calendar or shifts can be mentioned for future reference and easy understanding.
- **Inherit Definition from Calendar**: This option is available only for the organization which is not an enterprise. Select this option to inherit calendar definition from the selected primary enterprise calendars. After a calendar is selected from this list, the Default Effective From, Default Effective To, and Shifts for Effective Periods are disabled.
- **Default Effective From and Default Effective To**: Enter the start date and end date when you want the calendar to be effective
- **Shifts For Effective Period**: Specify the shift name, start time, end time, and the working days for the shift.
- **Calendar Day Exceptions**: Specify a Working Day or Non-Working Day exception in the calendar. The screen to specify the exceptions is shown only on saving the calendar details.

Department

Overview

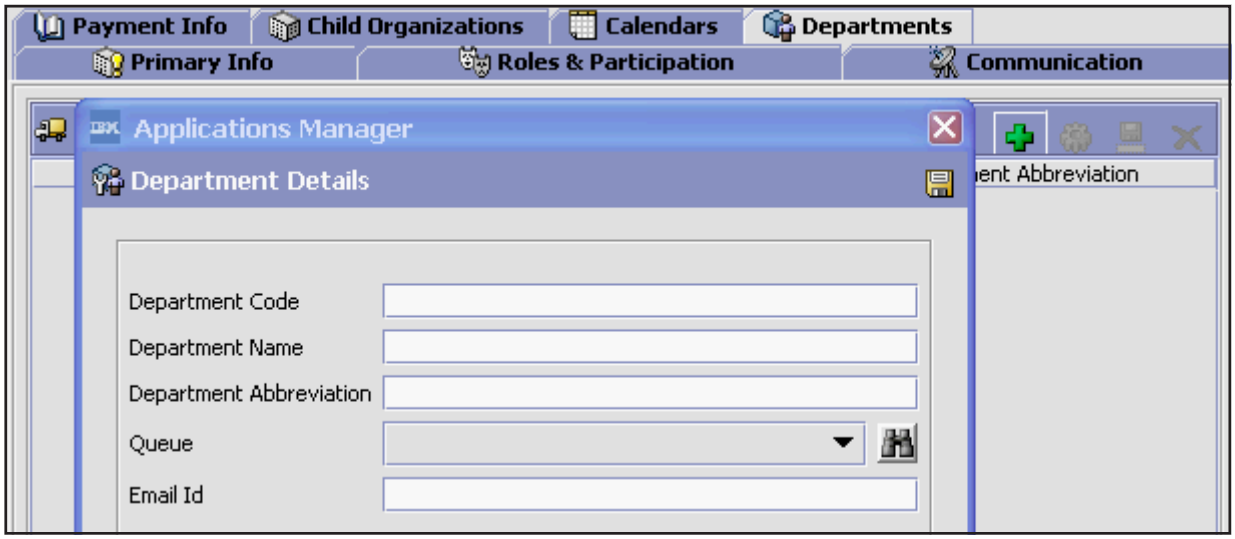
Sterling Selling and Fulfillment Foundation enables you to create various departments for an organization. These departments are independent of user groups and have no relationship. The departments can be aligned to a default Alert Queue. The queue configuration is discussed in detail in the following lessons.

Department Configuration

You can configure the list of departments for an organization.

Department Tab Screen layout

The following figure indicates the Department Details screen.



The following information needs to be specified for a department.

- **Department Code, Name** and **Abbreviation**: Specify a unique code, name and abbreviation for the department.
- **Queue**: Select the alert queue that must be routed to the now-created department from the drop-down list. The drop-down list contains the predefined alert queues.
- **Email Id**: Enter a valid email ID for the department.

Walk-through: Create an Organization and Configure Attributes

Scenario

General Holdings started a new business division, BenPharma, which handles the new Pharmaceuticals Business vertical. The new organization is an enterprise and handles the centralized purchasing for the business division and is independent of Matrix Inc.

The URL of the organization is www.benPharma.com and is based in San Francisco, California. This organization is administered by Matrix Inc.

BenPharma has a five day business calendar with Saturday and Sunday as non-working days. They operate in one shift (General shift) between 8:00 to 17:00 hours. December 25th is a holiday for this year.

In this walk-through, watch as your instructor demonstrates the following activities:

- Create an organization, BenPharma.
- Configure the primary information (Administered By), corporate address, and URL of BenPharma in the application.
- Assign it with an enterprise and buyer role.
- Set up the calendar for BenPharma as specified.

The instructions for each activity are broken down into separate procedures for ease of understanding.

(Continued on next page)

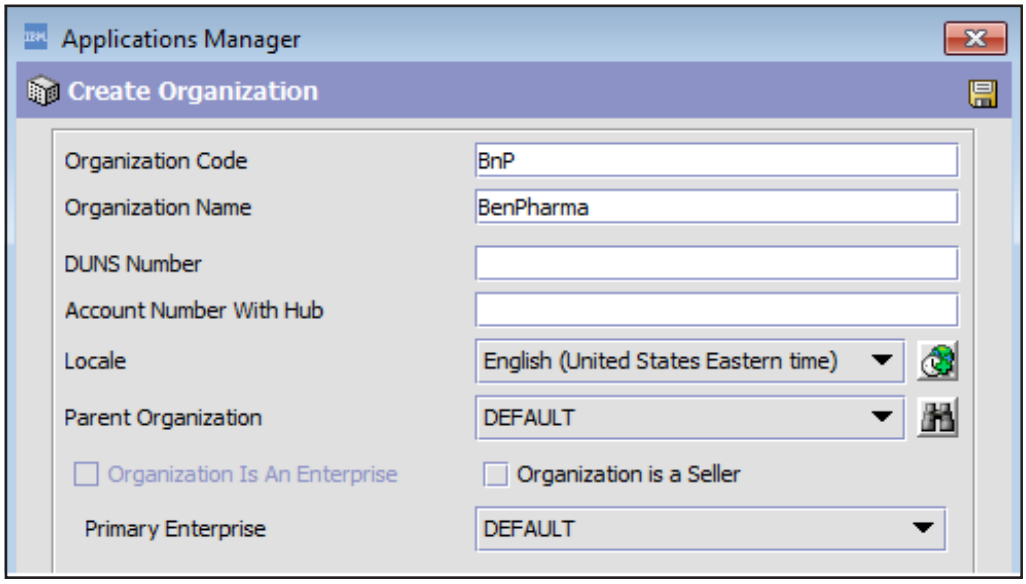
Walk-through: Create an Organization and Configure Attributes

(Continued)

Instructions

Procedure to Create an Organization

1. Log in to the Application Console with Login ID as **admin** and password as **password**.
2. Launch Applications Manager from the **Configuration** menu option.
3. Navigate to **Applications** > **Application Platform** > **Participant Modeling** > **Participant Setup**. The organization Search window is shown.
4. On the Search Results panel, click to create an organization. The **Create Organization** screen displays.
5. Enter the data as shown in the following figure.



6. Click to save the changes made. The Organizational Details screen is shown for BenPharma.

(Continued on next page)

Walk-through: Create an Organization and Configure Attributes

(Continued)

Instructions

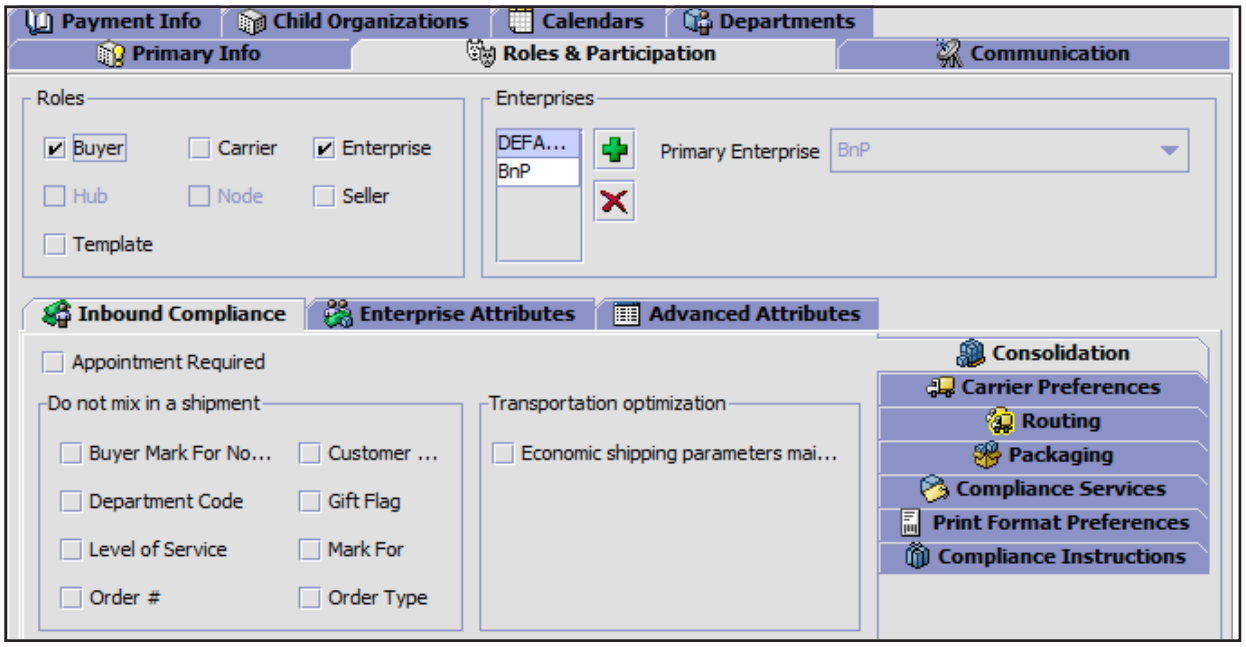
....(Continued)

Procedure to Assign Roles

1. Navigate to the **Organization Details** screen in the work area.
2. On the **Organization Details** screen, click the **Roles and Participation** tab.
3. In the Roles Panel, select the following roles:
   - Enterprise
   - Buyer

After these roles are selected, the following tabs are as shown in the following figure:

- Enterprise Attributes
- Inbound Compliance



4. Note the primary enterprise attribute is set to Ben Pharma, the organization created.
5. Save the changes made.

(Continued on next page)

Walk-through: Create an Organization and Configure Attributes

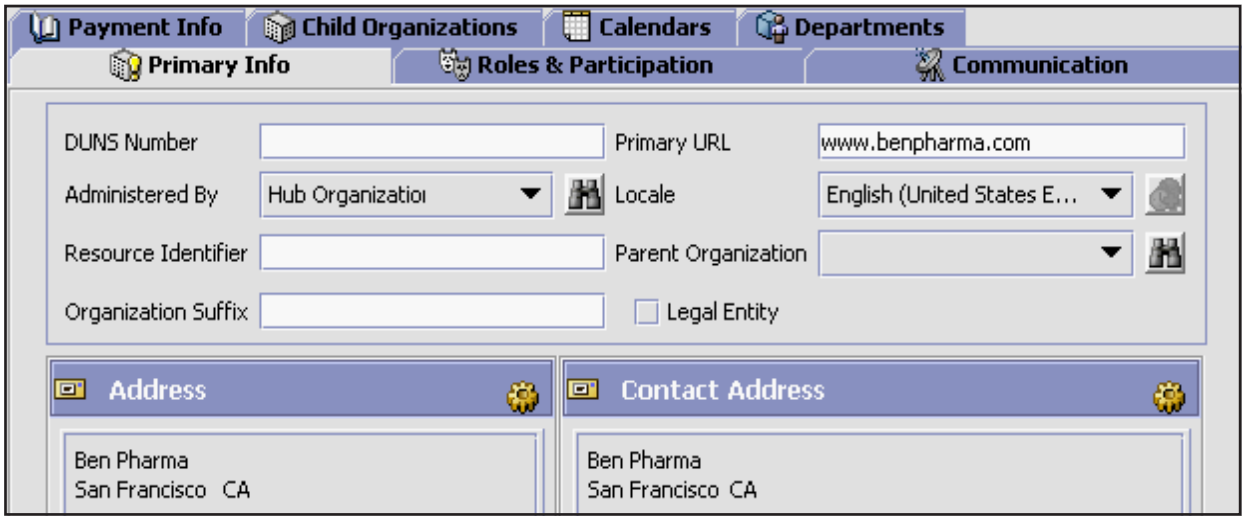
(Continued)

Instructions

....(Continued)

Procedure to Configure Primary Information

1. Navigate to the **Organization Details** screen in the work area.
2. On the **Organization Details** screen, click the **Primary information** tab.
3. Enter the information as specified in the following figure.



(Continued on next page)

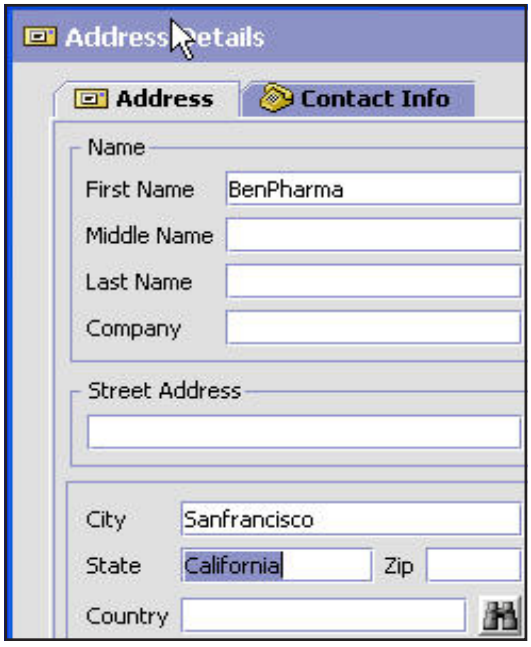
Walk-through: Create an Organization and Configure Attributes

(Continued)

Instructions

....(Continued)

4. To enter the address, click .The Address Details screen is shown.
5. Enter the information as shown in the following figure, and save the details.



6. Save the changes that are made to the Primary Info.

(Continued on next page)

Walk-through: Create an Organization and Configure Attributes

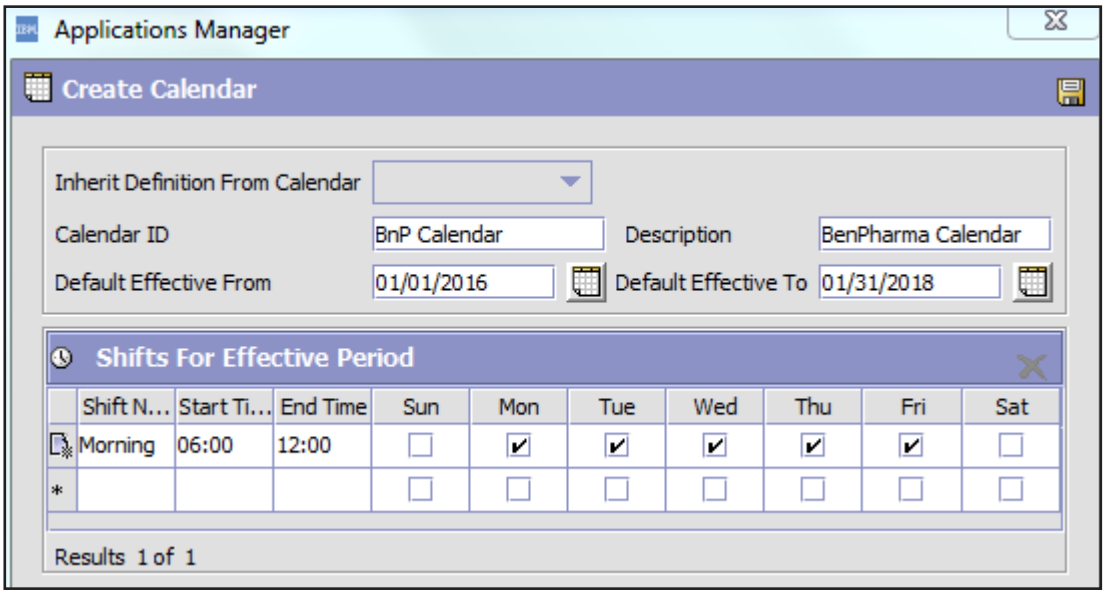
(Continued)

Instructions

....(Continued)

Procedure to Create Calendar

1. Navigate to the **Organization Details** screen in the work area.
2. Click the **Calendars** tab of the **Organizational Details** screen.
3. Click  to add a Calendar.
4. Enter the details as specified in the following figure.



5. Click **Save**. The **Calendar Details** screen is shown.
6. Select the date **December 25th** in the Calendar.

(Continued on next page)

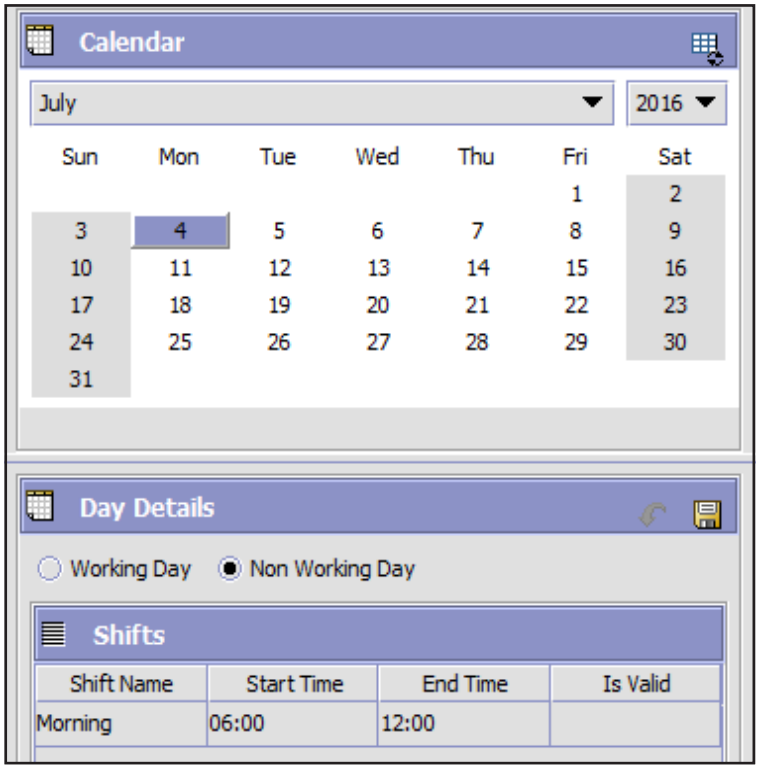
Walk-through: Create an Organization and Configure Attributes

(Continued)

Instructions

....(Continued)

7. Select the **Non-Working Day** option in the **Day Details** section, as shown in the following figure.



8. Save the details.

Result

In this walk-through, an organization is created, BenPharma that is administered by Matrix. The corporate address and URL are set and assigned with an enterprise and buyer role. The calendar for BenPharma is also set.

Exercise 2.2.1: Create Child Organizations and Department

Scenario

The organization Ariba buys commodities from enterprise Matrix Business. Ariba places bulk orders with Matrix Business on a monthly basis. To receive the incoming goods, Ariba plans to set up an exclusive node (child organization) to store the orders that Matrix Business fulfills.

Ariba (Distribution Center) wants to set up different departments to manage the different alert queues. Create one of the departments called *Address Verification* department to handle the alerts that are sent to the Verify Address queue.

Instructions

Procedure to Create Child Organizations and Create a Department

1. Launch Applications Manager.
2. Navigate to **Applications** > **Application Platform** > **Participant Modeling** > **Participant Setup**. The Organization Search window displays.
3. Filter your search results by selecting the role, Buyer, from the Roles drop-down list, and click the **Search** icon.
4. Double-click **Ariba_MTRXB**. The Organization Details window displays.
5. Click the **Child Organizations** tab.

(Continued on next page)

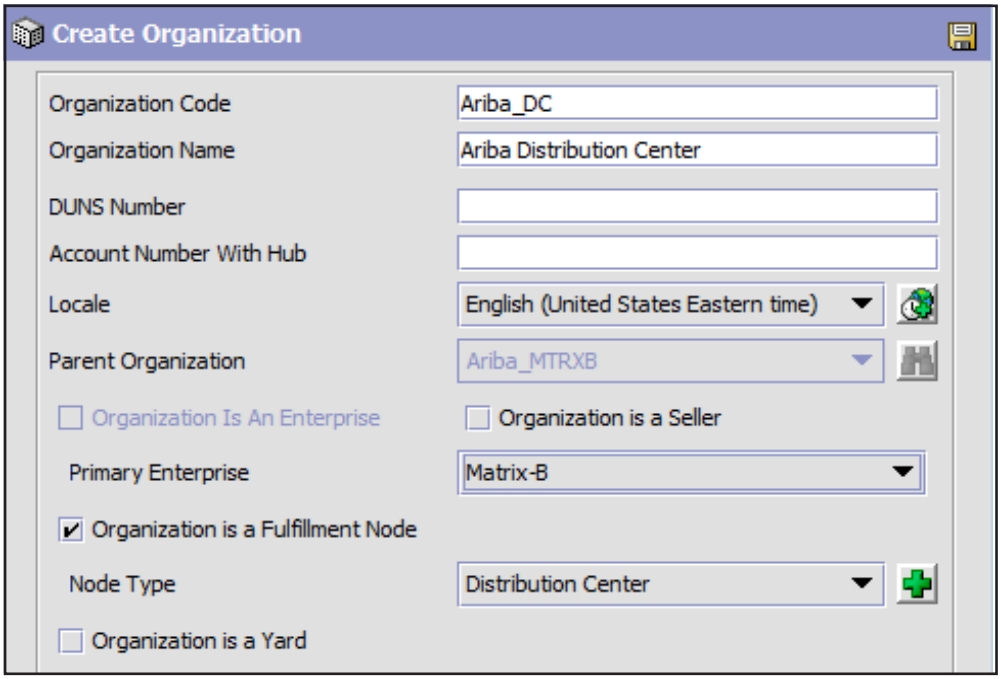
Exercise 2.2.1: Create Child Organizations and Department

(Continued)

Instructions

....(Continued)

6. Click to add child organizations to Ariba Integration. The Create Organization details screen is displayed.
7. Enter the details on the **Create Organization** screen as specified in the following figure.



8. Click to save the changes made. The Organization Details window is shown.

(Continued on next page)

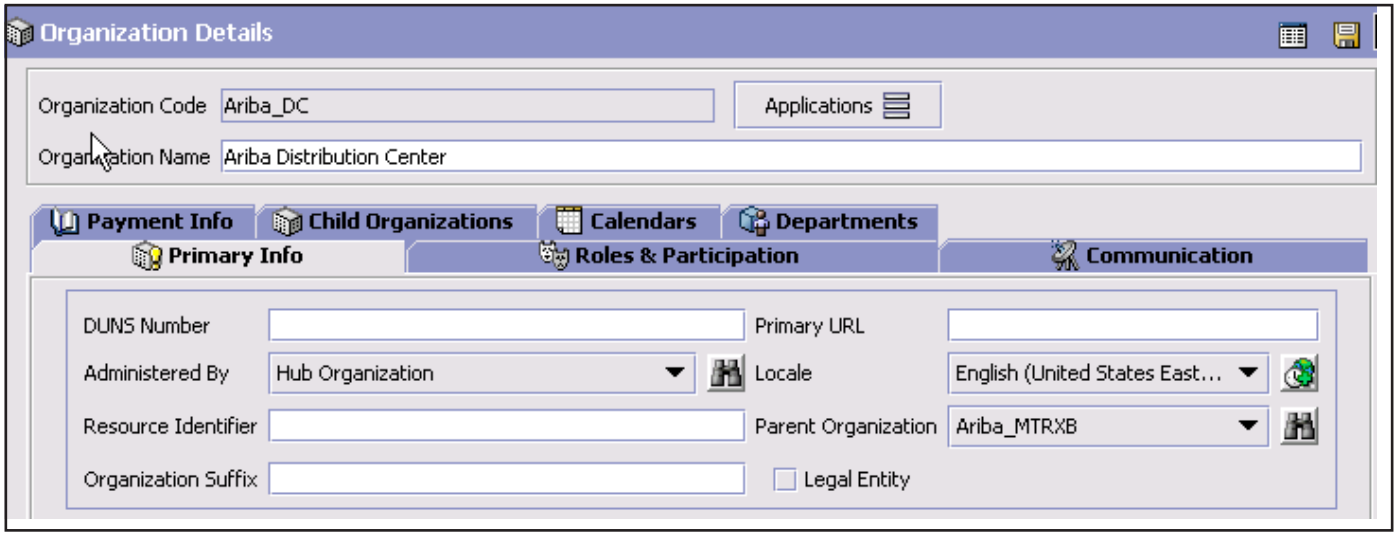
Exercise 2.2.1: Create Child Organizations and Department

(Continued)

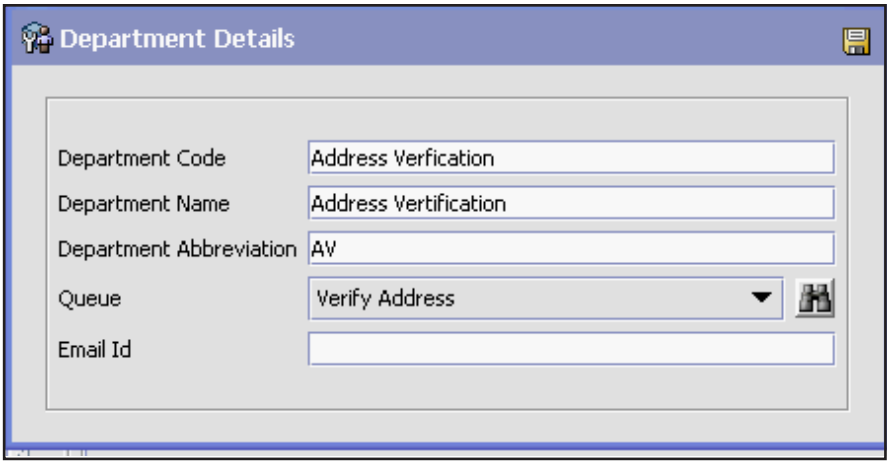
Instructions

....(Continued)

9. You have created an organization, Ariba DC as a child to the parent organization, Ariba_MTRXB. The Organization Details window for the child organization is shown here:



10. Click the **Departments** tab. Click to add a department.
11. The **Department Details** screen is as shown in the following figure. Enter the details shown.



12. Save the changes.

Result

The child organization Ariba DC is created. The department Address Verification is created for Ariba DC. This department is listed in the Departments tab of the organization details.

Optional Exercise

Create an Organization

Matrix buys cameras and accessories from one of the leading manufacturers CamMax and stores them in its warehouse at Brockton. CamMax is headquartered at Lowell and uses its Lowell distribution center to fulfill orders of Matrix. All the business rules for CamMax and its distribution center are defined by Matrix.

In this exercise, you must create an organization, CamMax - and its distribution center in Application Platform. Also, assign Matrix role of a Purchasing organization as it purchases accessories from CamMax.

Instructions

1. Log on to Application Console by using the Login ID as admin and Password as password.
2. Launch Applications Manager.
3. Create an organization, CamMax, and assign specific/appropriate roles.
4. Ensure that you choose the appropriate organization as the primary enterprise.
5. Create a fulfillment Node, Lowell Node, as a distribution center for CamMax.
6. Load the organizational details for Matrix.
7. Assign an appropriate role to Matrix to accommodate the newly established relationship with CamMax.

Result

A seller organization, CamMax and its DC is created.

Lesson Review

Completed Objectives

This lesson was designed to enable you to:

- Create organizations.
- Assign roles to the organization.
- Configure organizational attributes such as:
  - Primary information
  - Communication protocols
  - Payment information
  - Child organization details
  - Calendars
  - Departments

LESSON 2.3: Assigning Attributes to Roles

Introduction

This lesson helps you understand how to specify the key attributes for the different roles. Only the attributes that determine the rules across multiple applications are specified here. These attributes are described in additional detail in the courses that pertain to the respective applications.

Lesson Objectives

This lesson is designed to enable you to describe the key attributes for the following roles:

- Enterprise
- Buyer
- Seller
- Carrier
- Node
- Template

References

For more information on configuring participants, refer:

- http://www.ibm.com/support/knowledgecenter/SS6PEW_9.5.0/com.ibm.help.org.partic.concepts.doc/productconcepts/c_OrganizationModelingInSellingAndFulfillmentFoundation.html

  Navigate to **Sterling Order Management 9.5.0 > Configuring shared components and users > Organization and participant modeling > Considerations > Organization modeling in Sterling Order Management**

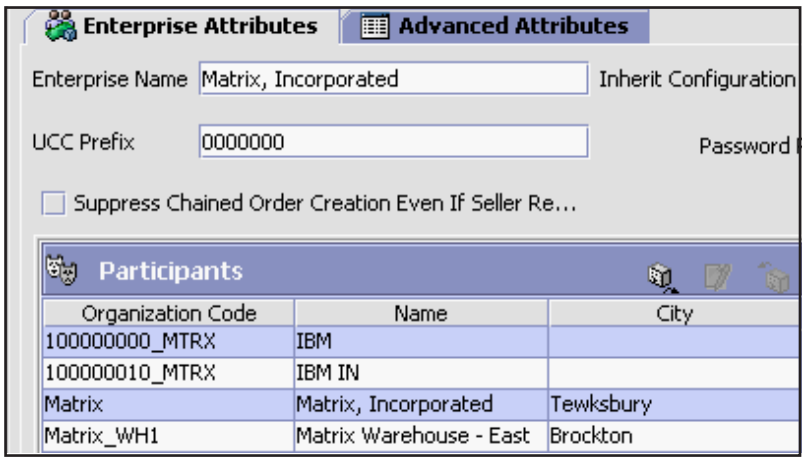
Enterprise Attributes

Overview

When the enterprise role is selected for an organization, the Enterprise Attributes tab is added to the Roles & Participation tab. The enterprise attributes define the inheritance rules, password policy, chained order creation rules, the participating organizations, and the cost factor preferences.

Enterprise Attributes

The following figure indicates the Enterprise Attributes tab. The key details are explained in the following sections.



Password Policy

A password policy is a set of rule definitions to control and manage the user passwords for the enterprise. Sterling Selling and Fulfillment Foundation supports the pre-configured rule types for a password policy. They are Login Rules, Assignment Rules, Password Change Rules, Password Reset Rules, and Password Secret Answer Rule. A password policy contains the values and definitions for these rules. For example, a password policy might have a rule which specifies whether password reset must be allowed.

(Continued on next page)

Enterprise Attributes

(Continued)

Password Policy

....(Continued)

A password policy can also be assigned to each user or a group of users in an organization. The Password Policy that is assigned to a user takes precedence over the policy that is defined for the enterprise. The password policy can be set at Application Manager > Password Policy Management.

Enterprise Inheritance

The Sterling Selling and Fulfillment Foundation provides an enterprise the option to inherit the application configurations from another previously configured enterprise instead of defining a new set of configurations.

For example, an organization ABC corporation has a child enterprise, Enterprise A. A new legal entity Enterprise B is created for ABC Corporation. The rules and configurations for Enterprise B are same as Enterprise A. Instead of defining configurations for Enterprise B again, B can choose to inherit the configurations from A.

Note

When an enterprise inherits the configuration from another, the option is provided in the Sterling Selling and Fulfillment Foundation for the inheriting organization to override the configurations for a set of rules.

Illustration of Enterprise Inheritance

The following figure indicates the enterprise attributes tab for Candlestick Materials Handling. You can see that the Inherit Configuration from Enterprise is set to the enterprise HeavyLift.

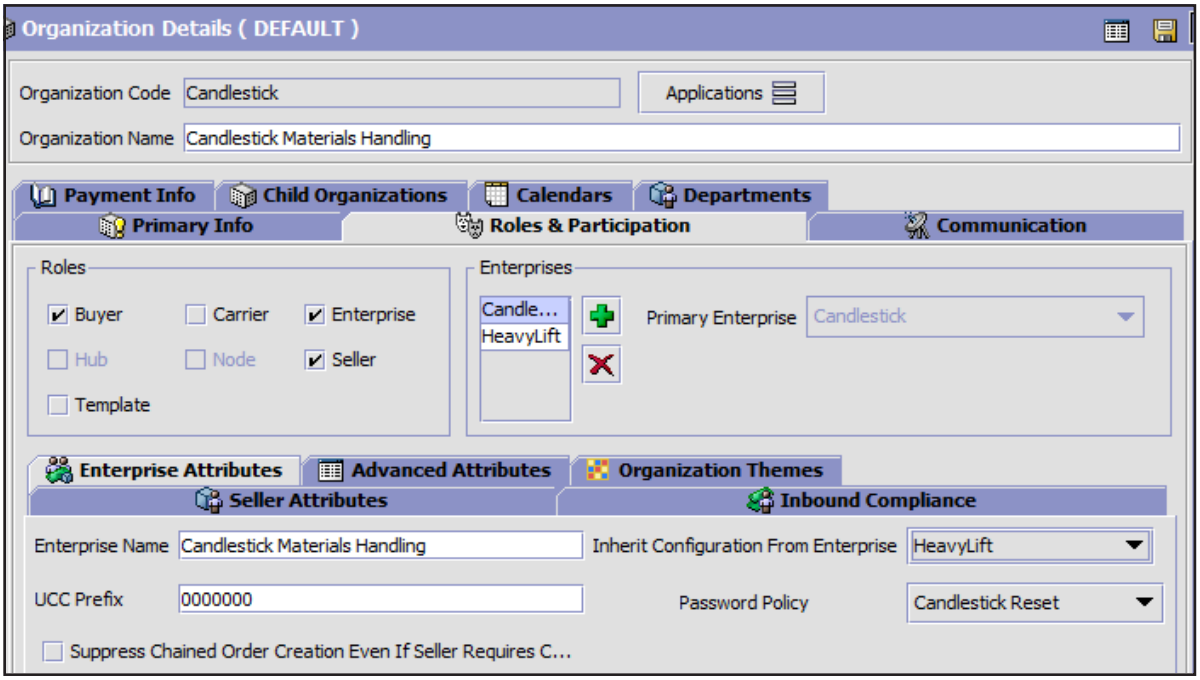
(Continued on next page)

Enterprise Attributes

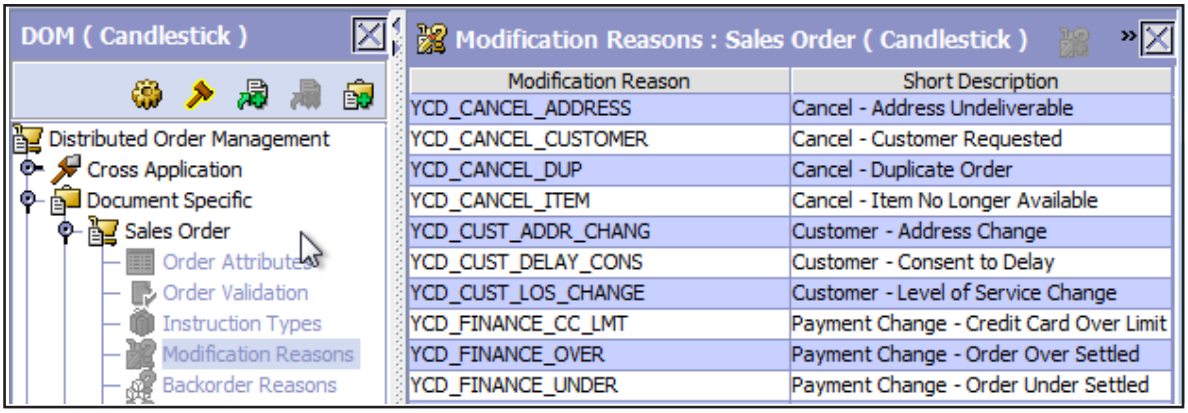
(Continued)

Enterprise Inheritance

....(Continued)



The following figure indicates attributes for the Sales Order configurations for the enterprise Candlestick Materials Handling in the Distributed Order Management application. You can see that the configuration options are inherited from Enterprise HeavyLift and are not editable.



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Enterprise Attributes

(Continued)

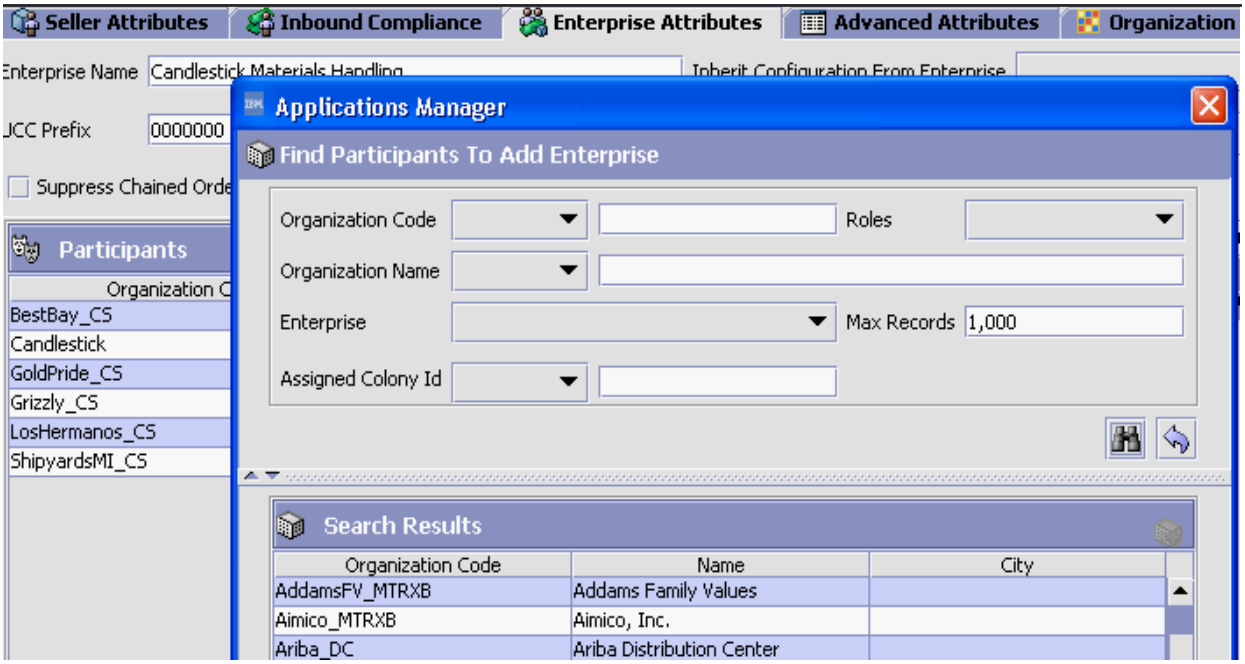
Enterprise Participants

The organizations that participate in the enterprise are a key attribute of the enterprise. The participant organizations can be buying organizations, selling organizations, carrier, or nodes.

The participants organizations can be added to an enterprise from the participants section of the Enterprise Attributes tab.

Enterprise Participants Screen Layout

The following figure displays the screen to search and add participants to the enterprise.



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Enterprise Attributes

(Continued)

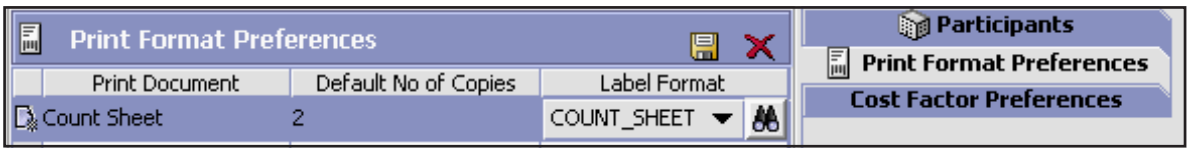
Print Format Preferences

Sterling Selling and Fulfillment Foundation provides the option to configure the print documents specific to each role for an organization. The Print Format Preferences tab is available for each of the Role attributes. A print document is associated with a label format. The default number of copies that are required for the document can be specified.

- **Print Documents:** A standard set of print documents such as pack list, count sheet supported by the Sterling Selling and Fulfillment Foundation. In addition, option to create new print documents is provided. Each document is associated with a default label format.
- **Label Format:** A standard set of Label formats that the Sterling Selling and Fulfillment Foundation supports. In addition, option to create new label formats is provided. Label format is the name of the label design file (.LWL) created by using Loftware Label Manager™. Loftware Label Manager™ is a third party software that can be purchased directly from the vendor, Loftware, Inc.

Print Format Preferences Screen Layout

The following figure indicates the **Print Format Preferences** tab.



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Enterprise Attributes

(Continued)

Print Format Preferences

....(Continued)

The following figure indicates a sample Label format for a container Label.

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Enterprise Attributes

(Continued)

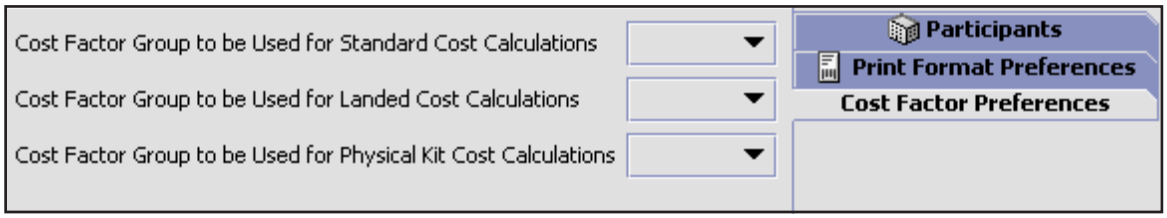
Cost Factor Preferences

The inventory costing factors can be set at the enterprise level or at the vendor (seller) level. The Cost factor groups that are defined at the seller level take precedence over the cost groups that are defined for the Enterprise. The Cost factors are the value modifiers that are an additional function or component from a base cost item factor to give a new derived unit cost. Examples of cost factors include insurance, freight, material handling, and packaging.

A cost factor group is a set of cost factors that are applied for a specific organization's needs. Enterprises must specify the cost factor group to derive the landed cost, standard cost, and the physical kit costs.

Cost Factor Preferences Tab Screen Layout

The following figure indicates the Cost Factor Preferences screen. Note that the cost factor groups must be preconfigured in the Global Inventory Visibility application for it to be populated in the cost factor preferences drop-down lists.



The standard cost is the predetermined cost of operating or producing a good or service, under normal conditions. The landed cost is the total cost of a landed shipment that includes Purchase Price, Freight, Insurance, and other costs up to the port of destination. The physical kit cost pertains to the work in process handling cost at the item level for each physical kit component.

Inbound Compliance

Overview

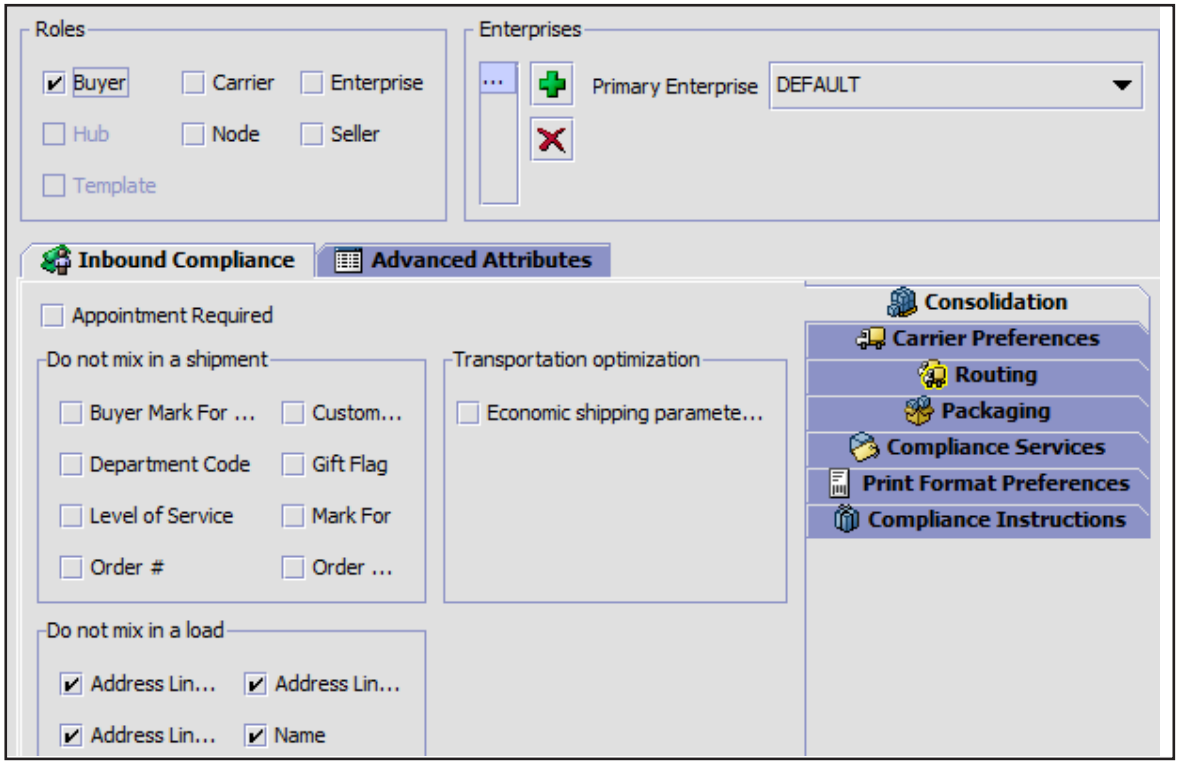
A buyer organization can define the shipping and routing conditions that must be met when shipping to the buyer. These conditions are known as Inbound Compliance attributes and determine the rules that are applied to the consolidation and delivery to the buyer. The Inbound Compliance Attributes are grouped into Consolidation, Carrier Preference, Routing, Packaging, Compliance Services, Print Format Preferences, and Compliance Instructions.

Consolidation Attributes

The buyer configures the rules for the consolidation of shipments and loads. These consolidation rules are applied to the buyer's orders. The consolidation attributes are detailed in the following sections.

Consolidation Attributes Tab Screen Layout

The following figure indicates the Consolidation tab of the Inbound Compliance panel.



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Inbound Compliance

(Continued)

Appointment Required

The buyer can specify that an appointment must be set for delivery so that the buyer's docks would be ready to receive the shipment.

Do not Mix Attributes

The Sterling Selling and Fulfillment Foundation allows the consolidation of orders based on various parameters, including ship to, buyer, seller, Mark For, and Economic Shipping Parameters (ESP). The Do not mix attributes allow the buyer organization to control the consolidation of the shipment or load.

For example, a buyer might frequently place orders that must be split into several shipments, if the orders are associated with different departments. The items that are going to the same department might be consolidated.

- **Do not mix in a shipment:** These options set the rules to segregate a shipment. Separate shipments must be created for items that have different values for these attributes. The options include buyer Mark for Node ID, Customer PO, Department code, Gift flag (if the order is marked for gifts), Level of Service, Mark for (if marked for different individuals), Order Number, and Order type.
- **Do not mix in a load:** These options set the rules to segregate a load. The options are Address line 1, Address line 2, Address line 6, and Name.

  For example, if Address Line 1 and Name are cleared, shipments that have different first address line but the same address line 2 and 6 can be included in the same load.

 Note

A shipment is group of items, from one or multiple customer orders, collected to send to the same ship-to address together in the same truck. A load is a collection of line items from orders that are organized in a way to maximize picking efficiency. If a load contains line items from different customers or ship-to locations, the picked items must be segregated later to their respective shippers.

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Inbound Compliance

(Continued)

Economic Shipping Parameters (ESP)

Shipment costs can be reduced by consolidating shipping that is based on volume or weight. An optimum volume and weight must be defined by a buyer for the consolidation. However, the consolidation must take into account the ability to stick to the delivery dates. The buyer can set the optimum weight, optimum volume, or maximum delay in the number of days for shipping consolidation. The shipment is consolidated until one parameters such as weight, volume, or delay is reached.

Example

A buyer sets the ESP parameters as follows:

- Weight Threshold: 300 kilos
- Volume Threshold: 40 cubic meter
- Delay in shipment not more than three days.

The Ship By dates of orders O1, O2 are spaced by five days. The combined weight of the shipment is 200 kilos and the combined volume is 20 cubic meter. The weight and the volume threshold allow shipping consolidation. In this case, the two orders must be shipped separately as the gap between the ship by dates is more than three days, which is more than the allowed delay for shipment.

In this example, an Outbound Shipment Pipeline is being used and then connected to the Shipment Process.

Carrier Preferences

The buyer and node set the carrier preferences for parcel carrier mode. The buyer's carrier preferences are considered whether the buyer undertakes the freight charges. The carrier preferences contain the list of preferred carriers. The node's carrier preferences are considered when the node undertakes the freight charges.

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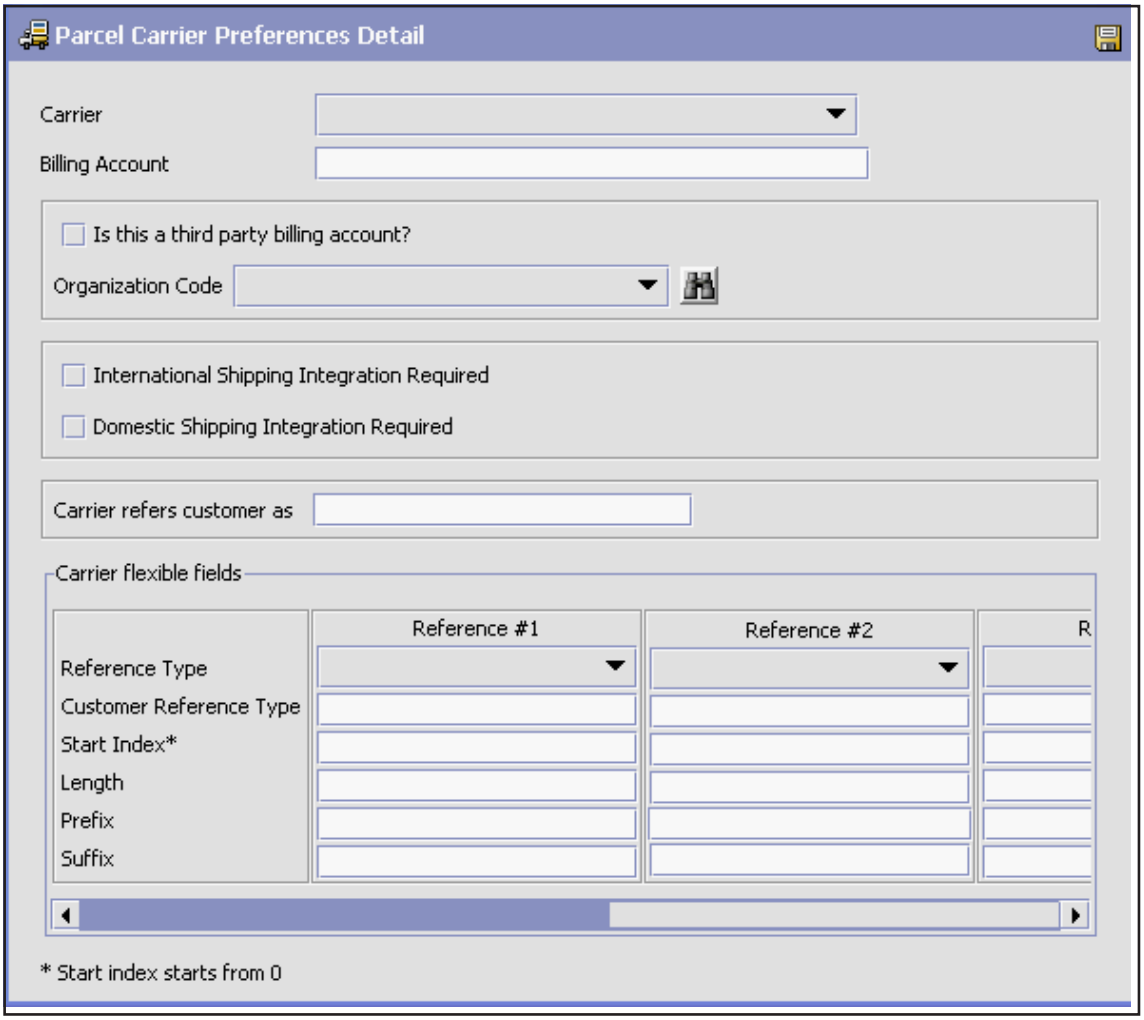
Inbound Compliance

(Continued)

Carrier Preferences

Carrier Preferences: Parcel Carrier Preferences Screen Layout

The following figure indicates the Parcel Carrier Preferences Detail screen.



The main details that are specified for a carrier are name and billing account of the carrier, and Shipping Integration Requirement. If another organization manages the billing, the organization code for the third-party billing account must be specified. The carrier details are explained in the carrier node attributes.

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Inbound Compliance

(Continued)

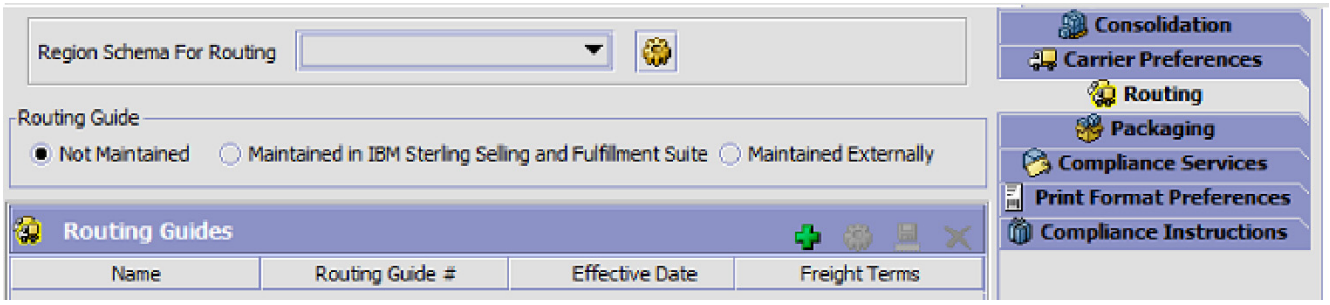
Routing

Routing determines the assignment of shipment to a load. Sterling Selling and Fulfillment Foundation can route based on routing guides that are defined within Sterling Selling and Fulfillment Foundation, guides defined externally or by manual routing.

Routing guides are a list of conditions that determine how a shipment must be routed. An effective time period and conditions when it must be applied is defined for each routing guide. The routing parameters that the buyer defines are considered when the buyer bears the freight charges. If not, the enterprise routing rules are applied. A buyer can select the regional schema for routing and specify the routing guides if the routing guides are maintained internally.

Routing Tab Screen Layout

The following figure indicates the **Routing** tab.



The application provides user exits to consider the routing guides that are maintained externally.

The following are the key parameters that need to be configured for Routing:

- **Region Schema For Routing:** The region schema represents a set of geographical regions defined as a hierarchy. Remember,
- **Routing Guide:** Specify where the Routing guide needs to be maintained. The options are **Not Maintained** (manual routing), Maintained in Selling and Fulfillment Foundation (Use Routing Guides in Sterling Selling and Fulfillment Foundation) and Maintained Externally (Use external routing system). If an external system maintains the routing guides, the user exits is defined for the system.

(Continued on next page)

Inbound Compliance

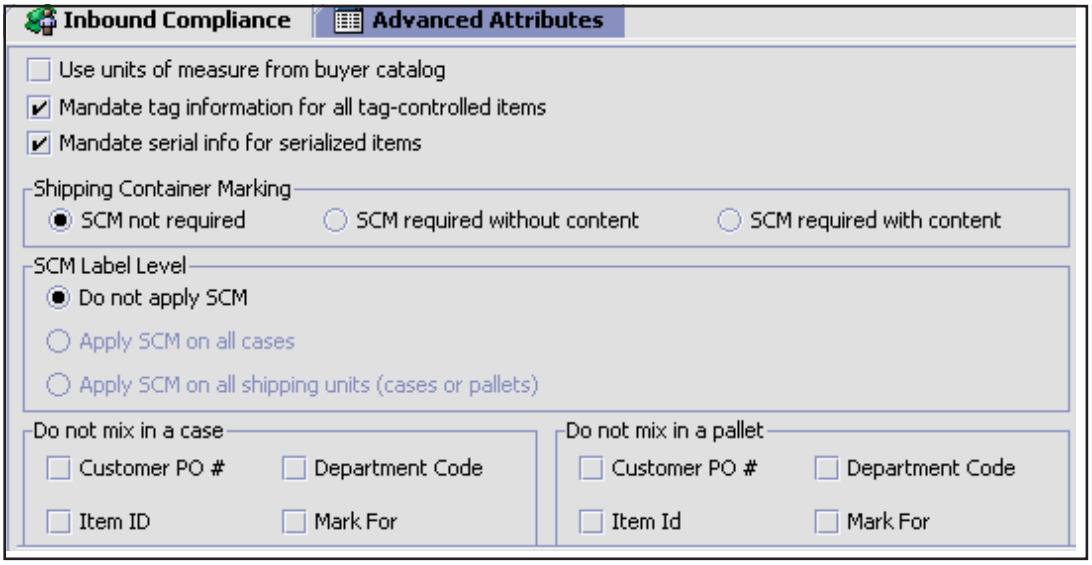
(Continued)

Packaging

These parameters specify how the buyer wants the items to be packed, for all their inbound orders. The buyer can specify if the Units of Measure might be based on their catalog, specify the SCM requirements, and the Do not Mix constraints for Packaging.

Packaging Tab Screen Layout

The following figure indicates the **Packaging** tab.



The following parameters are key for packaging:

- **Use Units of Measure from Buyer Catalog**: This option controls the units of measure which might be used for packaging for the shipments to the buyer. By default this option is based on the catalog that is maintained for the enterprise. If this option is checked, the units of measure for packaging must be based on the buyer's Catalog. This option includes information such as number of packages that are contained in a case, or the number of cases in a pallet.
- **Mandate tag information for tag controlled Item:** This option is checked when the buyer requires the tag information for all tag controlled items in the warehouse.
- **Mandate serial info for serialized item:** A serialized item is one for which the serial number is maintained for each single unit. This option is checked when the buyer requires the serial information for all serialized items.

(Continued on next page)

Inbound Compliance

(Continued)

Packaging

....(Continued)

- **Shipment Container Marking:** A Shipment Container Marking (SCM), usually in barcode format, is an identifier for a pallet. You can specify whether the buyer wants the SCM to be applied for all their inbound orders and the details that is required in the SCM. The options are - SCM not required, SCM required without content, and SCM required with content.
- **SCM Label Level:** You can also specify if the SCM is required only on the individual cases, or on all shipping units (pallets and cases).
- **Do not mix in a case** and **Do not mix in a pallet:** These panels have the options to restrict the mixing of the individual SKUs in a pallet or a case. The options are Customer PO #, Department Code, Item ID, Mark for, Units of Measure and Product Class.

 Note

A case is a container that holds a specified quantity of identical items (SKU) as packaged by a vendor. A pallet is an industry standard sized wooden, plastic, or metal platform to facilitate the movement of materials. Cartons are stacked on the pallet.

Compliance Service

The Compliance Service Parameters have the rules to specify the additional Value Added Services (VAS) that a buyer wants on certain item classification. For example, Monogramming the item with a corporate logo or adding promotional materials in the item's packaging. When an order which meets the criteria for the compliance service is created, the compliance service is run.

For Example, an enterprise ABC supplies jewelry. You establish an Item Classification "Expensive Jewelry" for jewelry worth more than $200. buyer requires that a security tag might be applied to the Item Classification, "Expensive Jewelry". This option is specified in the compliance services. When an item of expensive jewelry is ordered, the compliance service is run.

(Continued on next page)

Inbound Compliance

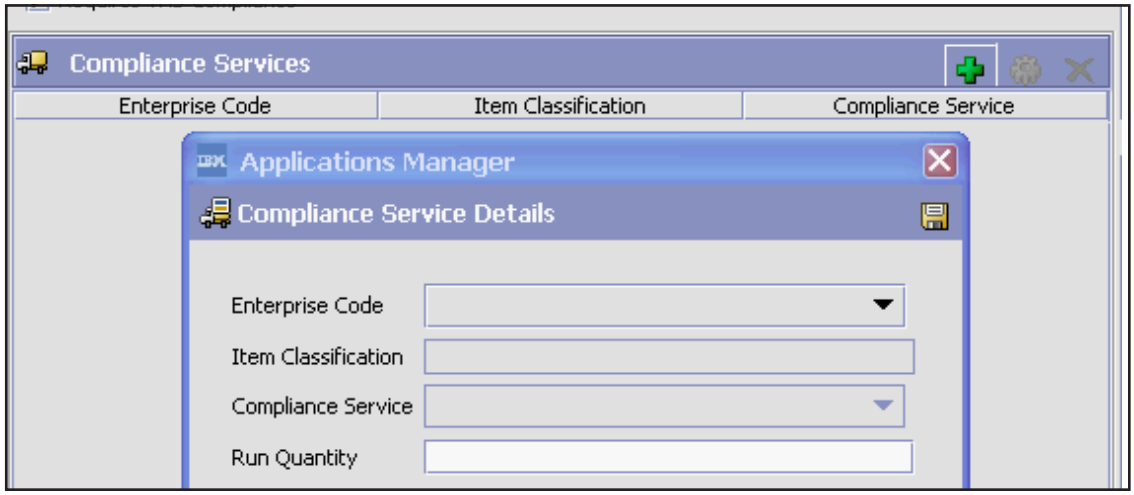
(Continued)

Compliance Service

....(Continued)

Add Compliance Service Details Screen Layout

The following figure shows the **Compliance Service Details** Screen.



The key details that must be specified for a Compliance Service are:

- **Enterprise Code:** A buyer can set up different compliance requirements for different enterprises. Select the appropriate enterprise for which these criteria might be applied.
- **Item Classification:** The Compliance service is run only for items with this classification.
- **Compliance Service:** A Compliance Service define activities that might be performed to prepare the item to meet the requirements of the buyer.
- **Run Quantity**: The Run Quantity is a number that indicates how many items to batch together for a compliance service. The actual request for product and available inventory determine how many items must have the Compliance service applied.

Compliance Instructions

Sterling Selling and Fulfillment Foundation enables you to create buyer Instructions as a buyer attribute. You can define instructions to the buyer by adding instruction types and notes. For example, a buyer instruction would be to accept all shipments between 7:00 and 18:00 hours.

Carrier Attributes

Overview

An organization that handles everything that is related to logistics can take on a role of the carrier. A carrier picks up the orders from the sellers and delivers to the buyers (customers). A carrier provides different types of services for truckload (TL), less-than truckload (LTL), and parcel shipments. Multiple services can be defined for each of the different modes of services of the carrier.

Modes of Service

Truckload (TL) Services

A truckload is the largest of the shipping modes and is normally considered a shipment of over 10,000 pounds. The shipment fills the truck or trailer and has one ship to location.

Less Than Truck load (LTL) Services

A shipment is normally called as a Less-Than Truckload shipment when it weighs 150 - 10,000 pounds. Typically this must be mixed with other shipments from other businesses and use strategically placed processing centers.

Parcel Services

Parcel Services is the smallest Shipping Mode. A shipment is normally called as a parcel when it weighs under 150 pounds. Parcel Services are typically generated by Distribution centers.

PRO Number Length

A PRO Number also known as Progressive Number refers to the unique Progressive or Serial Number that is generated during routing by the carrier to identify and track a specific shipment for a load with carrier type LTL. This number is used on freight bills, bills of lading, and waybills for invoicing and tracking purposes. A node might define the range of PRO Numbers that are assigned by a carrier.

The PRO Number is specified in the Bill of Lading (BOL).

(Continued on next page)

Carrier Attributes

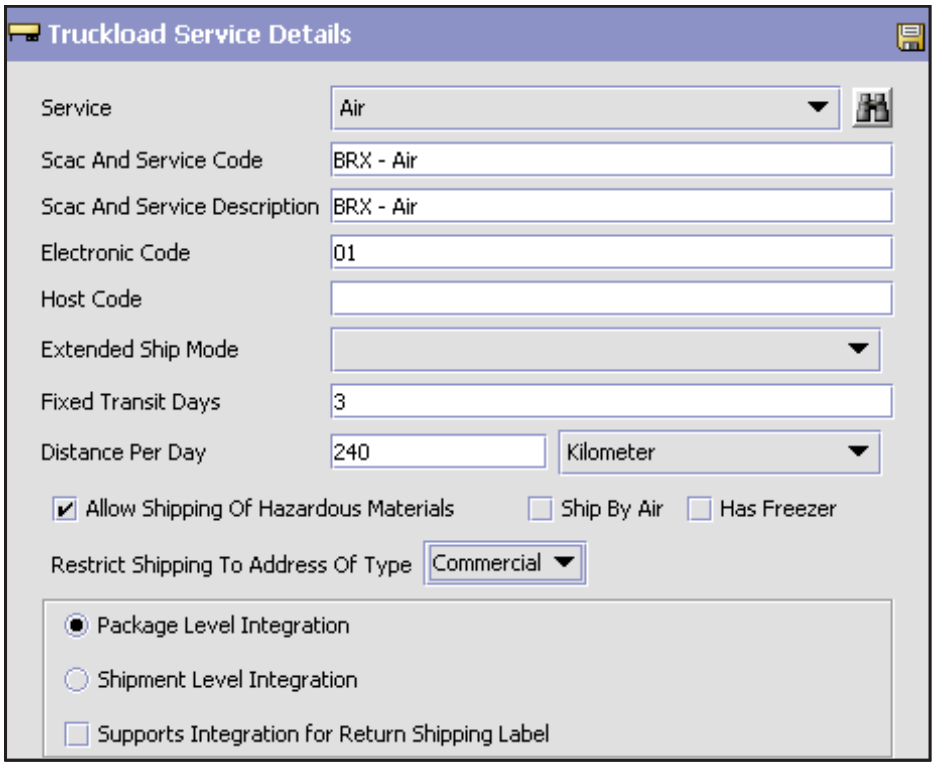
(Continued)

Carrier Services Configuration

A carrier organization can configure the details for the services it offers under each of the modes. The carrier service is selected in the Routing Guide that the buyer creates.

Add Truckload Service Details Screen

The following figure shows the **Truckload Service Details** screen.



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Carrier Attributes

(Continued)

Carrier Services Configuration ....(Continued)

The key details for a carrier services are as follows:

- **Electronic Code**: Specify the code the carrier organization uses to define the service. Example: Air has the electronic code ‘01’.
- **Extended Ship Mode:** Select an Extended Ship Mode to the already-defined service. For example, if you choose TL initially, you can add another ship mode LTL along with your TL.
- **Fixed Transit Day:** Enter the maximum number of days that the Service allows for delivery. This field depends on the selected service. This number is used for order line scheduling. For example, one Day Air would have a maximum of one transit day.
- **Distance Per Day:** Specify the maximum distance that the selected service must travel in each transit day and the unit of measure.
- **Restrict Shipping to Address of Type**: Specify whether the service can be used for Residential address type, Commercial address or both. For example, if you select the commercial address type, the carrier can use this service only to the addresses that are defined as commercial address types.
- **Package Level Integration and Shipment Level Integration:** These options are available only if the carrier organization is integrated with Sterling Selling and Fulfillment Foundation. In this case, the carrier can be tracked during transit either at specific Package-Level or at Shipment- level. For example, if the carrier is carrying 20 shipments with 20 cases each, and if the **Shipment Level Integration** rule is enabled, the shipments is tracked during transit and not the individual cases.
- **Supports Integration for Return Shipping Label:** Choose this field to indicate that this carrier service supports integration for return Shipping Label. For example, a carrier is transporting the Shipment from the source location to a customer’s location and the customer is dissatisfied and wants to return the order. If this rule is enabled, the carrier gets the returned items back to the source location.

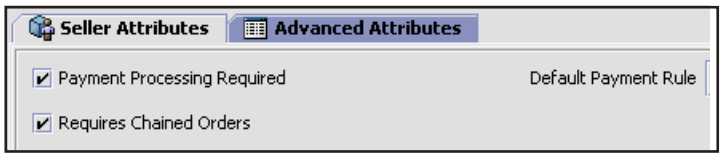
Seller Attributes

Overview

The seller attributes must be specified for an organization which is assigned a role of a seller. The attributes which can be configured are Primary Info, Print Format Preferences, and Cost Factor Preferences.

Primary Info

The seller Primary Info includes details which define the payment processing rules for the seller and rules for chained order processing. A Chained Order is an order that is linked to a parent order in which the life cycle of one effects the other. If a seller needs to be allowed to process the payment, the **Default Payment Rule** can be selected for the seller. The payment rules determine whether the payment processing is done through Accounts Receivable or Sterling Selling and Fulfillment Foundation, and the type of payment processing.The following figure indicates the Primary Information for a seller.



Note

The payment rule can also be specified for each order during order creation. The payment processing rules are configured in the Distributed Order Management configurations.

Cost Factor Preferences

The Cost Groups for the Standard Cost and Landed Cost Calculations can be defined at the seller level also. If the Cost Groups are specified at the enterprise level, they do not need to be specified for the seller.

Example for Cost Factor Preferences Setting

A brand outlet store is a typical example of a Node (where inventory is maintained) which is a seller. For the store, the enterprise sets the cost factor preferences, even though it is also a seller organization. On the other hand, a Regional Dealer for a region can be a Selling organization alone. In this case, it is possible that the dealer sets the cost factor group that is to be considered for the Selling attributes.

Node Attributes

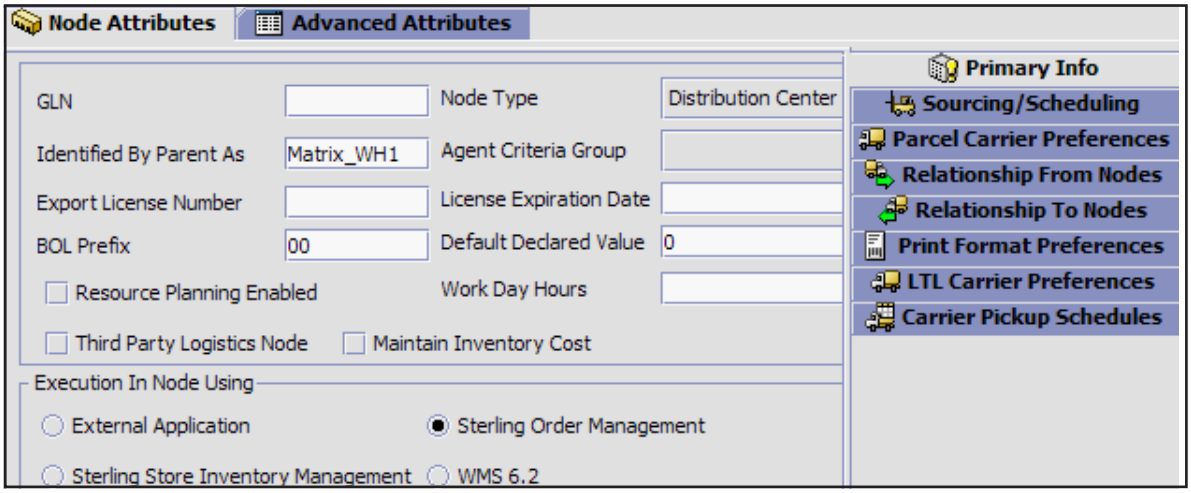
Overview

An organization that is a Distribution Center or a Store can be defined as a Node. A Node is the owner of the Inventory or Service capacity. The attributes that can be defined for a node are as follows:

- Primary Info
- Sourcing/Scheduling
- Parcel Carrier Preferences
- Relationship from Nodes
- Relationship to Nodes
- Print Format Preferences
- LTL Carrier Preferences
- Carrier Pickup Schedules

Node Primary Info

A Primary Information of a Node determines how a Node is identified throughout the system. The following figure indicates the **Primary Information** tab for a Node.



The key details that are specified for a Node are as follows:

- **Node Type**: The default node types that Sterling Selling and Fulfillment Foundation supports are Distribution Center (DC) and Store. You can create a Node Type from this screen.

(Continued on next page)

Node Attributes

(Continued)

Node Primary Info

....(Continued)

- **GLN**: The unique Global Location Number of the Node. Organizations can encode GLNs in as bar codes and Radio Frequency Identification (RFID) tags to support automatic data capture of the location details.

Note

The Global Location Number (GLN) makes possible the unique and unambiguous identification of physical locations and legal entities. This number is issued by GS1, an international not-for-profit organization that is involved in the design and implementation of global standards for use in the supply chain. This number has become a prerequisite for efficient e-Commerce and global data synchronization across multiple applications.

- **Identified By Parent As**: This field specifies the name, the parent's node uses to identify the node.
- **BOL Prefix**: The Node generates Bill of Lading (BOL) and each of these are prefixed with a label. In this field, you can enter the label.
- **Agent Criteria Group:** This field is used to classify nodes. The Warehouse Management System time-triggered transactions use this value to perform tasks on the nodes with a matching node transactional velocity value. The default values are LOW and HIGH. Additional values can be defined by the Hub from **Application Platform** > **System Administration**.
- **Default Declared Value:** This field is the price to be shown as the Default Declared Value in Application Console. The parcel carriers use this price for computing insurance.
- **Work Day Hours:** This field is the standard number of working hours per resource (person) in a day. This field is used to convert hours to days.
- **Resource Planning Enabled:** The Resource Planning tool of the Sterling Selling and Fulfillment Foundation enables warehouses to plan for expected workload and determine the resource requirement for activities. Selecting this field enables planning of resources and activities by the node.

(Continued on next page)

Node Attributes

(Continued)

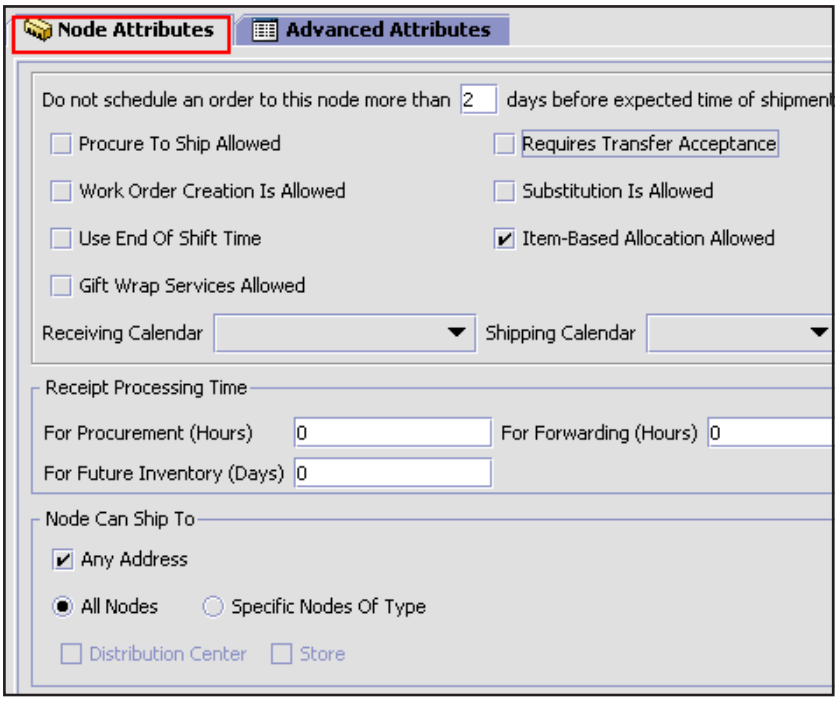
Node Primary Info

....(Continued)

- **Third Party Logistics Node:** Choose this field if the Node is part of a third-party logistics business model. Chained orders are not created for Nodes that are marked as a Third-Party Logistics Node.
- **Maintain Inventory Costs:** Choose this field if the Node maintains its own inventory costs. When this option is selected, cost must be entered for each Inventory Adjustment that happens at this Node. If you choose this field, the Inventory Adjustments made for this Node must be approved. Adjustments awaiting approvals are called “Pending Adjustments.” The actual adjustment does not occur until the pending adjustment is approved.
- **Execution in Node Using:** The order release from the node can be through the Sterling Order Management System, Sterling WMS or through an external application. If the Order release is from an external application, an action that must be initiated on Order Release must be selected. Only the actions that is linked to the primary enterprise of this Node/organization are available.

Sourcing/Scheduling

You can set up the Sourcing and Scheduling attributes for the node to define how orders are sourced from nodes and how these orders are scheduled. The following figure indicates the Sourcing and Scheduling screen layout.



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Node Attributes

(Continued)

Sourcing/Scheduling ....(Continued)

The key details are as follows:

- **Order Scheduling Rules:** You can specify the maximum number of business days ahead of which an order can be scheduled to a Node for it to be fulfilled. This number is used when performing earliest schedule date calculations.
- **Procure to Ship Allowed:** Select this field if you want this Node to procure chained orders from other Nodes.
- **Requires Transfer Acceptance:** Select this field if you want this Node to accept a procurement to confirm availability of the required items before proceeding with the order.
- **Work Order Creation Is Allowed**: Select this field if you want the Node to use work orders to support Compliance Services at this Node. Work Orders describe the service activities to customized items based on a buyer's requests. For example, a buyer may have set Logo Printing as a Compliance service requirement. The Node sourcing this shipment must have the required resources and be capable of executing work orders fort this service.
- **Substitution Is Allowed:** Select this field to allow substitution of items within an order. For example, Item A and Item B are T-shirts of different brands. If there is a shortage of item A, you can fulfill an order by allowing substitution and adding Item B in-place of Item A.
- **Use End Of Shift Time:** Select this field if you want the Node to consider scheduling shipments even at the end of a shift time. For example, a Node works five days a week, with two shifts, 8AM - 4PM and 4PM - 10PM. The Node's Minimum Notification Time is set to 2 hours. If an order is sent to a Node on Friday at 1PM, the order is scheduled to ship on same day at 4PM if Use End Of Shift Time box is checked. The order is scheduled to ship on same day at 3PM if Use End Of Shift Time box is unchecked.
- **Gift Wrap Services Allowed**: Select this field if the Node provides gift wrapping services for orders.

(Continued on next page)

Node Attributes

(Continued)

Sourcing/Scheduling ....(Continued)

- **Item-Based Allocation Allowed:** Item-based allocation (IBA) reallocates the demands for items of existing sales orders to more suitable supplies when there is a change in the supply and demand such as emergency orders or order cancellations. For example, on cancellation of a sales order, the corresponding supplies might be reallocated to another order.
- **Receiving Calendar:** The node used this calendar to determine the available shifts for receiving deliveries at the node. The pre-defined calendars of the node and the calendars of the primary enterprise of the Node are listed in this drop-down list.
- **Shipping Calendar:** The node uses this calendar to determine the available shifts for shipping from the Node.
- **Receipt Processing Time:** The receipt processing time is the number of hours that are required at the node to process the receipts dropped at the Node. The Receipt processing time is defined for Procurement and Forwarding and is used in the calculation of the Expected Ship dates for future orders and the number of days for processing Future Inventory. Future inventory are the items that are planned to arrive at a later date.
- **Node Can Ship To**: Specify whether the shipments from this node can be shipped to all nodes or only to a specific node type. You can select the node types to which it can be shipped. In addition, you can also specify whether the node can ship to any address.

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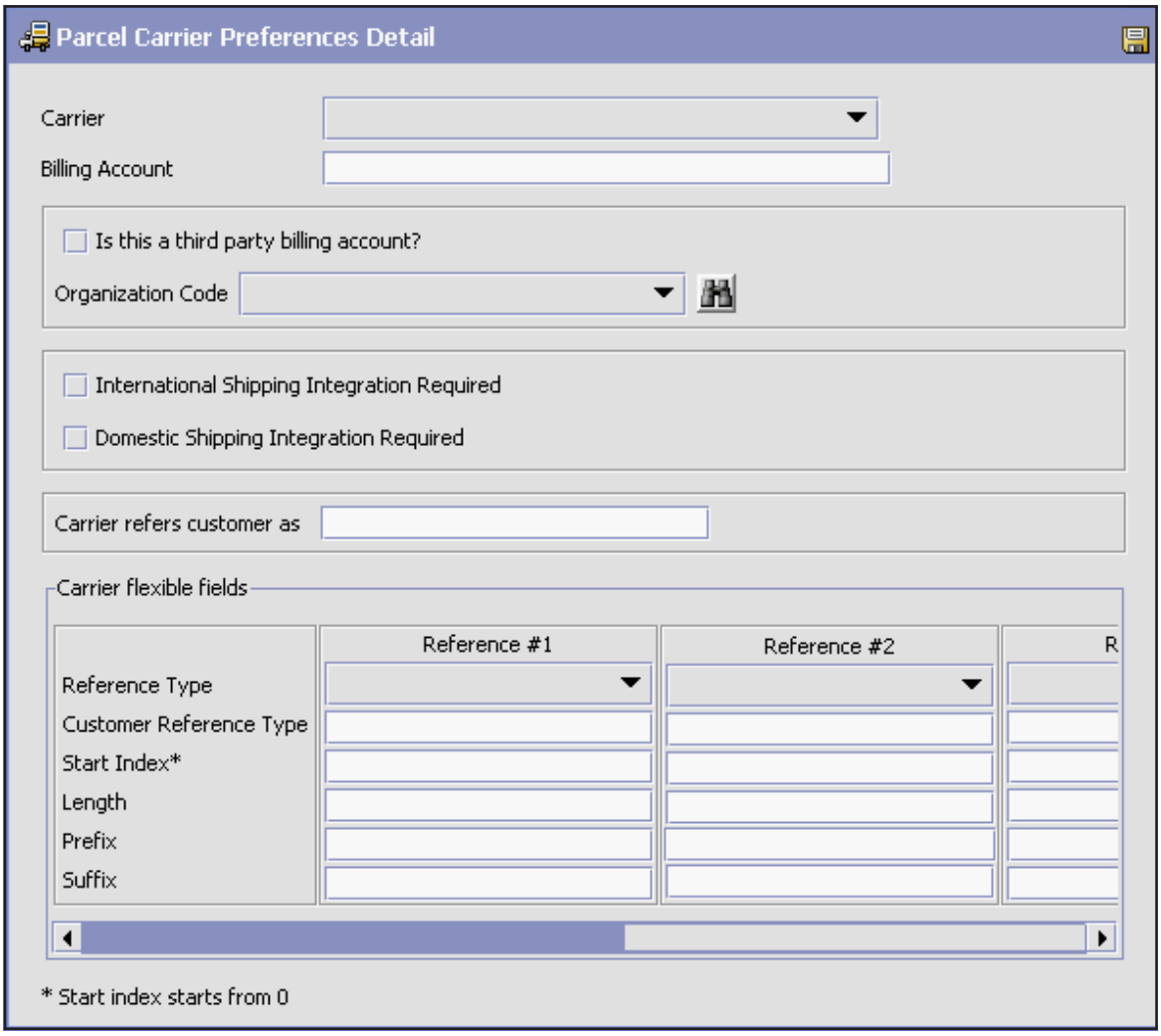
Node Attributes

(Continued)

Carrier Preferences

You can identify the carriers that a Node uses and define how they must interact. The carrier preferences of a Node is considered when the freight charges are borne by the enterprise. The carrier preferences can be defined for Parcel carrier services and Less-than-truck load (LTL) carrier services from the node.

The PRO Number Generation settings for the carriers a Node uses must be specified for LTL services.



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Node Attributes

(Continued)

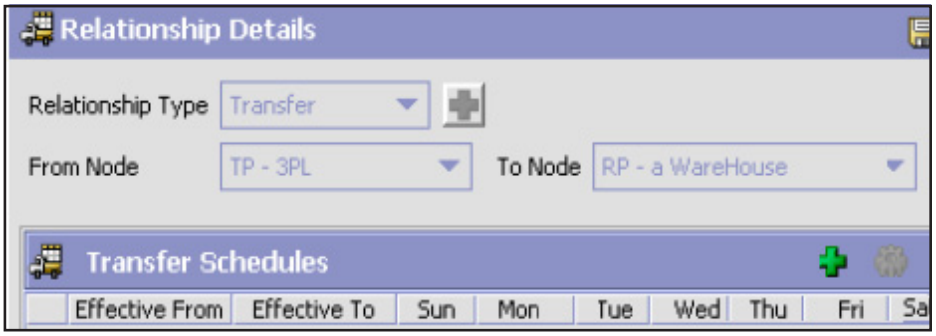
Relationship between Nodes

There are different types of orders such as Transfer Orders, Purchase Orders, and Sales Orders. A Transfer Order is a type of chained order that is created when a Node that belongs to the organization you are configuring, needs to replenish their stock from another Node within the organization, to fulfill an order. You can define a relationship between the Node you are configuring, and another Node for the transfer orders, define a Transfer Schedule within this relationship and define the transit time to procure items from a Node, on a day-of-week basis. The relation is always defined between two nodes. The relationship can be specified from this node to another node (Relationship to Node) and also from another node to this node (Relationship from Node).

The Relationship To and Relation From nodes can be set only after the organization details are set for a Node and saved.

Relationship Details Screen

The following figure shows the Relationship Details screen.



- **Relationship Type**: The Relationship Type and the From and To nodes must be defined. For the Relationship From Node tab, the To Node option is defaulted to the Node you are configuring and is disabled. For the Relationship To Node tab, the From Node option is defaulted to the Node you are configuring and is disabled.
- **Transfer Schedules:** Transfer Schedules provide a means to allow or disallow a transfer during a specific period. The effective dates and the specific days of the week when the transfer schedule is available can be defined.

(Continued on next page)

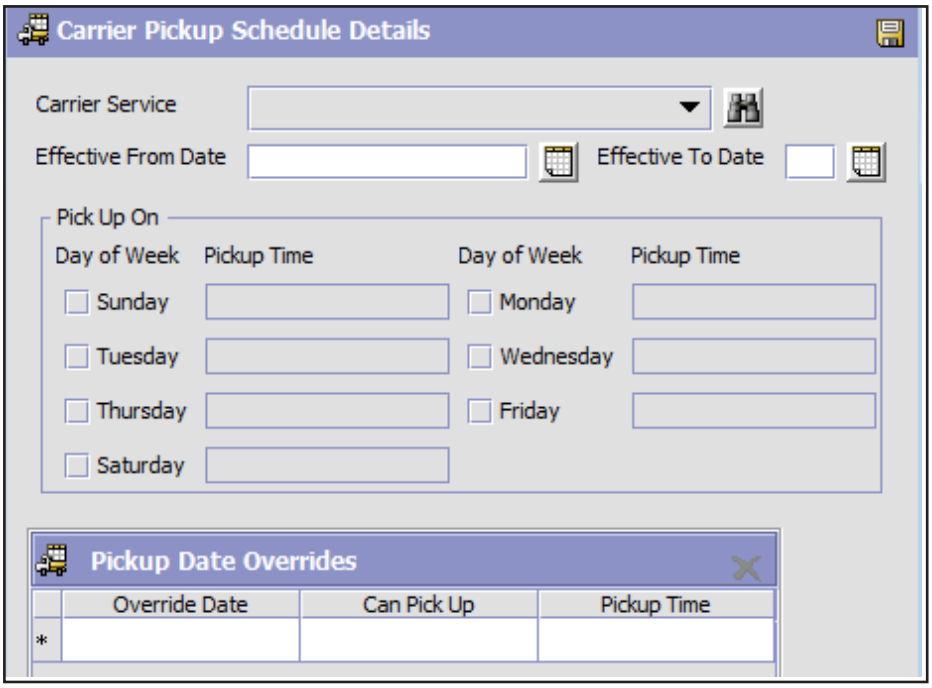
Node Attributes

(Continued)

Carrier Pickup Schedule

A carrier pickup schedule of a node determines the date and time when carriers pick up shipments from the Node. Carriers can have schedules for different seasons, such as the holiday and summer seasons, and schedules can include overrides for days, such as holidays. Sterling Selling and Fulfillment Foundation refers to the pickup schedules of the different carriers of the Node when calculating shipment dates.

The following figure indicates the Carrier Pickup Schedule Details screen.



Carrier Pickup Schedule: An Example

A carrier, Ground Service, picks up orders for delivery every Monday, Wednesday, and Friday at 3:00 P.M. If an order is placed at 12:00 P.M. on Monday, Ground Service picks up the order for delivery the same day at 3:00 P.M. Alternatively, if an order is placed at 3:30 P.M. on Monday, and if you want the same carrier to deliver it, the order is scheduled to be picked by the carrier on Wednesday. You can also choose to select another carrier if you want the delivery before Wednesday.

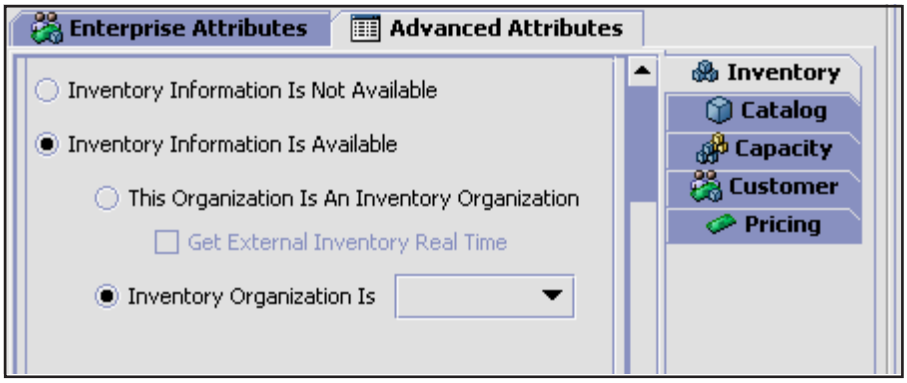
Advanced Attributes

Inventory Organization

The inventory organization is the organization that consolidates and maintains inventory information about warehouses, stores, nodes for this organization. The inventory organization provides inventory identification for a product across multiple organizations and establishes inventory ownership when a single physical location is shared across multiple organizations and provides inventory separation, allowing all organizations (part of the inventory organization) to have visibility to the inventory of all of the other organizations that are part of the inventory organization.

Inventory Organization Tab Screen Layout

The following figure shows the Advanced Inventory Attributes screen



Important

The advanced attributes are an installation level configuration only. Do not attempt to reconfigure the parameters on this tab mid-implementation.

The key details that can be specified are as follows;

- **Inventory Information in Not Available:** Sterling Selling and Fulfillment Foundation cannot provide an inventory picture for this organization and does not check for any inventory availability. Orders can still be placed by using this organization as a seller, but the orders are scheduled without any inventory availability checks.
- **Inventory Information is Available:** The inventory information may be maintained using the Sterling Selling and Fulfillment Foundation or an external application. If an external application is used, the data can still be made available using the `get External Inventory` user exit.

(Continued on next page)

Advanced Attributes

(Continued)

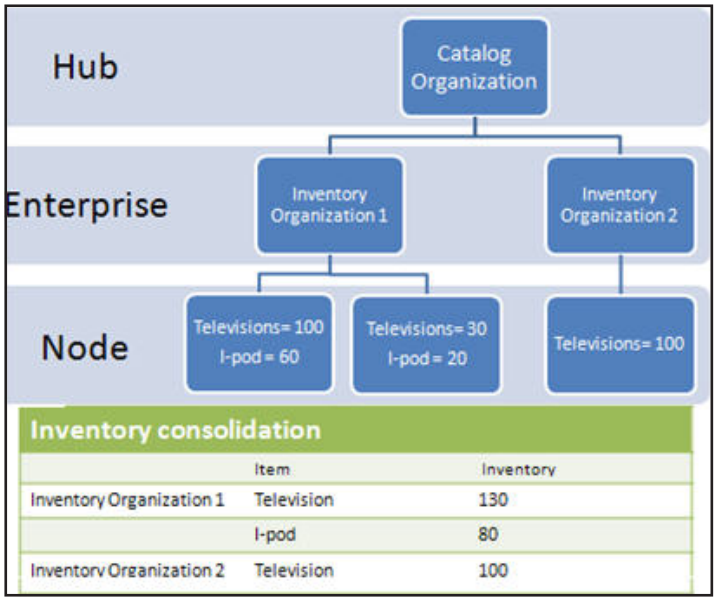
Inventory Organization

....(Continued)

Inventory Consolidation

The consolidation of the inventory information can be at the organization level or maintained by another organization in the hierarchy. Consolidation of the inventory information allows multiple organizations to access and source inventory data within Sterling Selling and Fulfillment Foundation. The option is provided to configure the organization as an inventory organization or select another organization. The organization must have the same catalog organization as the inventory organization you are associating with.

The following figure indicates the Inventory Consolidation of a sample organization with the Inventory and catalog organization set.



Inventory consolidation

	Item	Inventory
Inventory Organization 1	Television	130
	I-pod	80
Inventory Organization 2	Television	100

Important

When creating an organization through the Save As operation, the new organization's inventory organization is the inventory organization of the source organization. If the source organization is its own inventory organization, then it is set as the inventory organization of the new organization.

(Continued on next page)

Advanced Attributes

(Continued)

Node as an Inventory Organization

Certain additional attributes are specified for an inventory organization if it is a node. The tag and serial number of the item are explained in detail in the course on item and pricing. The Inventory attributes for a node include the following details.

- **Capture tag**: A Tag Number is an inventory attribute that is used to identify items that share the same lot attributes in a warehouse. It is used for item tracking and indicates the lot attributes of the item. This attribute specifies the conditions for which the item's tag information must be captured. The tag information can be captured only when receiving or during any Node operation, such as receiving, picking, put away, or counting.
- **Capable of Serial Tracking in Inventory**: Select this field if the tracking of the serials for serial tracked items can be performed at the node. If this option is not selected, serial tracking is based on configuration for serialized items.
- **Serialized Item**: A Serial Number is unique identifier of each single unit of a SKU attached to the item if serial number tracking is required. These attributes specify the conditions for which a node must capture or exclude the serial information about an item. It can be specified whether the node captures the serial number on an item for inbound orders, outbound orders or both. For inbound orders, it can be further specified whether the serial information must be captured for all inbound orders or only for return orders. The option is provided to exclude Serial Capturing for transfer orders.
- **Physical Count:** Physical Count is the task of counting all items in storage at one time to verify the accuracy of system inventory records.You can specify whether other inventory operations can be done during the physical count process. If this option is not selected, no other inventory operation is allowed at that time.
- **Inventory Adjustment Reasons**: You can associate Inventory Adjustment Reasons for a Ship Node for receiving, Packing, Shipping, and OverPick for Voice Based Tasks. Based on the configurations done for a Ship Node in the Sterling Warehouse Management System, the Inventory Adjustment Reasons drop-down list displays. By default, the adjustment code for receiving is RECEIPT, the code for Packing activity is PACK, the code for shipping activity is SHIP. The adjustment reason code associated with Over Pick for Voice-Based tasks is applicable only when Voice-Based Picking is implemented in a warehouse.

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Advanced Attributes

(Continued)

Catalog Organization

An organization can maintain its own Catalog, or it can be maintained by another organization. If the organization is a catalog organization, it can define and share its own Item Master Catalog. If a different organization is chosen as the catalog organization, the Item Master Catalog of the catalog organization is available to this organization. They cannot maintain a separate catalog of their own.

The catalog organization must be higher or at the same level as the inventory organization in the hierarchy. Only then the inventory information is maintained by the inventory organization.

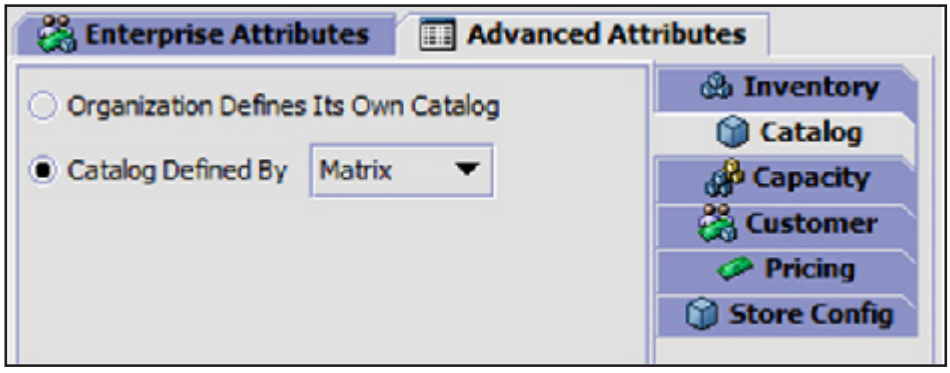
Only an organization with the role of a buyer, seller, or enterprise can be defined as a catalog organization.

Important

When creating an organization through the Save As operation, the new organization's catalog organization is the catalog organization of the source organization. If the source organization is its own catalog organization, it is set as the catalog organization of the new organization.

Advanced Attributes Catalog Tab Screen Layout

The following figure shows the Advanced Catalog Attributes screen:



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Advanced Attributes

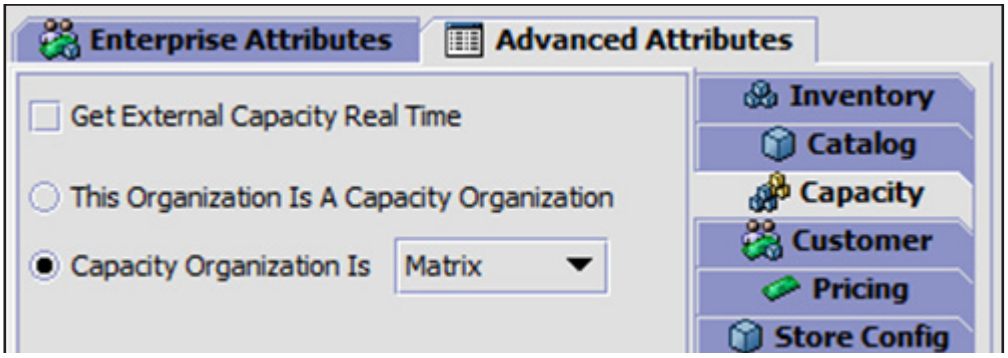
(Continued)

Capacity Organization

An organization can maintain its own capacity or it must be maintained by another organization. A capacity organization provides service capacity identification for a product and establishes ownership of capacity when a single physical location is shared across multiple organizations. It provides capacity separation, allowing all organizations (part of the capacity organization) to have visibility to the capacities of all of the other organizations that are part of the same capacity organization. If a different organization is selected as the capacity organization, it must have the same catalog organization as the capacity organization you are associating it with.

Get External Capacity Real Time

The organization can make capacity information available to Sterling Selling and Fulfillment Foundation from an external system. When the capacity is checked, the external system provides the capacity in response to a user exit call from Sterling Selling and Fulfillment Foundation. The following figure shows the Advanced Capacity Attributes screen:



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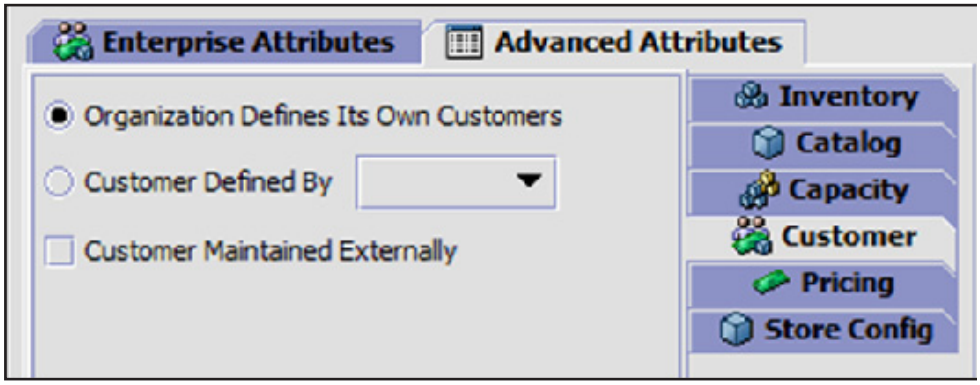
Advanced Attributes

(Continued)

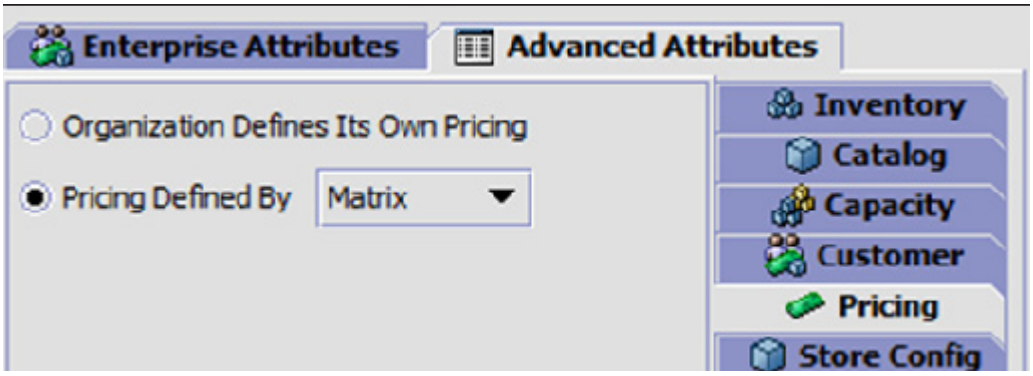
Customer Organization

An organization with the role of an enterprise can define its own customers. Alternatively, its customers can be defined by another organization. If the organization defines its own customers, these customers can be shared with other organizations. The following figure shows the Advanced Customer Attributes screen:



Pricing Organization

An organization can maintain its own pricing or it must be maintained by another organization. The pricing data includes Price Lists, Pricing Rules, and Coupons. If the organization defines its own pricing (pricing organization), the pricing data that this organization defines can be shared with other organizations. The following figure shows the Advanced Pricing Attributes screen.



The Pricing Organization defines and manages price lists and pricing rules. A Pricing Organization can define prices that are based on criteria such as the quantity of items ordered, the importance of the customer, the region where the item is sold, and the time period during which the item is sold.

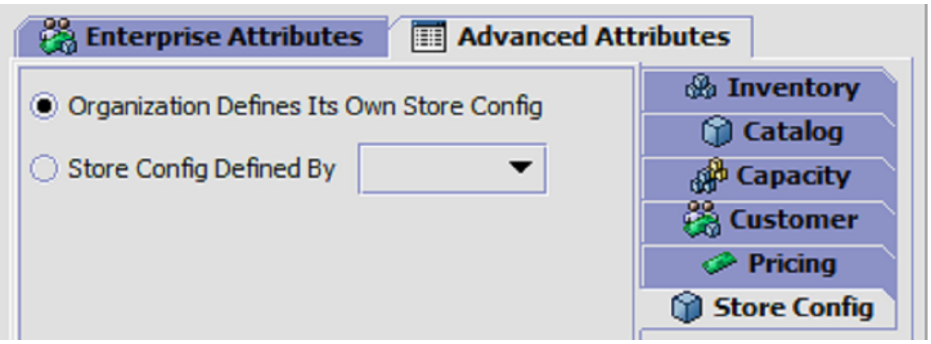
(Continued on next page)

Advanced Attributes

(Continued)

Store Config

An organization can maintain its own store information or it can be maintained by another organization. The store data includes point-of-sale store rules and configuration data. If the organization defines its store data, then the data can be shared with other organizations.



Role Attributes

Scenario

Note

This activity is a paper-based activity for students. Discuss the solution of this case study and draw it on the board.

KatterPillar is a leading original equipment manufacturer. It has three business units:

- **BestDeal:** BestDeal handles contract orders mainly from large and medium corporations. One of the customers is FastShop. BestDeal handles the Payment processing for all their orders.
- **FastShop:** FastShop has long term contract with BestDeal. They have a preferred carrier QuickLoad for all their Less Than Truck load deliveries. They would prefer all their deliveries to be done within 15 days of the order date.
- **BuyLarge**: BuyLarge is the retail store operations. It has two retail stores named Hoggers and Warney. BuyLarge requires that all the items shipped to it must have the company logo stamped on it.

KatterPillar currently keeps inventory at its distribution centers at Boston and New York. These distribution centers fulfill the contract orders, catalog orders, and replenish the stores. The consolidated inventory is maintained at the inventory center by using the Sterling Selling and Fulfillment Foundation. KatterPillar maintains the item master.

Discuss how you set the attributes for the various roles. Some of the issues which can be discussed are:

- What are the roles different organizations play?
- How do you configure that BestDeal handles the Payment processing?
- How do you set the carrier preferences for FastShop?
- What are the Economic shipping parameters that are required by Fast Shop and how do you set the ESP parameters in the application?
- Which organizations must be the Inventory and catalog organizations and how do you configure them?
- What are the Value Added Services that are required by BuyLarge and how do you configure them?

Check Your Understanding

The following set of multiple choice questions enable you to evaluate your understanding of the concepts covered and reinforce the content presented so far. The answer key for these questions are provided in the Appendix of this course.

Questions

1. Which of the following is not an organizational role?
   - Node
   - Seller
   - Vendor
   - Hub
2. Which type of an organization cannot have a parent?
   - Node
   - Seller
   - Hub
   - Enterprise
3. If an enterprise wants to do business with the child org of another enterprise, the first enterprise should designate the child org as:
   - One of its own children
   - A participant
   - Either of the above
   - None of the above
4. Which of the following buyer attribute facilitates consolidation of shipments?
   - Customer entitlement
   - Economic Shipping Parameters
   - Do not mix constraints
   - Seller entitlement

Check Your Understanding

(Continued)

5. An organization can be assigned the role of an enterprise and can also inherit rules from another enterprise.
   - True
   - False
6. Assume that BuyLarge is the parent organization of BigBay and Glows is the primary enterprise. If BigBay has to inherit all the business rules from any organization, which Organization will it be?
   - Glows
   - BuyLarge
   - BigBay cannot inherit the business rules
   - BigBay can inherit the rules from the parent organization as well as the primary enterprise

Lesson Review

Completed Objectives

This lesson was designed to enable you to describe the attributes that relate to each of the following roles:

- Enterprise
- Buyer
- Seller
- Carrier
- Node
- Template